

**Longitudinal Community Impact Study:
1999 Report**

Volume 2: Regional Profiles

Geelong
Maribyrnong
Mildura
Wellington
Moreland
Dandenong

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Victorian Casino and Gaming Authority

Report of the 1999
Longitudinal Community
Impact Study: Geelong
regional profile

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1 Summary

The City of Greater Geelong is Victoria's second largest population centre. It has many of the features of a metropolis, but is situated within a rural environment.

Geelong has experienced relatively strong population growth in recent years, which is expected to continue in the future. The City has age, marital status, household structure and employment tenure profiles that reflect its unique position as a major city within a rural setting (essentially between the profiles of Regional Victoria and Victoria as a whole). Compared to Victoria as a whole, Geelong's residents are less ethnically diverse, less mobile, less well educated and have lower income levels and are high recipients of social security payments. Crime rates are relatively low and decreasing compared with Victoria as a whole.

Geelong is a significant trading port, especially for bulk grains and petrochemicals. Manufacturing is the mainstay of the region's economy, accounting for 20.4% of all employment. Compared to Victoria as a whole, Geelong's workforce has relatively low levels of labour force participation, high unemployment, high employment in manufacturing and retail industries and has more tradespersons and elementary sales workers. While average house prices are above the average of regional Victoria, they have been fairly stable in recent years. Tourism revenue, is an important feature of the economy and has been relatively stable. Almost 60% of Geelong respondents believe their local economy is doing well and 80% believe it is a good place to live. Around 57% believe it is better place to live now than three years ago. In general, Geelong respondents are more satisfied with their region and more positive than the average of other regions.

Geelong has a high level of Electronic Gaming Machines (EGMs) and gaming expenditure per head of population. Over recent years, the number of venues has been static, but the number of EGMs has continued to grow. Gaming expenditure in Geelong has grown from \$11.09M in 1992/1993 to \$84.92M in 1998/1999. Average annual gaming expenditure per adult in Geelong is 6% higher than the State average.

According to our survey, just over half of Geelong respondents' gamble. Playing poker machines at a pub or club is the most popular form of gambling. While Geelong gamblers patronise the Crown Casino less frequently than other gaming venues, on average more money is spent per daily visit there than at local gaming venues. Gamers in Geelong play pokies mainly for social reasons and because of the prospect of a lucky win. Gaming appears to be especially prevalent amongst older people, and women during the day.

Our survey findings indicate that playing pokies is a part of a broader social and entertainment experience for Geelong gamers. Geelong gamers spend around a third of the time in gaming venues playing EGMs with the majority of gamers choosing venues on the basis of proximity and convenience, good meals and restaurants and perceived entertainment value. Gamers in Geelong travel an average of 2.5km to get to a venue. The majority of Geelong gamers arrive at gaming venues between 4pm and 8pm.

The community regards problem gambling as a major issue in Geelong. About 3% of residents in Geelong are at risk of problem gambling and 5% of all Geelong gamblers said that they, or a member of their family, had at some time experienced difficulties with excessive gambling. Around 15% of Geelong's gamblers have had negative gambling experiences, such as money arguments over gambling.

During the course of our consultations, the following costs and benefits were identified with gaming in recent years.

Benefits

- The benefits of gaming for Geelong are mostly felt by venues with EGMs and individuals who have enjoyed greater employment opportunities as a result of the liberalisation of gaming. The venues now offer improved service facilities and employment and training opportunities for some employees.
- Gaming venues provide older people with a safe, accessible environment, which increases their leisure options.
- Gaming venues provide donations to sporting clubs, although the benefits of this must be weighed against their inability to compete with gaming venues.

Costs

Some venues believe that one of the costs of the introduction of EGMs has been the increasingly negative perception in the community towards gambling and the stigma associated with machine gaming as a form of recreational activity. That said, there has been a rapid expansion of machines and some people are critical that this is reducing, not increasing, leisure options.

Community support agencies have identified costs for individuals of the introduction of EGMs to include:

- financial problems;
- interpersonal and family problems; and
- heightened emotional problems, self-loathing and a loss of control.

2 Description of the Local Government area of Geelong

2.1 Data sources

Data for this profile has been sourced from:

- a range of different government departments and agencies;
- consultations; and
- KPMG surveyed 1,000 residents in six local government areas, of which 167 respondents lived in Geelong. The survey was conducted in October 1999. The full results of the survey are reported in Supporting Paper No. 1, and the results for Geelong are attached to this paper.

It should be noted that while percentages have been included in the following tables, the total percentage for a number of tables does not equal one hundred per cent due to rounding.

2.2 The geography

The City of Greater Geelong is a Local Government Area and is comprised of the following Statistical Local Areas:

- | | |
|--------------------------------|--------------------------------|
| ■ Bellarine - Inner | ■ Corio – Inner |
| ■ Geelong | ■ Geelong West |
| ■ Greater Geelong (C) – Part B | ■ Greater Geelong (C) – Part C |
| ■ Newtown | ■ South Barwon – Inner |

Geelong is located 75 kilometres from the Melbourne CBD and is Victoria's second largest City, which is located on the shores of Corio Bay and the Barwon River. Geelong is minutes away from the Bellarine Peninsula and Great Ocean Road holiday destinations and is less than an hour from the centre of the capital city, Melbourne.

Geelong was first declared a town in 1838. During the 19th century, the city developed as a major trading port for the export of wool to Britain. In addition, textile industries flourished along the Barwon River. Following the establishment of the Ford Motor Co. in 1925, other international and national manufacturing industries also moved to the region. Aided by post-war immigration and the rapid expansion of industry, the population of the region increased from 65,700 in 1947 to 191,261 in 1991. Geelong is now the largest provincial city in Victoria and the 11th largest urban centre in Australia.

Figure 2.1: Geelong LGA



3 Demographic profile of Geelong

3.1 The population

Population growth for Geelong was 0.51% annually for the period between 1991 and 1996 and was consistent with the trend experienced for Victoria as a whole. During the previous period between 1986 and 1991, the population of Geelong grew by 1.27% annually and was marginally higher than the level of annual population growth experienced throughout Victoria of 1.22%.

The levels of growth projected for the population and housing numbers in Geelong is expected to exceed the level of growth forecast for both Regional Victoria and Victoria as a whole. Population and housing forecasts prepared by the Victorian Department of Infrastructure predict that the resident population of Geelong will grow at an average annual rate of 0.96% for the period between 1996 and 2001 and 0.87% from 2001 to 2011. Additionally, housing stock is also anticipated to increase by an average annual rate of 1.28% for the period between 1996 and 2001 and 1.16% from 2001 to 2011. Housing growth is predicted to exceed population growth, indicating a trend toward smaller household sizes within the City of Geelong, which is consistent with the trend for Victoria as a whole. Population projections obtained from the Department of Infrastructure for Geelong, Regional Victoria and Victoria and are presented in Table 3.1 below.

Table 3.1: Projections of household numbers and estimated resident population

Population and household forecasts						
Number of households = number of occupied private dwellings						
Year	Greater Geelong		Regional Victoria		Victoria	
	Population	Households	Population	Households	Population	Households
Actual 1981	154,934	49,946	1,090,996	338,514	3,851,094	1,238,617
1986	170,219	55,748	1,193,447	384,965	4,160,785	1,355,308
1991	181,277	61,718	1,264,078	426,546	4,420,298	1,476,047
1996	185,956	71,211	1,297,976	500,042	4,539,400	1,699,920
Forecast 2001	195,047	75,901	1,356,830	530,329	4,735,710	1,799,383
2011	212,794	85,159	1,470,627	590,961	5,092,312	1,990,051
2021	229,106	93,800	1,576,162	648,882	5,399,730	2,163,024
Annual change (%)						
1981-1986	1.90	2.22	1.81	2.61	1.56	1.82
1986-1991	1.27	2.06	1.16	2.07	1.22	1.72
1991-1996	0.51	2.90	0.53	3.23	0.53	2.86
Forecast annual change (%) 1996-2001	0.96	1.28	0.89	1.18	0.85	1.14
Forecast annual change (%) 2001-2011	0.87	1.16	0.81	1.09	0.73	1.01
2011-2021	0.74	0.97	0.70	0.94	0.59	0.84

Annual percentage change measured as a compound growth rate
Source: Department of Infrastructure 1991 projections. Revised data for 1996 shown

3.2 Age distribution

As shown in Table 3.2 following, Geelong has an ageing population, with the proportion of the resident population below 40 years of age declining from 61.4% in 1991 to 58.1% in 1996. Conversely, the proportion of the population over 40 has increased from 38.6% in 1991 to 41.9% in 1996. This trend is in line with that experienced by Regional Victoria and Victoria as a whole. In terms of overall comparison, the age profile of Geelong residents is similar to that of Victoria as a whole, but with a slightly higher proportion of older residents (60yo+).

Table 3.2: Age structure of population, 1991 and 1996

Age group	Greater Geelong		Regional Victoria		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
0 – 9	14.8	14.1	16.3	15.4	14.7	14.2
10 – 19	16.2	15.1	16.0	15.3	15.2	14.1
20 – 29	15.1	14.1	13.8	12.4	16.4	15.4
30 – 39	15.3	14.8	15.6	15.0	16.0	15.9
40 – 49	12.7	14.2	12.8	14.5	13.3	14.5
50 – 59	9.0	9.7	9.0	10.0	9.1	10.0
60 – 69	8.7	8.2	8.5	8.2	7.9	7.5
70 +	8.3	9.8	8.1	9.3	7.4	8.4
Total	100	100	100	100	100	100

Source: ABS Census data 1996

3.3 Marital status

The marital status profile of the population of Geelong is comparable to Victoria as a whole. The proportion of married persons has declined from 1991 to 1996, however this trend is consistent throughout Regional Victoria and Victoria. The proportion of residents from the City who have never been married increased which is also consistent with the trend experienced across Regional Victoria and Victoria. Similarly, the proportions of separated, divorced and widowed persons in Geelong increased, consistent with the general trend in Victoria. The marital status of the resident population of Geelong, Regional Victoria and Victoria as at the 1991 and 1996 Census are presented in Table 3.3.

Table 3.3: Marital status of residents, 1991 and 1996

Status	Greater Geelong		Regional Victoria		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
Married	57.9	54.5	59.3	56.2	56.4	53.6
Never Married	27.7	29.1	26.7	27.6	29.9	30.9
Separated	2.6	3.3	2.6	3.2	2.6	3.2
Divorced	4.8	5.8	4.5	5.7	4.7	5.8
Widowed	6.9	7.3	6.9	7.3	6.3	6.6
Total	100	100	100	100	100	100

Source: ABS Census data 1996

3.4 Birthplace

The City of Geelong (79.4%) and Regional Victoria (86.6%) have a high proportion of Australian born residents and have a lower level of ethnic diversity compared with Victoria (72.8%). The country of birth of the resident population of Geelong, Regional Victoria and Victoria as a whole is presented in Table 3.4 for 1991 and 1996.

Table 3.4: Country of birth, 1991 and 1996

	Greater Geelong		Regional Victoria		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
English-speaking countries	87.4	86.7	93.2	91.6	81.3	79.6
Non-English speaking countries	12.6	13.3	6.8	8.4	18.7	20.4
Six top ranking in Greater Geelong:						
Australia	79.5	79.4	88.0	86.6	73.9	72.8
United Kingdom(f)	6.5	6.0	4.2	3.9	5.5	4.9
Italy	1.4	1.3	1.0	0.9	2.5	2.3
Netherlands	1.2	1.1	0.8	0.7	0.7	0.6
Germany	1.0	1.0	0.6	0.6	0.7	0.7
Croatia	n/a	1.0	0.0	0.2	n/a	0.4
All other countries	8.6	7.3	4.0	3.8	14.6	15.0
Not stated	1.7	3.0	1.5	3.2	2.1	3.3
Total	100	100	100	100	100	100

Source: ABS Census data 1996

3.5 Religion

The resident population of Geelong is predominantly Christian (72%) and the proportions of Christians living in Geelong and Regional Victoria are higher than Victoria as a whole reflecting the lower levels of ethnic diversity. The proportions of Christians in Geelong declined from 1991 and 1996 (74.7% to 71.9%), while the proportion of the population indicating they follow no religion increased significantly over the same period (12.8% to 17.7%). This trend was consistent throughout Victoria. Table 3.5 presents the top five ranking professed religions of the resident population of the City of Geelong in comparison to Regional Victoria and for the State of Victoria.

Table 3.5: Professed religion of residents, 1991 and 1996

Religious Category	Greater Geelong		Regional Victoria		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
Catholic	28.7	28.7	25.9	25.8	29.2	29.0
Anglican	18.9	17.6	21.8	20.2	18.2	16.5
Uniting Church	11.3	10.3	13.6	12.4	8.1	7.3
Presbyterian and Reformed	6.2	5.4	6.5	5.6	4.6	3.9
Orthodox	2.5	2.4	0.9	0.9	4.7	4.7
Total Christian	74.7	71.9	75.3	71.8	70.7	67.6
Total Non-Christian	0.8	1.1	0.5	0.7	3.4	4.5
No Religion	12.8	17.7	13.0	18.0	14.4	18.7
Inadequately Described and Not-Stated	11.6	9.4	11.1	9.5	11.4	9.1
Total	100	100	100	100	100	100

Source: ABS Census data 1996

3.6 Mobility

As shown in Table 3.6 following, Geelong residents had a marginally lower level of mobility as at June 1996 in comparison to Regional Victoria and Victoria. At 1996, 55.2% of residents lived at the same address in 1991, compared with 53.6% of residents in Regional Victoria and 53.7% in Victoria.

Table 3.6: Mobility of the population (% of population, aged 15 and over), 1996

Usual residence	Greater Geelong	Regional Victoria	Victoria
	%	%	%
Same address 5 years prior	55.2	53.6	53.7
Different address 5 years prior	34.9	35.9	35.8
Not stated	9.9	10.5	10.5
Total	100	100	100

Source: ABS Census data1996

3.7 Household structure

The household structure of Geelong is generally in-line with the household profile of Regional Victoria and Victoria. Over the period 1991 to 1996 the household structure of Geelong residents changed markedly, with a relatively significant decline in the proportion of households with children (60.0% to 54.7%) offset by an increase in couples without children (17.8% to 19.5%) and an increase in lone person households (8.2% to 9.9%). This trend was consistent across Victoria. Table 3.7 provides a comparative summary of the demographic profile by household type and composition for Geelong, Regional Victoria and Victoria as at 1991 and 1996.

Table 3.7: Household type and composition, number of persons, 1991 and 1996

	Greater Geelong		Regional Victoria		Victoria	
	1991	1996	1991	1996	1991	1996
One family:	%	%	%	%	%	%
Couple with children	60.0	54.7	61.0	55.8	60.9	56.6
Couple without children	17.8	19.5	18.1	20.0	16.2	17.6
One parent family	9.3	10.6	8.7	9.8	8.9	9.8
Other one family households	0.9	0.8	0.9	0.8	1.1	1.1
Total number of persons in one family households	88.0	85.6	88.6	86.4	87.2	85.1
Two or more families	0.9	1.4	0.7	1.1	1.5	2.3
Lone person households	8.2	9.9	8.1	9.7	7.7	9.0
Group households	2.9	3.1	2.6	2.9	3.6	3.6
Total	100	100	100	100	100	100

Source: ABS Census data1996

3.8 Tenure

Geelong residents have a similar dwelling tenure profile to Regional Victoria, with relatively high levels of public rental compared to Victoria as a whole. The dwelling tenure profile of Geelong, Regional Victoria and Victoria is presented in Table 3.8.

Table 3.8: Dwelling tenure by type of landlord, 1991 and 1996

	Greater Geelong		Regional Victoria		Victoria	
	% 1991	% 1996	% 1991	% 1996	% 1991	% 1996
Fully owned	40.1	41.6	41.4	42.6	39.0	41.5
Being purchased	35.9	33.9	32.6	31.6	34.8	32.5
Rented (government)	5.1	4.3	5.0	4.1	3.9	3.1
Rented (other)	14.4	16.3	15.4	16.4	16.8	17.9
Other	4.5	3.9	5.6	5.2	5.6	5.0
Total	100	100	100	100	100	100

Source: ABS Census data 1996. In 1996, persons living in manufactured home estates and accommodation for the retired have been excluded for comparability with 1991. The 'Other' category includes 'being occupied free', 'being occupied under a life tenure scheme' and 'other/not-stated'

3.9 Education

Over the period 1991 to 1996, Geelong residents have improved their general level of education qualifications, with a reduction in the proportion of the population with no qualifications from 63.3% to 60.8%. Overall as at 1996, Geelong residents had a marginally higher level of education than Regional Victoria and marginally lower than the State population. Table 3.9 provides a summary of the level of education attained for Geelong, Regional Victoria and Victorian residents in 1991 and 1996.

Table 3.9: Levels of education attainment, 1991 and 1996

Highest qualification obtained	Persons aged 15 years and over					
	Greater Geelong		Regional Victoria		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
Higher degree	0.6	0.8	0.4	0.6	1.0	1.3
Postgraduate diploma	0.9	1.2	1.0	1.3	1.2	1.7
Bachelor degree	4.6	6.0	3.9	5.1	6.2	8.4
Undergraduate diploma	3.8	3.3	4.1	3.4	3.9	3.5
Associate diploma	1.3	2.7	1.2	2.3	1.3	2.6
Vocational qualification	14.1	14.0	13.5	13.7	12.5	12.4
No qualification	63.3	60.8	65.1	62.1	61.9	58.3
Not stated	11.3	11.2	10.8	11.5	12.1	11.7
Total	100	100	100	100	100	100

Source: ABS Census data 1996

3.10 Household income

Geelong's households earn low to medium levels of gross annual household income. 40.6% earned a gross annual income of less than \$26,000 at the 1996 Census, compared with 43.3% for Regional Victoria and 34.9% for Victoria. In contrast, the proportion of households in Geelong earning more than \$52,000 per annum in gross income is significantly lower than that for Victoria as a whole. Table 3.10 provides a comparative summary of gross annual income per household for Geelong, Regional Victoria and Victoria as at the 1996 Census.

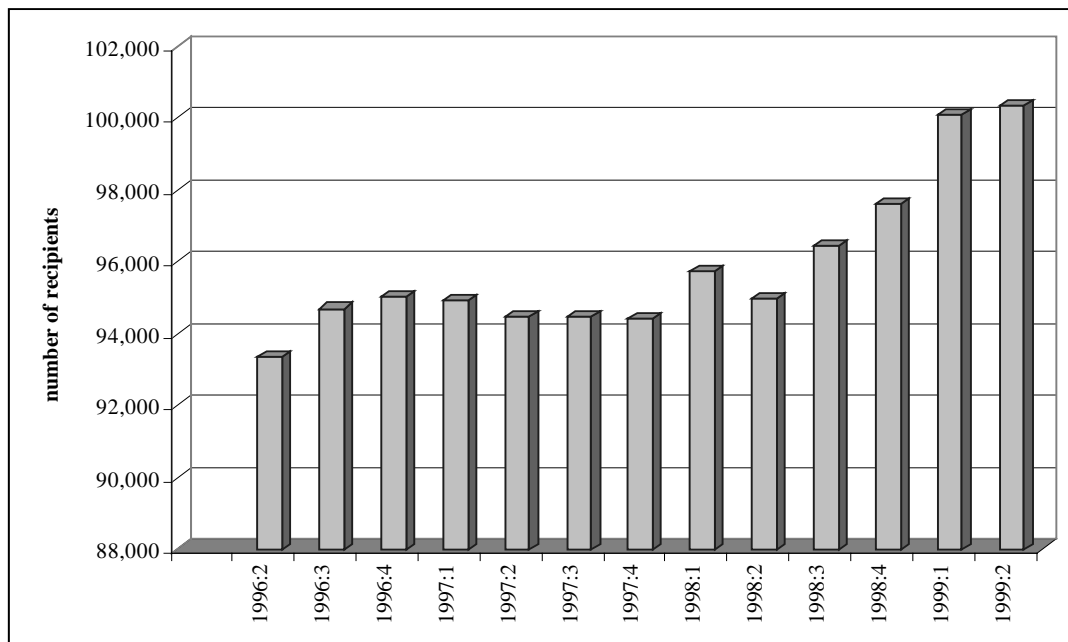
Table 3.10: Gross annual income per household (\$), 1996

	Percentage of households		
	Greater Geelong	Regional Victoria	Victoria
Negative/nil income	0.5	0.8	0.7
\$52-\$6,239	0.8	1.0	0.8
\$6,240-\$15,599	21.5	21.9	17.5
\$15,600-\$25,999	17.8	19.6	15.9
\$26,000-\$36,399	13.4	14.7	13.5
\$36,400-\$51,999	15.6	15.0	16.1
\$52,000-\$77,999	13.2	10.8	14.5
\$78,000-\$103,999	3.9	3.0	5.2
\$104,000 plus	2.6	2.2	4.8
Partial/incomplete records	10.8	11.2	11.0
Total	100	100	100

Source: ABS Census data 1996

3.11 Social security recipients

Figure 3.1 demonstrates that the number of recipients of social security payments has since increased strongly since end 1997. The number of pensioners has risen, but growth has been strongest in labour market payments and in “other” payments (this category includes child care and rent assistance).

Figure 3.1: Number of claimants of social security benefits, 1996 to 1999

Source: Centrelink. Some individuals receive multiple payments so a degree of double-counting occurs.

3.12 Vehicle ownership

The vehicle ownership profile of households in Geelong is comparable with the State average. At June 1996, approximately 85% of the total households in Geelong owned at least one vehicle, compared with 87% for Regional Victoria and 84% for Victoria. Similarly, 46% of Geelong households owned two or more vehicles, compared with 50% for Regional Victoria and 48% for Victoria. The vehicle ownership profile for Geelong, Regional Victoria and Victoria as at 1996 is presented in Table 3.11 below.

Table 3.11: Car ownership, 1996

Vehicles	Households		
	Geelong %	Regional Victoria %	Victoria %
No vehicle	10.6	8.7	10.5
One vehicle	39.1	36.7	36.6
Two vehicles	34.5	36.3	35.2
Three or more vehicles	11.0	13.7	12.6
Not stated	4.7	4.6	5.2
Total (no.)	100.0	100.0	100.

Source: ABS Census data1996

3.13 Travel to work

The most common method of travelling to work for Geelong residents as at the 1996 Census was by car as driver, followed by car as passenger. Both Geelong and Regional Victoria have a significantly lower proportion of employed persons using public transport, such as the train, bus and tram, to travel to work compared with the State average. Geelong has a higher proportion of people that travel to work by car, either as driver or as passenger, in comparison to both Regional Victoria and Victoria as a whole, while the proportion of employed persons that work at home is low in comparison to Regional Victoria and the Victorian average. The following table presents a summary of the method of travel to work employed by the residents of Geelong, Regional Victoria and Victoria as at the 1996 Census.

Table 3.12: Mode of travel to work, 1996

Includes multi-mode journeys	Employed persons		
	Geelong %	Regional Victoria %	Victoria %
Train	2.1	0.7	5.5
Bus	1.5	0.8	1.3
Tram	0.0	0.0	1.2
Car, as driver	66.1	58.2	61.4
Car, as passenger	7.3	6.2	6.1
Other modes	6.2	10.0	6.8
Worked at home	3.5	10.4	5.7
Did not go to work	11.4	11.5	10.2
Not stated	1.8	2.2	1.8
Total	100.0	100.0	100.0

Source: ABS Census data1996

3.14 Crime rates

Table 3.13 shows that the incidence of crime in Greater Geelong has been below the Victorian average over the four years for which data is available. The number of criminal incidents per thousand residents has also diminished though it is increasing elsewhere in the State.

Table 3.13: Crime trends: Number of offences reported in Greater Geelong and Victoria, 1995 to 1998

Year	Greater Geelong	% growth	Incidents per thousand persons	Victoria	% growth	Incidents per thousand persons
1995	15,121	-	82.7	374,241	-	84.8
1996	14,057	-7.0	76.5	399,237	6.7	89.5
1997	14,198	1.0	76.8	404,817	1.4	89.9
1998	14,141	-0.4	75.9	413,836	2.2	90.7

Source: Victoria Police

3.15 Summary

The City of Greater Geelong has experienced relatively strong population growth, which is expected to continue in the future. The City has an age, marital status and household structure and tenure profile that reflects its unique position as a major city within a rural setting (essentially between the profiles of Regional Victoria and Victoria as a whole). Compared to Victoria as a whole, residents are less ethnically diverse, less mobile, less well educated and with lower income levels and high receipt of social security payments. Crime rates are relatively low and decreasing compared with Victoria as a whole.

4 The regional economic profile

Geelong is a significant trading port especially for bulk grains and petrochemicals. Manufacturing is the mainstay of the region's economy, accounting for 19.5% of all employment. Since the early 1970's employment opportunities have broadened through the development of the tertiary sector. Geelong is the headquarters for the Target national retail chain; it is also the site of Ford Australia, Deakin University, the Australian Animal Health Laboratory, a Marine Sciences complex and the CSIRO Division of Wool Technology. The region's bay and ocean coasts are key leisure and recreation destinations outside the State Capital of Melbourne, with over a million tourist visits per annum.

4.1 Employment and labour force participation

As at December 1999, the labour force participation rate in Geelong was 56%, lower than the State average of 68%. The unemployment rate in Geelong in December 1999 was 10.25%, higher than the State average of 6.7%. More detailed but dated information on labour force participation and employment is provided in the 1996 Census, and reproduced below in Table 4.1 and Table 4.2. As at June 1996, Geelong had a higher unemployment rate (11.7%) in comparison to the State level of 9.4%.

Table 4.1: Labour force participation by sex, 1996

Age group Persons 15 years and over	Percentage employed or seeking work			
	Males		Females	
	Geelong %	Vic %	Geelong %	Vic %
15-19 years	44.1	43.8	47.3	45.1
20-24 years	83.6	80.8	75.0	74.7
25-34 years	91.0	89.7	64.5	68.0
35-44 years	91.3	89.9	68.7	69.8
45-54 years	87.0	86.0	64.0	67.0
55-64 years	55.6	60.3	22.8	29.9
65-69 years	10.9	17.0	4.0	6.9
70-74 years	4.1	8.7	1.7	3.1
75 years and over	1.9	4.3	0.7	1.3
All age groups	67.6	70.0	47.7	51.9
Not in the labour force	30.3	27.4	50.5	45.8
Not stated/overseas visitors	2.3	2.9	2.0	2.6

Source: ABS Census data 1996

Table 4.2: Labour force status, 1996

	Males		Females		Persons	
	Geelong %	Vic %	Geelong %	Vic %	Geelong %	Vic %
Full-time employed	70.7	72.6	41.2	47.9	57.9	61.7
Part-time employed	15.0	15.4	45.9	41.2	28.4	26.7
Employed (not-stated)	2.0	2.0	2.0	2.2	2.0	2.1
Unemployed	12.4	9.9	10.9	8.8	11.7	9.4

Source: ABS Census data1996

4.2 Industry of employment

The number of employed residents living in the City of Geelong increased from 67,435 in 1991 to 69,468 in 1996. The proportion of people employed within the manufacturing industry and in the retail trade sector in Geelong is higher than that of Regional Victoria and Victoria. At the 1996 Census, manufacturing (19.5%) and retail trade (16.2%) remained the principal sectors for employment for the residents of Geelong. However, there was a marginal decrease in the proportion of residents employed in manufacturing and a corresponding increase in the proportion of residents employed in retail trade from 1991 to 1996.

Other significant employment sectors for the City include health and community services (10.1%) and education (8.0%). The proportion of residents employed in health and community services increased from 1991 to 1996 and was against the trend experienced across Victoria. However, the proportion of residents employed in the education sector declined from 1991 to 1996, in line with the trend for Victoria as a whole. Geelong residents employed in the property and business services sector increased significantly from 1991 to 1996 in line with a general increase across Victoria.

The following table provides a summary of the industry of employment profile for Geelong and Victoria as at 1991 and 1996.

Table 4.3: Industry of employment of residents, 1991 and 1996

Industry	Greater Geelong		Victoria		Greater Geelong		Victoria	
	1991 Persons	%	1991 Persons	%	1996 Persons	%	1996 Persons	%
Agriculture, Forestry and Fishing	863	1.3	70,556	3.9	1,000	1.4	72,924	3.9
Mining	165	0.2	5,633	0.3	123	0.2	5,531	0.3
Manufacturing	13,913	20.6	289,266	16.0	13,557	19.5	307,029	16.3
Electricity, Gas and Water Supply	786	1.2	25,666	1.4	582	0.8	13,408	0.7
Construction	4,278	6.3	96,695	5.4	4,620	6.7	110,482	5.9
Wholesale Trade	3,526	5.2	111,684	6.2	3,164	4.6	115,336	6.1
Retail Trade	10,183	15.1	241,324	13.4	11,270	16.2	260,829	13.8
Accommodation, Cafes and Restaurants	2,380	3.5	59,525	3.3	3,037	4.4	72,236	3.8
Transport and Storage	2,592	3.8	74,762	4.1	2,322	3.3	73,238	3.9
Communication Services	1,031	1.5	34,330	1.9	1,107	1.6	42,848	2.3
Finance and Insurance	2,370	3.5	84,427	4.7	1,949	2.8	77,378	4.1
Property and Business Services	3,765	5.6	126,156	7.0	5,575	8.0	186,245	9.9
Government Administration and Defence	2,910	4.3	94,015	5.2	2,570	3.7	71,662	3.8
Education	5,487	8.1	122,760	6.8	5,572	8.0	131,119	7.0
Health and Community Services	5,602	8.3	153,744	8.5	7,031	10.1	175,123	9.3
Cultural and Recreational Services	832	1.2	30,289	1.7	1,150	1.7	44,486	2.4
Personal and Other Services	2,472	3.7	55,915	3.1	2,662	3.8	65,294	3.5
Non-classifiable economic units	152	0.2	6,791	0.4	1,047	1.5	29,288	1.6
Not stated	4,128	6.1	123,023	6.8	1,130	1.6	30,424	1.6
Total	67,435	100	1,806,561	100	69,468	100	1,884,880	100

Source: ABS Census data 1996

4.3 Employment by occupation

Over the period 1991 to 1996, the key trends in the occupation profile of Geelong residents was the increase in the percentage of people employed in professional, associate professional and clerical, sales and service occupations. Table 4.4 provides a summary of employment by occupation for Geelong, Regional Victoria and Victoria as a whole for 1991 and 1996.

Table 4.4: Employment of Geelong residents by occupation, 1991 and 1996

Occupation	Greater Geelong		Regional Victoria		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
Managers and Administrators	6.5	6.1	15.1	14.0	10.0	9.5
Professionals	14.2	16.0	12.9	14.2	15.6	17.8
Associate Professionals	8.3	11.4	7.8	11.4	7.5	11.4
Tradespersons and Related Workers	16.8	15.2	14.4	13.7	13.7	12.9
Advanced Clerical and Service Workers	5.2	3.5	4.7	3.2	6.5	4.3
Intermediate Clerical, Sales and Service Workers	10.9	14.9	9.5	13.0	11.6	15.4
Intermediate Production and Transport Workers	11.0	11.1	9.0	9.1	8.7	8.9
Elementary Clerical, Sales and Service Workers	11.3	10.3	9.9	8.6	10.8	8.9
Labourers and Related Workers	9.2	8.6	10.0	10.0	8.8	8.3
Not stated/inadequately described	6.6	2.8	6.7	2.8	6.8	2.7
Total	100	100	100	100	100	100

Source: ABS Census data 1996

4.4 Business size

According to the September 1998 ABS Business Register, Geelong had a total of 7,598 businesses located within the City. Approximately 94% of the total number of businesses were small with the majority of businesses operating within the retail trade, property and business services and construction industries. Table 4.5 provides an overall summary of the nature of businesses that are located within the City of Geelong as at September 1998.

Table 4.5: The structure of business in Geelong: Distribution of businesses by industry and firm size, 1998

Industry to which business is assigned <i>ANZSIC Division</i>	Number of businesses by firm size			
	Small	Medium	Large	Total
A AGRICULTURE FORESTRY AND FISHING	381	6	0	387
B MINING	21	0	0	21
21 Food Beverage & Tobacco Manufacturing	41	2	0	43
22 Textile Clothing Footwear Manufacturing	65	7	1	73
23 Wood & Paper Product Manufacturing	53	0	0	53
24 Printing Publishing & Recorded Media	42	1	0	43
25 Petroleum Coal & Chemical Manufacturing	33	1	2	36
26 Non-Metallic Mineral Product Manufacturing	31	3	0	34
27 Metal Product Manufacturing	88	6	1	95
28 Machinery & Equipment Manufacturing	89	4	1	94
29 Other Manufacturing	93	0	0	93
C MANUFACTURING	535	24	5	564
D ELECTRICITY GAS AND WATER SUPPLY	5	0	3	8
E CONSTRUCTION	1,000	23	2	1,025
F WHOLESALE TRADE	427	14	0	441
51 Food Retailing	367	26	10	403
52 Personal & Household Good Retailing	690	15	5	710
53 Motor Vehicle Retailing & Services	364	10	0	374
G RETAIL TRADE	1,421	51	15	1,487
H ACCOMMODATION CAFES AND RESTAURANTS	289	39	1	329
I TRANSPORT AND STORAGE	317	28	1	346
J COMMUNICATION SERVICES	57	7	2	66
K FINANCE AND INSURANCE	324	13	0	337
L PROPERTY AND BUSINESS SERVICES	1,235	39	7	1,281
M GOVERNMENT ADMINISTRATION AND DEFENCE	44	12	4	60
N EDUCATION	144	54	6	204
O HEALTH AND COMMUNITY SERVICES	650	40	7	697
P CULTURAL AND RECREATIONAL SERVICES	183	9	2	194
Q PERSONAL AND OTHER SERVICES	491	16	4	511
ALL INDUSTRIES	7,459	416	83	7,958

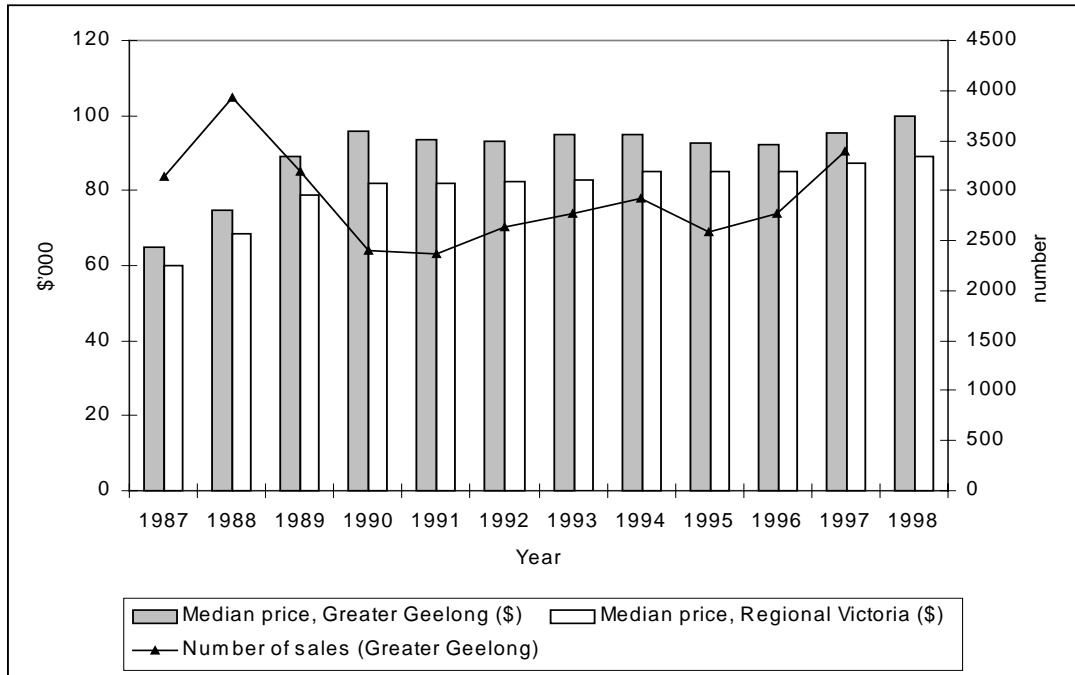
Source: ABS Business register, September 1998

The ANZSIC industry classification is used. Most industries are shown at the divisional level (one-digit). However manufacturing and retailing industries are presented also at the sub-divisional (two-digit) level. The definition of business size is as follows: Small business, <20 employees; Medium-sized business, 20-99 employees; Large business, 100+ employees.. However, for manufacturing industry: Small business = <100 employees; Medium-sized business = 100-499 employees; Large business = 500+ employees.

4.5 House prices and sales

Median house prices in Greater Geelong are significantly above the regional Victorian average, which is unsurprising given Geelong's status as the largest, most urbanised centre outside the Melbourne metropolitan area. As in Greater Dandenong, the number of house transactions in Geelong reached a zenith in 1988 but then plummeted sharply. The early 1990s recession was especially protracted in Geelong and activity in the housing market only turned upwards from 1992. Sales volumes have still not risen to late 1980s levels. Average house prices have remained reasonably constant, however, for most of the 1990s, at around \$85-90,000.

Figure 4.1: Median house prices, Greater Geelong and Country Victoria, 1987 to 1998



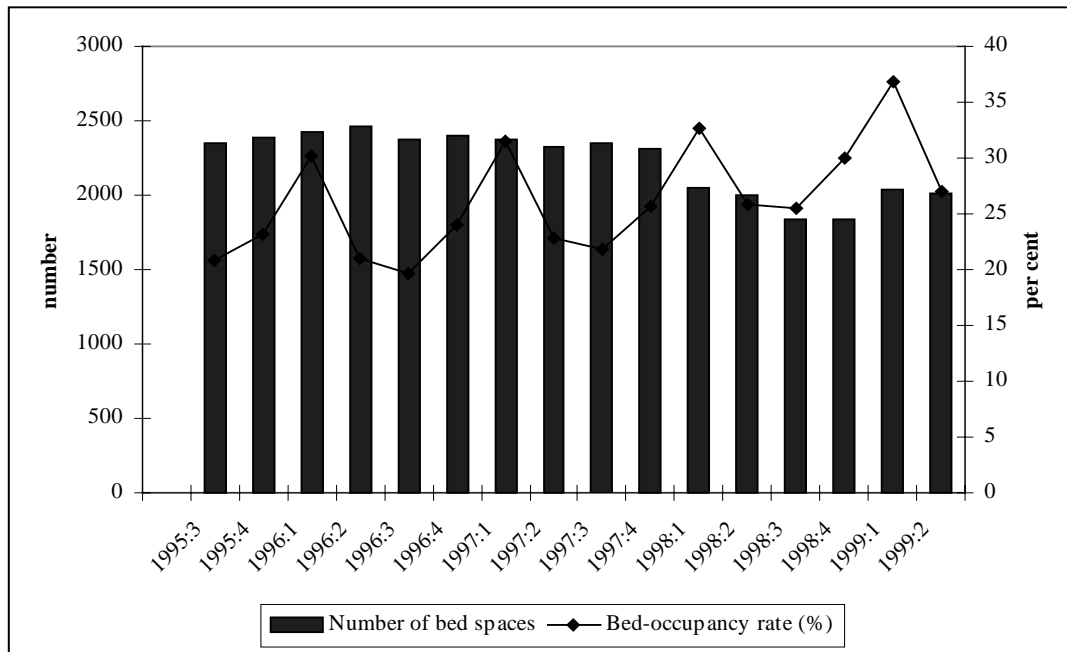
Source: Land Victoria, 1987-98

4.6 Tourism

The number of tourism bed-spaces in Greater Geelong has fallen over the four-year period since mid-1995, with the sharpest decline taking place in late 1997. There have been closures of some smaller hotels and conversion of other, older establishments to alternative uses. Increasingly, over this period, other destination resorts further along the coast have become more popular, and these have lured visitors who might otherwise favour Geelong and its immediate environs.

Due to the reduction in available bed spaces, the bed occupancy rate in Greater Geelong has increased since early 1998 and now fluctuates between 25-40 per cent rather than between 20-35 per cent as was previously the case. Seasonal variations in occupancy are quite pronounced, with summer being by far the busiest period.

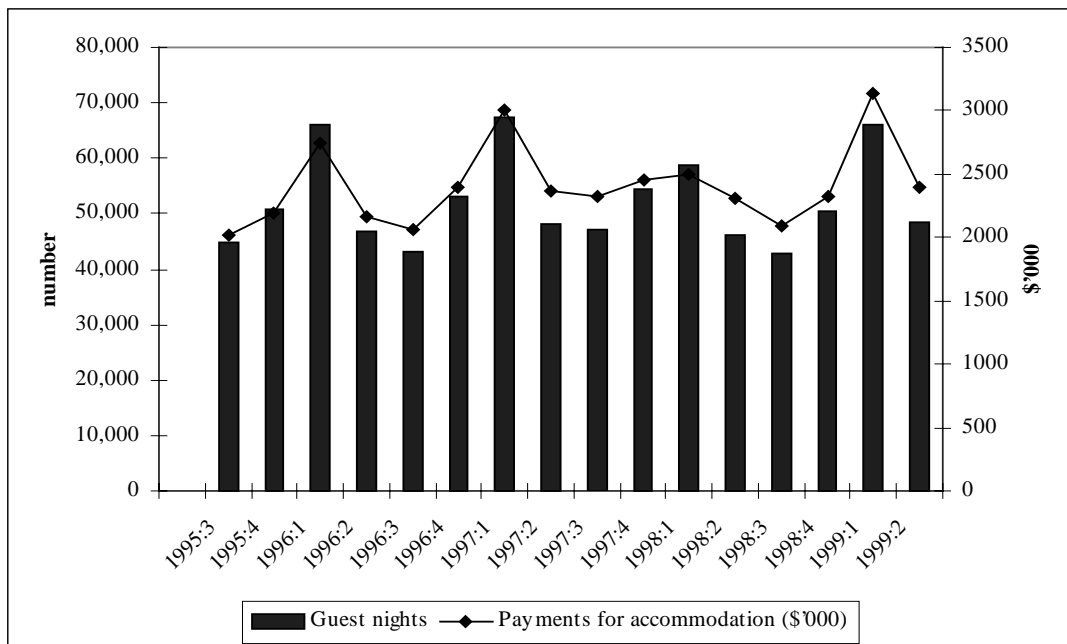
Figure 4.2: Accommodation establishments in Greater Geelong, 1995 to 1999



Source: ABS, cat. 8635.2. Bed-occupancy rate = Bed nights occupied / (Bed spaces) × (No. of days in period)

The number of guest nights spent in Greater Geelong has shown no structural change over the period 1995-1999, and visitation remains highly seasonal. The revenues from accommodation reached record highs in early 1999, suggesting a particularly active holiday period. There has also been an increase in business travel to Geelong, with the result that the average accommodation spend per overnight visitor has risen.

Figure 4.3: Number of guest nights and takings from accommodation, 1995 to 1999



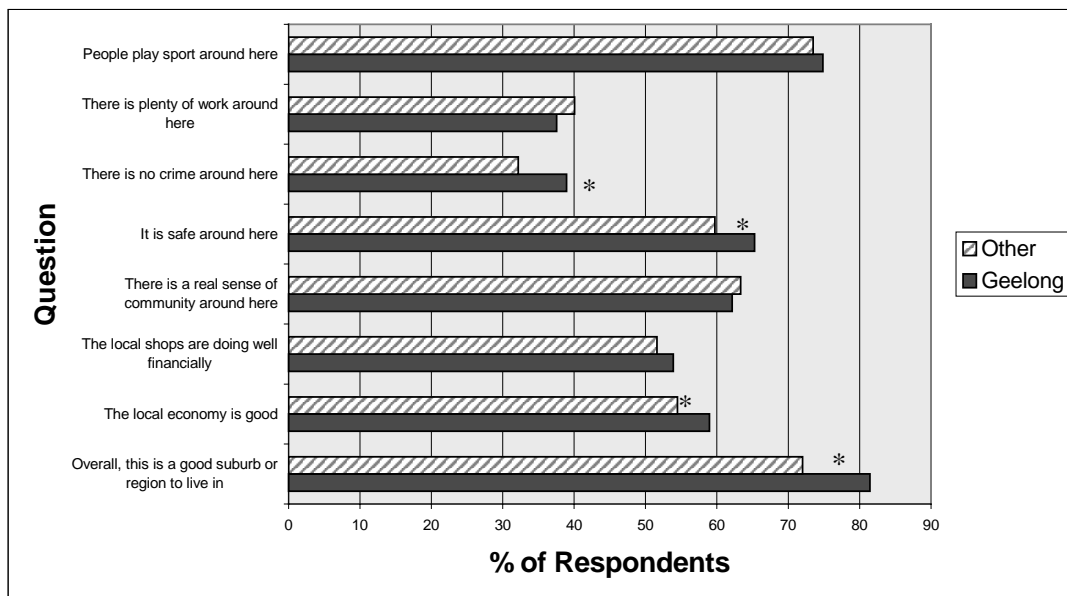
Source: ABS, cat. 8635.2 and unpublished statistics. Guest nights are the total number of nights each guestroom or unit was occupied during the survey period (of three months).

4.7 Community perceptions of the region

In our survey of 167 adults living in the City of Greater Geelong, conducted in October 1999, we asked questions about residents’ opinions of the region. While the survey sample size is sufficiently large to enable us to draw conclusions about Geelong, it does not allow us to draw statistically significant conclusions about the differences between Geelong and the other regions surveyed for many of the survey questions.¹ As a result, comparisons between the City of Greater Geelong and other regions can only be made where differences are statistically significant, and have been denoted by an asterisk (*) on the relevant graph.

Eighty percent of Geelong respondents (significantly higher than in other regions) have a good general opinion of their region – specifically in the areas of crime, safety and the local economy. Importantly, a significantly higher percentage of respondents think that Geelong is a good place in which to live when compared to other respondents. The majority of Geelong respondents, however, consider that there is insufficient work in the region.

Figure 4.4: Opinion of Geelong

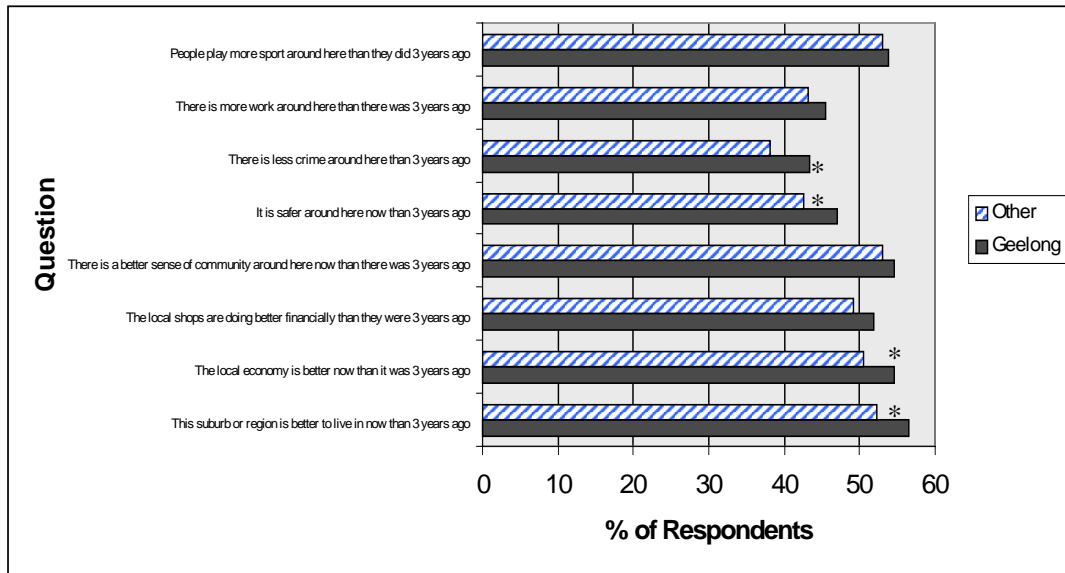


(*) Statistically significant difference between Geelong and the average of the other regions.

More Geelong residents believe that the City has improved over the last three years, when compared to the responses in the other regions. With respect to crime, safety and the local economy, more Geelong respondents believe that there has been an improvement over the last three years when compared to the perceptions of respondents in other regions. Around 55% of Geelong respondents (greater than in other regions) believe that their region is better to live in now than three years ago. The results compared to other regions are set out in Figure 4.5.

¹ The regions surveyed were the local government areas of Mildura, Geelong, Wellington, Maribyrnong, Moreland and Dandenong. KPMG surveyed about 167 adults in each of these regions.

Figure 4.5: Opinion of Geelong compared to three years ago



(*) Statistically significant difference between Geelong and the average of the other regions.

4.8 Summary

Geelong is a significant trading port, especially for bulk grains and petrochemicals. Manufacturing is the mainstay of the region’s economy, accounting for 19.5% of all employment. However, compared to Victoria as a whole, Geelong’s workforce has relatively low levels of labour force participation, high unemployment, high employment in manufacturing and retail industries and more tradespersons and elementary sales workers. While average house prices are higher than the average for regional Victoria, they have been fairly constant in recent years. Tourism revenues, whilst still an important feature of the economy, are relatively stable.

Almost 60% of Geelong respondents believe their economy is doing well and 80% believe it is a good place to live. Around 55% believe it is a better place to live now than three years ago. In general, Geelong respondents are more satisfied and more positive about their region than respondents in the other study regions.

5 Participation in gaming in Geelong

5.1 Gambling defined

The Productivity Commission² suggests that the following characteristics distinguish gambling from other, apparently similar activities:

- as a group, gamblers necessarily lose money as a result of the activity, because the total “prize” is equal to the accumulated stakes of punters, less taxes to government and profits and costs for operators; and
- gambling is typically presented as a form of entertainment.

Gambling is the (lawful) placement of a wager or bet on the outcome of a future uncertain event. It is treated as an activity than can be clearly divided into two distinct areas – **racing** related and **gaming** related. Where the word *gambling* is referred to in this publication, it is intended to imply the total of racing and gaming activities.³

5.2 EGMs and venues

The supply of EGMs and gaming venues with EGMs in Geelong and Victoria is presented in the following table.

Table 5.1: EGMs and venues, 1992 to 1999

Geelong	Sep-92	Jun-93	Jun-94	Jun-95	Jun-96	Jun-97	Jun-98	Jun-99	Dec-99	AAG %
EGMs	192	479	817	923	1179	1310	1372	1393	1402	
EGM Growth %	n/a	149.5	70.6	13.0	27.7	11.1	4.7	1.5	0.6	10.1%
Venues	3	9	18	22	26	28	28	28	28	
Venue Growth %	n/a	200.0	100.0	22.2	18.2	7.7	0.0	0.0	0.0	10.4%
Average No. of EGMs per venue	64	53	45	42	45	47	49	49	49	
Victoria	Sep-92	Jun-93	Jun-94	Jun-95	Jun-96	Jun-97	Jun-98	Jun-99	Dec-99	AAG%
EGMs	3,929	13,661	17,537	21,268	23,478	25,962	26,965	27,811	27,208	
EGM Growth %	n/a	247.7	28.4	21.3	10.4	10.6	3.9	3.1	-2.2	15.2%
Venues	59	251	365	468	521	554	559	573	556	
Venue Growth %	n/a	325.4	45.4	28.2	11.3	6.3	0.9	2.5	3.0	18.7%
Average No. of EGMs per venue	67	54	48	45	45	46	48	48	48.9	

Source: VCGA
AAG = average annual growth (using June 1993 as base)

The supply of EGMs and venues with EGMs in Geelong has grown by an average annual rate of 10.1% and 10.4% respectively since 1993. Growth for Victoria across the same period was 15.2% and 18.7% respectively. Geelong experienced substantial increases in the number of gaming machines and gaming venues in 1992-93 and 1993-94, but since 1995-96 the level of growth in the number of EGMs and venues has slowed.

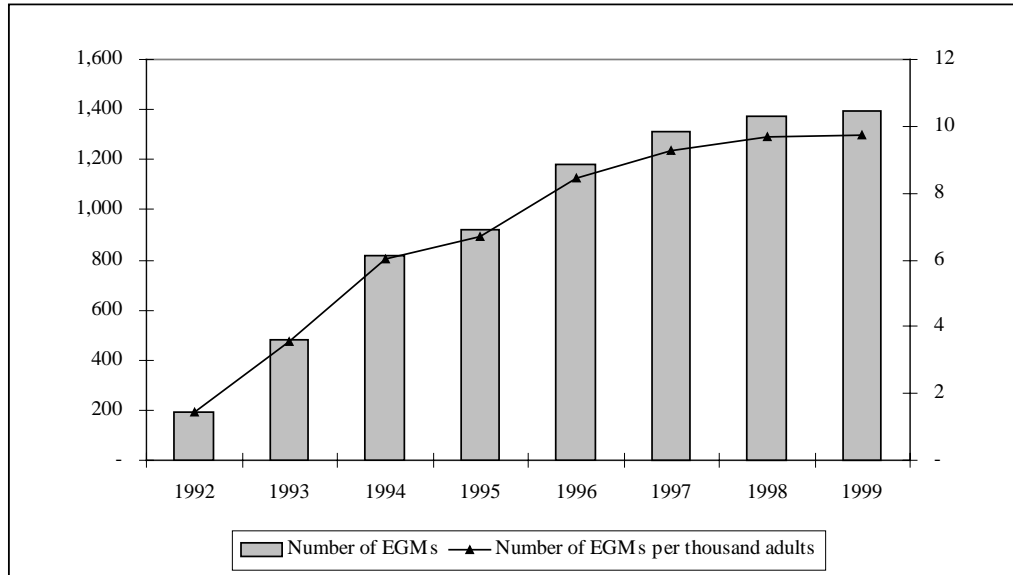
² Productivity Commission (1999), *Final Report*, Productivity Commission, Melbourne.

³ Tasmanian Gaming Commission, *Australian Gaming Statistics 1972-73 to 1997-98*, page 4

The number of EGMs per venue in Geelong has demonstrated a general declining trend from 64.0 machines per venue in September 1992 to 49 machines per venue in December 1999, largely mirroring state-wide trends.

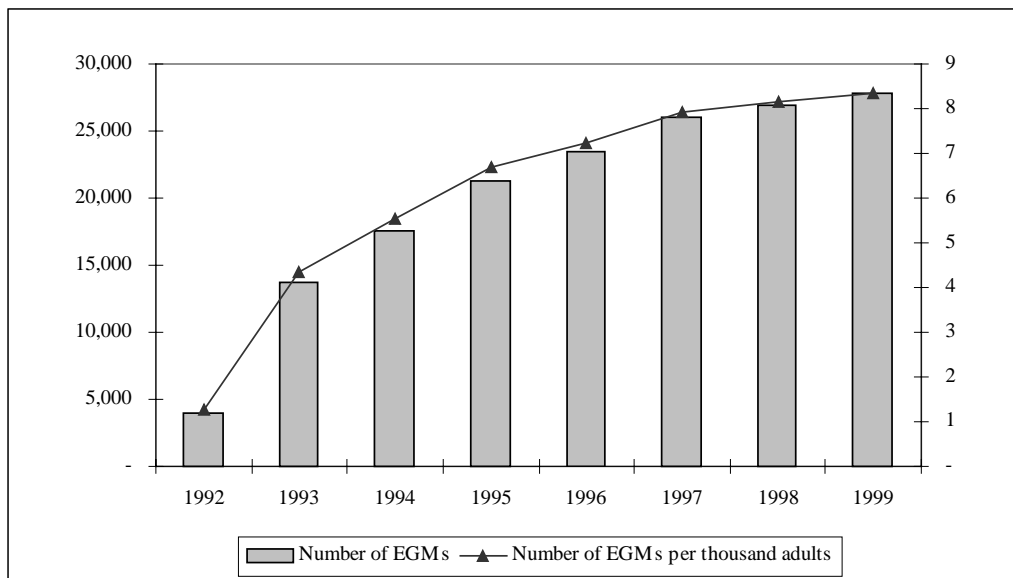
As shown in Figure 5.1, the number of EGMs per 1,000 adults in Geelong increased from 1.44 in 1992 to 9.71 in December 1999, which is higher than the average for Victoria as a whole, as shown in Figure 5.2.

Figure 5.1: EGM density in Geelong (EGMs/'000 adults), 1992 to 1999



Source: VCGA

Figure 5.2: EGM density in Victoria (EGMs/'000 adults), 1992 to 1999



Source: VCGA

As at 30 December 1999, Geelong had 28 licensed gaming venues offering a total of 1,402 EGMs of which 12 venues were hotels and 16 were clubs. The following map illustrates the location of each of these venues within the City of Geelong.

Figure 5.3: Venues in Geelong

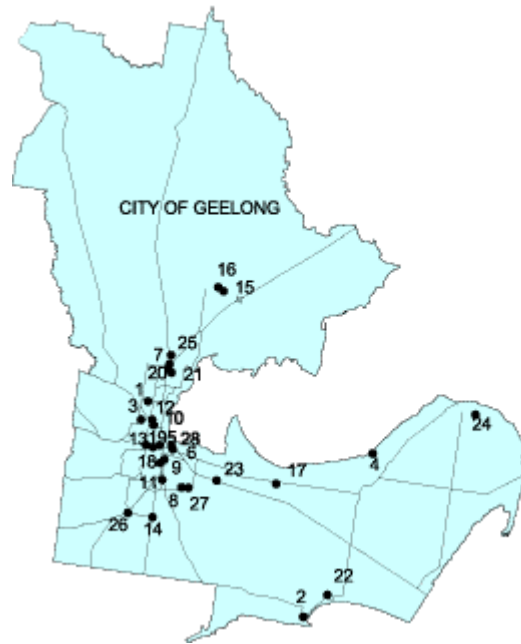


Table 5.2: Venue Mix Geelong

Venue	Venue Type	Address	Operator
1 Australian Croatian National Hall	Club	Bell Park	Tabcorp
2 Barwon Heads Hotel	Hotel	Barwon Heads	Tattersalls
3 Bell Park Sport & Recreation Club	Club	North Geelong	Tattersalls
4 Clifton Springs Golf Club	Club	Clifton Springs	Tabcorp
5 Corio Club	Club	Geelong West	Tattersalls
6 Criterion Hotel	Hotel	Geelong	Tattersalls
7 Gateway Hotel	Hotel	Corio	Tattersalls
8 Geelong Combined Leagues Club	Club	Breakwater	Tabcorp
9 Geelong Football Social Club Limited	Club	Geelong	Tabcorp
10 Geelong Golf Club	Club	North Geelong	Tabcorp
11 Geelong RSL	Club	Belmont	Tattersalls
12 Golf View Hotel	Hotel	North Geelong	Tattersalls
13 Great Western Hotel	Hotel	Newtown	Tabcorp
14 Grovedale Hotel	Hotel	Grovedale	Tabcorp
15 Lara Hotel	Hotel	Lara	Tattersalls
16 Lara Sporting Club	Club	Lara	Tabcorp
17 Leopold Sportsmans Club	Club	Leopold	Tabcorp
18 Lord Of The Isles Tavern	Hotel	Newtown	Tattersalls
19 Newtown Club	Club	Newtown	Tabcorp
20 Norlane Hotel	Hotel	Norlane	Tabcorp
21 North Shore Sports Club	Club	Norlane	Tattersalls
22 Ocean Grove Bowling Club	Club	Ocean Grove	Tabcorp
23 Peninsula Hotel Motel	Hotel	Newcomb	Tattersalls
24 Portarlington Golf Club	Club	Portarlington	Tabcorp
25 Shell Club	Club	Corio	Tattersalls
26 Waurn Ponds Hotel Motel	Hotel	Waurn Ponds	Tabcorp
27 White Eagle House	Club	Breakwater	Tabcorp
28 Wool Exchange Hotel	Hotel	Geelong	Tabcorp

Source: VCGA

The supply of Hotel EGMs represents 43.8% of the total number of EGMs in Geelong, with Club EGMs accounting for 56.2%. The average size of an EGM installation for Hotels and Clubs was 51 and 49 respectively as at December 1999. The following table illustrates the supply of EGMs by venue in Geelong and their respective share of either hotel or club EGM supply and the total supply of EGMs.

Table 5.3: Gaming venue details in Geelong, December 1999

Venue	EGMs	% Hotel EGMs	% Total EGMs
Barwon Heads Hotel	29	5%	2%
Criterion Hotel	50	8%	4%
Gateway Hotel	60	10%	4%
Golf View Hotel	60	10%	4%
Great Western Hotel	40	7%	3%
Grovedale Hotel	70	11%	5%
Lara Hotel	20	3%	1%
Lord Of The Isles Tavern	60	10%	4%
Norlane Hotel	105	17%	8%
Peninsula Hotel Motel	55	9%	4%
Waurm Ponds Hotel Motel	35	6%	3%
Wool Exchange Hotel	30	5%	2%
TOTAL Hotels	614	100%	44%
Venue	EGMs	% Club EGMs	% Total EGMs
Australian Croatian National Hall	30	4%	2%
Bell Park Sport & Recreation Club	28	4%	2%
Clifton Springs Golf Club	40	5%	3%
Corio Club	0	0%	0%
Geelong Combined Leagues Club	105	13%	8%
Geelong Football Social Club Limited	100	13%	7%
Geelong Golf Club	30	4%	2%
Geelong RSL	42	5%	3%
Lara Sporting Club	50	6%	4%
Leopold Sportsmans Club	35	4%	3%
Newtown Club	35	4%	3%
North Shore Sports Club	48	6%	3%
Ocean Grove Bowling Club	55	7%	4%
Portarlinton Golf Club	55	7%	4%
Shell Club	100	13%	7%
White Eagle House	35	4%	3%
TOTAL Clubs	788	100%	57%
GRAND TOTAL	1393		100%

Source: VCGA

In summary, Geelong has a very high level of EGMs and venues per head. Over recent years, the number of venues has been static but the number of EGMs has continued to grow.

5.3 Gaming expenditure

Based on VCGA figures, expenditure on gaming in Geelong has increased from \$11.09M in 1992/1993 to \$84.92M in 1998/1999. During 1998/1999, Geelong's expenditure on gaming was 71% higher than the average expenditure in metropolitan Local Government Areas (LGA). In 1998/1999, Geelong's expenditure on gaming in Geelong was 6% (\$597.77) higher than the State average of \$562.56. Expenditure on gaming in Geelong is summarised in the table below.

Table 5.4: Expenditure on gaming in Geelong, 1992 to 1999

	92-93	93-94	94-95	95-96	96-97	97-98	98-99
Level of Expenditure	\$11,089,166	\$29,345,104	\$44,919,644	\$55,860,980	\$65,384,982	\$73,573,653	\$84,921,326
Total Expenditure – Metropolitan *	\$211,319,751	\$551,431,696	\$745,524,325	\$963,832,773	\$1,131,288,009	\$1,306,707,971	\$1,542,948,218
Average Expenditure per Metropolitan LGA	\$6,816,766	\$17,788,119	\$24,049,171	\$31,091,379	\$36,493,161	\$42,151,870	\$49,772,523
Total Expenditure – Non Metropolitan **	\$43,309,135	\$131,167,765	\$207,627,542	\$281,533,049	\$325,195,095	\$362,925,551	\$411,322,997
Average Expenditure per Non Metropolitan LGA	\$921,470	\$2,790,803	\$4,417,607	\$5,990,064	\$6,919,044	\$7,721,820	\$8,751,553
Total Expenditure– Victoria	\$254,628,886	\$682,599,461	\$953,151,867	\$1,245,365,822	\$1,456,483,104	\$1,669,633,522	\$1,954,271,215
Average Expenditure per Victorian LGA	\$3,264,472	\$8,751,275	\$12,219,895	\$15,966,228	\$18,672,860	\$21,405,557	\$25,054,759
Adult Population – Geelong #	133,451	134,726	135,841	137,604	139,207	141,011	142,064
Expenditure per adult - Geelong	\$83	\$217	\$330	\$405	\$469	\$521	\$597
% increase/decrease – Geelong##	n/a	162%	52%	23%	16%	11%	15%
Adult Population – Victoria #	3,293,135	3,318,245	3,343,108	3,373,447	3,408,503	3,446,886	3,473,879
Expenditure per adult – Victoria	\$77	\$205	\$285	\$369	\$427	\$484	\$562
% increase/decrease -Victoria ##	n/a	166%	39%	29%	16%	13%	16%
\$ difference per adult +	\$5	\$12	\$45	\$36	\$42	\$37	\$35
% difference per adult ++	7%	6%	16%	10%	10%	8%	6%

Source: VCGA

* 31 Metropolitan LGAs (defined as all LGAs in the Melbourne Statistical Division)

** 47 Non-metropolitan LGAs (defined as all LGAs not part of the Melbourne Statistical Division)

Population defined as number of adults over the age of 18. (Source VCGA figures as at June of each year except for 1992/1993 which represents population as at September.)

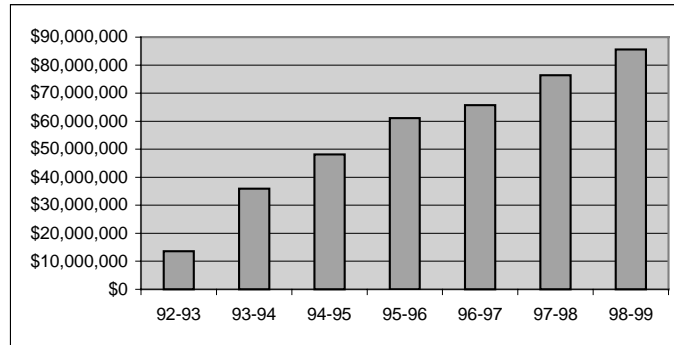
Increase/decrease relative to previous year's gaming expenditure

+ Difference between Geelong LGA and State per adult expenditure levels. A positive figure indicates that gaming expenditure per adult in Geelong is above the State average.

++ Percentage difference between Geelong and State per adult expenditure levels

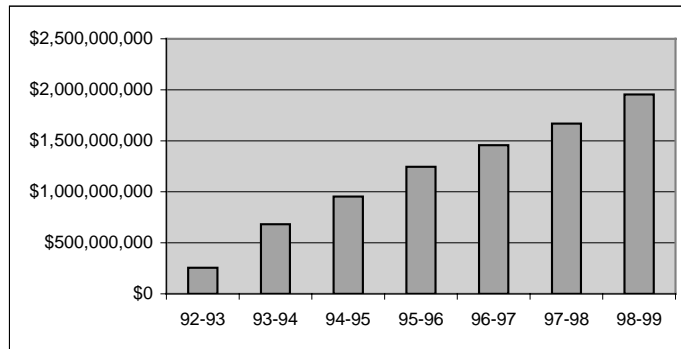
During the period 1992-1999, expenditure on gaming increased consistently for both Geelong and the State (all LGAs) as a whole. These findings are presented graphically below.

Figure 5.4: Expenditure on gaming for Geelong 1992-1999



Source: VCGA

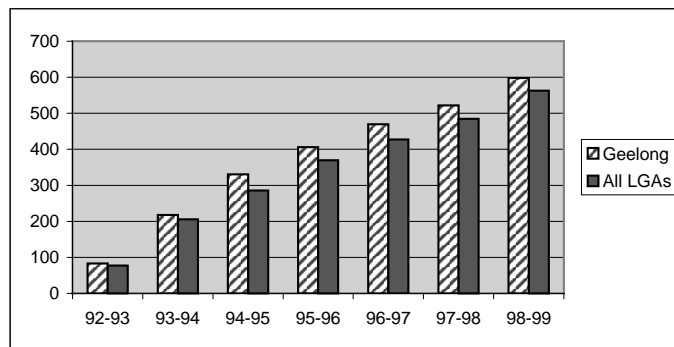
Figure 5.5: Expenditure on gaming Victoria, 1992-1999



Source: VCGA

In comparing average gaming expenditure by adults in Geelong against that of adults across the State (all LGAs) we found that the average amount spent on gaming was consistently higher in Geelong than the State average across the entire period of data collection. This comparison is presented in Figure 5.6.

Figure 5.6: Gaming expenditure per adult (\$) – Geelong, Victoria, 1992-1999



Source: VCGA

Over the seven years of data collection, the number of EGMs in Geelong increased from 479 in 1992/1993 to 1,393 in 1998/1999. During the same period average expenditure per EGM increased from \$23,151 in 1992/1993 to \$60,963 in 1998/1999. These figures are summarised in Table 5.5.

Table 5.5: Expenditure, number of EGMs and average expenditure per EGM, 1992-1999

	92-93	93-94	94-95	95-96	96-97	97-98	98-99
Expenditure	\$11,089,166.00	\$29,345,104.00	\$44,919,644.00	\$55,860,980.00	\$65,384,982.40	\$73,573,653.00	\$84,921,326.00
EGMs	479	817	923	1,179	1,310	1,372	1,393
Av. Exp/EGM	\$23,150.66	\$35,918.12	\$48,667.00	\$47,379.97	\$49,912.20	\$53,625.11	\$60,962.90

Source VCGA

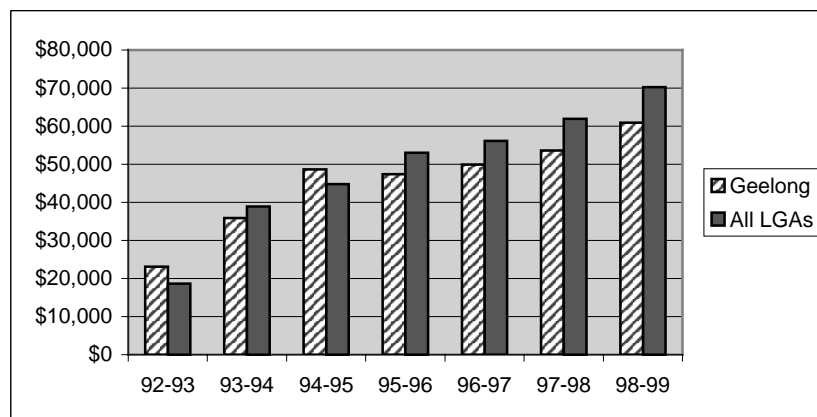
Comparing expenditure per EGM in Geelong against expenditure per EGM across the State, expenditure in Geelong has usually been lower than expenditure across the State average although no clear trend is evident (see Table 5.6).

Table 5.6: Average expenditure per EGM, 1992-1999

	92-93	93-94	94-95	95-96	96-97	97-98	98-99
Av. Exp/EGM - Geelong	\$23,150.66	\$35,918.12	\$48,667.00	\$47,379.97	\$49,912.20	\$53,625.11	\$60,962.90
Av. Exp/EGM - State	\$18,639.11	\$38,923.39	\$44,816.24	\$53,043.95	\$56,100.57	\$61,918.54	\$70,269.72
% change for Geelong	n/a	55%	35%	-3%	5%	7%	14%
% change State	n/a	109%	15%	18%	6%	10%	13%

Source VCGA

Figure 5.7: Average expenditure per EGM, 1992/1999

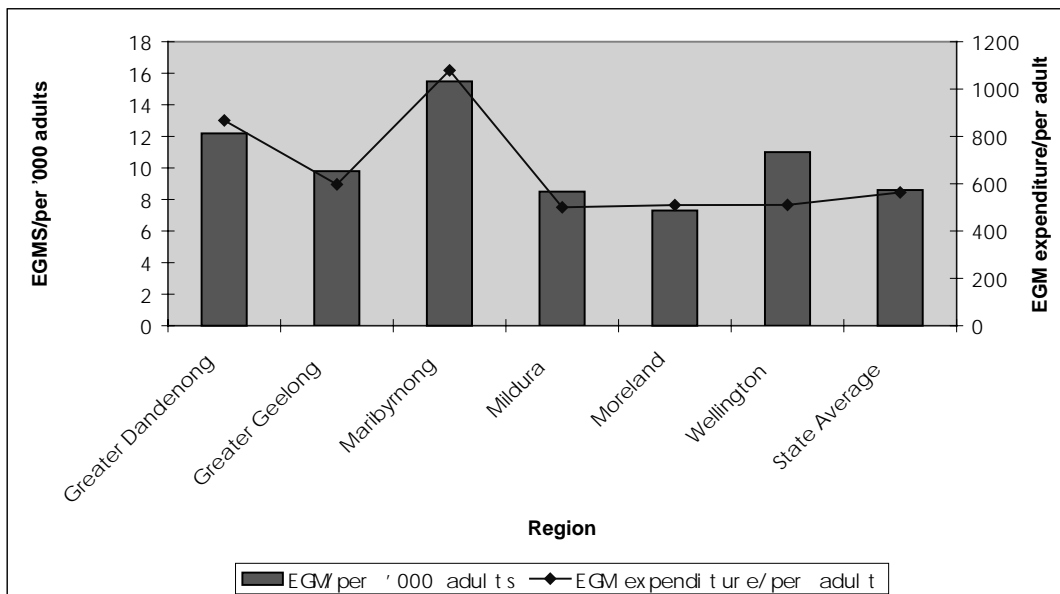


Source VCGA

5.4 Gaming: Comparison between Geelong and other regions

Figure 5.8 compares the number of EGMs and EGM expenditure, per thousand adults between Geelong, the other study regions, and the State average. These measures indicate that the level of gaming in Geelong is above the State average.

Figure 5.8: Number of EGMs per thousand adults and EGM expenditure per adult, 1999



5.5 Who gambles and frequency of gambling?

Our understanding of the profile of residents of the City of Greater Geelong who use EGMs is drawn from:

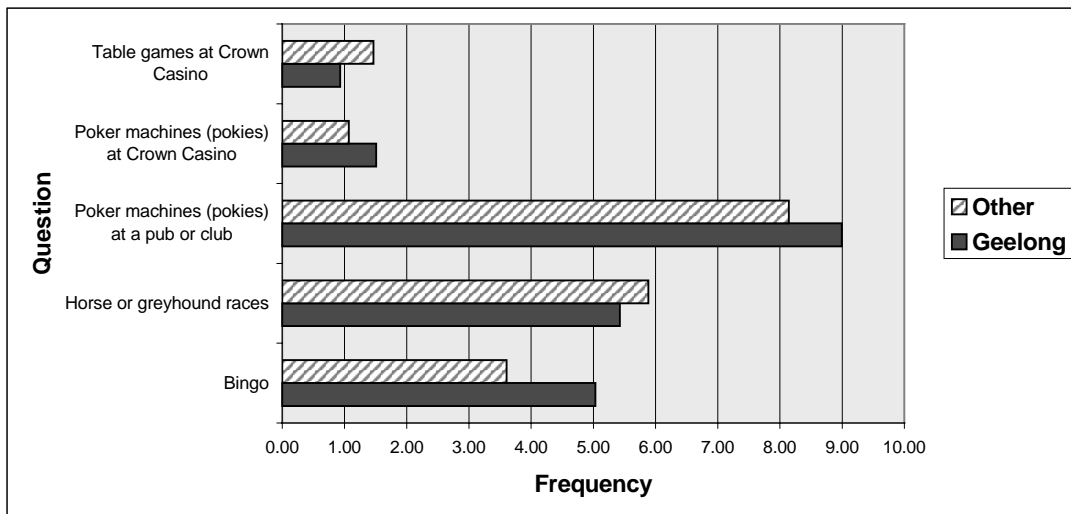
- our survey of 167 adults living in the City of Greater Geelong, conducted in October 1999; and
- opinions expressed during our consultations by venues, community groups and in public forums.

Of the 167 people surveyed in the Geelong region, almost 53% participated in gambling activities in the last six months, compared to the Roy Morgan ‘Patterns’ Survey findings which suggests that 75% of Victorians have gambled in the last 12 months.⁴

Figure 5.9 details the frequency of gambling among the Geelong respondents. The most popular gambling activity is playing the poker machines at a pub or club. Geelong respondents participate in this almost 9 times a year. Greyhound or horse races is the next most common activity, and the least is playing table games at the Crown Casino.

⁴ The full title of the ‘Patterns’ survey is the “Sixth Survey of Community Gambling Patterns and Perceptions”, April 1999, conducted by Roy Morgan Research for the Victorian Casino and Gaming Authority.

Figure 5.9: Frequency of alternative gambling, Geelong



(There is no statistically significant difference between Geelong and the other regions for these questions.)

In our consultations, venue operators said the demographic profile of gaming machine patrons included older single people who would otherwise spend their time alone. For these people, the venues give a sense of belonging with other people and social interaction. The staff at gaming venues also acknowledge gaming patrons, giving them a sense of being welcome. One hotel operator reported that approximately 70% of his customers were over the age of 60 years, although more recently he had been experiencing an increase in the number of young people visiting the venue. The same hotel operator also stated that he had a very low level of regular patrons, stating that the hotel would attract 10,000 “walk-ins” per week and only approximately 200 would be regular customers. Another hotel stated that it attracts older women during the day, whilst at night, the hotel’s patrons are generally younger people, shift workers and staff from other venues.

Several club venues indicated that the majority of their members and gamers were over 50 years of age. One noted that these patrons were mostly women, and the other that they were mainly employed. It was stated that pensioners and single people also frequent venues primarily in search of companionship and to socialise. Additionally, one sports club noted that the majority of its sporting members rarely used the EGMs at the facility.

At the public meeting, one venue operator said that approximately 50% of patrons are loyal to one venue, whilst the other 50% are patrons “chasing a good bet” who have no real regular venue.

One large 24 hour venue indicated that the majority of its patrons came from the local postcode area with the facilities attracting women during the day and younger people and couples of an evening. However, the operator noted that due to the low income nature of the area, gaming clientele would go from one venue to another “chasing promotions.”

Community support agencies said that gamblers included older people, young people, “attractive” people, wealthy people, shiftworkers with spare time, lonely people who liked to be in a place with other people, but did not want to socialise, depressed people suffering from other social problems and women at home with children.

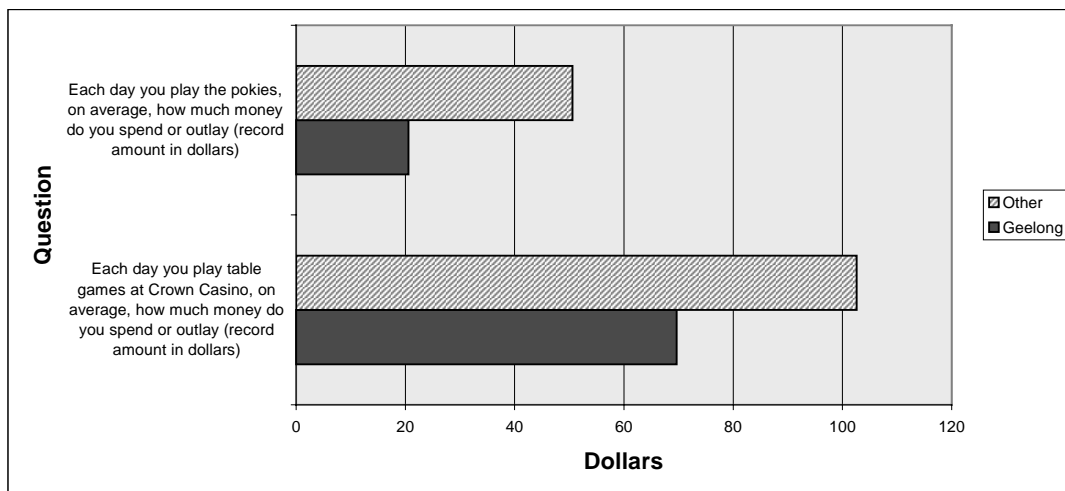
5.6 Gamblers in our survey

In our survey, gamblers are defined as those people who had participated in gambling in the last six months. They make up 53% of Geelong residents. We asked this sub-sample more detailed questions about their gaming behaviour (see sections 5.7 to 5.11), and also asked about their gambling behaviour to check for the prevalence of problem gambling (see section 5.12).

5.7 Time and money spent on gaming

We asked gamers how often they frequented Crown Casino, and how much they spent per visit on table games at the Casino. Gamblers from the Geelong region spend on average \$20 on poker machines per daily visit. While Geelong gamblers patronise the Crown Casino less frequently than local venues, on average they spend almost 3.5 times as much at the Casino on table games compared with their spending at local gaming venues.

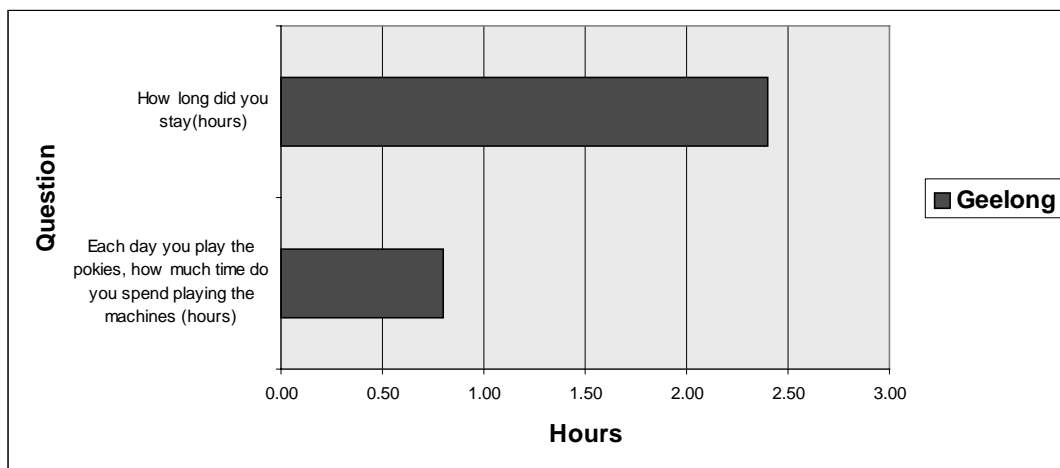
Figure 5.10: Money spent on gaming, Geelong



(There is no statistically significant difference between Geelong and other regions for these questions.)

Our survey indicates that Geelong gamers spend about a third of their time in gaming venues playing pokies. This suggests that gaming is only one component of the social and recreational experience provided by gaming venues.

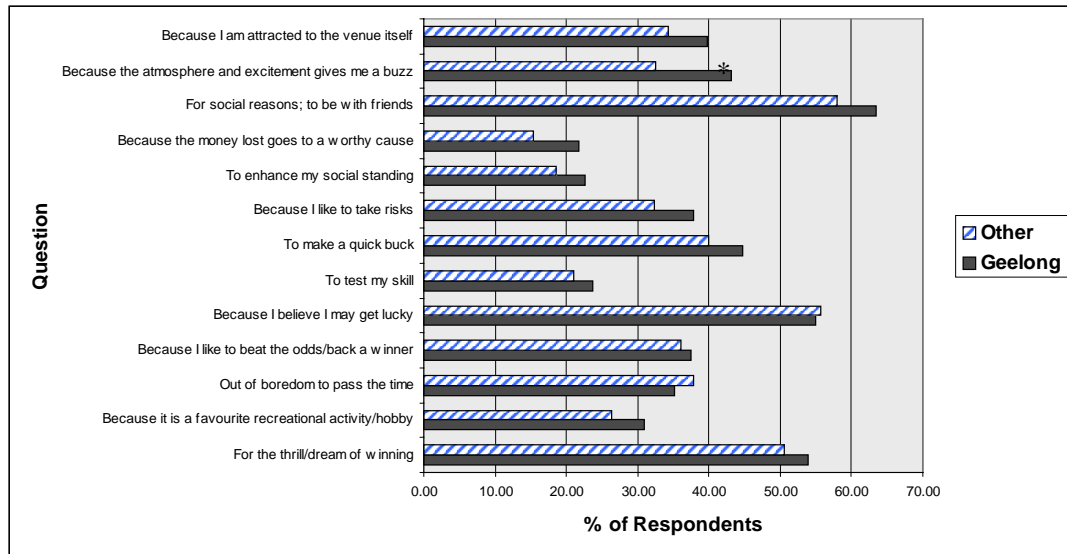
Figure 5.11: Time Spent at Venue, Geelong



5.8 Reasons for gaming

Our survey indicates that in Geelong, the main reason respondents play poker machines are for ‘social reasons; to be with friends’. The second most popular reason was described as being for the thrill/dream of winning. Figure 5.12 indicates that in Geelong the prospect of a lucky win, making a “quick buck” and the attraction of the venue itself are major influences in respondents choosing to play poker machines. More respondents in Geelong play the pokies for the excitement and atmosphere than in the other study regions.

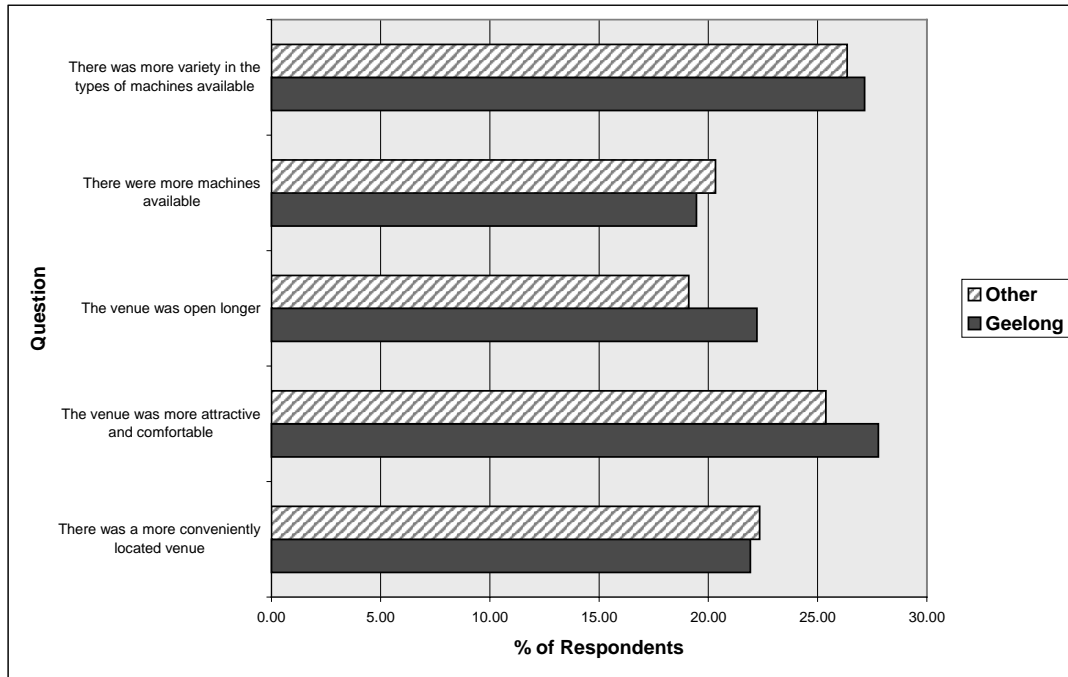
Figure 5.12: Reasons for gaming, Geelong



(*) Statistically significant difference between Geelong and the average of the other regions.

Gamers were asked what would make them game more. Overall most gamers indicated that the factors we suggested would not make them game more. In our survey, about 28% of Geelong gamers nominated venue attractiveness and the feeling of comfort as factors that might make them game more. While the variety of machines available was a significant reason for the choice of gaming venue, it featured as a minor reason contributing to people gaming more. More machines, extended venue operating hours or more conveniently located venues were considered as minor factors for gaming more.

Figure 5.13: Factors contributing to gaming more, Geelong

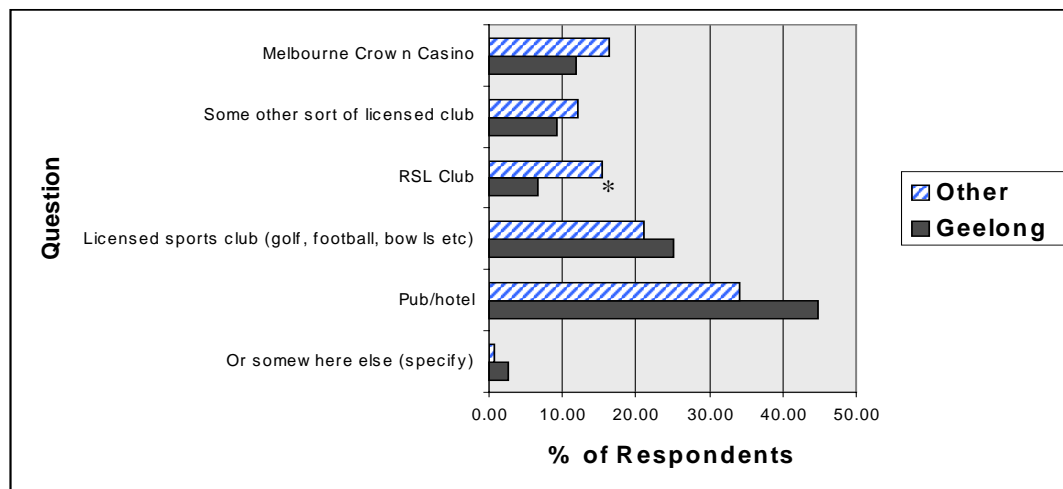


(There is no statistically significant difference between Geelong and the other regions for these questions.)

5.9 Venues at which EGMs are played

The most common venue among poker machine players is a pub or hotel. Approximately 45% of Geelong respondents chose this option, with the next most popular venue being licensed sports clubs. From our survey, significantly fewer gamers in Geelong frequent RSL clubs compared to gamers in other regions.

Figure 5.14: Venue at which EGMs are played, Geelong

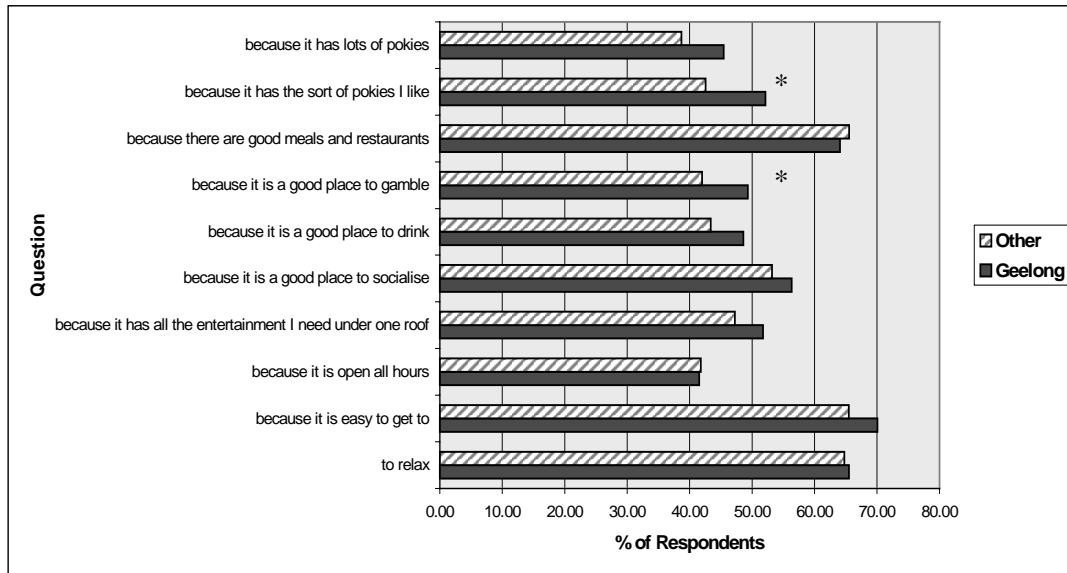


(*) Statistically significant difference between Geelong and the average of the other regions.

Our survey found that most gamblers game locally. Gamblers from the Geelong region travel on average 2.5km to gaming venues. The majority of gamblers in Geelong depart from home to get to the gaming venue.

In our survey, 70% of gamblers in Geelong choose gaming venues on the basis of proximity and convenience. Other major reasons include good meals and restaurants, to relax, the social ambience and because the venue had various forms of entertainment under the one roof. The survey findings also indicate that gamers in Geelong choose venues on the basis of poker machine type and because it's a good place to gamble, more so than in the other regions. While respondents also choose venues because they are open all hours and for the number of pokies, these reasons are less significant.

Figure 5.15: Reasons for Venue Choice, Geelong

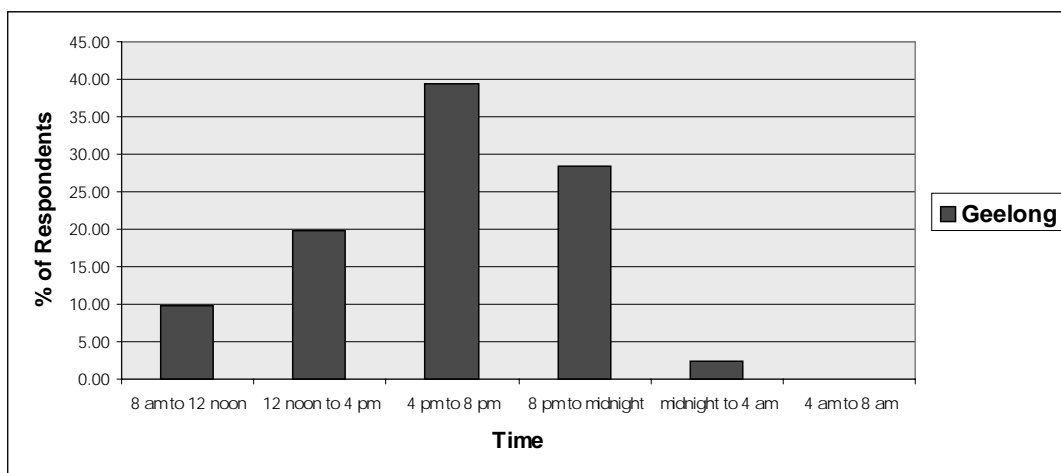


(*) Statistically significant difference between Geelong and the average of the other regions

5.10 Utilisation of poker machines

Figure 5.16 indicates that the busyness of venues varies over the day. The peak arrival time at venues is between 4pm and 8pm with about 40% of Geelong gamers arriving at venues during this time. Patron numbers begin declining after about 10pm with less than 5% of respondents arriving between the hours of midnight and 4am, although this finding may also reflect the fact that many venues are closed at this time. No responses were given for arrivals between 4am to 8am.

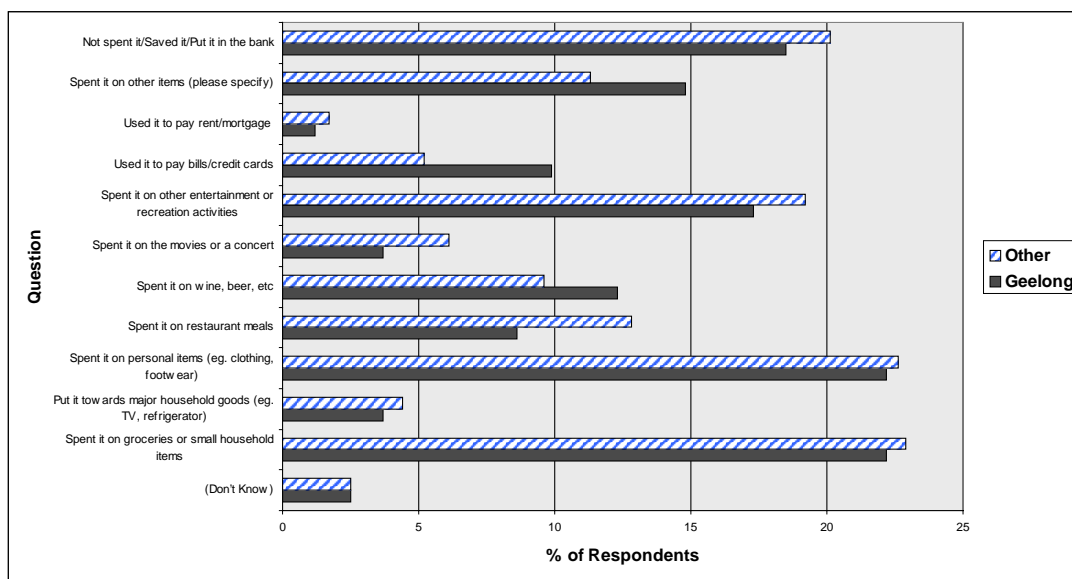
Figure 5.16: Time of arrival, Geelong



5.11 Alternative use of EGM funds

Figure 5.17 details what gamers in Geelong indicated they would spend their money on had they not spent it on gaming. Around 22% of Geelong gamers would have spent it on groceries or small household items and on personal items. In our survey, 18.5% of gamers would have saved this money and about 17.3% would have spent it on entertainment and recreation.

Figure 5.17: Alternative uses of EGM Funds, Geelong



(There is no statistically significant difference between Geelong and the other regions for these questions.)

5.12 Problem gambling

The respondents who had gambled in the last six months were asked the battery of questions from the South Oaks Gambling Screen (SOGS), which is a tool used to identify gambling risks in the total population. We derived a score to identify the percentage of people ‘at risk’ of gambling problems in our survey regions using the approach adopted in the state-wide ‘Patterns’ survey.⁵

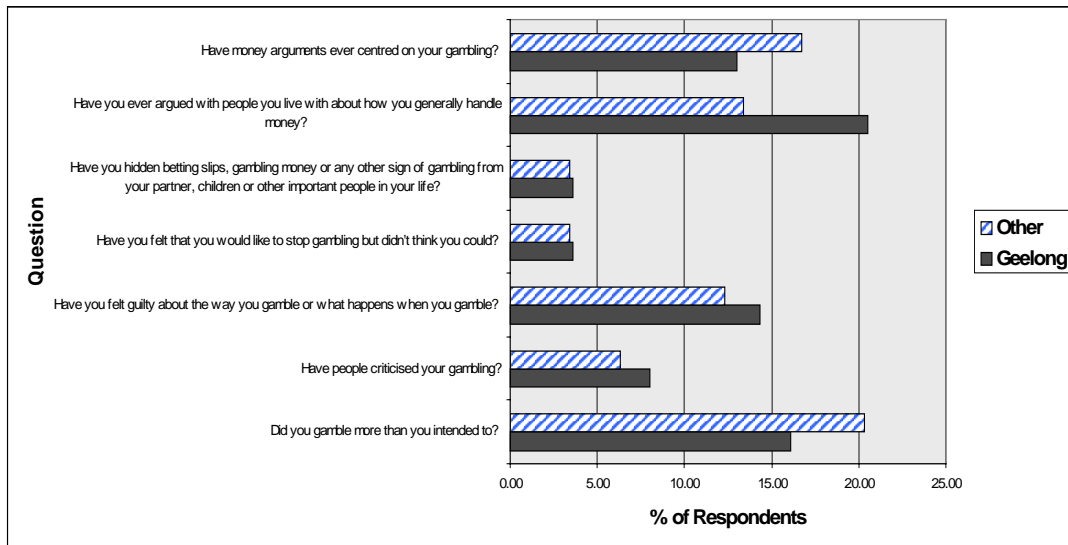
Our survey found that 3% of Geelong residents fall into the ‘at risk’ category, having SOGS scores of 5 or more. This compares with the State-wide average of 1.5%, and the average for our other five study regions of 1.8%.⁶ Only 1% of Geelong gamblers feel they have had a problem with gambling or that their gambling was out of control. However, 5% of all Geelong residents said that they or a member of their family had experienced difficulties with excessive gambling at some time, with 56% of this group having experienced difficulties in the last six months.

⁵ Ref: ‘Definition and Incidence of Problem Gambling including the Socio-Economic Distribution of Gamblers’ Australian Institute for Gambling Research (1997) commissioned by the VCGA. In this report, the Institute recommended that the SOGS was the best currently available instrument to measure the prevalence of problem gambling and that it should be used in the short term for the VCGA ongoing survey series of community gambling patterns and perceptions. The VCGA has included the SOGS in the last three of its ongoing Community Gambling Patterns surveys.

⁶ There was no statistically significant difference between the percentage of ‘at risk’ gamblers in Geelong compared to the average of our other five study regions.

In our survey, 16% of gamblers in Geelong indicated that they had gambled more than they intended to at some time in the last six months. Thirteen percent of Geelong gamblers admitted to having had money arguments centred over gambling and approximately 14% had felt guilty about what happens when they gamble or the repercussions of their gambling. (See Figure 5.18)

Figure 5.18: Negative gambling experiences in the last six months, Geelong



(There is no statistically significant difference between Geelong and the other regions for these questions.)

In order to probe the issue of problem gambling further, a series of questions was asked in relation to whether gambling activities were financed through credit or borrowing. In Geelong very little gambling activity is financed by credit. Less than 2% of Geelong gamblers admitted to having borrowed money to finance gambling, including borrowing money from relatives, credit cards, or selling personal property to finance gambling.

The Break Even Agency which covers the City of Greater Geelong (Bethamy Family Care) reported 153 cases and 623 client contacts in 1997-98 relating to problem gambling. These figures are an increase over the previous year (46% for cases, but a 12% decline for client contacts). (Note, these figures relate to a wider area than Geelong.)

Our consultations provided some insights into community perceptions. Consultations with venue operators resulted in the following findings:

- Generally, venue operators in Geelong are conscious of the problems associated with gambling. However, a number of venues raised the issue of the difficulty in identifying problem gamblers with one medium sized venue saying:

“ . . . this is a difficult one to deal with. We don't know people's circumstances and we can't invade their privacy. We don't know whether they have money or not. We know a few people pump money into the machines but they are sometimes business people and good club members”.

- One venue manager indicated that members of the staff get to know the regulars and what they spend on average on machine gaming. Additionally, it was stated that representatives of the venue were able to identify signs of problem gambling and would

intervene if it was considered that a patron was overdoing it. Staff were also encouraged to suggest to potential problem gamblers that they should contact Breakeven.

- One large venue manager suggested that signs of problem gambling included duration of play and agitation with EGMs, patrons and staff. Staff at this venue would discuss the problem with patrons and make them aware of the self-exclusion program.
- One medium sized hotel reported 35 incidences of self-exclusions and indicated that problem gamblers were typically patrons that sweat unexplainably and tended to show aggression towards the EGMs.

Community service organisations made the following comments:

- Geelong Financial Counselling and Consumer Information reported that they have experienced a doubling in the number of enquiries in relation to problem gambling from people in areas where EGMs are located. However, less than 5% of the people requesting financial counselling attributed their problem to gambling. The client base is quite diverse and not confined to the lower socio-economic segments of the resident population. Of the non-English speaking background clients seeking gambling assistance, approximately 90% of them were male who are either single or have been separated.
- Some community service agencies are of the belief that a significant proportion of married women clients seeking assistance for gambling related problems are not gamblers and that their requests for financial help are because of their spouses' gambling problems.
- At the time of the consultations, the Catholic Family Welfare Agency/Centacare was assisting 33 clients, with only 2 of them being identified as having a gambling related problem.
- 25% of Breakeven clients admit to committing crimes, such as embezzlement.

The following points relate to the comments made by participants at the public meeting held in Geelong:

- Venue operators stated that since the introduction of EGMs in 1992, their approach towards gambling related problems had been responsible, with the introduction of a number of initiatives including Breakeven, training of staff to identify and approach potential problem gamblers and large winnings now being paid by cheque.
- Problem gambling affects a diverse range of people from across the socio-economic spectrum. However, there was a belief that half of problem gamblers were unemployed, half were women who were invariably strongly attracted to EGMs (in contrast to male problem gamblers who also bet on horse racing).
- Boredom was identified as being a key factor attracting people to gaming venues as it presented them with a comfort zone with distractions to make them feel better with themselves. One participant proposed that problem gamblers feel socially constrained, but noted that "there are plenty of non-gaming venues in Geelong."

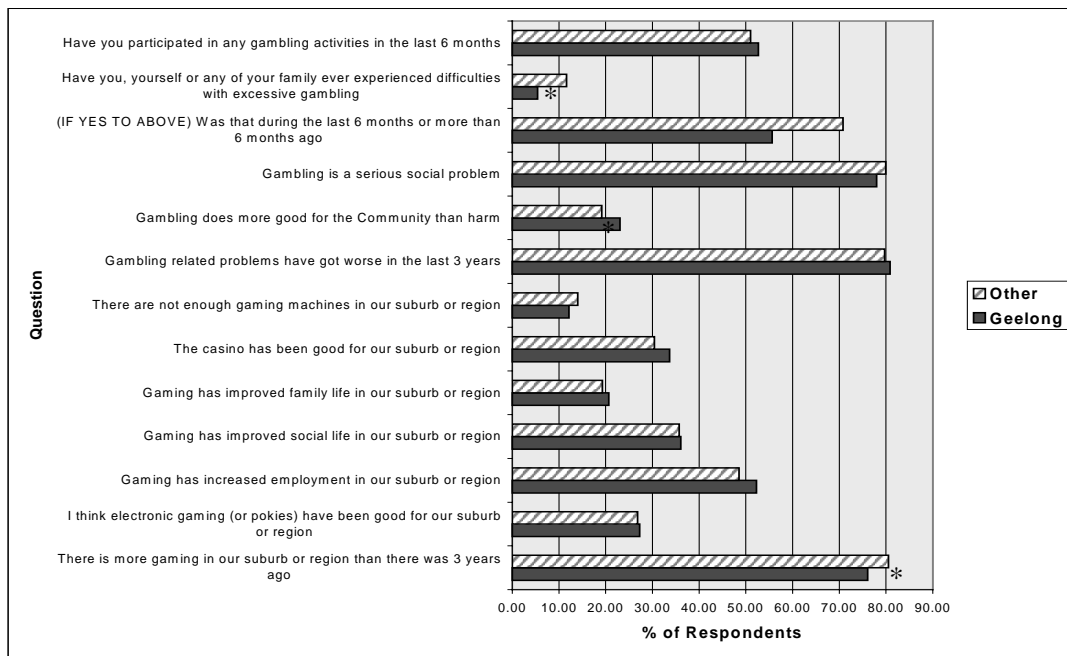
6 Social and economic impact of gaming

6.1 Impacts on the community

From our survey, 78% of Geelong respondents agree that gaming is a serious social problem, closely matching the findings of the “Patterns” survey, which indicated that 80% per cent of all Victorians felt this way.

Over 50% of respondents in Geelong believe that gaming has increased employment. It should be noted that while there may be a comparatively smaller percentage of respondents that feel there is more gaming in Geelong than in *other* regions, over 70% of respondents in the region have the opinion that there is more gaming in the region *than there was three years ago*.

Figure 6.1: Opinions on the impact of gambling, Geelong



(*) Statistically significant difference between Geelong and the average of the other regions.

Venue operators considered that there had been a fundamental change in the lifestyle of Geelong residents, with more emphasis now being placed on leisure activities outside the home. Older people have said that visiting venues to participate in gaming activities started as a hobby to improve social life and then just got out of control. One non-gaming venue considers that the introduction of gambling has spoilt the traditional pub atmosphere and perceives that there has been an increase in the level of crime as a desperate attempt by problem gamblers to finance their habits. However, official statistics show that crime levels are not increasing. (see Table 3.13)

One hotel venue has experienced an increase in the incidence of drug use amongst patrons, with syringes being found in the ladies lavatories. There was a perception some people use gaming to escape their other problems and to distract themselves from their loneliness. A community support agency noticed that quite often gambling related problems were linked with other social problems such as alcohol and other substance abuse.

Other community organisations consider that there has been an increase in the number of relationship breakdowns amongst family members and married couples as a result of the introduction of EGMs, with the number of gambling related problems having tripled in three years. Few community organisations recognised benefits in the area from contributions from the Community Support Fund (gaming taxes).

There has been debate within the Geelong community regarding 24 hour gaming venue trading with the Geelong council calling for a “time-out” period. However, at the public meeting venue operators argued that 24 hour trading enables venues to cater for a range of people, as different groups attend at different hours.

6.2 Economic effects

Overall, the perceptions of the economic impacts of EGMs on the local community are mixed. Some gaming venues have been very successful, and they argue that they have been able to improve facilities and offer leisure alternatives and increased employment opportunities and training for local residents, particularly young adults and women who may otherwise have little opportunity for employment elsewhere. All gaming venues reported increased employment after the introduction of EGMs:

- a medium sized hotel venue employed 44 people with 2 full-time staff dedicated to running the gaming room operations;
- another hotel employs 15 full-time staff;
- a large venue employed a total of 63 people, of which 9 on a full-time basis;
- a medium sized club venue employed a total of 10 staff, of which 4 were on a full-time basis;
- many venues emphasised the level of support that they have given to local clubs, charities and schools and have indicated that this would not have been possible without the introduction of EGMs, with one hotel venue indicating that it had donated \$50,000 to these three groups; and
- some local sporting clubs are generating large amounts of money via EGMs but others are losing out as they had relied in the past on Bingo.

The Geelong Chamber of Commerce was less positive about the effect of gaming on local business indicating that local retailers claim that the introduction of EGMs has caused a reduction in the level of discretionary spending. Additionally, it was indicated that another impact of the introduction of gaming has been the decrease in the level of household savings. However, it was recognised that the introduction of EGMs has seen an increase in the level of casual employment, predominantly taken up by women who now receive a salary and training. The Chamber of Commerce has also recognised that a benefit of the introduction of EGMs has been the overall improvement in venue facilities and amenities. Prior to EGMs there was a lack of facilities for older residents to socialise in a safe environment.

A concern was expressed that new venue operators or existing venues wishing to expand into machine gaming are unable to enter the marketplace as Tattersalls and TABCORP are only giving machines to facilities that have a proven track record.

6.3 Perceived benefits and costs

The perceived costs and benefits of gaming are summarised below.

6.3.1 Benefits

- The benefits of gaming for Geelong are mostly felt by venues with EGMs and individuals who have gained employment and expanded employment opportunities. The venues now offer better service facilities and employment and training opportunities for some.
- Older people now have a safe, accessible environment which increases their leisure options and helps them deal with their loneliness.
- The benefits in the form of donations to sporting clubs must be weighed against their inability to compete with gaming venues.

6.3.2 Costs

Some venues believe that one of the costs of the introduction of EGMs has been the increasingly negative perception in the community towards gambling and the stigma associated with machine gaming as a form of recreational activity. That said, there has been a rapid expansion of machines and venues and some are critical that this is reducing, not increasing, leisure options.

Community support agencies have identified costs of the introduction of EGMs to include, for individuals:

- financial problems;
- interpersonal and family problems; and
- emotional problems, self-loathing, and a sense of loss of control.

Appendix 1

VCGA Gaming Survey		Geelong	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
PART B - PERSONAL VALUES										
Life in general										
1	I am really happy w with life	75.90	73.65	2.25		0.287	X5B(1)	77.8	15.0	7.2
2	The Australian economy is doing well	54.95	52.85	2.10		0.289	X5B(2)	41.3	36.5	22.2
3	The Australian economy is getting better	56.00	52.25	3.75	p	0.035	X5B(3)	38.3	47.3	14.4
4	My life will be better in the next year than it was last year	67.83	66.95	0.88		0.682	X5B(4)	62.3	26.9	10.8
5	My family's financial situation is good	69.00	64.28	4.73	p	0.024	X5B(5)	71.3	18.0	10.8
6	I feel that where I end up in life will be more a matter of luck than planning	42.83	44.20	-1.38		0.6	X5B(6)	31.2	19.8	49.1
7	I believe rules should never be broken	53.60	52.23	1.38		0.608	X5B(7)	36.6	29.3	34.1
8	I seek out the latest things	49.70	48.68	1.03		0.657	X5B(8)	37.7	24.6	37.7
9	I am healthy	75.30	71.88	3.43		0.088	X5B(9)	82.0	10.2	7.8
10	I rarely feel stressed	45.50	46.15	-0.65		0.79	X5B(10)	29.4	26.9	43.7
Belonging and friendship										
11	I have a good family life	81.28	78.90	2.38		0.23	X5B(11)	86.8	7.2	6.0
12	Security is of concern to me	72.15	72.15	0.00		0.998	X5B(12)	75.4	9.6	15.0
13	I am hardly ever lonely	69.30	68.75	0.55		0.825	X5B(13)	70.0	12.0	18.0
Levels of activity										
14	I am always busy	80.25	78.20	2.05		0.304	X5B(14)	83.8	10.2	6.0
Fun and going out										
15	I have a full social life	61.83	62.03	-0.20		0.929	X5B(15)	57.5	21.0	21.6
16	I like crowds	45.95	47.35	-1.40		0.586	X5B(16)	31.2	27.5	41.3
17	I am hardly ever bored	68.28	68.68	-0.40		0.861	X5B(17)	69.5	13.8	16.8
Risk										
18	Taking risks gives me a thrill	43.85	46.30	-2.45		0.346	X5B(18)	31.2	23.4	45.5
Trust										
19	I believe most people can be trusted	46.70	46.13	0.58		0.798	X5B(19)	34.1	26.9	38.9
Income										
20	I always have enough money to go around	53.60	52.25	1.35		0.594	X5B(20)	46.7	19.8	33.6
21	I buy luxuries	41.63	42.48	-0.85		0.721	X5B(21)	27.0	23.4	49.7
Shopping										
22	I am a spender, not a saver	48.80	48.80	0.00		0.999	X5B(22)	35.4	22.8	41.9
Thinking about your suburb or region										
23	Overall, this is a good suburb or region to live in	81.43	72.00	9.43	* p	0	X5B(23)	88.0	8.4	3.6
24	The local economy is good	58.98	54.48	4.50	p	0.018	X5B(24)	48.5	35.9	15.6
25	The local shops are doing well financially	53.90	51.63	2.28		0.243	X5B(25)	37.7	40.7	21.6
26	There is a real sense of community around here	62.13	63.33	-1.20		0.559	X5B(26)	56.3	28.7	15.0
27	It is safe around here	65.28	59.73	5.55	p	0.006	X5B(27)	64.1	24.0	12.0
28	There is no crime around here	38.93	32.15	6.78	p	0.002	X5B(28)	20.4	27.5	52.1
29	There is plenty of work around here	37.58	40.08	-2.50		0.222	X5B(29)	14.4	34.1	51.5
30	People play sport around here	74.85	73.48	1.38		0.416	X5B(30)	85.1	9.6	5.4
Thinking about your life 3 years ago										
31	I was living in this suburb or region 3 years ago	78.75	78.25	0.50		0.837	X5B(31)	86.8	1.8	11.4

VCGA Gaming Survey		Geelong	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
Life in general										
32	I am happier than I was 3 years ago	69.15	67.05	2.10		0.342	X5B(32)	64.6	24.0	11.4
33	The Australian economy is better now than it was 3 years ago	63.18	60.30	2.88		0.117	X5B(33)	57.5	31.7	10.8
34	My family's financial situation is better than it was 3 years ago	61.38	61.25	0.13		0.966	X5B(34)	52.7	29.3	18.0
35	I am healthier now than I was 3 years ago	56.15	54.45	1.70		0.459	X5B(35)	39.5	37.7	22.8
36	I feel less stressed now than I did 3 years ago	54.20	51.48	2.73		0.25	X5B(36)	41.3	30.5	28.2
Belonging and friendship										
37	I have a better family life now than I did 3 years ago	62.13	59.98	2.15		0.331	X5B(37)	53.3	31.1	15.6
38	I am less concerned with security now than I was 3 years ago	46.10	45.65	0.45		0.842	X5B(38)	30.0	28.1	41.9
39	I am less lonely now than I was 3 years ago	56.58	53.75	2.83		0.217	X5B(39)	41.3	34.7	24.0
Levels of activity										
40	I am busier now than I was 3 years ago	66.03	66.00	0.03		0.993	X5B(40)	60.4	20.4	19.2
Fun and going out										
41	I have a better social life now than I did 3 years ago	52.55	53.25	-0.70		0.761	X5B(41)	34.2	37.1	28.8
42	I am less bored now than I was 3 years ago	58.98	57.90	1.08		0.599	X5B(42)	44.9	37.1	18.0
Risk										
43	I take more risks now than I did 3 years ago	43.13	43.73	-0.60		0.787	X5B(43)	25.2	27.5	47.3
Trust										
44	I trust people more now than I did 3 years ago	38.33	38.08	0.25		0.898	X5B(44)	12.0	40.1	47.9
Income										
45	My money goes further now than it did 3 years ago	35.48	37.75	-2.28		0.377	X5B(45)	23.4	18.0	58.6
46	I buy more luxuries now than I did 3 years ago	38.63	37.38	1.25		0.616	X5B(46)	23.4	22.2	54.5
Thinking about your suburb or region compared to how it was 3 years ago										
47	This suburb or region is better to live in now than 3 years ago	56.58	52.35	4.23	p	0.021	X5B(47)	37.7	46.1	16.2
48	The local economy is better now than it was 3 years ago	54.50	50.50	4.00	p	0.024	X5B(48)	35.3	47.9	16.8
49	The local shops are doing better financially than they were 3	51.95	49.15	2.80		0.144	X5B(49)	31.1	44.9	24.0
50	There is a better sense of community around here now than there	54.65	53.13	1.53		0.424	X5B(50)	35.9	46.1	18.0
51	It is safer around here now than 3 years ago	47.00	42.50	4.50	p	0.015	X5B(51)	21.0	48.5	30.5
52	There is less crime around here than 3 years ago	43.28	38.05	5.23	p	0.005	X5B(52)	14.4	48.5	37.1
53	There is more work around here than there was 3 years ago	45.50	43.15	2.35		0.246	X5B(53)	24.6	41.9	33.6
54	People play more sport around here than they did 3 years ago	53.75	53.10	0.65		0.714	X5B(54)	29.9	54.5	15.6
Gaming- explain that gaming is electronic gaming machines or pokies and the games played at the casino										
55	There is more gaming in our suburb or region than there was 3	76.05	80.53	-4.48	p	0.03	X5B(55)	78.4	14.4	7.2
56	I think electronic gaming (or pokies) have been good for our	27.25	26.83	0.43		0.849	X5B(56)	7.8	26.3	65.8
57	Gaming has increased employment in our suburb or region	52.25	48.53	3.73		0.123	X5B(57)	43.7	24.6	31.8
58	Gaming has improved social life in our suburb or region	36.08	35.73	0.35		0.871	X5B(58)	19.2	23.4	57.5
59	Gaming has improved family life in our suburb or region	20.65	19.28	1.38		0.42	X5B(59)	2.4	16.2	81.4
60	The casino has been good for our suburb or region	33.68	30.43	3.25		0.16	X5B(60)	15.6	27.5	56.8
61	There are not enough gaming machines in our suburb or region	12.13	14.03	-1.90		0.233	X5B(61)	2.4	6.6	91.0
62	Gambling related problems have got worse in the last 3 years	80.85	79.70	1.15		0.602	X5B(62)	82.6	8.4	9.0
63	Gambling does more good for the Community than harm	23.05	19.13	3.93	p	0.044	X5B(63)	6.0	17.4	76.6
64	Gambling is a serious social problem	78.00	79.93	-1.93		0.358	X5B(64)	80.8	10.2	9.0
65	Have you, yourself or any of your family ever experienced	5.40	11.60	-6.20	p	0.003	X2B(65)	5.4	0.0	94.6
66	(IF YES TO ABOVE) Was that during the last 6 months or more	55.60	70.80	-15.20	**	0.422	X2B(66)	55.6	0.0	44.4
67	Have you participated in any gambling activities in the last 6	52.70	51.00	1.70		0.694	X2B(67)	52.7	0.0	47.3

VCGA Gaming Survey		Geelong	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
PART C - FREQUENCY OF CONSUMPTION										
In the last month, how many times did you visit.....?										
1	Department stores	5.10	4.18	0.92	p	0.018	XFC(1)			
2	Shopping centres	7.20	6.45	0.75		0.107	XFC(2)			
In the last month, how many of the items in any of the following categories did you buy..?										
3	Clothing	3.16	3.50	-0.35		0.26	XFC(3)			
4	Fashion accessories	0.81	0.84	-0.03		0.877	XFC(4)			
5	Books	1.81	2.02	-0.21		0.451	XFC(5)			
6	Cds	0.99	1.21	-0.23		0.136	XFC(6)			
7	Computer software, hardware and accessories	0.58	0.53	0.05		0.821	XFC(7)			
8	Home wares	1.05	1.17	-0.11		0.56	XFC(8)			
In the last month, how many times did you.....?										
9	Go to a BYO or licensed restaurant	2.35	2.08	0.28		0.317	XFC(9)			
10	Eat takeaways	4.01	3.97	0.04		0.912	XFC(10)			
11	See a movie at a cinema	0.56	0.81	-0.24	p	0.008	XFC(11)			
12	Go to a pub or bar for drinks only	1.64	1.45	0.19		0.481	XFC(12)			
13	Go to a night club or disco	0.81	0.56	0.25		0.24	XFC(13)			
In the last six months, have you										
14	Bought or built a house or flat	7.19	4.80	2.38		0.266	XFC(14)			
15	Carried out renovations of more than \$5,000	8.98	7.32	1.66		0.489	XFC(15)			
16	Bought a car (new or used)	17.96	13.21	4.76		0.139	XFC(16)			
How often do you gamble on or play.....?										
17	Bingo	5.03	3.61	1.43		0.387	XFC(17)			
18	Horse or greyhound races	5.43	5.88	-0.46		0.758	XFC(18)			
19	Poker machines (pokies) at a pub or club	8.99	8.14	0.85		0.68	XFC(19)			
20	Poker machines (pokies) at Crown Casino	1.51	1.07	0.44		0.364	XFC(20)			
21	Table games at Crown Casino	0.93	1.46	-0.53		0.262	XFC(21)			
	Average frequency of Pokies,Horses and Bingo	6.49	5.82	0.66		0.592	_GFREQ			
	Average frequency of Pokies,Horses, Bingo, Crown (pokies,	4.26	3.90	0.36		0.644	_GFREQ			
22	I am gambling less now than I was 3 years ago	56.73	55.53	1.20		0.64	X5C(22)	35.4	44.9	19.8
PART D - GAMING										
1	Would you say you are satisfied or dissatisfied with your experience of playing table games at Crown Casino (very	73.23	64.33	8.90	*	0.121	X5D(1)	85.7	7.1	7.1
2	Each day you play table games at Crown Casino, how much time do you spend at the gaming tables (record time in minutes)	85.71	74.68	11.03	*	0.665	XND(2)			
3	Each day you play table games at Crown Casino, on average, how much money do you spend or outlay (record amount in	69.64	102.61	-32.97	****	0.083	XND(3)			
4	Would you say you are satisfied or dissatisfied with your experience of playing the pokies (vsatisfied=100)	47.05	46.63	0.43		0.906	X5D(4)	36.9	21.1	42.1
5	Each day you play the pokies, how much time do you spend playing the machines (record time in minutes)	49.74	55.61	-5.88		0.376	XND(5)			
6	Each day you play the pokies, on average, how much money do you spend or outlay (record amount in dollars)	20.58	50.57	-29.99	***	0.251	XND(6)			
7	What are the main motivations, attractions or reasons you play									
a	Thrill/dream rewards of winning	18.40	13.80	4.60		0.339	X2D7(1)	18.4	0.0	81.6
b	Atmosphere/excitement/gives a buzz	6.60	9.90	-3.30		0.309	X2D7(2)	6.6	0.0	93.4
c	Beating the odds/back a winner	1.30	3.60	-2.30		0.154	X2D7(3)	1.3	0.0	98.7
d	Exchange of money/handling money	0.00	0.30	-0.30		is	X2D7(4)	0.0	0.0	100.0
e	Upbringing/family background	0.00	0.50	-0.50		is	X2D7(5)	0.0	0.0	100.0
f	Ego/self esteem	0.00	0.00	0.00		is	X2D7(6)	0.0	0.0	100.0
g	Favourite recreational activity/hobby	9.20	9.40	-0.20		0.964	X2D7(7)	9.2	0.0	90.8
h	Social reasons/see friends	47.40	45.10	2.30		0.714	X2D7(8)	47.4	0.0	52.6
i	Compulsions/addiction	1.30	0.80	0.50		0.702	X2D7(9)	1.3	0.0	98.7
j	Like taking risks/risk taker	1.30	0.30	1.00		0.434	X2D7(10)	1.3	0.0	98.7
k	Belief in luck/may get lucky	10.50	13.00	-2.50		0.528	X2D7(11)	10.5	0.0	89.5
l	Want to be successful	2.60	2.30	0.30		0.886	X2D7(12)	2.6	0.0	97.4
m	Boredom/pass time	15.80	23.40	-7.60	*	0.109	X2D7(13)	15.8	0.0	84.2
n	Other (specify)	5.30	7.60	-2.30		0.433	X2D7(14)	5.3	0.0	94.7
o	(Don't know)	1.30	1.30	0.00		0.992	X2D7(15)	1.3	0.0	98.7

VCGA Gaming Survey		Geelong	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
I play the pokies:										
8	For the thrill/dream of winning	53.95	50.58	3.38		0.419	X5D(8)	51.4	15.8	32.9
9	Because it is a favourite recreational activity/hobby	30.93	26.38	4.55		0.186	X5D(9)	15.8	21.1	63.2
10	Out of boredom to pass the time	35.20	37.90	-2.70		0.489	X5D(10)	25.0	15.8	59.2
11	Because I like to beat the odds/back a winner	37.50	36.08	1.43		0.714	X5D(11)	26.3	15.8	57.9
12	Because I believe I may get lucky	54.93	55.60	-0.68		0.866	X5D(12)	48.7	22.4	29.0
13	To test my skill	23.68	20.98	2.70		0.376	X5D(13)	9.2	13.2	77.7
14	To make a quick buck	44.73	39.90	4.83		0.254	X5D(14)	38.1	11.8	50.0
15	Because I like to take risks	37.83	32.35	5.48		0.134	X5D(15)	27.6	18.4	54.0
16	To enhance my social standing	22.70	18.63	4.08		0.163	X5D(16)	6.5	11.8	81.5
17	Because the money lost goes to a worthy cause	21.70	15.30	6.40		0.052	X5D(17)	9.2	11.8	79.0
18	For social reasons; to be with friends	63.48	58.00	5.48		0.106	X5D(18)	64.5	15.8	19.7
19	Because the atmosphere and excitement gives me a buzz	43.10	32.48	10.63	* p	0.006	X5D(19)	35.5	15.8	48.7
20	Because I am attracted to the venue itself	39.80	34.30	5.50		0.147	X5D(20)	31.5	13.2	55.3
Other gambling questions										
Thinking of the last week in which you spent money on pokies or table games. If you hadn't spent the money on gambling, could you please tell me in what other ways you might have used it?										
21	Spent it on groceries or small household items	22.20	22.90	-0.70		0.902	X2D(21)	22.2	0.0	77.8
22	Put it towards major household goods (eg. TV, refrigerator)	3.70	4.40	-0.70		0.76	X2D(22)	3.7	0.0	96.3
23	Spent it on personal items (eg. clothing, footwear)	22.20	22.60	-0.40		0.94	X2D(23)	22.2	0.0	77.8
24	Spent it on restaurant meals	8.60	12.80	-4.20		0.247	X2D(24)	8.6	0.0	91.4
25	Spent it on wine, beer, etc	12.30	9.60	2.70		0.487	X2D(25)	12.3	0.0	87.7
26	Spent it on the movies or a concert	3.70	6.10	-2.40		0.316	X2D(26)	3.7	0.0	96.3
27	Spent it on other entertainment or recreation activities	17.30	19.20	-1.90		0.687	X2D(27)	17.3	0.0	82.7
28	Used it to pay bills/credit cards	9.90	5.20	4.70		0.182	X2D(28)	9.9	0.0	90.1
29	Used it to pay rent/mortgage	1.20	1.70	-0.50		0.728	X2D(29)	1.2	0.0	98.8
30	Spent it on other items (please specify)	14.80	11.30	3.50		0.413	X2D(30)	14.8	0.0	85.2
31	Not spent it/Saved it/Put it in the bank	18.50	20.10	-1.60		0.734	X2D(31)	18.5	0.0	81.5
32	(Don't know)	2.50	2.50	0.00		0.995	X2D(32)	2.5	0.0	97.5
Which type of venue do you play pokies at (MULTIPLE)										
33	Pub/hotel	52.60	39.80	12.80	* p	0.044	X2D(33)	52.6	0.0	47.4
34	Licensed sports club (golf, football, bowls etc)	31.60	26.00	5.60		0.343	X2D(34)	31.6	0.0	68.4
35	RSL Club	7.90	20.10	-12.20	* p	0.001	X2D(35)	7.9	0.0	92.1
36	Some other sort of licensed club	11.80	16.70	-4.90		0.252	X2D(36)	11.8	0.0	88.2
37	Melbourne Crown Casino	19.70	23.20	-3.50		0.499	X2D(37)	19.7	0.0	80.3
38	Or somewhere else (specify)	2.60	1.60	1.00		0.586	X2D(38)	2.6	0.0	97.4
Which type of venue do you go to the most to play pokies (single)										
40	Pub/hotel	44.70	34.10	10.60	*	0.091	X2D(40)	44.7	0.0	55.3
41	Licensed sports club (golf, football, bowls etc)	25.00	21.10	3.90		0.472	X2D(41)	25.0	0.0	75.0
42	RSL Club	6.60	15.40	-8.80	* p	0.011	X2D(42)	6.6	0.0	93.4
43	Some other sort of licensed club	9.20	12.20	-3.00		0.419	X2D(43)	9.2	0.0	90.8
44	Melbourne Crown Casino	11.80	16.40	-4.60		0.278	X2D(44)	11.8	0.0	88.2
45	Or somewhere else (specify)	2.60	0.80	1.80		0.334	X2D(45)	2.6	0.0	97.4
Thinking of the last time you played the pokies at a club or pub										
47	How far did you travel to get to this venue? (km)	2.50	2.53	-0.03		0.884	XND(47)			
48	Did you go to this venue									
	* From home	31.70	32.30	-0.60		0.888	2START(1)	31.7	0.0	68.3
	* On the way to or from work	2.40	2.00	0.40		0.783	2START(2)	2.4	0.0	97.6
	* From somewhere else	8.40	9.10	-0.70		0.755	2START(3)	8.4	0.0	91.6
49	I visit that venue more than other venues	56.35	52.98	3.38		0.449	X5D(49)	56.3	8.5	35.2
50	I really like visiting the venue	57.75	54.23	3.53		0.358	X5D(50)	47.9	26.8	25.4
51	I have lots of good luck there	32.40	28.05	4.35		0.177	X5D(51)	9.8	29.6	60.5
52	It is enjoyable and thrilling	49.30	43.30	6.00		0.104	X5D(52)	36.6	32.4	31.0
53	I had a meal	58.45	59.45	-1.00		0.821	X5D(53)	62.0	7.0	31.0

VCGA Gaming Survey		Geelong	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
	I went to the venue..									
54	to relax	65.50	64.78	0.73		0.849	X5D(54)	67.6	16.9	15.5
55	because it is easy to get to	70.08	65.48	4.60		0.158	X5D(55)	76.0	11.3	12.7
56	because it is open all hours	41.55	41.78	-0.23		0.95	X5D(56)	29.6	21.1	49.3
57	because it has all the entertainment I need under one roof	51.75	47.25	4.50		0.255	X5D(57)	45.1	18.3	36.7
58	because it is a good place to socialise	56.35	53.18	3.18		0.398	X5D(58)	50.7	19.7	29.5
59	because it is a good place to drink	48.60	43.38	5.23		0.22	X5D(59)	46.5	11.3	42.2
60	because it is a good place to gamble	49.30	42.00	7.30	p	0.05	X5D(60)	39.4	23.9	36.7
61	because there are good meals and restaurants	64.08	65.55	-1.48		0.679	X5D(61)	62.0	21.1	16.9
62	because it has the sort of pokies I like	52.13	42.55	9.58	* p	0.008	X5D(62)	38.0	33.8	28.2
63	because it has lots of pokies	45.43	38.68	6.75		0.062	X5D(63)	29.5	28.2	42.3
	On your last visit to a gaming venue									
64	What time did you arrive:									
	8 am to 12 noon	9.90	5.40	4.50		0.207	X2TIME(1)	9.9	0.0	90.1
	12 noon to 4 pm	19.80	18.40	1.40		0.785	X2TIME(2)	19.8	0.0	80.2
	4 pm to 8 pm	39.50	43.50	-4.00		0.508	X2TIME(3)	39.5	0.0	60.5
	8 pm to midnight	28.40	29.00	-0.60		0.914	X2TIME(4)	28.4	0.0	71.6
	midnight to 4 am	2.50	2.70	-0.20		0.903	X2TIME(5)	2.5	0.0	97.5
	4 am to 8 am	0.00	1.00	-1.00		is	X2TIME(6)	0.0	0.0	100.0
65	How long did you stay(hours)	2.41	2.46	-0.05		0.739	XND(65)			
	Thinking about w hen you last played the pokies									
66	How much did you w in? (a lot=100)	45.08	39.20	5.88		0.107	X5D(66)	28.9	21.1	50.0
67	I had really good luck	37.50	34.30	3.20		0.415	X5D(67)	26.3	15.8	57.9
68	I enjoyed myself	63.83	62.50	1.33		0.684	X5D(68)	65.7	17.1	17.1
	I would game more if:									
69	There was a more conveniently located venue	21.93	22.35	-0.43		0.87	X5D(69)	6.1	11.1	82.7
70	The venue was more attractive and comfortable	27.78	25.38	2.40		0.399	X5D(70)	8.6	11.1	80.3
71	The venue was open longer	22.23	19.10	3.13		0.193	X5D(71)	4.9	7.4	87.6
72	There were more machines available	19.45	20.33	-0.88		0.692	X5D(72)	2.4	4.9	92.6
73	There was more variety in the types of machines available	27.15	26.35	0.80		0.784	X5D(73)	12.3	8.6	79.0
PART E										
	Which any of these statements applied to you personally in the									
1	When you gamble, how often do you go back another day to win	1.11	1.18	-0.07		0.106	XNE(1)			
2	Have you ever claimed to be WINNING money when you really	1.16	1.09	0.07		0.197	XNE(2)			
3	Do you feel you have had a problem with gambling or that your	1.09	1.11	-0.02		0.632	XNE(3)			
	The following questions still relate to the last 6 months and only									
4	Did you gamble more than you intended to?	16.10	20.30	-4.20		0.275	X2E(4)	16.1	0.0	83.9
5	Have people criticised your gambling?	8.00	6.30	1.70		0.542	X2E(5)	8.0	0.0	92.0
6	Have you felt guilty about the way you gamble or what happens	14.30	12.30	2.00		0.581	X2E(6)	14.3	0.0	85.7
7	Have you felt that you would like to stop gambling but didn't think	3.60	3.40	0.20		0.918	X2E(7)	3.6	0.0	96.4
8	Have you hidden betting slips, gambling money or any other sign of gambling from your partner, children or other important people	3.60	3.40	0.20		0.909	X2E(8)	3.6	0.0	96.4
9	Have you ever argued with people you live with about how you	20.50	13.40	7.10		0.085	X2E(9)	20.5	0.0	79.5
10	Have money arguments ever centred on your gambling?	13.00	16.70	-3.70		0.67	X2E(10)	13.0	0.0	87.0
11	Have you borrowed money from someone and not paid them back	1.80	0.70	1.10		0.429	X2E(11)	1.8	0.0	98.2
12	Have you lost time from work or study because of gambling?	0.90	0.70	0.20		0.88	X2E(12)	0.9	0.0	99.1
13	Have you ever borrowed money to gamble or pay off gambling	1.80	2.60	-0.80		0.565	X2E(13)	1.8	0.0	98.2
14	Have you ever borrowed money to gamble or to pay gambling	2.70	1.90	0.80		0.621	X2E(14)	2.7	0.0	97.3
15	Have you borrowed money to gamble or to pay gambling debts	0.90	1.90	-1.00		0.363	X2E(15)	0.9	0.0	99.1
16	(Have you borrowed money to gamble or to pay gambling debts)	0.00	0.90	-0.90		is	X2E(16)	0.0	0.0	100.0
17	(Have you borrowed money to gamble or to pay gambling debts) from banks, finance companies or credit unions?	0.90	0.20	0.70		0.44	X2E(17)	0.9	0.0	99.1
18	(Have you borrowed money to gamble or to pay gambling debts) from high interest rate finance companies?	1.80	1.50	0.30		0.83	X2E(18)	1.8	0.0	98.2
19	(Have you borrowed money to gamble or to pay gambling debts) from cashing in stocks, bonds or other securities?	0.00	0.00	0.00		is	X2E(19)	0.0	0.0	100.0
20	(Have you borrowed money to gamble or to pay gambling debts) from selling personal or company property?	0.90	0.60	0.30		0.726	X2E(20)	0.9	0.0	99.1
21	(Have you borrowed money to gamble or to pay gambling debts) by writing cheques knowing there was no money in the account?	0.90	0.40	0.50		0.578	X2E(21)	0.9	0.0	99.1
22	(Have you borrowed money to gamble or to pay gambling debts) by writing cheques knowing there was no money in the account?	0.00	0.00	0.00		is	X2E(22)	0.0	0.0	100.0
	SOGs score	0.55	0.47	0.08		0.453	SOG			
	No risk (score<=4)	97.00	98.20	-1.20		0.395	X2SOG(1)	97.0	0.0	3.0
	One in 5 risk (score>=5 and score<=6)	2.40	1.10	1.30		0.29	X2SOG(2)	2.4	0.0	97.6
	One in 2 risk (score>=7 and score<=9)	0.60	0.40	0.20		0.707	X2SOG(3)	0.6	0.0	99.4
	One in 1 risk (score>=10)	0.00	0.40	-0.40		is	X2SOG(4)	0.0	0.0	100.0

VCGA Gaming Survey		Geelong	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
PART A - SAMPLE AND DEMOGRAPHICS										
1	Gender (male=0 female=100)	49.70	51.40	-1.70		0.693	X2A(1)	49.7	0.0	50.3
2	Region									
	Dandenong	0.00	20.00	-20.00	**	is	X2LOC(1)	0.0	0.0	100.0
	Geelong	100.00	0.00	100.00	*** **	is	X2LOC(2)	100.0	0.0	0.0
	Maribyrnong	0.00	20.00	-20.00	**	is	X2LOC(3)	0.0	0.0	100.0
	Midura	0.00	20.00	-20.00	**	is	X2LOC(4)	0.0	0.0	100.0
	Moreland	0.00	19.90	-19.90	**	is	X2LOC(5)	0.0	0.0	100.0
	Wellington/ South Gippsland	0.00	19.90	-19.90	**	is	X2LOC(6)	0.0	0.0	100.0
1	Do you live with a partner or spouse? (No=0 Yes=100)	64.70	54.90	9.80	* p	0.017	X2F(1)	64.7	0.0	35.3
2	Do you have dependent children living at home? (No=0 Yes=100)	42.50	34.90	7.60	*	0.071	X2F(2)	42.5	0.0	57.5
3	Do you receive a government pension or benefit? (No=0	38.30	38.20	0.10		0.971	X2F(3)	38.3	0.0	61.7
4	Are you the main income earner? (No=0 Yes=100)	59.90	63.50	-3.60		0.384	X2F(4)	59.9	0.0	40.1
5	Highest education level? (1=primary 4=year 12 7=degree)	3.96	3.91	0.05		0.737	XNF(5)			
	Less than year 12	53.90	49.30	4.60		0.284	X2ED(1)	53.9	0.0	46.1
	Year 12	19.20	24.20	-5.00		0.135	X2ED(2)	19.2	0.0	80.8
	Trade or diploma	13.20	14.60	-1.40		0.612	X2ED(3)	13.2	0.0	86.8
	Degree	13.80	11.80	2.00		0.489	X2ED(4)	13.8	0.0	86.2
6	Work status?									
	* Work full time (for money)	44.30	42.70	1.60		0.709	X2JOB(1)	44.3	0.0	55.7
	* Work part time(for money)	21.00	18.50	2.50		0.473	X2JOB(2)	21.0	0.0	79.0
	* Household duties only	6.60	8.60	-2.00		0.341	X2JOB(3)	6.6	0.0	93.4
	* Full time student	3.00	5.50	-2.50		0.102	X2JOB(4)	3.0	0.0	97.0
	* Retired (self supporting)	13.80	8.80	5.00		0.08	X2JOB(5)	13.8	0.0	86.2
	* Other pensioner	8.40	12.20	-3.80		0.114	X2JOB(6)	8.4	0.0	91.6
	* Unemployed	68.30	64.70	3.60		0.372	X2JOB(7)	68.3	0.0	31.7
		31.70	35.20	-3.50		0.388	X2JOB(8)	31.7	0.0	68.3
7	What is (was) your occupation?									
	Un-skilled Blue Collar									
	Semi-skilled Blue Collar	10.20	6.50	3.70		0.14	X2OCC(1)	10.2	0.0	89.8
	Skilled Blue Collar	6.60	11.20	-4.60	p	0.04	X2OCC(2)	6.6	0.0	93.4
	Lower White Collar	19.80	11.80	8.00	* p	0.016	X2OCC(3)	19.8	0.0	80.2
	Upper White Collar	22.80	28.30	-5.50		0.124	X2OCC(4)	22.8	0.0	77.2
	Senior Upper White Collar	16.20	10.00	6.20	p	0.043	X2OCC(5)	16.2	0.0	83.8
8	What industry do (did) you work in?	1.20	1.20	0.00		0.998	X2OCC(6)	1.2	0.0	98.8
9	Were you or your parents born overseas?							16.2	16.2	67.7
10	What was the main language spoken at home when you were	24.25	31.10	-6.85	p	0.037	X3F(9)			
	English	67.70	59.20	8.50	* p	0.035	2LANG(1)	67.7	0.0	32.3
	Mandarin	16.20	19.40	-3.20		0.302	2LANG(2)	16.2	0.0	83.8
	Cantonese	16.20	21.40	-5.20		0.104	2LANG(3)	16.2	0.0	83.8
	Vietnamese	0.00	0.00	0.00		is	2LANG(4)	0.0	0.0	100.0
	Spanish	0.00	0.00	0.00		is	2LANG(5)	0.0	0.0	100.0
	Italian	0.00	0.00	0.00		is	2LANG(6)	0.0	0.0	100.0
	Greek	0.00	0.00	0.00		is	2LANG(7)	0.0	0.0	100.0
	Other	0.00	0.00	0.00		is	2LANG(8)	0.0	0.0	100.0
11	Age in years	44.37	43.46	0.91		0.497	AGE			
12	What is the gross (before tax) family income?	35.11	31.67	3.44		0.105	INCOME			
		16.700 %	83.300 %*					10.843 %*		
		167.00	833.00							

Victorian Casino and Gaming Authority

Report of the 1999
Longitudinal Community
Impact Study: Maribyrnong
regional profile

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1 Summary

The City of Maribyrnong is an established residential and commercial centre approximately 7 kilometres to the west of the Melbourne CBD. Recently, parts of the City have undergone a considerable change in land use and residential profile. The inner west and areas close to the Maribyrnong River are being redeveloped as high density living and are attracting young skilled and professional residents.

The resident population is forecast to grow only marginally over the coming ten years, despite the forecast housing growth for the area. There is an increasing concentration of young adults and aged residents within the City. Residents of Maribyrnong are more likely to be overseas born (with a high proportion of Vietnamese residents) than the Victorian average and there is a comparatively high and increasing proportion of single person and sole parent households. Maribyrnong residents are on average relatively mobile, less well educated than the Victorian average and their income is lower, with high proportions of residents in receipt of social security payments and living in privately rented or government housing. Maribyrnong residents typically have fewer cars and are more likely to use public transport. The City has a very high crime rate compared to the rest of Victoria.

Maribyrnong has a comparatively low rate of participation in the workforce and the unemployment rate is substantially above the State average. Employment has declined in Maribyrnong, with a marked decline in the proportion of residents employed in manufacturing from 1991 to 1996. The resident population is principally employed in unskilled and labour-related roles. However the proportion of residents engaged in professional and managerial roles increased from 1991 to 1996, possibly reflecting gentrification of the suburb, which is confirmed by increasing house prices in the region.

Just over half of the people in Maribyrnong believe their local economy is doing well, and almost 70% believe the suburb is good to live in. Crime and safety are important concerns, more so than in the other regions. Around half the population believes things are better than in the past.

The City of Maribyrnong has a very high concentration of Electronic Gaming Machines (EGMs) and gaming venues. Expenditure on gaming in the City of Maribyrnong has increased from \$12.89M in 1992/1993 to \$53.25M in 1998/1999. Average annual gaming expenditure per adult in Maribyrnong is 92% higher than the State average and the highest of the six regions in our study.

According to our survey, half of Maribyrnong residents gambled in the last 6 months. Playing poker machines is the most popular form of gambling, with the most popular venues being pubs and clubs. Maribyrnong gamblers patronise Crown Casino to play table games more frequently than residents in the other regions surveyed. Maribyrnong gamers tend to frequent local venues on average travelling 1.9km to a venue, or access Crown Casino via the free courtesy bus.

Our survey indicates that Maribyrnong gamers spend less than half their time in gaming venues playing pokies, with the majority of gamblers choosing venues on the basis of proximity, good meals and restaurants the entertainment offered and because it is a good place to relax. Compared to respondents in the other study regions, more gamers in Maribyrnong frequent venues because they have 'lots of pokies'. The majority of Maribyrnong gamblers arrive at gaming venues between 4pm and 8pm. Anecdotal evidence

suggests there is a high participation in gaming among older people during the day and younger people at night.

Problem gambling is regarded as a serious issue in Maribyrnong. About 3% of gamblers in Maribyrnong are at risk of problem gambling, and about 17.5% of all Maribyrnong residents said that they, or a member of their family, had at some time experienced difficulties with excessive gambling. These two results were significantly higher than the State average, and the average across the six regions in our study. Almost 35% of Maribyrnong gamblers gambled more than they intended to and almost 30% have had money arguments centred on gambling. This is consistent with the high incidence of gaming in an area of low income and high unemployment. While venues claim to take into account self exclusion, they noted difficulties in identification of problem gamblers. Community agencies noted the detrimental effect of gambling on family life and finances.

During the course of our consultations, the following costs and benefits of gaming were identified.

Benefits

Gaming venues argued that there are identifiable benefits associated with the operation of EGMs:

- The positive effects of gaming machines were noted in all venues with increased profits enabling them to upgrade their facilities and offer more services to members and consumers.
- Most venues were also positive about the effect of the EGMs on social opportunities for gamers looking for an “entertainment package” and for members of the general community, who would have lost the services offered by the clubs, had it not been for the boost to viability provided by EGMs. Club venues point to the fact that they offer a safe, comfortable environment for members and guests. The venues often offer free access to sporting and recreational facilities. Additionally, other social sub-clubs (basketball, golf, football, bowls and ethnic-based clubs) have been developed, to operate within the clubs.
- It was noted that there have been improved social opportunities for women and elderly people in particular, through the provision of a safe licensed venue. The safety of these venues tends to attract older people, particularly women, who feel more comfortable due to the presence of security and the non-threatening nature of gaming (as opposed to a hotel where drinking is the primary form of entertainment or means of socialisation). Social interaction with staff can also be important to older people with limited social opportunities.
- Many venues (particularly clubs) emphasised the support of a number of local clubs, which would not have been possible without EGMs and the additional revenue they provide. This not only included clubs internal to the larger club (sub-clubs) but also external organisations such as the local football or cricket clubs. In part this support might be seen as promotional in that it could encourage people to use the venue more. One club advised that it donates 10% of pre-tax profits into a community support fund from which donations are made to local charities and groups.

Costs

While some community organisations recognise a positive role for gaming venues in terms of social opportunities, most see these as being outweighed by the consequences of problem gambling. Problem gambling is considered to be the major cost of gaming in the community. Few community organisations recognised benefits to the area from contributions from the Community Support Fund.

The negative economic effects observed in consultations related to the diversion of discretionary spending from other local businesses to EGM venues. In practice, identifying the effect of EGM venues on local business is virtually impossible. A range of factors will have influenced business activity in Maribyrnong, including general economic conditions, other social and economic problems (e.g. drugs, unemployment) and consumer preferences in the area (e.g. caused by an ageing population).

2 Description of the Local Government area of Maribyrnong

2.1 Data sources

Data for this profile has been sourced from:

- a range of different government departments and agencies;
- consultations; and
- KPMG surveyed 1,000 residents in six local government areas, of which 167 respondents lived in Maribyrnong. The survey was conducted in October 1999. The full results of the survey are reported in Supporting Paper No. 1, and the results for Maribyrnong are attached to this paper.

It should be noted that while percentages have been included in the following tables, the total percentage for a number of tables does not equal one hundred per cent due to rounding.

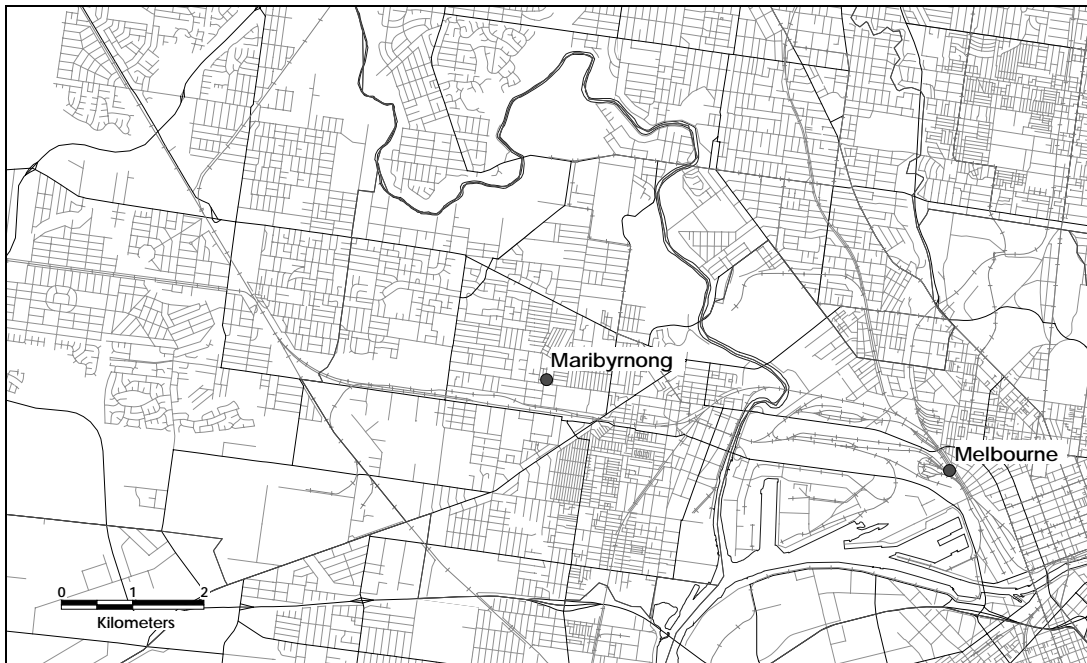
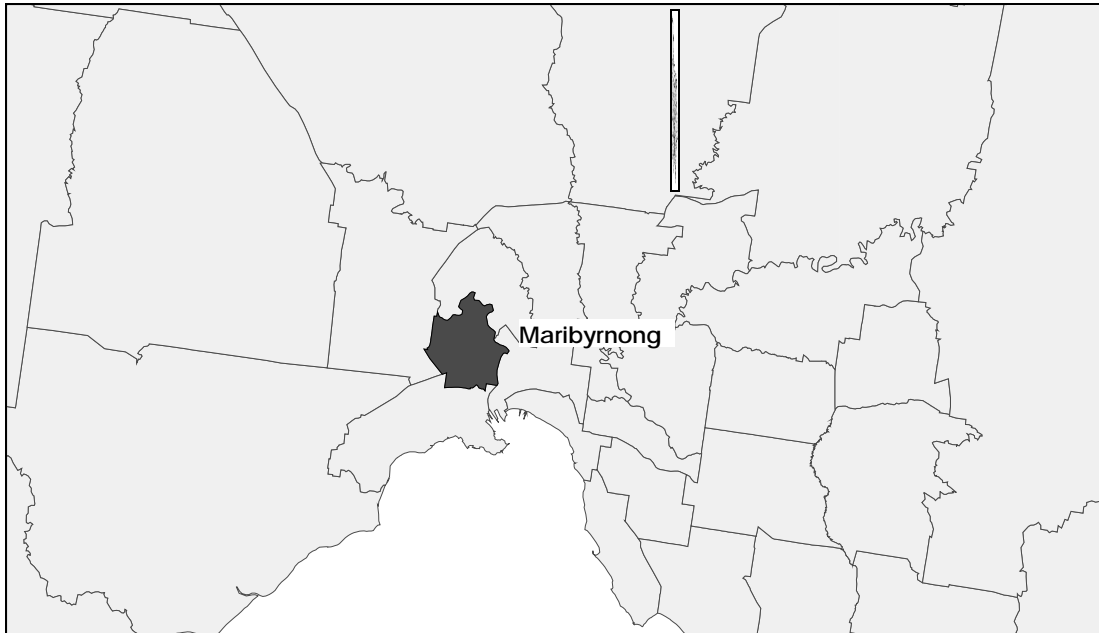
2.2 The geography

Maribyrnong is a single statistical local area (SLA), in addition to being a single local government area (LGA). The Maribyrnong City Council was formed in 1994 when the former City of Footscray and part of the former City of Sunshine were amalgamated through a re-structuring of local government areas in Victoria. The area is classified as Urban Developed Medium and comprises around 31km² and includes the following suburbs:

- | | |
|------------------|--------------|
| ■ Braybrook | ■ Footscray |
| ■ Kingsville | ■ Maidstone |
| ■ Maribyrnong | ■ Seddon |
| ■ West Footscray | ■ Yarraville |
| ■ Tottenham | |

The City of Maribyrnong is bounded by the Maribyrnong River to the north and east, the Westgate Freeway to the south and the suburban railway line to the west. The centre of Maribyrnong is located approximately 8 km west of the CBD of Melbourne as shown in Figure 2.1.

Figure 2.1: Maribyrnong LGA



3 Demographic profile of Maribyrnong

3.1 The population

In the five years to 1991, the population of Maribyrnong experienced a decline of 0.16% annually, which was significantly lower than the State average for the same period of 1.22%. A further decline of 0.54% occurred annually between the period 1991 to 1996, which again was slower than for Victoria as a whole. Population and housing forecasts prepared by the Victorian Department of Infrastructure predict that the resident population of Maribyrnong will increase at an average annual rate of 0.86% for the period between 1996 and 2001 and 0.44% from 2001 to 2011. Housing stock is anticipated to increase faster, by an average annual rate of 1.11% for the period between 1996 and 2001 and 0.73% from 2001 to 2011. This indicates a trend toward smaller household sizes within the City of Maribyrnong, which is consistent with the trend for Victoria as a whole. The levels of growth projected for the population and housing numbers in Maribyrnong is less than that anticipated for Victoria as a whole. Population projections obtained from the Department of Infrastructure for Maribyrnong, Melbourne and Victoria and are presented in Table 3.1 below. However, the Maribyrnong City Council has prepared population projections for the City, which indicate a substantially higher growth rate (see Table 3.2).

Table 3.1: Projections of Maribyrnong household numbers and estimated resident population

Population and household forecasts (Number of households are number of occupied private dwellings)						
Year	Maribyrnong		Melbourne		Victoria	
	Population	Households	Population	Households	Population	Households
Actual 1981	65,801	22,591	2,760,098	899,259	3,851,094	1,238,617
1986	62,929	22,215	2,967,338	971,381	4,160,785	1,355,308
1991	62,413	22,993	3,156,220	1,049,110	4,420,298	1,476,047
1996	60,753	24,898	3,241,424	1,199,878	4,539,400	1,699,920
Forecast 2001	63,419	26,308	3,378,880	1,269,054	4,735,710	1,799,383
2011	66,278	28,290	3,621,685	1,399,090	5,092,312	1,990,051
2021	68,202	29,895	3,823,567	1,514,142	5,399,730	2,163,024
Annual change (%)	-0.89	-0.34	1.46	1.55	1.56	1.82
1981-1986						
1986-1991	-0.16	0.69	1.24	1.55	1.22	1.72
1991-1996	-0.54	1.60	0.53	2.72	0.53	2.86
Forecast annual change (%) 1996-2001	0.86	1.11	0.83	1.13	0.85	1.14
Forecast annual change (%) 2001-2011	0.44	0.73	0.70	0.98	0.73	1.01
2011-2021	0.29	0.55	0.54	0.79	0.59	0.84

Annual percentage change measured as a compound growth rate
Source: Department of Infrastructure 1991 projections. Revised data for 1996 shown

Table 3.2: Population of the City of Maribyrnong

Population Forecasts – City of Maribyrnong 2001 to 2011				
	2001	2006	2011	Compound average annual growth 2001 to 2011
Resident population	66,201	70,250	74,409	1.18%
Source: City of Maribyrnong 1998				

3.2 Age distribution

The age profile of the City of Maribyrnong is characterised by a generally older population, with a low proportion of residents aged under 20 years of age. This suggests that Maribyrnong has a slightly higher proportion of working aged and retired residents in comparison with Melbourne and the rest of the State. However, Maribyrnong experienced an increase in the proportion of the population aged between 30 and 49 years and those aged over 70 years between 1991 and 1996. During this same period of time, the proportion of the population in the other age categories experienced a marginal decline or remained relatively unchanged. This trend suggests the resident population of the City of Maribyrnong is aging. Table 3.3 summarises the age distribution for the resident population of Maribyrnong, Melbourne and Victoria in 1991 and 1996.

Table 3.3: Age structure of Maribyrnong population, 1991 and 1996

Age group	Maribyrnong		Melbourne		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
0 – 9	12.3	12.5	14.1	13.7	14.7	14.2
10 – 19	13.0	11.3	14.9	13.6	15.2	14.1
20 – 29	19.1	17.5	17.4	16.6	16.4	15.4
30 – 39	16.4	18.3	16.2	16.3	16.0	15.9
40 – 49	10.7	12.5	13.6	14.5	13.3	14.5
50 – 59	9.0	8.6	9.1	10.0	9.1	10.0
60 – 69	9.8	8.6	7.6	7.3	7.9	7.5
70 +	9.7	10.7	7.1	8.0	7.4	8.4
Population	61,246	58,774	3,013,210	3,122,243	4,232,914	4,354,126
Source: Census data 1996						

3.3 Marital status

Maribyrnong is comprised of relatively low proportions of married couples and high proportions of persons who have either never been married or who are separated or divorced. The high incidence of widowed persons is consistent with the very high proportion of aged residents. The proportion of married persons has declined from 1991 to 1996, however this trend is consistent across Melbourne and Victoria. The proportion of residents from the City who have never been married increased and this is consistent with the trend across Melbourne and Victoria. Similarly, the proportions of separated, divorced and widowed persons in Maribyrnong increased, consistent with the general trend in Victoria. The marital status of the resident population of Maribyrnong, Melbourne and Victoria as at the 1991 Census and 1996 Census is presented in Table 3.4.

Table 3.4: Marital status of Maribyrnong residents, 1991 and 1996

Status	Maribyrnong		Melbourne		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
Married	49.3	45.2	55.2	52.5	56.4	53.6
Never Married	33.2	34.7	31.2	32.3	29.9	30.9
Separated	3.3	4.2	2.6	3.1	2.6	3.2
Divorced	5.7	7.2	4.9	5.9	4.7	5.8
Widowed	8.6	8.8	6.1	6.2	6.3	6.6
Total persons	50,162	48,448	2,385,705	2,500,888	3,299,412	3,428,775
Source: Census data 1996						

3.4 Birthplace

The City of Maribyrnong has a high level of ethnic diversity with a significant proportion of non-Australian born residents (48.6%), compared with Melbourne (32.7%) and Victoria (27.2%). The majority of overseas born residents are from Vietnam, United Kingdom, Italy, Greece and China. A further 20.5% of Maribyrnong residents were born in other overseas countries. From 1991 to 1996, there was a substantial increase in the proportion of non-Australian born residents in the City of Maribyrnong, in particular those from Vietnam increased markedly from 10.9% to 13.7%. The country of birth of the residents of Maribyrnong, Melbourne and Victoria is presented in Table 3.5 for 1991 and 1996.

Table 3.5: Country of birth of Maribyrnong residents, 1991 and 1996

	Maribyrnong		Melbourne		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
English-speaking countries	58.7	55.8	76.4	74.8	81.3	79.6
Non-English speaking countries	41.3	44.2	23.6	25.2	18.7	20.4
Six top ranking in Maribyrnong:						
Australia	53.8	51.4	68.2	67.3	73.9	72.8
Vietnam	10.9	13.7	1.5	1.7	1.0	1.3
United Kingdom	3.5	3.0	6.0	5.3	5.5	4.9
Italy	3.3	2.9	3.1	2.8	2.5	2.3
Greece	2.9	2.5	2.1	1.9	1.6	1.4
China (excluding Taiwan Province)	1.3	1.7	0.6	0.9	0.5	0.6
All other countries	21.2	20.5	16.0	16.6	12.9	13.4
Not stated	3.2	4.5	2.4	3.4	2.1	3.3
Total persons	61,246	58,775	3,013,210	3,122,243	4,232,914	4,354,126
Source: Census data 1996						

3.5 Religion

While the resident population of the City of Maribyrnong is predominantly Christian (60.5%), the proportions of Christians living within the City are lower than those for both Melbourne and Victoria, reflecting its ethnic diversity. The proportions of Christians declined from 1991 to 1996, while persons following Buddhism increased significantly,

corresponding with the increase in the Vietnamese population to the City. Maribyrnong recorded an increasing proportion of persons with no religious following, consistent with the trend throughout Victoria. Table 3.6 presents the top five religions of Maribyrnong residents compared to Melbourne and Victoria.

Table 3.6: Professed religion of Maribyrnong residents, 1991 and 1996

Five top ranking in Maribyrnong	Maribyrnong		Melbourne		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
Total Christian	66.8	60.5	68.9	66.0	70.7	67.6
Total Non-Christian	8.5	12.3	4.6	6.0	3.4	4.5
Catholic	32.1	30.3	30.5	30.2	29.2	29.0
Anglican	11.5	9.5	16.8	15.0	18.2	16.5
Uniting Church	3.6	3.2	5.8	5.3	8.1	7.3
Orthodox	10.8	9.3	6.2	6.2	4.7	4.7
Buddhism	5.5	8.3	1.3	1.9	1.0	1.4
No Religion	14.3	18.1	15.0	19.0	14.4	18.7
Inadequately Described and Not-Stated	10.4	9.1	11.6	9.0	11.4	9.1
Total persons	61,246	58,775	3,013,210	3,122,243	4,232,914	4,354,126

Source: Census data 1996

3.6 Mobility

The population of the City of Maribyrnong demonstrated a high level of mobility from 1991 to 1996. At 1996, only 49.7% of residents lived at the same address as in 1991, compared with 53.7% of residents in Melbourne and Victoria. The following table shows the mobility of the population of Maribyrnong, Melbourne and Victoria as a whole.

Table 3.7: Mobility of the population (% of population, aged 15 and over), 1996

Usual residence	Maribyrnong %	Melbourne %	Victoria %
Same address 5 years prior	49.7	53.7	53.7
Different address 5 years prior	37.2	35.8	35.8
Not stated	13.1	10.5	10.5
Total persons	58,775	3,122,243	4,354,126

Source: Census data 1996

3.7 Household structure

The City of Maribyrnong has a relatively large and increasing proportion of single parent family and lone person households. The proportion of households comprised of couples with children in the City of Maribyrnong is relatively low and declining. Table 3.8 provides a comparative summary of the demographic profile by household type and composition for Maribyrnong, Melbourne and Victoria as at 1991 and 1996.

Table 3.8: Household type and composition, number of persons, 1991 and 1996

	Maribyrnong		Melbourne		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
One family:						
Couple with children	51.0	45.8	60.9	56.9	60.9	56.6
Couple without children	16.3	16.0	15.5	16.7	16.2	17.6
One parent family	12.0	13.4	9.0	9.7	8.9	9.8
Other one family households	2.1	2.0	1.2	1.3	1.1	1.1
One family households	81.5	77.2	86.6	84.5	87.2	85.1
Two or more families	2.9	5.0	1.8	2.7	1.5	2.3
Lone person households	11.0	12.9	7.6	8.8	7.7	9.0
Group households	4.6	4.9	4.1	3.9	3.6	3.6
Total persons	56,692	54,395	2,829,201	2,936,161	3,961,578	4,079,013

Source: Census data 1996

3.8 Tenure

The City of Maribyrnong has a relatively large and increasing proportion of households who rent, and a correspondingly low proportion of fully owned properties and properties being purchased. Of particular note is the high proportion of retirees in the City, coupled with the relatively low level of dwellings fully owned. In contrast to Maribyrnong, it is common for areas with a large retired population to also have a high level of home ownership. The dwelling tenure profile of Maribyrnong, Melbourne and Victoria is presented in Table 3.9 below.

Table 3.9: Dwelling tenure by type of landlord, 1991 and 1996

	Number of persons for each type of dwelling					
	Maribyrnong		Melbourne		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
Fully owned	36.3	37.5	38.0	41.0	39.0	41.5
Being purchased	23.4	22.9	35.6	32.8	34.8	32.5
Rented (government)	7.9	6.1	3.4	2.8	3.9	3.1
Rented (other)	25.5	26.6	17.4	18.5	16.8	17.9
Other	6.9	6.9	5.6	4.9	5.6	5.0
Total	59,497	57,141	2,941,861	3,044,602	4,116,343	4,229,534

Source: Census data 1996. In 1996, persons living in manufactured home estates and accommodation for the retired have been excluded for comparability with 1991. The 'Other' category includes 'being occupied free', 'being occupied under a life tenure scheme' and 'other/not-stated'.

3.9 Education

In 1996 and 1991, the resident population of the City of Maribyrnong had relatively low levels of formal education when compared with Victoria as a whole, but this has been improving in recent years. Table 3.10 provides a summary of the level of education attained for Maribyrnong, Melbourne and Victoria in 1991 and 1996.

Table 3.10: Levels of education attainment, 1991 and 1996

Highest qualification obtained	Persons aged 15 years and over					
	Maribyrnong		Melbourne		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
Higher degree	0.4	0.8	1.2	1.6	1.0	1.3
Postgraduate diploma	0.7	1.4	1.3	1.8	1.2	1.7
Bachelor degree	4.1	7.1	7.1	9.7	6.2	8.4
Undergraduate diploma	1.9	2.1	3.9	3.5	3.9	3.5
Associate diploma	0.8	2.4	1.3	2.8	1.3	2.6
Vocational qualification	9.6	9.0	12.2	12.0	12.5	12.4
No qualification	67.1	62.5	60.7	56.9	61.9	58.3
Not stated	15.3	14.8	12.5	11.8	12.1	11.7
Total	50,162	48,448	2,377,769	2,486,719	3,299,412	3,428,775

Source: Census data 1996

3.10 Household income

The City of Maribyrnong is predominantly comprised of households earning low to mid levels of gross annual household income. At the 1996 Census, approximately 45.3% of the City's households earned gross annual incomes of less than \$26,000, compared with 34.9% for Victoria. Table 3.11 provides a comparative summary of gross annual income per household for Maribyrnong, Melbourne and Victoria as at the 1996 Census.

Table 3.11: Gross annual income per household (\$), 1996

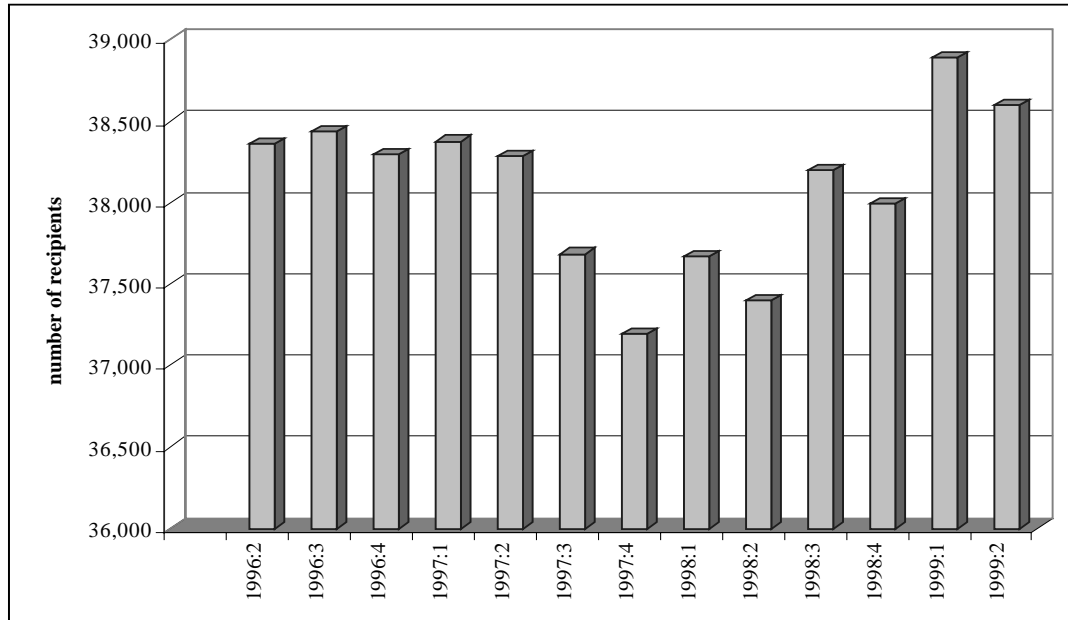
Household income band	Maribyrnong % of total	Melbourne % of total	Victoria % of total
Negative/nil income	1.0	0.7	0.7
\$52-\$6,239	1.0	0.7	0.8
\$6,240-\$15,599	25.2	15.7	17.5
\$15,600-\$25,999	18.1	14.5	15.9
\$26,000-\$36,399	13.6	13.1	13.5
\$36,400-\$51,999	14.3	16.5	16.1
\$52,000-\$77,999	11.3	15.9	14.5
\$78,000-\$103,999	3.5	6.0	5.2
\$104,000 plus	1.7	5.9	4.8
Partial/incomplete records	10.2	10.9	11.0
Total	22,417	1,119,721	1,569,927

Source: Census data 1996

3.11 Social security recipients

The City of Maribyrnong has a high number of social security recipients and this has grown over the past few years.

Figure 3.1: Number of claimants of social security benefits, 1996 to 1999



Source: Centrelink. Some individuals receive multiple payments so a degree of double-counting occurs.

3.12 Vehicle ownership

According to 1996 Census data, vehicle ownership for Maribyrnong residents was very low, compared with Melbourne and Victoria. At 1996, 22.5% of households owned no vehicle, compared with 11.2% for Melbourne and 10.5% for Victoria. Similarly, only 26.5% of households owned two or more vehicles, compared with 46.7% for Melbourne and 47.5% for Victoria. The car ownership profile for Maribyrnong, Melbourne and Victoria as at 1996 is presented in Table 3.12 below.

Table 3.12: Car ownership, 1996

Vehicles	Households			
	No. Maribyrnong	Maribyrnong %	Melbourne %	Victoria %
No vehicle	5,152	22.5	11.2	10.5
One vehicle	9,799	42.8	36.6	36.7
Two vehicles	4,845	21.1	34.6	35.0
Three or more vehicles	1,233	5.4	12.1	12.5
Not stated	1,886	8.2	5.5	5.2
Total	22,915	100.0	100.0	100.0

Source: Census data96

3.13 Travel to work

The most common method of travelling to work for Maribyrnong residents as at the 1996 Census was by car as driver, followed by train. Maribyrnong and Melbourne both have a significantly higher proportion of employed persons utilising public transport such as train, bus and tram in comparison to that of Victoria as a whole. In contrast, Maribyrnong has a lower proportion of employed residents that travel by car, as driver, in comparison to both the Melbourne and Victorian average. There was also a lower proportion of Maribyrnong

and Melbourne residents that worked from home in comparison to the rest of the State. The following table presents a summary of the method of travel to work for Maribyrnong, Melbourne and Victoria as at the 1996 Census.

Table 3.13: Mode of travel to work, 1996

Includes multi-mode journeys	Employed persons			
	No. Maribyrnong	Maribyrnong %	Melbourne %	Victoria %
Train	1,838	9.1	7.2	5.5
Bus	945	4.7	1.5	1.3
Tram	117	0.6	1.6	1.2
Car, as driver	11,504	56.8	62.6	61.4
Car, as passenger	1,553	7.7	6.0	6.1
Other modes	1,358	6.7	5.6	6.8
Worked at home	723	3.6	4.0	5.7
Did not go to work	1,798	8.8	9.8	10.2
Not stated	399	2.0	1.7	1.8
Total	50,279	100.0	1,391,812	1,884,892

Source: Census data⁹⁶

3.14 Journey to work destination and origin

As at the 1996 Census, Maribyrnong was a net importer of labour. The City provided employment for 30,528 people, however, only 5,022 jobs were filled by local residents of Maribyrnong. The majority of the jobs in Maribyrnong were filled by residents from the surrounding areas of Brimbank, Hobsons Bay, Moonee Valley and Wyndham. Of the 18,514 residents of Maribyrnong employed at 1996, 27.1% were employed in jobs based within the City area. 26.1% of employed residents of Maribyrnong worked within the Melbourne City area. A further 20.0% were employed in the surrounding areas of Hobsons Bay, Brimbank and Port Phillip. These data indicate that residents of Maribyrnong may seek a range of their needs (eg., entertainment as well as work) outside of their local region. The following table presents a summary of the origin and destination matrix of the working resident population and working population of Maribyrnong as at the 1996 Census.

Table 3.14: Journey-to-Work data: Maribyrnong and rest of Melbourne

Origin-Destination Matrix			
Number of workers			
Work in LGA:	Live in Maribyrnong	Live in LGA:	Work in Maribyrnong
Maribyrnong	5,022	Brimbank	6,678
Melbourne	4,825	Maribyrnong	5,022
Hobsons Bay	1,398	Hobsons Bay	3,092
Brimbank	1,251	Moonee Valley	3,047
Port Phillip	1,044	Wyndham	2,405
Yarra	786	Melton	1,254
Moonee Valley	770	Other Victoria	1,246
Wyndham	532	Hume	1,044
Hume	507	Darebin	524
Stonnington	291	Boroondara	482
Boroondara	238	Port Phillip	442
Darebin	226	Yarra	411
Monash	182	Manningham	389
Glen Eira	125	Banyule	381
Other	832	Other	3,056
Total	18,514	Total	30,528

3.15 Crime rates

Crime incidence within the City of Maribyrnong is well above the average for Victoria as a whole. However, crime incidence has decreased in the past year, contrary to the trend for Victoria as a whole.

Table 3.15: Crime trends: Number of offences reported in Maribyrnong and Victoria, 1995 to 1998

Year	Maribyrnong	% growth	Incidents per thousand persons	Victoria	% growth	Incidents per thousand persons
1995	9,499	-	155.2	374,241	-	84.8
1996	9,705	2.2	158.3	399,237	6.7	89.5
1997	9,898	2.0	161.3	404,817	1.4	89.9
1998	9,435	-4.7	154.3	413,836	2.2	90.7

Source: Victoria Police

3.16 Summary

The population of Maribyrnong is forecast to grow only marginally over the next decade, despite the forecast housing growth for the area. There is an increasing concentration of young adults and aged residents within the City. Residents of Maribyrnong are more likely to be overseas born (with a high proportion of Vietnamese residents) and there is a comparatively high and increasing proportion of single persons and sole parent households. Maribyrnong residents are relatively mobile, less well educated than the Victorian average and their income is lower, with high proportions of residents in receipt of social security payments and living in privately rented or government housing. They have fewer cars and are more likely to use public transport. The City is a net importer of labour and has a very high crime rate compared to the rest of Victoria.

4 The regional economic profile

4.1 Major economic features

The City of Maribyrnong is an established residential and commercial centre approximately 7 kilometres to the west of the Melbourne CBD. While employment is relatively strong within the City, there was a marked decline in the proportion of residents employed in manufacturing from 1991 to 1996.

The City of Maribyrnong is one of the fastest growing inner urban residential and commercial areas in Melbourne, both in terms of commercial activity and residential growth. Its boundaries include major manufacturing, tertiary education, retail centres and recreational features including the Maribyrnong Valley. The Maribyrnong Council has identified that the municipality's infrastructure will be under continued pressure and accordingly, Council is seeking to address this potential weakness through continued improvement of public infrastructure. There exists redundant industrial land along the Maribyrnong River, providing an opportunity for redevelopment and enhancement, and Council has ear-marked the Footscray Central area as a focal point for urban re-design as a part of the State Government's Pride of Place program.

According to Maribyrnong City Council, as at February 1998, the City's land use profile was as follows:

■ Residential	44%
■ Industrial	21%
■ Transport (road and rail)	18%
■ Reserved for Commonwealth use	7.5%
■ Existing public open space	6%
■ Business and commercial	3%

About 28% of the municipality is used for industrial purposes (including Commonwealth land), however, industrial land has been declining rapidly over the past decade as redundant industrial operations are redeveloped for residential use. This has resulted in severe local unemployment especially for unskilled and low-skilled workers. Council projects that within 10 years, over 170 hectares of Commonwealth land will be re-zoned and developed for housing and other activities.

Other features of the City of Maribyrnong include:

- two major, interstate, intrastate and suburban rail routes converge at Footscray;
- two large, regional shopping and commercial centres are located in Maribyrnong, namely, Footscray Central and Highpoint Shopping and Entertainment Centre. Other shopping centres within the City are small and many businesses within these centres are struggling to remain viable;

- the City has traditionally been an industrial centre. However, over the past three decades, industrial activity has declined. The loss of industrial-related jobs has not been replaced by sufficient jobs in other sectors, leading to serious structural unemployment. The disused industrial land has presented a major problem for Council, which is seeking to encourage re-development within the City; and
- the City has provided low cost housing to industrial workers and unskilled migrants. Accordingly, much of the older parts of the City are comprised of small, weatherboard housing. In the 1960s and 1970s, the City experienced a walk-up flat boom. Since the 1980s, most housing redevelopment has been in townhouse style.

4.2 Employment and labour force participation

As at December 1999, the labour force participation rate in Maribyrnong was 60.2%, lower than the State average of 68%. The unemployment rate of Maribyrnong in December 1999 was 14.6%, higher than the State average of 6.7%. More detailed but dated information on labour force participation and employment is provided in the 1996 Census, and reproduced below in Table 4.1 and Table 4.2. As at June 1996, Maribyrnong had a higher unemployment rate (18.9%) in comparison to the State level of 9.4%.

Table 4.1: Labour force participation by sex, 1996

Age group Persons 15 years and over	Percentage employed or seeking work			
	Males		Females	
	Maribyrnong %	Vic %	Maribyrnong %	Vic %
15-19 years	34.4	43.8	35.0	45.1
20-24 years	70.5	80.8	64.2	74.7
25-34 years	82.3	89.7	66.4	68.0
35-44 years	81.9	89.9	63.3	69.8
45-54 years	72.2	86.0	53.3	67.0
55-64 years	44.3	60.3	19.1	29.9
65 and more years	4.5	10.0	1.5	3.3
All age groups	59.8	70.0	43.6	51.9
Not in the labour force	35.9	27.4	52.7	45.8
Not stated/overseas visitors	4.5	2.9	3.9	2.6
Adult population	23,786	1,675,400	24,880	1,770,691
Source: Census data 1996				

Table 4.2: Labour force status: Maribyrnong and Victorian residents, June 1996

	Males		Females		Persons	
	Maribyrnong	Vic	Maribyrnong	Vic	Maribyrnong	Vic
Full-time employed	63.4%	72.6%	49.9%	47.9%	57.6%	61.7%
Part-time employed	15.4%	15.4%	29.3%	41.2%	21.4%	26.7%
Employed (not-stated)	2.2%	2.0%	1.9%	2.2%	2.1%	2.1%
Unemployed	19.0%	9.9%	18.9%	8.8%	18.9%	9.4%
No. of persons in the labour force	14,171	1,167,357	10,792	913,712	24,963	2,081,069
Not in the labour force	8,547	458,927	13,113	810,421	21,660	1,269,348
Not stated/overseas visitors	1,068	49,116	975	46,558	2,043	95,674
Adult population	23,786	1,675,400	24,880	1,770,691	48,666	3,446,091

Source: Census data 1996

4.3 Industry of employment

At the 1996 Census, manufacturing remained the principal sector of employment for the Maribyrnong population (22.2%). However, there was a significant decline in the proportion of residents employed in the sector from 1991 to 1996. Other significant employment sectors for the City include Retail Trade and property and business services. The proportion of residents employed in retail trades increased from 1991 to 1996, in line with trends across Victoria. Employment in the government and defence sector, and the transport sector declined significantly from 1991 to 1996.

Over the period 1991 to 1996, employment increased significantly in the following sectors:

- Accommodation, cafes and restaurants;
- Property and business services;
- Education;
- Health; and
- Cultural and recreational services.

The following table provides a summary of the industry of employment profile for Maribyrnong and Victoria as at 1991 and 1996.

Table 4.3: Industry of employment of Maribyrnong residents, 1991 and 1996

Industry	Maribyrnong		Victoria	
	1991 %	1996%	1991 %	1996%
Agriculture, Forestry, Fishing	0.1	0.3	3.9	3.9
Mining	0.1	0.1	0.3	0.3
Manufacturing	23.2	22.2	16.0	16.3
Electricity, Gas, Water Supply	1.0	0.4	1.4	0.7
Construction	3.5	3.6	5.4	5.9
Wholesale Trade	6.4	6.1	6.2	6.1
Retail Trade	11.0	11.6	13.4	13.8
Accommodation, Cafes, Restaurants	3.2	4.2	3.3	3.8
Transport and Storage	7.4	5.6	4.1	3.9
Communication Services	2.4	2.9	1.9	2.3
Finance and Insurance	3.9	3.5	4.7	4.1
Property and Business Services	5.8	9.8	7.0	9.9
Government Admin, Defence	6.8	4.3	5.2	3.8
Education	4.7	6.4	6.8	7.0
Health and Community Services	7.1	8.4	8.5	9.3
Cultural and Rec Services	1.3	3.1	1.7	2.4
Personal and Other Services	2.8	3.6	3.1	3.5
Non-classifiable economic units	0.4	2.0	0.4	1.6
Not stated	9.0	1.9	6.8	1.6
Total	21,127	20,236	1,806,561	1,884,880

4.4 Employment by occupation

The “traditional” labour force of the City of Maribyrnong (production and labour workers) changed from 1991 to 1996, with a significant increase in the proportion of the City’s workforce engaged in managerial, professional, para-professional and clerical roles. Maribyrnong’s workforce however remains less likely to be undertaking managerial and professional roles than the rest of Victoria. Table 4.4 provides a summary of employment by occupation for Maribyrnong, Melbourne and Victoria as a whole for 1991 and 1996.

Table 4.4: Employment by occupation of Maribyrnong residents, 1991 and 1996

Occupation	Maribyrnong		Melbourne		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
Managers and Administrators	3.4	4.2	8.2	7.8	10.0	9.5
Professionals	11.1	16.1	16.6	19.1	15.6	17.8
Associate Professionals	6.4	9.8	7.5	11.4	7.5	11.4
Tradespersons and Related Workers	13.7	11.8	13.4	12.6	13.7	12.9
Advanced Clerical and Service Workers	5.2	3.0	7.2	4.7	6.5	4.3
Intermediate Clerical, Sales and Service Workers	11.5	15.8	12.4	16.2	11.6	15.4
Intermediate Production and Transport Workers	16.3	15.5	8.6	8.8	8.7	8.9
Elementary Clerical, Sales and Service Workers	10.3	9.0	11.1	9.0	10.8	8.9
Labourers and Related Workers	13.5	11.6	8.4	7.6	8.8	8.3
Not stated/inadequately described	8.6	3.1	6.9	2.6	6.8	2.7
Total employment	21,127	20,236	1,320,996	1,391,637	1,806,561	1,884,880

Source: Census data 1996

4.5 Businesses by industry and size

According to the September 1998 ABS Business Register, Maribyrnong had a total of 2,894 businesses located within the City. Approximately 90% of the total number of businesses were classified as being small, with the majority of businesses operating within the retail trade, property and business services and manufacturing industries. The City's manufacturing base is reflected in the relatively high number of small and medium sized manufacturing businesses in operation. However, it is noted that there is only one large manufacturing business within Maribyrnong. Government, health and education organisations provide the majority of the large-scale employment base of the City while retail and wholesale operations are important medium-sized employment generators. Table 4.5 provides an overall summary of the nature of businesses that are located within the City of Maribyrnong.

Table 4.5: The structure of business in Maribyrnong: Distribution of businesses by industry and firm size, 1998

Industry to which business is assigned <i>ANZSIC Division</i>	Number of business locations by firm size			
	Small	Medium	Large	Total
Agriculture forestry and fishing	5	0	1	6
Mining	0	0	0	0
Food beverage & tobacco manufacturing	21	3	0	24
Textile clothing footwear manufacturing	173	6	1	180
Wood & paper product manufacturing	10	0	0	10
Printing publishing & recorded media	23	1	0	24
Petroleum coal & chemical manufacturing	18	3	0	21
Non-metallic mineral product manufacturing	9	0	0	9
Metal product manufacturing	29	3	0	32
Machinery & equipment manufacturing	28	5	0	33
Other manufacturing	28	0	0	28
Manufacturing	339	21	1	361
Electricity gas and water supply	0	1	0	1
Construction	148	3	0	151
Wholesale trade	212	28	3	243
Food retailing	203	9	2	214
Personal & household good retailing	351	15	6	372
Motor vehicle retailing & services	182	7	0	189
Retail trade	736	31	8	775
Accommodation cafes and restaurants	97	9	2	108
Transport and storage	166	21	4	191
Communication services	16	2	2	20
Finance and insurance	69	5	0	74
Property and business services	337	23	4	364
Government administration and defence	13	3	5	21
Education	41	16	4	61
Health and community services	258	18	4	280
Cultural and recreational services	65	6	0	71
Personal and other services	159	7	1	167
All industries	2,609	225	60	2,894

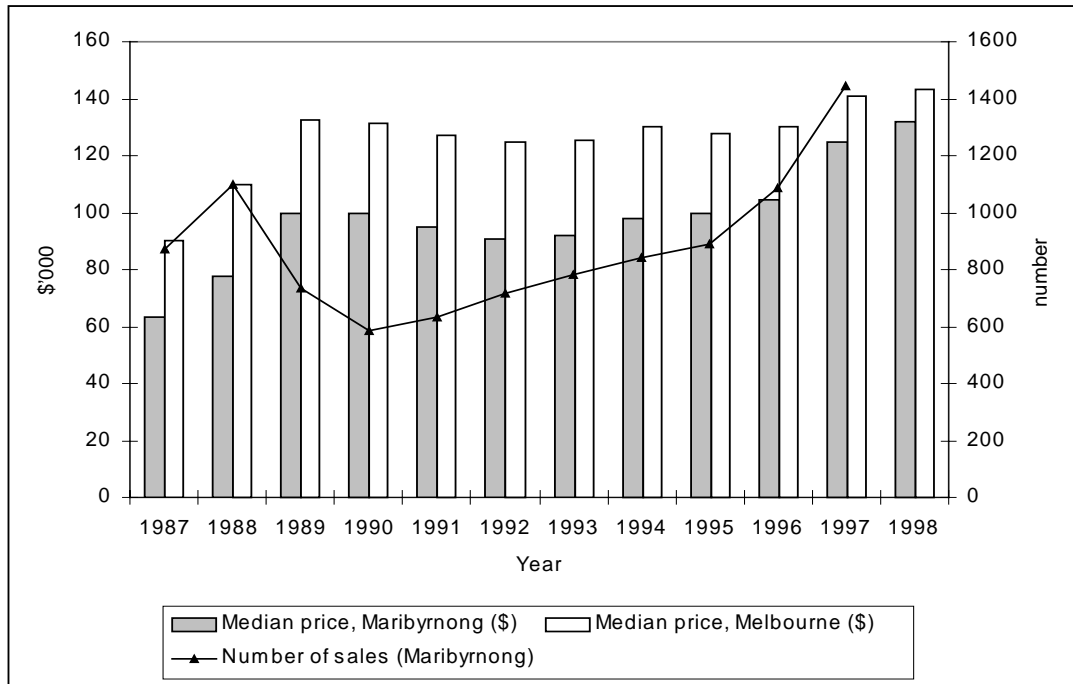
Source: ABS Business register, September 1998

The ANZSIC industry classification is used. Most industries are shown at the divisional level (one-digit). However manufacturing and retailing industries are presented also at the sub-divisional (two-digit) level. The definition of business size is as follows: Small business, <20 employees; Medium-sized business, 20-99 employees; Large business, 100+ employees.. However, for manufacturing industry: Small business = <100 employees; Medium-sized business = 100-499 employees; Large business = 500+ employees.

4.6 House prices and sales

Median house prices in Maribyrnong have generally been below the Melbourne average, although this gap is narrowing and the number of sales has been increasing markedly over recent years. This reflects the increasing attraction of inner city living in Melbourne.

Figure 4.1: Median house prices, Maribyrnong and Melbourne, 1987 to 1998



Source: Land Victoria, 1997-98

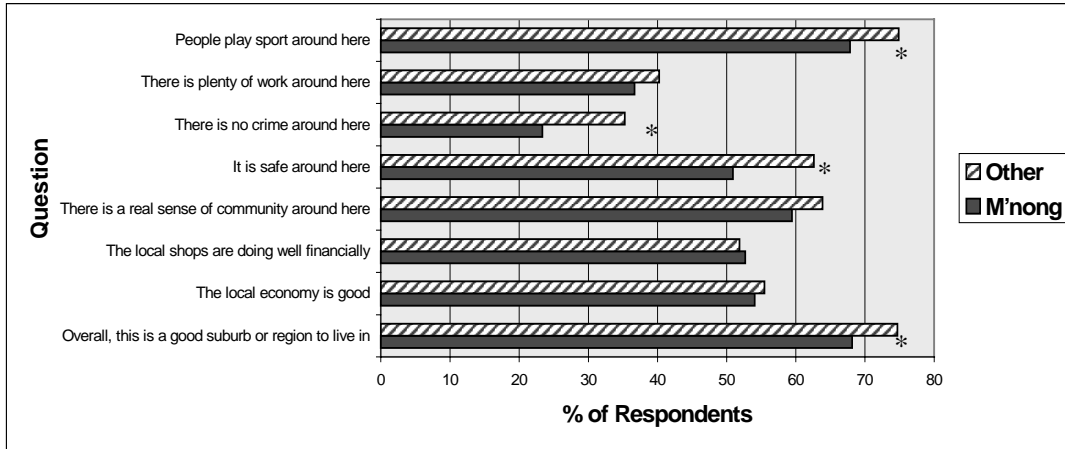
4.7 Community perceptions of the region

In our survey of 167 adults living in the City of Maribyrnong, conducted in October 1999, we asked questions about residents' opinions of their region. While the sample size is sufficiently large to enable us to draw conclusions about Maribyrnong, it does not allow us to draw statistically significant conclusions about the differences between Maribyrnong and the other regions surveyed for many of the survey questions¹. As a result, comparisons between the City of Maribyrnong and other regions can only be made where differences are statistically significant, and have been denoted by an asterisk (*) on the relevant graph.

While Maribyrnong residents are generally favourable about their City as a place to live, fewer Maribyrnong respondents (68%) rate their region as favourable, compared to the 75% of residents of the other regions. Figure 4.2 indicates that the major negative differences between Maribyrnong and the other regions are safety and crime. The majority of respondents, however, believe that there is a sense of community within the region and that the local shops and the local economy are doing well.

¹ The regions surveyed were the local government areas of Mildura, Geelong, Wellington, Maribyrnong, Moreland, Moreland and Dandenong. KPMG surveyed about 167 adults in each of these regions.

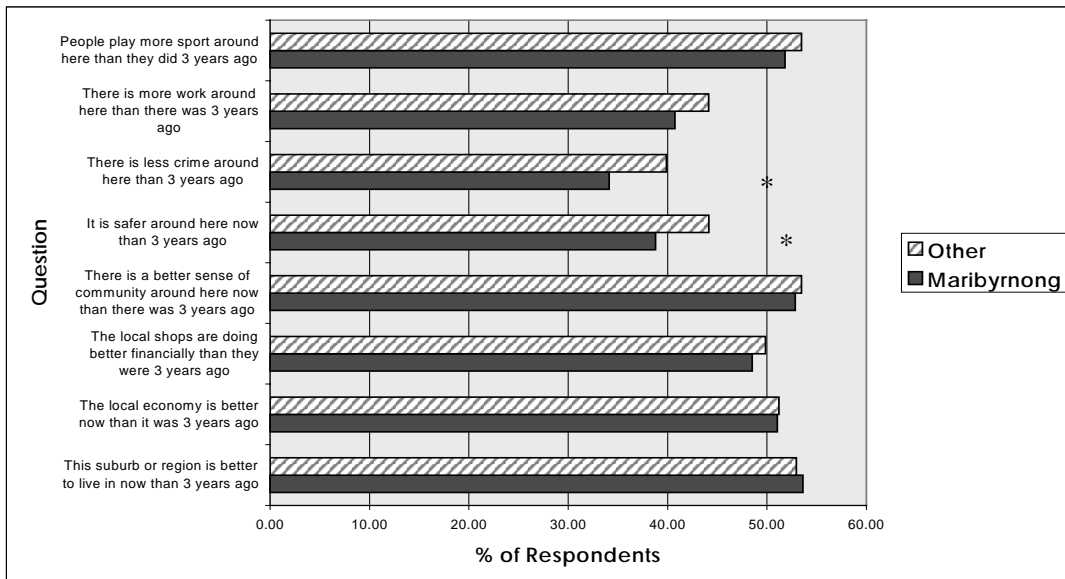
Figure 4.2: Opinion of Maribyrnong



(*) Statistically significant difference between Maribyrnong and the average of the other regions.

Just over 50% of the population in Maribyrnong feel that their region is better to live in now, than it was three years ago. There is a general consensus amongst Maribyrnong residents that there is a better sense of community and that the local economy is doing better than three years ago. Fewer Maribyrnong respondents believe that there has been an improvement over the last three years in crime and safety, when compared to perceptions of respondents in other regions. Respondents' opinions of Maribyrnong compared to three years ago are set out in Figure 4.3.

Figure 4.3: Opinion of Maribyrnong compared to three years ago



(*) Statistically significant difference between Maribyrnong and the average of the other regions.

4.8 Summary

The City of Maribyrnong has a relatively low rate of participation in the workforce and the unemployment rate is substantially above the State average. Employment has declined in the City, with a marked decline in the proportion of residents employed in manufacturing from 1991 to 1996. The resident population is principally employed in unskilled and labour-related roles. However, the proportion of residents engaged in professional and managerial roles increased from 1991 to 1996, possibly reflecting gentrification of the suburb, which is confirmed by increasing house prices in the region.

Just over half of the people in Maribyrnong believe their local economy is doing well, and almost 70% believe the region is good to live in. Crime and safety are important concerns, more so than in the other regions. Around half of people in Maribyrnong believe things are better than in the past.

5 Profile of gaming and recreation in Maribyrnong

5.1 Gambling defined

The Productivity Commission² that the following characteristics distinguish gambling from other, apparently similar, activities:

- as a group, gamblers necessarily lose money as a result of the activity, because the total “prize” is equal to the accumulated stakes of punters, less taxes to government and profits and costs for operators; and
- gambling is typically presented as a form of entertainment.

Gambling is the (lawful) placement of a wager or bet on the outcome of a future uncertain event. It is treated as an activity than can be clearly divided into two distinct areas – **racing** related and **gaming** related. Where the word *gambling* is referred to in this publication, it is intended to imply the total of racing and gaming activities.³

5.2 EGMs and venues

The supply of EGMs and venues with EGMs in Maribyrnong and Victoria is presented in the following table.

Table 5.1: EGMs and gaming venues in Maribyrnong and Victoria, 1992 to 1999

Maribyrnong	Sep-92	Jun-93	Jun-94	Jun-95	Jun-96	Jun-97	Jun-98	Jun-99	Dec-99	AAG %
EGMs	258	368	658	703	735	757	804	771	764	
EGM Growth %	n/a	42.6	78.8	6.8	4.6	3.0	6.2	-4.1	-0.9	16.5%
Venues	4	6	11	11	13	14	15	15	15	
Venue Growth %	n/a	50.0	83.3	0.0	18.2	7.7	7.1	0.0	0.0	9.2%
Average No. EGMS per venue	64.5	61.3	59.8	63.9	56.5	54.1	53.6	51.4	50.9	
Victoria	Sep-92	Jun-93	Jun-94	Jun-95	Jun-96	Jun-97	Jun-98	Jun-99	Dec-99	AAG %
EGMs*	3,929	13,661	17,537	21,268	23,478	25,962	26,965	27,811	27,208	
EGM Growth %	n/a	247.7	28.4	21.3	10.4	10.6	3.9	3.1	-2.2	15.2%
Venues	59	251	365	468	521	554	559	573	556	
Venue Growth %	n/a	325.4	45.4	28.2	11.3	6.3	0.9	2.5	3.0	18.7%
Average No. EGMs per venue	66.6	54.4	47.6	45.4	45.1	46.9	48.2	48.5	48.9	
Source: VCGA										
AAG = average annual growth										
* excludes 2,500 EGMs operating within Crown Casino										

The number of EGMs and venues with EGMs in Maribyrnong has grown by an average annual rate of 16.5% and 9.2% respectively since 1992. Growth for Victoria across the same period was 15.2% and 18.7% respectively.

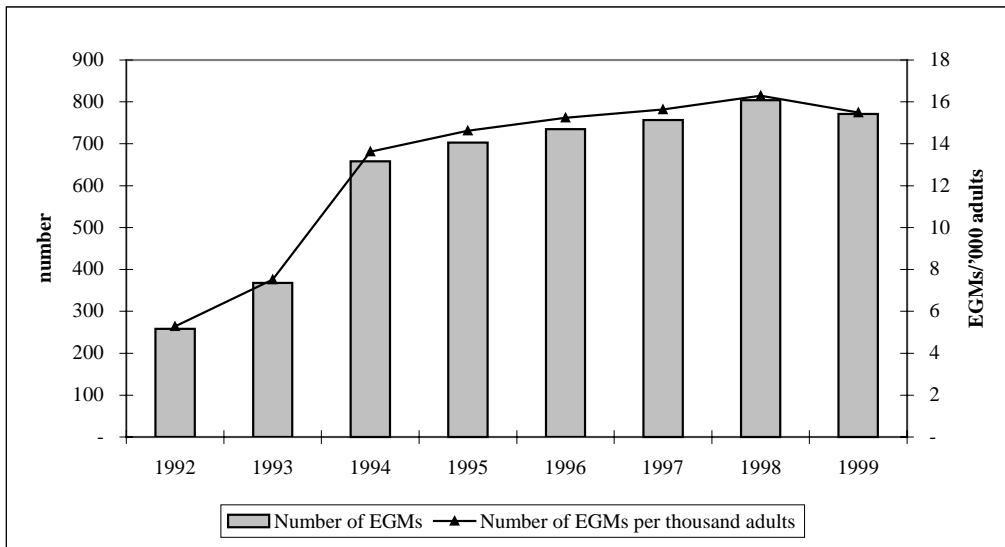
The average number of EGMs per venue in Maribyrnong has been above the Victorian average since June 1993, however, the average has declined from 64.5 machines per venue in September 1992 to 50.9 machines per venue in December 1999.

² Productivity Commission (1999), *Final Report*, Productivity Commission, Melbourne.

³ Tasmanian Gaming Commission, *Australian Gaming Statistics 1972-73 to 1997-98*, page 4

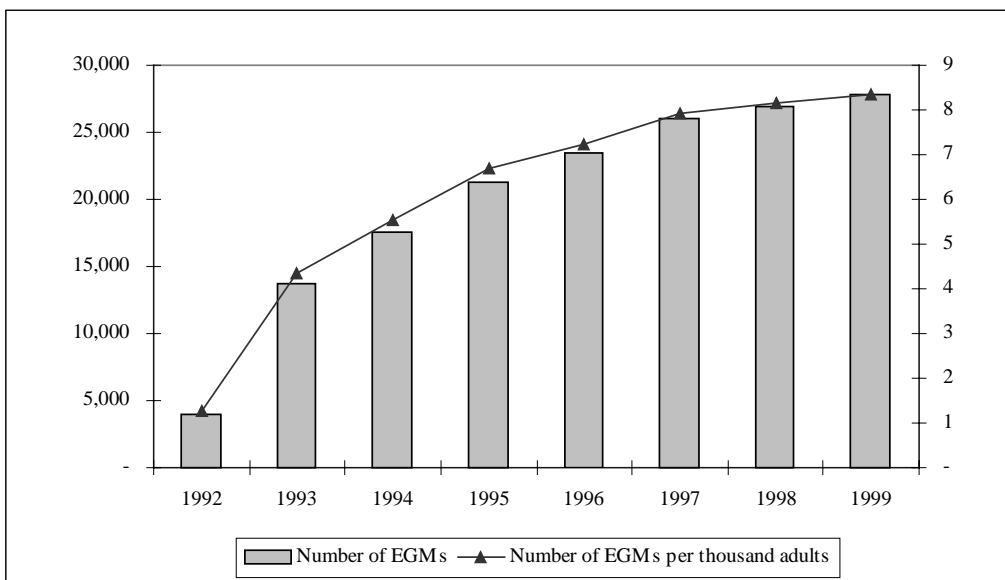
Maribyrnong has the highest density of EGMs per 1,000 adult residents of all Victorian LGAs⁴. As shown in Figure 5.1, the number of EGMs per 1,000 adults in Maribyrnong increased from 5.3 in 1992 to 15.5 in June 1999, which is substantially higher than the Victorian average of 8.6.

Figure 5.1: EGMs density in Maribyrnong (EGMs/'000 adults), 1992 to 1999



Source: VCGA

Figure 5.2: EGMs density in Victoria (EGMs/'000 adults), 1992 to 1999



Source: VCGA – Excludes EGMs at Crown Casino

⁴ Excluding the City of Melbourne, which has a higher EGM density because of the 2,500 EGMs at Crown Casino.

As at 31 December 1999, Maribyrnong had 15 gaming venues licensed to offer EGMs. Medway Golf Club had no machines operating at the time. Accordingly, 14 sites offered a total of 764 EGMs of which 7 venues were hotels and 7 were clubs. The following map illustrates the location of each of these venues within the City of Maribyrnong.

Figure 5.3: Venues in Maribyrnong



	Venue	Venue Type	Address	Operator
1	Anglers Tavern	Hotel	Maribyrnong	Tattersalls
2	Ashley Hotel	Hotel	Braybrook	Tabcorp
3	Australian Croatian Association	Club	Footscray	Tabcorp
4	Braybrook Hotel	Hotel	Braybrook	Tattersalls
5	Court House Hotel (Footscray)	Hotel	Footscray	Tattersalls
6	Footscray Football Club	Club	West Footscray	Tabcorp
7	Footscray RSL Club	Club	Footscray	Tattersalls
8	Highpoint Tavern	Hotel	Maribyrnong	Tabcorp
9	Maribyrnong Maidstone RSL	Club	Maribyrnong	Tattersalls
10	Medway Golf Club *	Club	Maidstone	Tattersalls
11	Powell Hotel	Hotel	Footscray	Tattersalls
12	Victoria Hotel (Yarraville)	Hotel	Yarraville	Tabcorp
13	Yarraville & Seddon Bowling Club	Club	Spotswood	Tabcorp
14	Yarraville Club	Club	Yarraville	Tattersalls
15	Yarraville Club Cricket Club	Club	Maidstone	Tabcorp

Source: VCGA
*No machines operating as at 31 December 1999

The supply of Hotel EGMs represents 56% of the total number of EGMs in Maribyrnong with Club EGMs accounting for 44%. The average size of an EGM installation for Hotels and Clubs was 51 and 40 respectively as at June 1999.

The following table illustrates the supply of EGMs by venue in Maribyrnong and their respective share of either hotel or club EGM supply and the total supply of EGMs as at June 1999.

Table 5.2: Gaming venue details in Maribyrnong – December 1999

Hotel Venues	EGMs	% Hotel EGMs	% Total EGMs
Anglers Tavern	34	8%	4%
Ashley Hotel	90	21%	12%
Braybrook Hotel	68	16%	9%
Court House Hotel (Footscray)	40	9%	5%
Highpoint Tavern	105	25%	14%
Powell Hotel	53	12%	7%
Victoria Hotel (Yarraville)	35	8%	5%
TOTAL Hotels	425	100%	56%
Club Venues	EGMs	% Club EGMs	% Total EGMs
Australian Croatian Association	20	6%	3%
Footscray Football Club	60	18%	8%
Footscray RSL Club	29	9%	4%
Maribyrnong Maidstone RSL	5	1%	1%
Medway Golf Club	0	0%	0%
Yarraville & Seddon Bowling Club	20	6%	3%
Yarraville Club	105	31%	14%
Yarraville Club Cricket Club	100	29%	13%
TOTAL Clubs	339	100%	44%
GRAND TOTAL	764		100%
Source: VCGA			

In summary, the City of Maribyrnong has a very high concentration of EGMs and gaming venues. However, recent statistics indicate that there may be some decline in the supply of EGMs to the region.

5.3 Gaming expenditure

Based on VCGA figures, expenditure on gaming in Maribyrnong has increased from \$12.89M in 1992/1993 to \$53.25M in 1998/1999. In 1998/1999, Maribyrnong's expenditure on gaming was 7% higher than the average expenditure for metropolitan Local Government Areas (LGA). In 1998/1999 Maribyrnong's expenditure on gaming per adult was 92% (\$1,079.31) higher than the State average of \$562.56. Expenditure on gaming in Maribyrnong is summarised in the table below.

Table 5.3: Expenditure on gaming in Maribyrnong, 1992 to 1999

	92-93	93-94	94-95	95-96	96-97	97-98	98-99
Total Expenditure – Maribyrnong	\$12,892,936	\$24,903,196	\$33,133,783	\$38,663,951	\$43,945,745	\$48,435,952	\$53,254,055
Total Expenditure – Metropolitan *	\$211,319,751	\$551,431,696	\$745,524,325	\$963,832,773	\$1,131,288,009	\$1,306,707,971	\$1,542,948,218
Average Expenditure per Metropolitan LGA	\$6,816,766	\$17,788,119	\$24,049,171	\$31,091,379	\$36,493,161	\$42,151,870	\$49,772,523
Total Expenditure- Non Metropolitan **	\$43,309,135	\$131,167,765	\$207,627,542	\$281,533,049	\$325,195,095	\$362,925,551	\$411,322,997
Average Expenditure per Non Metropolitan LGA	\$921,470	\$2,790,803	\$4,417,607	\$5,990,064	\$6,919,044	\$7,721,820	\$8,751,553
Total Expenditure - Victoria	\$254,628,886	\$682,599,461	\$953,151,867	\$1,245,365,822	\$1,456,483,104	\$1,669,633,522	\$1,954,271,215
Average Expenditure per Victorian LGA	\$3,264,472	\$8,751,275	\$12,219,895	\$15,966,228	\$18,672,860	\$21,405,557	\$25,054,759
Adult Population – Maribyrnong #	48,826	48,953	48,307	48,092	48,229	48,398	49,341
Expenditure per adult - Maribyrnong	\$264	\$508	\$685.90	\$803	\$911	\$1,000	\$1,079
% increase/decrease – Maribyrnong ##	n/a	93%	35%	17%	13%	10%	8%
Adult Population – Victoria #	3,293,135	3,318,245	3,343,108	3,373,447	3,408,503	3,446,886	3,473,879
Expenditure per adult - Victoria	\$77	\$205	\$285	\$369	\$427	\$484	\$562
% increase/decrease – State ##	n/a	166%	39%	29%	16%	13%	16%
\$ difference per adult +	\$186	\$303	\$400	\$434	\$483	\$516	\$516
% difference per adult ++	242%	147%	141%	118%	113%	107%	92%

Source: VCGA

* 31 Metropolitan LGAs (defined as all LGAs in the Melbourne Statistical Division)

** 47 Non-metropolitan LGAs (defined as all LGAs not part of the Melbourne Statistical Division)

Population defined as number of adults over the age of 18. (Source VCGA figures as at June of each year except for 1992/1993 which represents population as at September.)

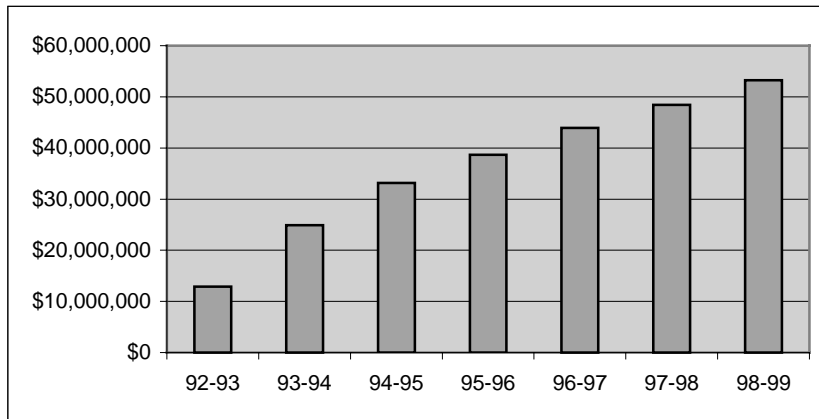
Increase/decrease relative to previous year's gaming expenditure

+ Difference between Maribyrnong LGA and State per adult expenditure levels. A positive figure indicates that gaming expenditure per adult in Maribyrnong is above the State average.

++ Percentage difference between Maribyrnong and State per adult expenditure levels

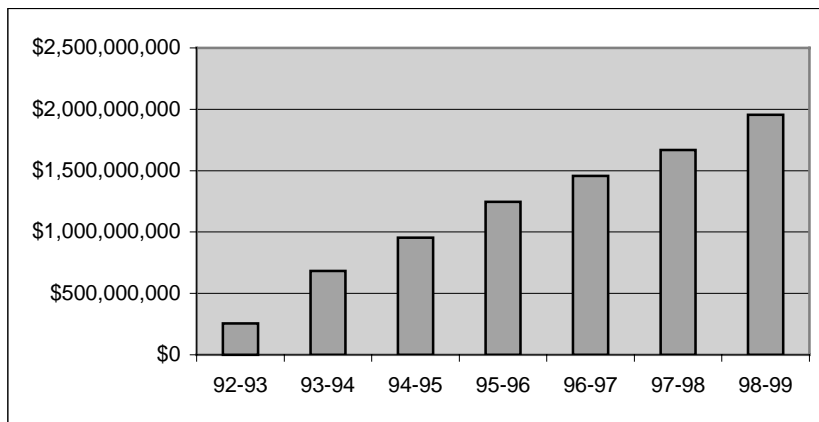
During the period 1992-1999, expenditure on gaming increased for both Maribyrnong and the State (all LGAs) as a whole. These findings are presented graphically below.

Figure 5.4: Expenditure on gaming for Maribyrnong, 1992-1999



Source: VCGA

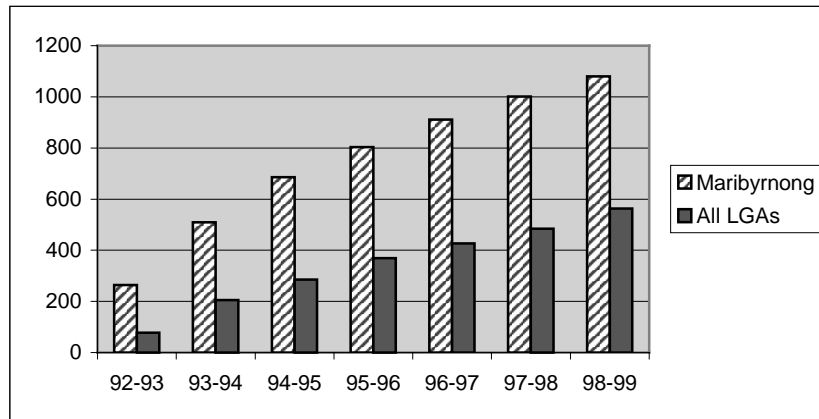
Figure 5.5: Expenditure on gaming for Victoria, 1992-1999



Source: VCGA

In comparing average expenditure by adults over the age of 18 years in Maribyrnong against that of adults across the State (all LGAs), we found that the average amount spent on gaming was consistently higher in Maribyrnong than the State average across the entire period of data collection. This comparison is presented in Figure 5.6.

Figure 5.6: Gaming expenditure per adult (\$) – Maribyrnong, Victoria, 1992-1999



Source: VCGA

Over the seven years of data collection, the number of EGMs in Maribyrnong increased from 368 in 1992/1993 to 771 in 1998/1999. During the same period average expenditure per EGM increased from \$35,035 in 1992/1993 to \$69,071 in 1998/1999. These figures are summarised in Table 5.4.

Table 5.4: Expenditure, number of EGMs and average expenditure per EGM, 1992-1999

	92-93	93-94	94-95	95-96	96-97	97-98	98-99
Expenditure	\$12,892,936	\$24,903,196	\$33,133,783	\$38,663,951	\$43,945,745	\$48,435,953	\$53,254,055
EGMs	368	658	703	735	757	804	771
Av. Exp/EGM	\$35,035	\$37,846	\$47,131	\$52,604	\$58,052	\$60,243	\$69,071

Source: VCGA

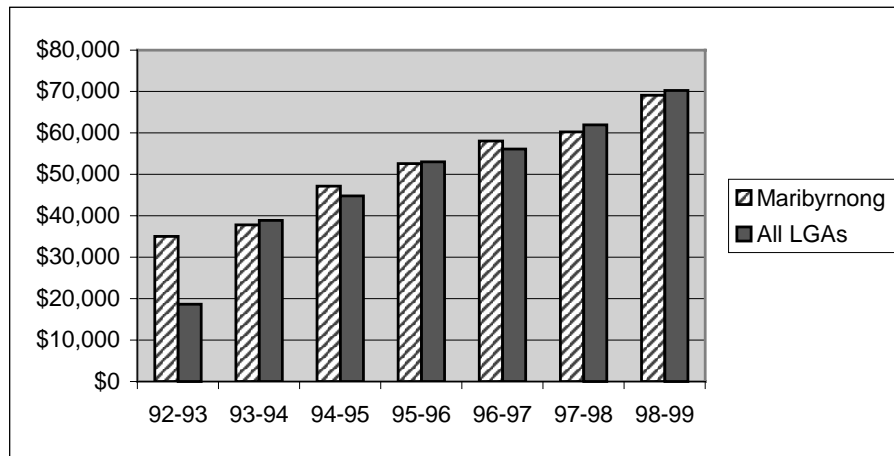
Comparing expenditure per EGM in Maribyrnong against expenditure per EGM across the State, expenditure in Maribyrnong has usually been close to the State average (see Table 5.5).

Table 5.5: Average expenditure per EGM, 1992-1999

	92-93	93-94	94-95	95-96	96-97	97-98	98-99
Av. Exp/EGM - Maribyrnong	\$35,035	\$37,846	\$47,131	\$52,604	\$58,052	\$60,243	\$69,071
Av. Exp/EGM - State	\$18,639	\$38,923	\$44,816	\$53,043	\$56,100	\$61,918	\$70,269
% change for Maribyrnong	n/a	8%	25%	12%	10%	4%	15%
% change - State	n/a	109%	15%	18%	6%	10%	13%

Source VCGA

Figure 5.7: Average expenditure per EGM, 1992-1999

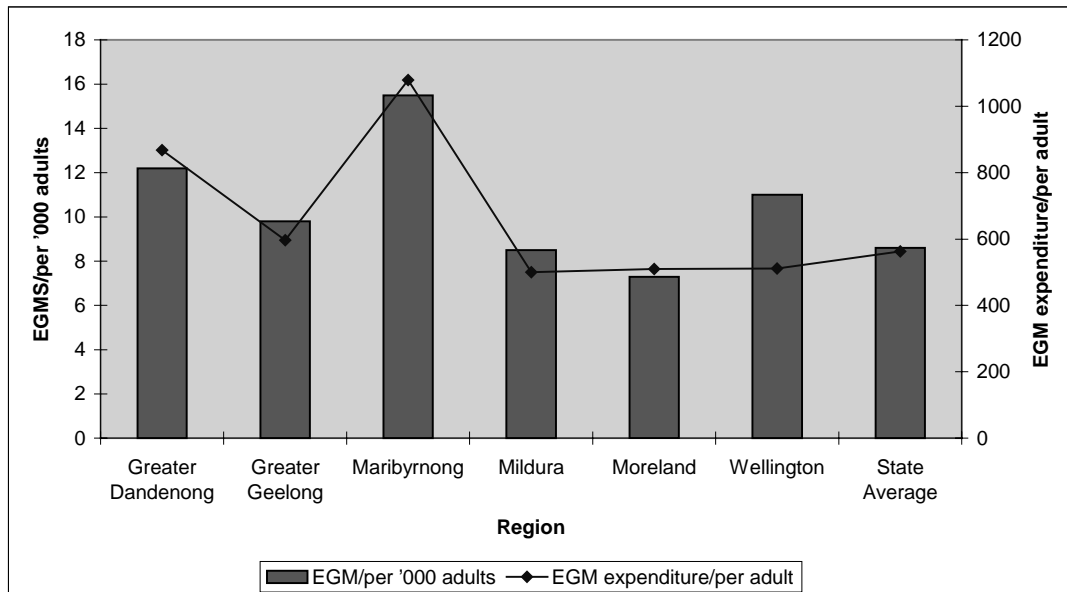


Source VCGA

5.4 Gaming: comparison between Maribyrnong and other regions

Figure 5.8 compares the number of EGMs and EGM expenditure, per thousand adults between Maribyrnong, the other study regions, and the State average. These measures indicate that the level of gaming in Maribyrnong is above the State average.

Figure 5.8: Number of EGMs per thousand adults and EGM expenditure per adult, 1999



5.5 Who gambles and frequency of gambling?

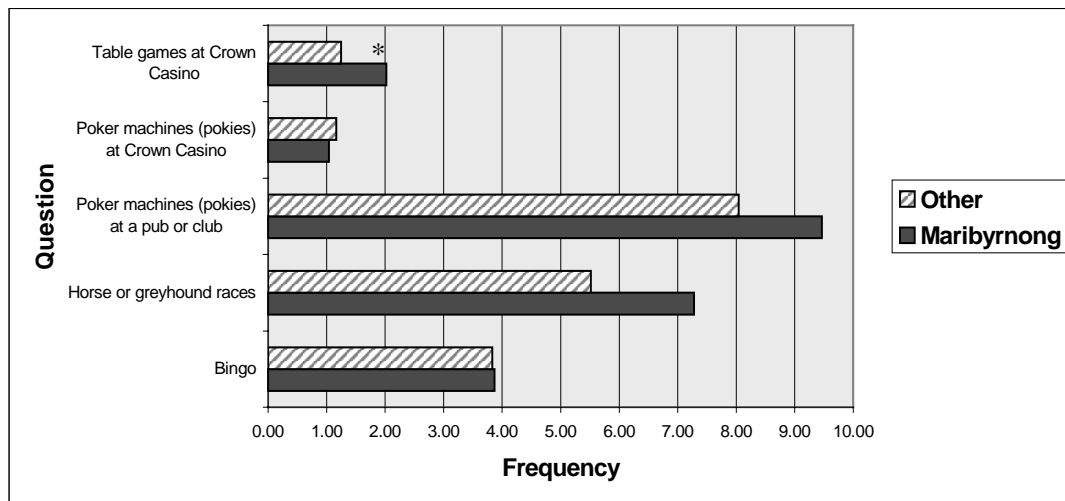
Our understanding of the profile of residents of the City of Maribyrnong who use EGMs is drawn from:

- our survey of 167 adults living in the City of Maribyrnong, conducted in October 1999; and
- opinions expressed during our consultations by venues, community groups and in public forums.

Of the 167 people surveyed in the Maribyrnong region, 50% participated in gambling activities in the last six months, compared to the ‘Patterns’ Survey findings which suggests that 75% of Victorians have gambled in the last 12 months.⁵

Figure 5.9 details the frequency of gambling among the Maribyrnong respondents. The most popular gambling activity is playing the poker machines at a pub or club. The Maribyrnong respondents participate in this almost 9.5 times a year. Greyhound or horse races are the next most common gambling activity, and the least common is playing the poker machines at the Crown Casino. However, respondents in Maribyrnong play table games at the Crown Casino more frequently than respondents in other regions.

Figure 5.9: Frequency of gambling, Maribyrnong



(*) Statistically significant difference between Maribyrnong and the average of the other regions.

In our consultations, it was noted by most venues that they generally have a very regular clientele, with a tendency for visitation levels to decline during school holidays, suggesting that a core of participants have school-aged children. Most gamblers were thought to frequent a range of venues in the local area. Crown Casino also offers a free courtesy bus for residents from Maribyrnong.

The demographic profile of gamers varies. One large club venue reported a majority of older female players, who comprise 80% of the venue’s ‘regulars’. Gamers at one hotel were reported to be mainly over 50 years. The hotel reported that its bistro attracts the family market for dinner, but the gaming room mainly attracts an older demographic. One hotel reported a change in the demographic profile of its patrons coinciding with the introduction of gaming machines. The hotel formerly attracted a core “drinker” market and used to have control problems associated with alcohol, however, it now attracts a diverse range of people,

⁵ The full title of the ‘Patterns’ survey is the “Sixth Survey of Community Gambling Patterns and Perceptions”, April 1999, conducted by Roy Morgan Research for the Victorian Casino and Gaming Authority.

aged from mid 20s to 50s. Another venue has been attracting a “corporate market” during particular periods, such as late afternoon and lunch periods.

During the day when we visited the venues, there was a predominance of middle-aged and elderly women. Anecdotal evidence from venue owners suggested that the users of venues change according to time of day and week – at night times and weekends there seem to be more men and more couples using the EGMs. While some venues reported decreases in business before pension day, other venues suggested that this effect was reducing over time. One club emphasised that its clients needed to feel safe in the venue and therefore the club sought to offer a safe and secure environment for older and vulnerable people.

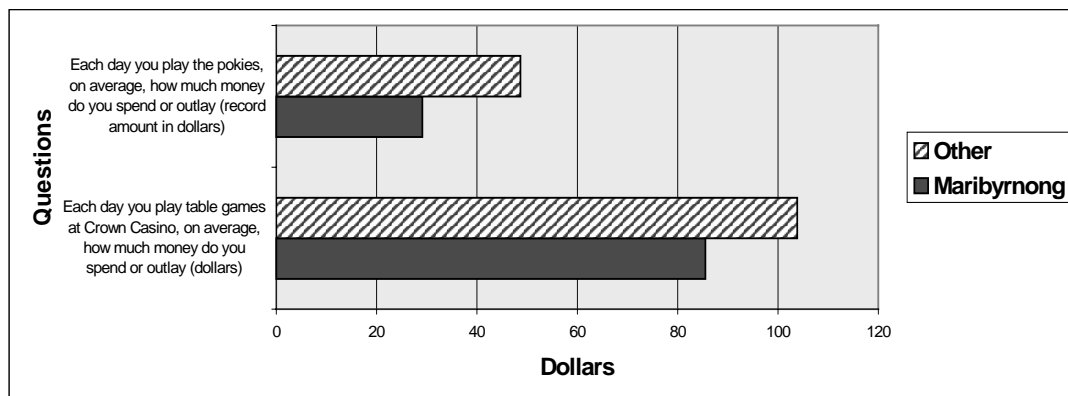
5.6 Gamblers in our survey

In our survey, gamblers are defined as those people who had participated in gambling in the last six months. They make up 50% of Maribyrnong residents. We asked this sub-sample more detailed questions about their gaming behaviour (see sections 5.7 to 5.11), and also asked about their gambling behaviour to check for the prevalence of problem gambling (see section 5.12).

5.7 Time and money spent on gaming

Maribyrnong gamers spend on average \$29 per daily visit at the pokies. While Maribyrnong gamers patronise the Crown Casino less frequently than other gaming venues, on average they spend over 2.5 times as much at Crown Casino, compared with elsewhere. (Note that respondents who are patrons at Crown Casino were answering with respect to table games and not pokies.)

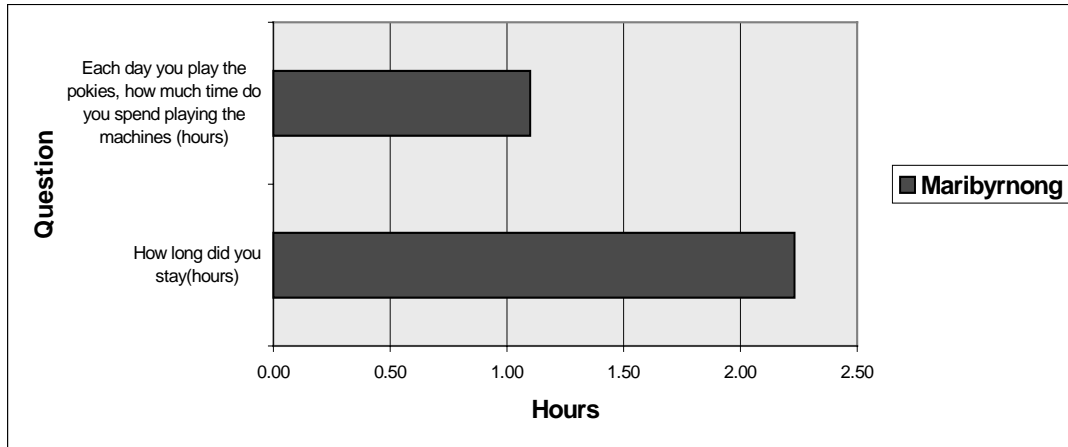
Figure 5.10: Money spent on gaming, Maribyrnong



(There is no statistically significant difference between Maribyrnong and other regions for these questions).

Our survey indicates that in Maribyrnong gamblers spend less than half the time in gaming venues playing pokies. This suggests that gamblers are attracted to gaming venues for additional reasons than using poker machines.

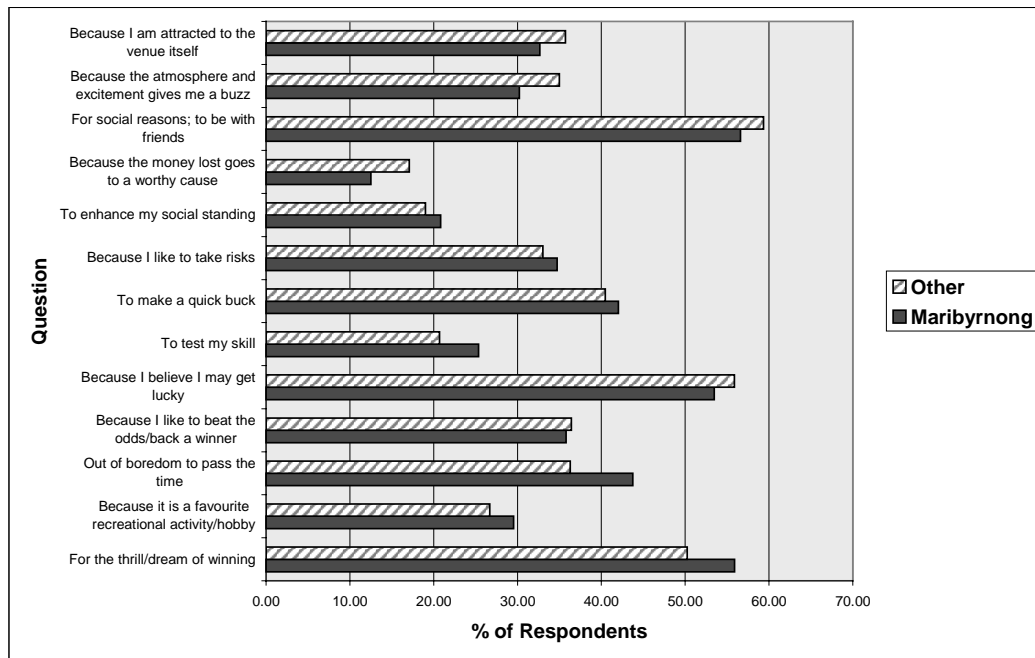
Figure 5.11: Time spent at venue, Maribyrnong



5.8 Reasons for gaming

Our survey indicates that in Maribyrnong the main reason gamblers play poker machines are for ‘social reasons; to be with friends’. However, over 55% of gamblers indicated that the thrill of winning is also a significant factor for playing the pokies. Figure 5.12 indicates that in Maribyrnong the prospect of a lucky win, passing time and the attraction of the venue itself are major influences in gamblers choosing to play poker machines. In addition, the excitement and atmosphere as well as the element of risk associated with playing attracts a significant number of gamblers to poker machines.

Figure 5.12: Reasons for gaming, Maribyrnong

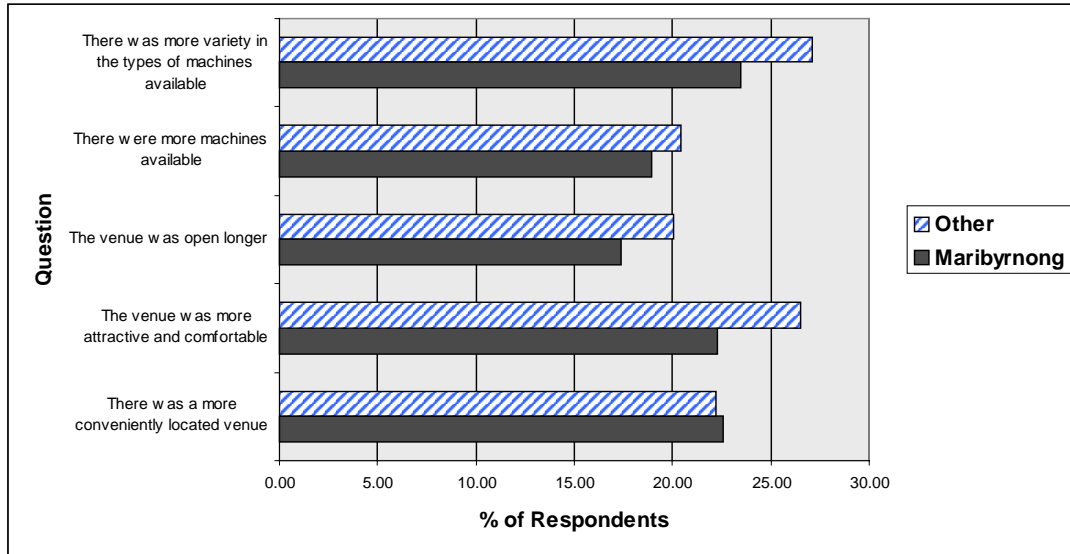


(There is no statistically significant difference between Maribyrnong and other regions for these questions).

Gamers were asked what would make them game more. Overall most gamers indicated that the factors we suggested would not make them game more. Variety of machines, venue attractiveness and ambience, the quantity of machines available, extended operating hours of

venues and the convenient location of venues were considered as minor factors in gaming more.

Figure 5.13: Factors contributing to people gaming more, Maribyrnong

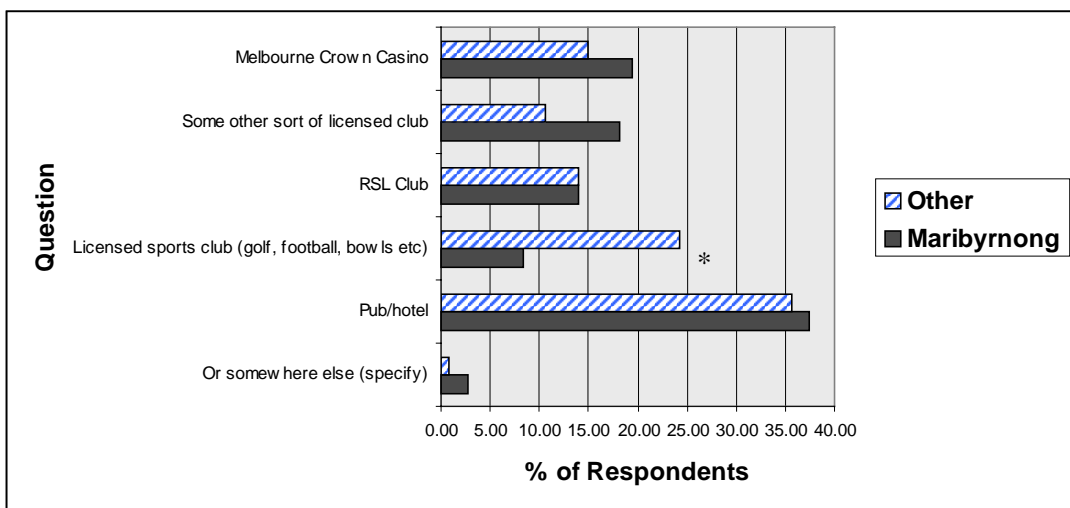


(There is no statistically significant difference between Maribyrnong and other regions for these questions)

5.9 Venues at which EGMs are played

The most common venue among poker machine players in the City of Maribyrnong is a pub or hotel. Over 35% of respondents chose this option with the next most popular being Melbourne Crown Casino, reflecting the proximity of the Casino. Significantly fewer Maribyrnong respondents frequent licensed sports clubs (8.3%), in comparison to 24.2% of respondents in the other regions.

Figure 5.14: Gaming venues, Maribyrnong

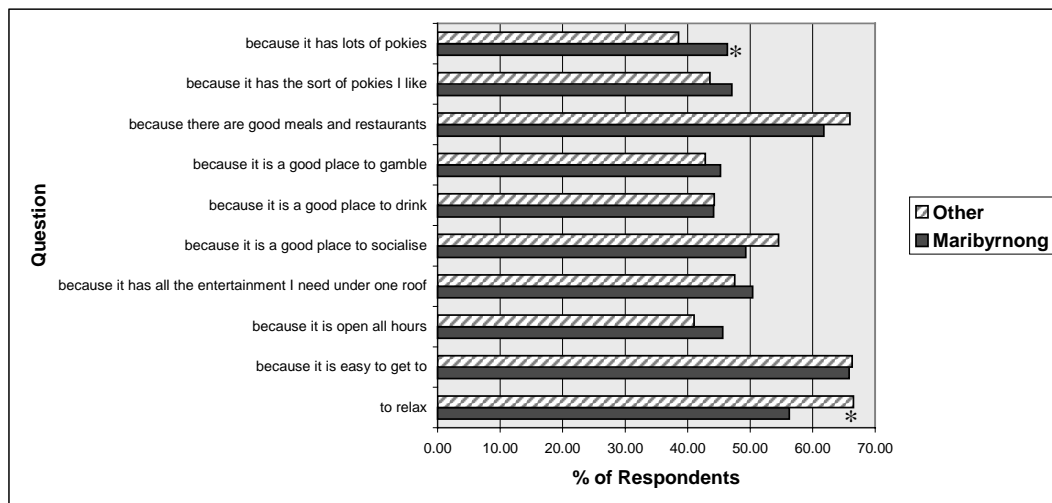


(*) Statistically significant difference between Maribyrnong and the average of the other regions.

Our survey found that most gamers game locally. Gamers from the Maribyrnong region travel on average 1.9km to gaming venues, which is less than the 2.6km travelled by those gamers residing in the other study regions. The majority of gamers depart from home to get to the gaming venue.

In our survey, over 60% of gamers in Maribyrnong choose gaming venues on the basis of proximity and convenience and because there are good meals and restaurants. While 56% of Maribyrnong gamers frequent venues in order to relax, this is significantly less than the average of the other regions (67%). More gamers in Maribyrnong frequent venues because they have ‘lots of pokies’, compared to respondents in the other study regions. The social ambience and having various forms of entertainment under one roof are also major determinants of venue choice.

Figure 5.15: Reasons for Venue Choice, Maribyrnong

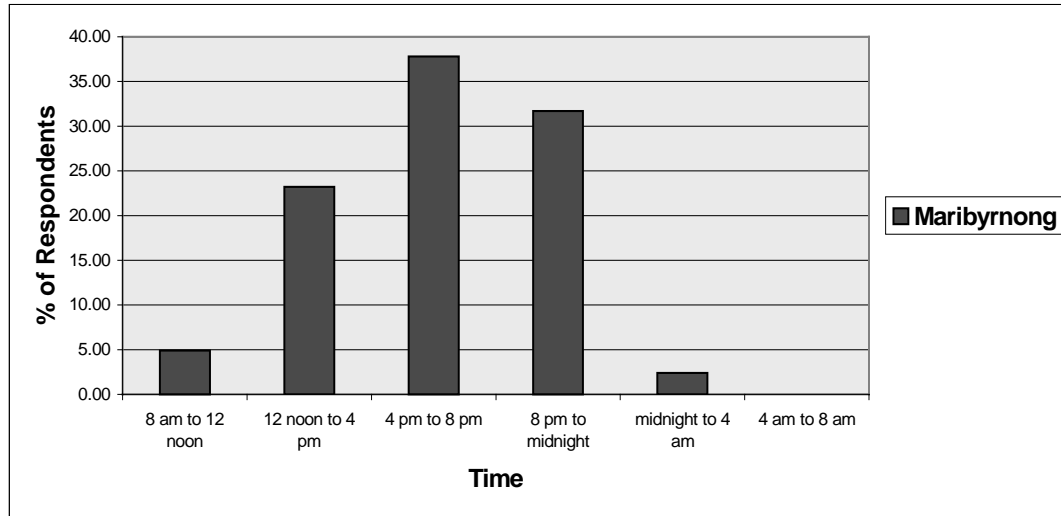


(*) Statistically significant difference between Maribyrnong and the average of the other regions.

5.10 Utilisation of poker machines

Figure 5.16 indicates that the use of venues varies over the day. The peak arrival time at Maribyrnong venues is between 4pm and 8pm with 38% of respondents arriving at venues during these times. Less than 5% of respondents arrive between the hours of midnight and 8am, although this finding may also reflect the fact that many venues are closed at this time.

Figure 5.16: Time of arrival at venue, Maribyrnong

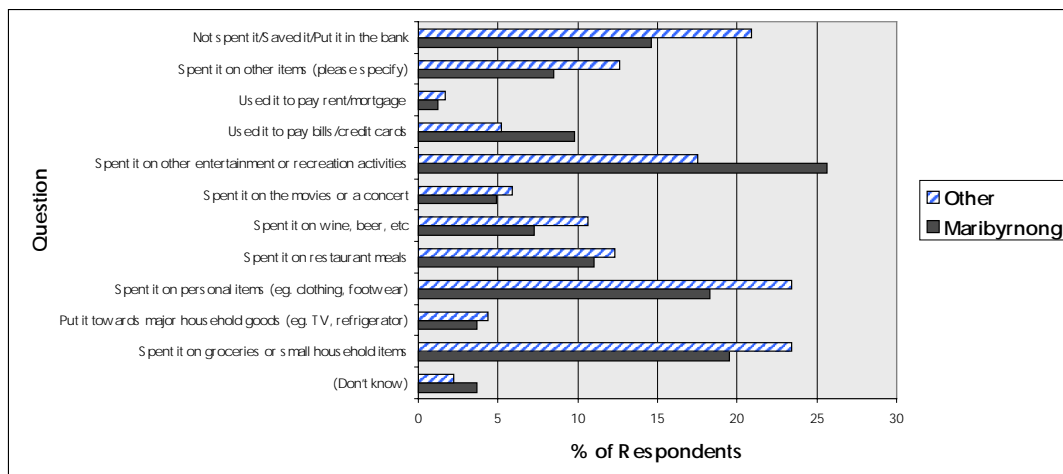


(There is no statistically significant difference between Maribyrnong and other regions for these questions)

5.11 Alternative use of EGM funds

Figure 5.17 details what gaming respondents indicated they would spend their money on had they not spent it on gaming. Approximately 25% of Maribyrnong gamers would have spent it on entertainment and recreation, 19.5% on groceries or small household items and 18% on personal items. In our survey, 14.6 % of gamers said they would have saved the money and less than 10% said they would spend their money on essentials such as rent, mortgage, credit cards or paying bills, if they had not spent it on gaming.

Figure 5.17: Alternative uses for EGM Funds, Maribyrnong



(There is no statistically significant difference between Maribyrnong and other regions for these questions).

5.12 Problem gambling

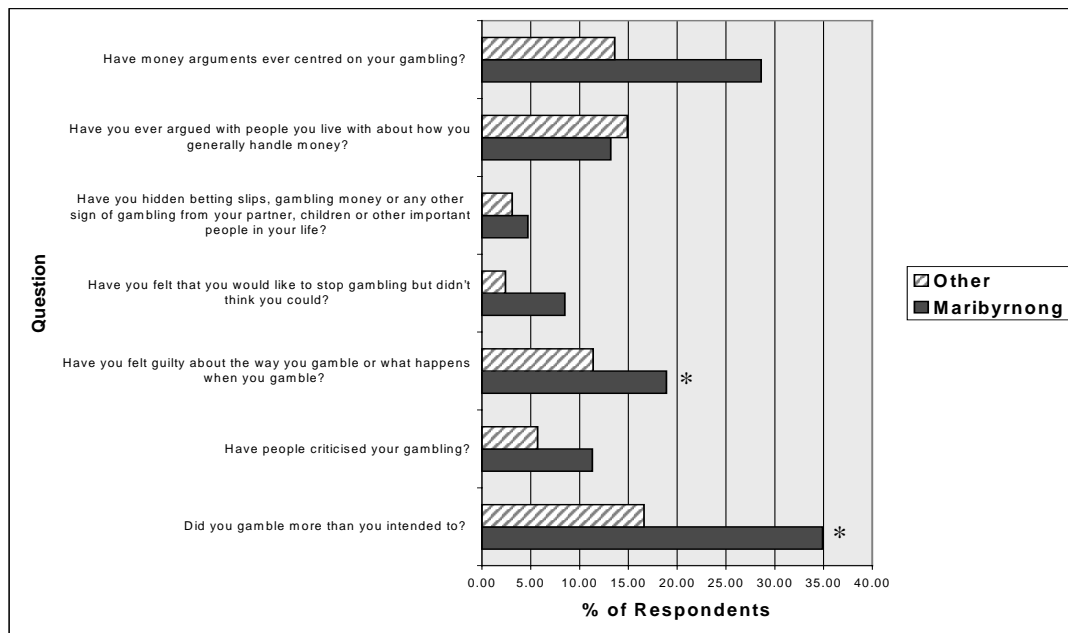
The respondents who had gambled in the last six months were asked the battery of questions from the South Oaks Gambling Screen (SOGS), which is a tool used to identify gambling

risks in the total population. We derived a score to identify the percentage of people ‘at risk’ of gambling problems in our survey regions using the approach adopted in the state-wide ‘Patterns’ survey.⁶

Our survey found that 3% of Maribyrnong residents fall into the ‘at risk’ category, having SOGS scores of 5 or more. This is significantly higher than the State-wide average of 1.5% and higher than the average of our other five regions of 2%. Only 1% of Maribyrnong gamblers feel they have had a problem with gambling or that their gambling was out of control. However, 17% of Maribyrnong residents said that they, or a member of their family had experienced difficulties with excessive gambling at some time, with 66% of this group having experienced difficulties in the last six months.

In our survey, almost 35% of gamblers had, at some time in the last six months, gambled more than they intended, which is more than double the response of the other regions. Approximately 30% have had money arguments centred on gambling and many have experienced guilt and criticism around their gambling. This is consistent with the high incidence of gaming in an area of low income and high unemployment. Compared to respondents in our other five regions, more respondents in Maribyrnong have felt difficulty stopping gambling. It is worth noting that the higher incidence of problem gambling in Maribyrnong coincides with Maribyrnong having the highest level of gaming expenditure per adult of our six study regions.

Figure 5.18: Negative gambling experiences, Maribyrnong



(*) Statistically significant difference between Maribyrnong and the average of the other regions.

⁶ Ref: ‘Definition and Incidence of Problem Gambling including the Socio-Economic Distribution of Gamblers’ Australian Institute for Gambling Research (1997) commissioned by the VCGA. In this report, the Institute recommended that the SOGS was the best currently available instrument to measure the prevalence of problem gambling and that it should be used in the short term for the VCGA ongoing survey series of community gambling patterns and perceptions. The VCGA has included the SOGS in the last three of its ongoing Community Gambling Patterns survey.

In order to probe the issue of problem gambling further, a series of questions was asked in relation to whether gambling activities were financed through borrowing. In Maribyrnong very little gambling activity is financed by credit. Less than 2% of Maribyrnong gamblers admitted to having borrowed money to finance gambling, including borrowing money from relatives, credit cards or selling personal property to finance gambling.

Our consultations provided some insight into community perceptions of problem gambling. Venue operators made the following points:

- All venues with gaming machines reported having a core of regular clients that visit the venue on several occasions each week. Operators were aware of the potential for incidents of problem gambling to emerge in their venues. However, all venue operators reported difficulty in detecting problem gambling because of the subjective nature of the condition. It was suggested that one sign for problem gambling is that clients will visit the same venue regularly and spend a large amount of time at the venue each day.
- Venues were able to provide us with self-exclusion estimates. All but one gaming venue consulted currently had a small number of self-excluded clients. One large club reported five self-exclusions while a smaller club had one self-exclusion, although problems were noted with gamblers at the rate of once or twice per month. One hotel reported 8 or 9 self-exclusions, but again commented on the difficulties of detecting problem gamblers. An example was cited where a well-dressed man was observed on 3 or 4 occasions. After a large payout, the man suggested that it might save him from financial ruin as a result of gambling. However, prior to this, the venue was not aware that the man had a problem with gambling.

Community service organisations made the following comments:

- There are a number of agencies which either focus on, or indicated increasing caseloads involving, problem gambling:
 - Breakeven Western employs approximately 7 full time equivalent persons. The agency deals exclusively with problem gambling for the western Region of Melbourne. EGMs and TAB gambling were the two most prominent forms of gambling for Breakeven cases.
 - Carlton Family Resource Centre reported increasing caseloads with respect to EGM and Casino players, possibly resulting from increased accessibility within the local community and at the Casino. Bingo and EGMs were reported by Carlton Family Resource Centre as the most common forms of problem gambling.
 - Centrecare at Footscray reported that approximately 20% of its caseload relates to problem gambling. Local EGMs and TAB betting was reported to be the main forms of problem gambling and that the EGM problems related to local venues and not Crown Casino.
 - The Migrant Resource Centre in Footscray reported that approximately 5% of cases involving relief are directly related to gambling. However, it was noted that this may under-estimate problem gambling because the organisation is not specifically focussed on gambling-related problems.

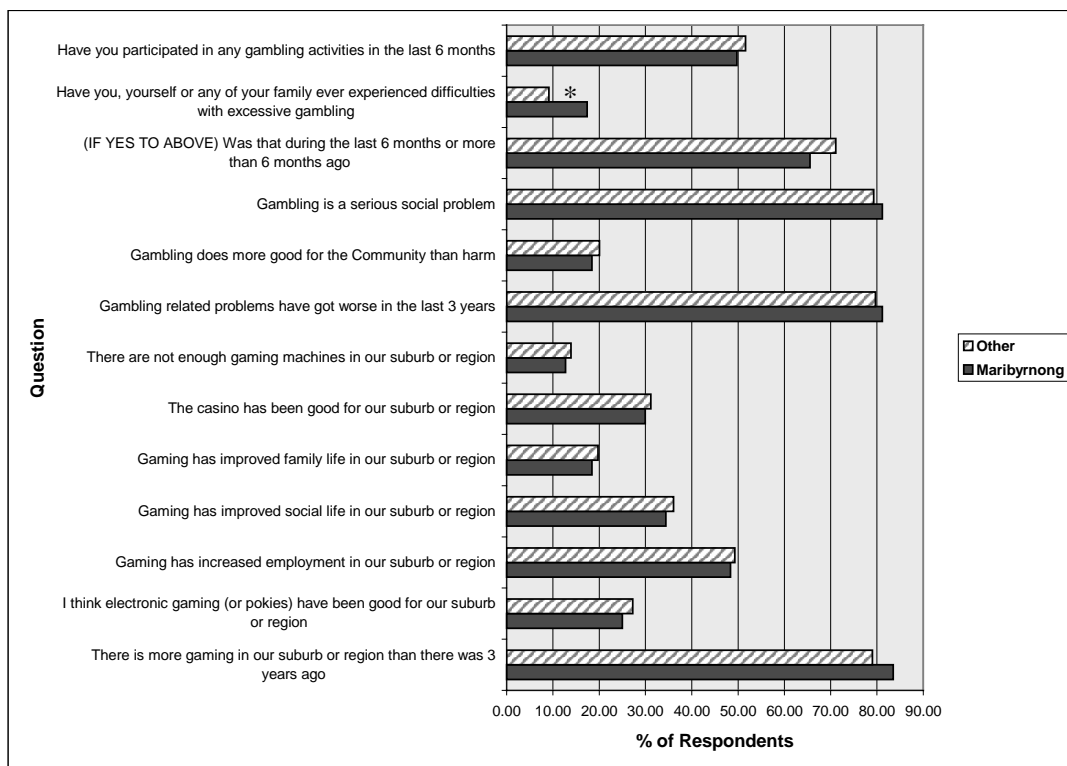
- The Vietnamese Family Welfare Association commenced its gambling counselling services in 1997. It now reports that over 50% of its cases involve gambling-related problems, stemming from EGMs at the casino and at local venues.
- The Catholic Family Welfare Association reported an increasing trend in the need to provide counselling services to people affected by gambling. The Association reported an increasing trend towards women problem gamblers visiting the Casino.
- The Break Even Agency which covers the City of Maribyrnong (Brimbank Community Health Services) reported 279 cases and 1,213 client contacts in 1997-98. These figures are an increase over the previous year (96% and 23% respectively). It should be noted that these figures relate to a much wider area than Maribyrnong.
- Gambling problems are manifested through an inability to meet day-to-day bills, loss of assets and interpersonal problems.
- Reasons given for persons playing EGMs at problematic levels were isolation, loneliness, depression, chasing the “big win”, escaping from personal problems and a desperate need for extra money. A typical characteristic of problem gamblers included an obsession for quickly recovering lost money. Easy access to EGMs was reported to be a contributing factor for problem gambling.
- Problem gamblers were reported mostly to be women gambling within local areas, often within walking distances from their homes. These women are often quite young (25-35 years). A high incidence of gambling-related cases stemming from the Vietnamese community was also reported, although Vietnamese residents often gamed in the Casino, rather than locally.
- Community Service agencies reported difficulties in assisting some ethnic groups because of language and cultural barriers.

6 Social and economic impact of gaming

6.1 Impacts on the community

From our survey, 81% of Maribyrnong respondents agree that gaming is a serious social problem and that gambling related problems have become worse in the last three years. 83.5% of Maribyrnong residents believe that there is more gaming in the region, now than three years ago. In addition, our survey found that 17.4% of Maribyrnong residents or members of their family have experienced difficulties with excessive gambling, with 66% of this group experiencing difficulties in the last six months. This compares with 9.1% of respondents in our other study regions. Overall, our study finds that a greater percentage of Maribyrnong residents have problems with gambling, compared to residents in the other study regions.

Figure 6.1: Opinion on the impact of gaming, Maribyrnong



(*): Statistically significant difference between Maribyrnong and the average of the other regions

- Community service organisations strongly associated the availability of EGMs at local venues with increasing incidence of gambling problems. However, it was recognised by many organisations that gambling isn't the source of all problems, with drug problems and unemployment being cited as major concerns. Often, social problems arising from gambling are the result of a number of influences.
- A number of community service organisations argued that the introduction of EGMs at hotels and clubs has resulted in a reduction in the number of restaurants. However, there were no suggestions that EGMs had caused other businesses to close.

- A smaller club noted that its extensive range of member activities, such as snooker, darts, hookey, and other entertainment were not viable without the revenue supplied by EGMs. Additionally, it supports other social sub-clubs (basketball, golf, football and bowls), and one hotel was able to sponsor the Footscray Lacrosse Club; and
- Another smaller club noted that EGMs had improved social opportunities for ethnic women in particular.

6.2 Economic effects

Overall, the perceptions of the economic impacts of EGMs on the local community are mixed; gaming venues argue that they have been able to improve facilities and offer increased employment opportunities for local residents, particularly young adults and women who may otherwise have little opportunity for employment elsewhere.

Several of the clubs and hotels visited had undergone recent refurbishment projects to provide improved facilities. One hotel was able to refurbish its premises to include seminar facilities to attract a corporate market. A smaller club was in financial difficulty prior to the introduction of EGMs, with the club reporting losses in 1989-91 financial years. EGMs were reported to have arrested the slide and allowed the club to upgrade facilities including a new dining room and renovations to other areas. One hotel operator claimed that EGMs had allowed him to change the demographic profile of his clientele. Formerly, the hotel attracted heavy drinkers and experienced regular crowd control problems. Now the venue attracts a diverse clientele, consisting of older people during the day to local business people during lunches and afternoons. Another smaller club also reported financial difficulties that have been appeased by the introduction of EGMs. However, little upgrading of facilities had occurred at this venue.

All gaming venues reported increased employment after the introduction of EGMs:

- a small club employed 2 people full time and 11 on a casual basis;
- a large club employed approximately 90 people, with 10 on a full time basis;
- one hotel employed approximately 24 people, with 10 full time; and
- a mid-sized club employed 10 workers, with 4 full time.

The Maribyrnong Chamber of Commerce was less positive about the effect of gaming on local business. While recognising a positive effect on venues themselves, they noted that other businesses were “hurting” as a result of EGMs. Consequently, the Chamber of Commerce has a policy position against the further introduction of EGMs in the area. Evidence provided, however, was largely anecdotal.

The two non-gaming venues we visited had taken different approaches to dealing with the introduction of EGM venues. These venues were more circumspect about the introduction of EGMs to the area. While both noted that hotels in the area had been somewhat ‘cleaned up’ by the introduction of EGMs, the non-gaming venues considered that playing gaming machines was anti-social rather than social behaviour. Other negative impacts on shopping centres / retail strips were identified, although again causality is an issue here. Drugs were perceived to be a larger social ‘problem’ than gaming.

Community service organisations argue that EGMs have contributed to increased social problems, and demands on their services, but this has not been matched by higher funding levels. Accordingly community organisations contend that there is a negative net economic impact resulting from EGMs.

6.3 Perceived benefits and costs

To summarise, during our consultations, the following costs and benefits of gaming were identified.

6.3.1 Benefits

Gaming venues argued that there are identifiable benefits associated with the operation of EGMs:

- Venues have been able to upgrade their facilities and offer more services to members and consumers.
- Most venues were also positive about the effect of the EGMs on social opportunities for gamers who are looking for an “entertainment package” and for members of the general community, who may otherwise have lost the services offered by the clubs that were struggling financially prior to the introduction of EGMs. Club venues point to the fact that they offer a safe, comfortable environment for members and guests. The venues often offer free access to sporting and recreational facilities. Additionally, other social sub-clubs (basketball, golf, football, bowls and ethnic-based clubs) have been developed.
- It was noted that there have been improved social opportunities for women in particular, through the provision of a safe licensed venue. The safety of these venues tends to attract older people, particularly women, who feel more comfortable due to the presence of security and the non-threatening nature of gaming (as opposed to a hotel where drinking is the primary form of entertainment or means of socialisation). Socialisation with staff (however small) can also be important to older people with limited social opportunities.
- Many venues (particularly clubs) emphasised the support of a number of local clubs, which would not have been possible without EGMs and the additional revenue they provide. This not only included clubs internal to the larger club (sub-clubs) but also external organisations such as the local football or cricket clubs. In part this support might be seen as form of marketing in that it could encourage people to use the venue more. One club advised that it donates 10% of pre-tax profits into a community support fund from which donations are made to local charities and groups.

6.3.2 Costs

While some community organisations recognise a positive role for gaming venues in terms of social opportunities, most see these as being outweighed by the consequences of problem gambling. Problem gambling is considered to be the major cost of gaming in the community. Few community organisations recognised benefits to the area from contributions from the Community Support Fund.

The negative economic effects observed in consultations related to the diversion of discretionary spending from other local businesses to EGM venues. In practice, identifying the effect of EGM venues on local business is virtually impossible. A range of factors will have influenced business activity in Maribyrnong, including general economic conditions, other social and economic problems (e.g. drugs, unemployment) and consumer preferences in the area (e.g. caused by an ageing population).

Appendix 1

VCGA Gaming Survey		Marib'g	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
PART B - PERSONAL VALUES										
Life in general										
1	I am really happy with life	73.20	74.20	-1.00		0.62	X5B(1)	73.0	19.2	7.8
2	The Australian economy is doing well	53.15	53.20	-0.05		0.976	X5B(2)	42.5	28.1	29.4
3	The Australian economy is getting better	53.00	52.85	0.15		0.943	X5B(3)	36.5	37.7	25.8
4	My life will be better in the next year than it was last year	66.63	67.20	-0.58		0.79	X5B(4)	59.9	26.9	13.2
5	My family's financial situation is good	62.43	65.60	-3.18		0.149	X5B(5)	56.9	28.1	15.0
6	I feel that where I end up in life will be more a matter of luck than planning	42.38	44.30	-1.93		0.477	X5B(6)	32.4	15.0	52.7
7	I believe rules should never be broken	48.20	53.30	-5.10		0.069	X5B(7)	36.0	23.4	40.8
8	I seek out the latest things	47.60	49.10	-1.50		0.53	X5B(8)	32.4	28.7	38.9
9	I am healthy	70.80	72.78	-1.98		0.363	X5B(9)	72.4	15.6	12.0
10	I rarely feel stressed	46.40	45.98	0.43		0.863	X5B(10)	37.1	18.6	44.3
Belonging and friendship										
11	I have a good family life	78.15	79.53	-1.38		0.47	X5B(11)	85.6	6.0	8.4
12	Security is of concern to me	73.65	71.85	1.80		0.414	X5B(12)	74.8	12.0	13.2
13	I am hardly ever lonely	68.28	68.98	-0.70		0.759	X5B(13)	69.5	12.6	18.0
Levels of activity										
14	I am always busy	77.10	78.85	-1.75		0.396	X5B(14)	77.8	13.8	8.4
Fun and going out										
15	I have a full social life	63.18	61.78	1.40		0.551	X5B(15)	59.3	19.2	21.6
16	I like crowds	51.50	46.25	5.25		0.054	X5B(16)	41.9	19.8	38.3
17	I am hardly ever bored	69.45	68.43	1.03		0.64	X5B(17)	69.5	18.6	12.0
Risk										
18	Taking risks gives me a thrill	52.10	44.65	7.45	p	0.006	X5B(18)	43.1	21.0	36.0
Trust										
19	I believe most people can be trusted	48.50	45.78	2.73		0.24	X5B(19)	34.1	30.5	35.4
Income										
20	I always have enough money to go around	52.85	52.40	0.45		0.864	X5B(20)	49.1	15.0	36.0
21	I buy luxuries	45.80	41.63	4.18		0.105	X5B(21)	35.9	19.8	44.3
Shopping										
22	I am a spender, not a saver	52.85	48.00	4.85		0.063	X5B(22)	40.8	21.0	38.3
Thinking about your suburb or region										
23	Overall, this is a good suburb or region to live in	68.13	74.68	-6.55	p	0.004	X5B(23)	68.9	16.8	14.4
24	The local economy is good	54.05	55.45	-1.40		0.503	X5B(24)	41.9	29.9	28.2
25	The local shops are doing well financially	52.70	51.85	0.85		0.698	X5B(25)	36.5	37.1	26.4
26	There is a real sense of community around here	59.43	63.88	-4.45		0.051	X5B(26)	55.1	18.6	26.4
27	It is safe around here	50.90	62.60	-11.70	* p	0	X5B(27)	43.1	23.4	33.6
28	There is no crime around here	23.35	35.28	-11.93	* p	0	X5B(28)	7.8	14.4	77.8
29	There is plenty of work around here	36.68	40.25	-3.58		0.101	X5B(29)	18.0	25.7	56.3
30	People play sport around here	67.83	74.88	-7.05	p	0	X5B(30)	67.1	24.6	8.4
Thinking about your life 3 years ago										
31	I was living in this suburb or region 3 years ago	74.40	79.10	-4.70		0.087	X5B(31)	81.4	1.2	17.4

VCGA Gaming Survey		Marib'g	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree
ref: VCGA99-BD09-Reports.xls					(word)					
Life in general										
32	I am happier than I was 3 years ago	64.53	67.98	-3.45		0.131	X5B(32)	55.7	28.7	15.6
33	The Australian economy is better now than it was 3 years ago	58.98	61.13	-2.15		0.297	X5B(33)	49.1	32.9	18.0
34	My family's financial situation is better than it was 3 years ago	60.18	61.50	-1.33		0.551	X5B(34)	55.1	22.8	22.2
35	I am healthier now than I was 3 years ago	53.30	55.00	-1.70		0.453	X5B(35)	38.9	31.1	30.0
36	I feel less stressed now than I did 3 years ago	51.05	52.10	-1.05		0.661	X5B(36)	37.7	27.5	34.7
Belonging and friends hip										
37	I have a better family life now than I did 3 years ago	57.33	60.93	-3.60		0.105	X5B(37)	43.1	37.1	19.8
38	I am less concerned with security now than I was 3 years ago	40.13	46.85	-6.73	p	0.004	X5B(38)	22.8	26.9	50.3
39	I am less lonely now than I was 3 years ago	51.20	54.83	-3.63		0.092	X5B(39)	31.8	38.9	29.4
Levels of activity										
40	I am busier now than I was 3 years ago	62.58	66.68	-4.10		0.081	X5B(40)	55.1	24.0	21.0
Fun and going out										
41	I have a better social life now than I did 3 years ago	50.60	53.63	-3.03		0.181	X5B(41)	33.0	34.1	32.9
42	I am less bored now than I was 3 years ago	55.55	58.58	-3.03		0.139	X5B(42)	37.7	41.9	20.4
Ris k										
43	I take more risks now than I did 3 years ago	42.08	43.95	-1.88		0.425	X5B(43)	27.0	21.6	51.5
Trust										
44	I trust people more now than I did 3 years ago	35.93	38.58	-2.65		0.186	X5B(44)	11.4	35.9	52.7
Income										
45	My money goes further now than it did 3 years ago	34.58	37.93	-3.35		0.181	X5B(45)	21.6	15.0	63.5
46	I buy more luxuries now than I did 3 years ago	36.23	37.85	-1.63		0.507	X5B(46)	21.6	16.8	61.7
Thinking about your suburb or region compared to how it was 3 years ago										
47	This suburb or region is better to live in now than 3 years ago	53.60	52.95	0.65		0.76	X5B(47)	36.5	36.5	27.0
48	The local economy is better now than it was 3 years ago	51.05	51.20	-0.15		0.938	X5B(48)	30.5	43.1	26.4
49	The local shops are doing better financially than they were 3 years ago	48.50	49.85	-1.35		0.51	X5B(49)	27.6	42.5	30.0
50	There is a better sense of community around here now than there was 3	52.85	53.48	-0.63		0.734	X5B(50)	33.5	43.7	22.8
51	It is safer around here now than 3 years ago	38.78	44.15	-5.38	p	0.005	X5B(51)	10.2	44.9	44.9
52	There is less crime around here than 3 years ago	34.13	39.88	-5.75	p	0.003	X5B(52)	9.0	35.3	55.7
53	There is more work around here than there was 3 years ago	40.73	44.13	-3.40		0.094	X5B(53)	16.2	36.5	47.3
54	People play more sport around here than they did 3 years ago	51.80	53.48	-1.68		0.35	X5B(54)	24.0	57.5	18.6
Gaming- explain that gaming is electronic gaming machines or pokies and the games played at the casino										
55	There is more gaming in our suburb or region than there was 3 years ago	83.53	79.03	4.50	p	0.013	X5B(55)	85.0	12.0	3.0
56	I think electronic gaming (or pokies) have been good for our suburb or	25.00	27.28	-2.28		0.299	X5B(56)	10.8	17.4	71.8
57	Gaming has increased employment in our suburb or region	48.35	49.30	-0.95		0.697	X5B(57)	39.5	27.5	33.0
58	Gaming has improved social life in our suburb or region	34.43	36.05	-1.63		0.502	X5B(58)	19.8	22.8	57.4
59	Gaming has improved family life in our suburb or region	18.43	19.73	-1.30		0.459	X5B(59)	3.6	12.0	84.4
60	The casino has been good for our suburb or region	29.95	31.18	-1.23		0.597	X5B(60)	15.0	20.4	64.6
61	There are not enough gaming machines in our suburb or region	12.73	13.90	-1.18		0.488	X5B(61)	3.0	7.8	89.2
62	Gambling related problems have got worse in the last 3 years	81.15	79.65	1.50		0.484	X5B(62)	83.8	7.8	8.4
63	Gambling does more good for the Community than harm	18.43	20.05	-1.63		0.386	X5B(63)	4.8	13.2	82.0
64	Gambling is a serious social problem	81.15	79.30	1.85		0.392	X5B(64)	83.8	7.8	8.4
65	Have you, yourself or any of your family ever experienced difficulties with	17.40	9.10	8.30	* p	0.009	X2B(65)	17.4	0.0	82.6
66	(IF YES TO ABOVE) Was that during the last 6 months or more than 6	65.50	71.10	-5.60		0.597	X2B(66)	65.5	0.0	34.5
67	Have you participated in any gambling activities in the last 6 months	49.70	51.60	-1.90		0.652	X2B(67)	49.7	0.0	50.3

VCGA Gaming Survey		Marib'g	Other	diff	diff	prob	var	%Agree	%Neutral	%Dis agree
ref: VCGA99-8DT 09-Reports.xls					(word)					
PART C - FREQUENCY OF CONSUMPTION										
In the last month, how many times did you visit.....?										
1	Department stores	4.38	4.32	0.06		0.855	XFC(1)			
2	Shopping centres	6.46	6.60	-0.13		0.762	XFC(2)			
In the last month, how many of the items in any of the following categories did you buy..?										
3	Clothing	3.47	3.44	0.03		0.93	XFC(3)			
4	Fashion accessories	0.90	0.82	0.08		0.577	XFC(4)			
5	Books	2.47	1.89	0.58		0.063	XFC(5)			
6	Cds	1.41	1.13	0.28		0.159	XFC(6)			
7	Computer software, hardware and accessories	0.26	0.59	-0.33	p	0.001	XFC(7)			
8	Home wares	1.27	1.12	0.15		0.397	XFC(8)			
In the last month, how many times did you.....?										
9	Go to a BYO or licensed restaurant	2.47	2.05	0.42		0.134	XFC(9)			
10	Eat takeaw ays	4.84	3.81	1.04	p	0.015	XFC(10)			
11	See a movie at a cinema	1.19	0.68	0.50	p	0.004	XFC(11)			
12	Go to a pub or bar for drinks only	1.78	1.42	0.36		0.187	XFC(12)			
13	Go to a night club or disco	0.85	0.55	0.30		0.162	XFC(13)			
In the last six months, have you										
14	Bought or built a house or flat	3.59	5.52	-1.93		0.243	XFC(14)			
15	Carried out renovations of more than \$5,000	10.78	6.96	3.82		0.138	XFC(15)			
16	Bought a car (new or used)	8.98	15.01	-6.02	p	0.018	XFC(16)			
How often do you gamble on or play.....?										
17	Bingo	3.87	3.83	0.04		0.976	XFC(17)			
18	Horse or greyhound races	7.28	5.52	1.76		0.406	XFC(18)			
19	Poker machines (pokies) at a pub or club	9.46	8.04	1.42		0.506	XFC(19)			
20	Poker machines (pokies) at Crow n Casino	1.04	1.16	-0.12		0.073	XFC(20)			
21	Table games at Crow n Casino	2.02	1.25	0.77	p	0.036	XFC(21)			
	Average frequency of Pokies,Horses and Bingo	6.65	5.79	0.86		0.477	X_GFREQ3			
	Average frequency of Pokies,Horses, Bingo, Crow n (pokies, tables)	4.07	3.93	0.13		0.835	X_GFREQ5			
22	I am gambling less now than I was 3 years ago	55.25	55.83	-0.58		0.815	X5C(22)	36.6	41.9	21.6
PART D - GAMING										
1	Would you say you are satisfied or dissatisfied w ith your experience of playing table games at Crow n Casino (very satisfied=100)	62.88	66.38	-3.50		0.501	X5D(1)	54.6	30.3	15.1
2	Each day you play table games at Crow n Casino, how much time do you spend at the gaming tables (record time in minutes)	71.82	77.64	-5.83		0.738	XND(2)			
3	Each day you play table games at Crow n Casino, on average, how much money do you spend or outlay (record amount in dollars)	85.52	103.83	-18.32	**	0.38	XND(3)			
4	Would you say you are satisfied or dissatisfied w ith your experience of playing the pokies (vsatisfied=100)	38.20	48.25	-10.05	* p	0.007	X5D(4)	22.3	23.6	54.1
5	Each day you play the pokies, how much time do you spend playing the machines (record time in minutes)	64.35	52.84	11.51	*	0.168	XND(5)			
6	Each day you play the pokies, on average, how much money do you spend or outlay (record amount in dollars)	29.08	48.68	-19.60	**	0.451	XND(6)			
7	What are the main motivations, attractions or reasons you play the pokies?									
a	Thrill/dream rewards of winning	18.10	13.90	4.20		0.4	X2D7(1)	18.1	0.0	81.9
b	Atmosphere/excitement/gives a buzz	9.70	9.30	0.40		0.908	X2D7(2)	9.7	0.0	90.3
c	Beating the odds/back a winner	4.20	3.10	1.10		0.672	X2D7(3)	4.2	0.0	95.8
d	Exchange of money/handling money	0.00	0.30	-0.30		is	X2D7(4)	0.0	0.0	100.0
e	Upbringing/family background	0.00	0.50	-0.50		is	X2D7(5)	0.0	0.0	100.0
f	Ego/self esteem	0.00	0.00	0.00		is	X2D7(6)	0.0	0.0	100.0
g	Favourite recreational activity/hobby	9.70	9.30	0.40		0.908	X2D7(7)	9.7	0.0	90.3
h	Social reasons/see friends	40.30	46.40	-6.10		0.338	X2D7(8)	40.3	0.0	59.7
i	Compulsions/addiction	2.80	0.50	2.30		0.258	X2D7(9)	2.8	0.0	97.2
j	Like taking risks/risk taker	0.00	0.50	-0.50		is	X2D7(10)	0.0	0.0	100.0
k	Belief in luck/may get lucky	9.70	13.10	-3.40		0.384	X2D7(11)	9.7	0.0	90.3
l	Want to be successful	1.40	2.60	-1.20		0.461	X2D7(12)	1.4	0.0	98.6
m	Boredom/pass time	34.70	19.80	14.90	* p	0.015	X2D7(13)	34.7	0.0	65.3
n	Other (specify)	5.60	7.50	-1.90		0.528	X2D7(14)	5.6	0.0	94.4
o	(Don't know)	1.40	1.30	0.10		0.947	X2D7(15)	1.4	0.0	98.6

VCGA Gaming Survey		Marib'g	Other	diff	diff	prob	var	%Agree	%Neutral	%Dis agree
ref: VCGA99-8DT 09-Reports.xls					(word)					
I play the pokies :										
8	For the thrill/dream of winning	55.90	50.25	5.65		0.193	X5D(8)	50.0	18.1	32.0
9	Because it is a favourite recreational activity/hobby	29.53	26.68	2.85		0.469	X5D(9)	19.4	6.9	73.6
10	Out of boredom to pass the time	43.75	36.28	7.48		0.071	X5D(10)	34.7	16.7	48.6
11	Because I like to beat the odds/back a winner	35.78	36.40	-0.63		0.876	X5D(11)	27.7	9.7	62.5
12	Because I believe I may get lucky	53.48	55.88	-2.40		0.588	X5D(12)	52.8	12.5	34.7
13	To test my skill	25.35	20.68	4.68		0.186	X5D(13)	13.9	8.3	77.8
14	To make a quick buck	42.03	40.48	1.55		0.742	X5D(14)	38.9	6.9	54.2
15	Because I like to take risks	34.73	33.00	1.73		0.649	X5D(15)	25.0	9.7	65.3
16	To enhance my social standing	20.83	19.00	1.83		0.564	X5D(16)	9.7	5.6	84.7
17	Because the money lost goes to a worthy cause	12.50	17.08	-4.58		0.074	X5D(17)	4.2	4.2	91.7
18	For social reasons; to be with friends	56.60	59.35	-2.75		0.484	X5D(18)	58.3	8.3	33.3
19	Because the atmosphere and excitement gives me a buzz	30.20	34.98	-4.78		0.185	X5D(19)	18.1	15.3	66.6
20	Because I am attracted to the venue itself	32.65	35.70	-3.05		0.407	X5D(20)	19.5	18.1	62.5
Other gambling questions										
Thinking of the last week in which you spent money on pokies or table games. If you hadn't spent the money on gambling, could you please tell me in what other ways you might have used it? (Don't read out, circle yes as										
21	Spent it on groceries or small household items	19.50	23.40	-3.90		0.427	X2D(21)	19.5	0.0	80.5
22	Put it towards major household goods (eg. TV, refrigerator)	3.70	4.40	-0.70		0.739	X2D(22)	3.7	0.0	96.3
23	Spent it on personal items (eg. clothing, footwear)	18.30	23.40	-5.10		0.288	X2D(23)	18.3	0.0	81.7
24	Spent it on restaurant meals	11.00	12.30	-1.30		0.728	X2D(24)	11.0	0.0	89.0
25	Spent it on wine, beer, etc	7.30	10.60	-3.30		0.319	X2D(25)	7.3	0.0	92.7
26	Spent it on the movies or a concert	4.90	5.90	-1.00		0.699	X2D(26)	4.9	0.0	95.1
27	Spent it on other entertainment or recreation activities	25.60	17.50	8.10	*	0.122	X2D(27)	25.6	0.0	74.4
28	Used it to pay bills/credit cards	9.80	5.20	4.60		0.19	X2D(28)	9.8	0.0	90.2
29	Used it to pay rent/mortgage	1.20	1.70	-0.50		0.715	X2D(29)	1.2	0.0	98.8
30	Spent it on other items (please specify)	8.50	12.60	-4.10		0.254	X2D(30)	8.5	0.0	91.5
31	Not spent it/Saved it/Put it in the bank	14.60	20.90	-6.30		0.156	X2D(31)	14.6	0.0	85.4
32	(Don't know)	3.70	2.20	1.50		0.516	X2D(32)	3.7	0.0	96.3
Which type of venue do you play pokies at (MULTIPLE RESPONSE):										
33	Pub/hotel	45.80	41.20	4.60		0.476	X2D(33)	45.8	0.0	54.2
34	Licensed sports club (golf, football, bowls etc)	13.90	29.40	-15.50	** p	0.001	X2D(34)	13.9	0.0	86.1
35	RSL Club	15.30	18.60	-3.30		0.487	X2D(35)	15.3	0.0	84.7
36	Some other sort of licensed club	18.10	15.50	2.60		0.6	X2D(36)	18.1	0.0	81.9
37	Melbourne Crown Casino	25.00	22.20	2.80		0.611	X2D(37)	25.0	0.0	75.0
38	Or somewhere else (specify)	2.80	1.50	1.30		0.549	X2D(38)	2.8	0.0	97.2
Which type of venue do you go to the most to play pokies (single										
40	Pub/hotel	37.50	35.60	1.90		0.757	X2D(40)	37.5	0.0	62.5
41	Licensed sports club (golf, football, bowls etc)	8.30	24.20	-15.90	** p	0	X2D(41)	8.3	0.0	91.7
42	RSL Club	13.90	13.90	0.00		0.995	X2D(42)	13.9	0.0	86.1
43	Some other sort of licensed club	18.10	10.60	7.50		0.124	X2D(43)	18.1	0.0	81.9
44	Melbourne Crown Casino	19.40	14.90	4.50		0.374	X2D(44)	19.4	0.0	80.6
45	Or somewhere else (specify)	2.80	0.80	2.00		0.319	X2D(45)	2.8	0.0	97.2
Thinking of the last time you played the pokies at a club or pub (not including										
47	How far did you travel to get to this venue? (km)	1.94	2.63	-0.69	p	0	XND(47)			
48	Did you go to this venue									
	* From home	28.10	33.00	-4.90		0.207	2START(1)	28.1	0.0	71.9
	* On the way to or from work	3.00	1.90	1.10		0.446	2START(2)	3.0	0.0	97.0
	* From somewhere else	9.60	8.90	0.70		0.78	2START(3)	9.6	0.0	90.4
49	I visit that venue more than other venues	56.98	52.88	4.10		0.376	X5D(49)	57.4	4.4	38.2
50	I really like visiting the venue	58.10	54.18	3.93		0.291	X5D(50)	51.4	20.6	27.9
51	I have lots of good luck there	30.88	28.35	2.53		0.382	X5D(51)	7.4	27.9	64.7
52	It is enjoyable and thrilling	46.70	43.83	2.88		0.416	X5D(52)	35.3	25.0	39.7
53	I had a meal	51.48	60.75	-9.28	* p	0.05	X5D(53)	47.1	5.9	47.1

VCGA Gaming Survey		Marib'g	Other	diff	diff	prob	var	%Agree	%Neutral	%Dis agree
ref: VCGA99-8DT 09-Reports.xls					(word)					
	I went to the venue..									
54	to relax	56.25	66.50	-10.25	* p	0.008	X5D(54)	51.5	17.6	30.9
55	because it is easy to get to	65.80	66.30	-0.50		0.891	X5D(55)	69.1	11.8	19.1
56	because it is open all hours	45.60	41.03	4.58		0.231	X5D(56)	36.8	16.2	47.1
57	because it has all the entertainment I need under one roof	50.38	47.53	2.85		0.484	X5D(57)	42.7	16.2	41.2
58	because it is a good place to socialise	49.28	54.53	-5.25		0.173	X5D(58)	36.7	25.0	38.2
59	because it is a good place to drink	44.13	44.25	-0.13		0.976	X5D(59)	36.8	16.2	47.1
60	because it is a good place to gamble	45.23	42.80	2.43		0.537	X5D(60)	33.8	23.5	42.7
61	because there are good meals and restaurants	61.78	65.95	-4.18		0.214	X5D(61)	58.8	23.5	17.6
62	because it has the sort of pokies I like	47.05	43.55	3.50		0.402	X5D(62)	36.8	22.1	41.1
63	because it has lots of pokies	46.33	38.55	7.78	* p	0.05	X5D(63)	35.3	17.6	47.1
	On your last visit to a gaming venue									
64	What time did you arrive:									
	8 am to 12 noon	4.90	6.40	-1.50		0.571	X2TIME(1)	4.9	0.0	95.1
	12 noon to 4 pm	23.20	17.70	5.50		0.285	X2TIME(2)	23.2	0.0	76.8
	4 pm to 8 pm	37.80	43.80	-6.00		0.31	X2TIME(3)	37.8	0.0	62.2
	8 pm to midnight	31.70	28.30	3.40		0.55	X2TIME(4)	31.7	0.0	68.3
	midnight to 4 am	2.40	2.70	-0.30		0.887	X2TIME(5)	2.4	0.0	97.6
	4 am to 8 am	0.00	1.00	-1.00		is	X2TIME(6)	0.0	0.0	100.0
65	How long did you stay(hours)	2.23	2.50	-0.26		0.08	XND(65)			
	Thinking about w hen you last played the pokies									
66	How much did you w in? (a lot=100)	34.38	41.23	-6.85	p	0.031	X5D(66)	15.3	16.7	68.1
67	I had really good luck	28.13	36.08	-7.95	* p	0.023	X5D(67)	13.9	15.3	70.8
68	I enjoyed myself	60.43	63.15	-2.73		0.411	X5D(68)	59.7	23.6	16.6
	I w ould game more if:									
69	There w as a more conveniently located venue	22.55	22.23	0.33		0.916	X5D(69)	9.8	7.3	83.0
70	The venue w as more attractive and comfortable	22.25	26.48	-4.23		0.191	X5D(70)	12.2	4.9	82.9
71	The venue w as open longer	17.38	20.08	-2.70		0.237	X5D(71)	2.4	6.1	91.5
72	There w ere more machines available	18.90	20.45	-1.55		0.58	X5D(72)	7.3	4.9	87.8
73	There w as more variety in the types of machines available	23.48	27.10	-3.63		0.241	X5D(73)	8.6	11.0	80.5
PART E										
	Which any of these statements applied to you personally in the last 6									
1	When you gamble, how often do you go back another day to w in back	1.26	1.15	0.11		0.117	XNE(1)			
2	Have you ever claimed to be WINNING money w hen you really had lost?	1.09	1.11	-0.02		0.529	XNE(2)			
3	Do you feel you have had a problem w ith gambling or that your gambling	1.22	1.08	0.14	p	0.03	XNE(3)			
	The follow ing questions still relate to the last 6 months and only require a									
4	Did you gamble more than you intended to?	34.90	16.60	18.30	** p	0	X2E(4)	34.9	0.0	65.1
5	Have people criticised your gambling?	11.30	5.70	5.60		0.087	X2E(5)	11.3	0.0	88.7
6	Have you felt guilty about the w ay you gamble or w hat happens w hen you	18.90	11.40	7.50		0.068	X2E(6)	18.9	0.0	81.1
7	Have you felt that you w ould like to stop gambling but didn't think you could?	8.50	2.40	6.10	p	0.033	X2E(7)	8.5	0.0	91.5
8	Have you hidden betting slips, gambling money or any other sign of gambling from your partner, children or other important people in your life?	4.70	3.10	1.60		0.472	X2E(8)	4.7	0.0	95.3
9	Have you ever argued w ith people you live w ith about how you generally	13.20	14.90	-1.70		0.639	X2E(9)	13.2	0.0	86.8
10	Have money arguments ever centred on your gambling?	28.60	13.60	15.00	*	0.27	X2E(10)	28.6	0.0	71.4
11	Have you borrow ed money from someone and not paid them back because	1.90	0.70	1.20		0.406	X2E(11)	1.9	0.0	98.1
12	Have you lost time from work or study because of gambling?	0.90	0.70	0.20		0.84	X2E(12)	0.9	0.0	99.1
13	Have you ever borrow ed money to gamble or pay off gambling debts?	5.70	1.80	3.90		0.104	X2E(13)	5.7	0.0	94.3
14	Have you ever borrow ed money to gamble or to pay gambling debts from	3.80	1.70	2.10		0.278	X2E(14)	3.8	0.0	96.2
15	Have you borrow ed money to gamble or to pay gambling debts from your	2.80	1.50	1.30		0.427	X2E(15)	2.8	0.0	97.2
16	(Have you borrow ed money to gamble or to pay gambling debts) from other	0.90	0.70	0.20		0.842	X2E(16)	0.9	0.0	99.1
17	(Have you borrow ed money to gamble or to pay gambling debts) from banks, finance companies or credit unions?	0.00	0.40	-0.40		is	X2E(17)	0.0	0.0	100.0
18	(Have you borrow ed money to gamble or to pay gambling debts) from credit	0.90	1.70	-0.80		0.512	X2E(18)	0.9	0.0	99.1
19	(Have you borrow ed money to gamble or to pay gambling debts) from high interest rate finance companies?	0.00	0.00	0.00		is	X2E(19)	0.0	0.0	100.0
20	(Have you borrow ed money to gamble or to pay gambling debts) from cashing in stocks, bonds or other securities?	1.90	0.40	1.50		0.264	X2E(20)	1.9	0.0	98.1
21	(Have you borrow ed money to gamble or to pay gambling debts) from selling personal or company property?	0.00	0.60	-0.60		is	X2E(21)	0.0	0.0	100.0
22	(Have you borrow ed money to gamble or to pay gambling debts) by w riting cheques knowing there w as no money in the account?	0.00	0.00	0.00		is	X2E(22)	0.0	0.0	100.0
	SOGs score	0.73	0.43	0.29	p	0.026	SOG			
	No risk (score<=4)	97.00	98.20	-1.20		0.395	X2SOG(1)	97.0	0.0	3.0
	One in 5 risk (score>=5 and score<=6)	1.80	1.20	0.60		0.588	X2SOG(2)	1.8	0.0	98.2
	One in 2 risk (score>=7 and score<=9)	0.60	0.40	0.20		0.707	X2SOG(3)	0.6	0.0	99.4
	One in 1 risk (score>=10)	0.60	0.20	0.40		0.565	X2SOG(4)	0.6	0.0	99.4

VCGA Gaming Survey		Marib'g	Other	diff	diff	prob	var	%Agree	%Neutral	%Dis agree
ref: VCGA99-BDT 09-Reports.xls					(word)					
PART A - SAMPLE AND DEMOGRAPHICS										
1	Gender (male=0 female=100)	53.90	50.50	3.40		0.43	X2A(1)	53.9	0.0	46.1
2	Region									
	Dandenong	0.00	20.00	-20.00	**	is	X2LOC(1)	0.0	0.0	100.0
	Geelong	0.00	20.00	-20.00	**	is	X2LOC(2)	0.0	0.0	100.0
	Maribyrnong	100.00	0.00	100.00	***	is	X2LOC(3)	100.0	0.0	0.0
	Midura	0.00	20.00	-20.00	**	is	X2LOC(4)	0.0	0.0	100.0
	Moreland	0.00	19.90	-19.90	**	is	X2LOC(5)	0.0	0.0	100.0
	Wellington/ South Gippsland	0.00	19.90	-19.90	**	is	X2LOC(6)	0.0	0.0	100.0
1	Do you live with a partner or spouse? (No=0 Yes=100)	44.30	58.90	-14.60	* p	0.001	X2F(1)	44.3	0.0	55.7
2	Do you have dependent children living at home? (No=0 Yes=100)	22.80	38.90	-16.10	** p	0	X2F(2)	22.8	0.0	77.2
3	Do you receive a government pension or benefit? (No=0 Yes=100)	36.50	38.50	-2.00		0.625	X2F(3)	36.5	0.0	63.5
4	Are you the main income earner? (No=0 Yes=100)	65.30	62.40	2.90		0.484	X2F(4)	65.3	0.0	34.7
5	Highest education level? (1=primary 4=year 12 7=degree)	4.05	3.90	0.16		0.304	XNF(5)			
	Less than year 12	41.90	51.70	-9.80	* p	0.02	X2ED(1)	41.9	0.0	58.1
	Year 12	32.30	21.60	10.70	* p	0.006	X2ED(2)	32.3	0.0	67.7
	Trade or diploma	10.20	15.20	-5.00		0.058	X2ED(3)	10.2	0.0	89.8
	Degree	15.60	11.40	4.20		0.17	X2ED(4)	15.6	0.0	84.4
6	Work status?									
	* Work full time (for money)	43.10	43.00	0.10		0.974	X2JOB(1)	43.1	0.0	56.9
	* Work part time(for money)	19.20	18.80	0.40		0.925	X2JOB(2)	19.2	0.0	80.8
	* Household duties only	4.80	9.00	-4.20	p	0.03	X2JOB(3)	4.8	0.0	95.2
	* Full time student	8.40	4.40	4.00		0.084	X2JOB(4)	8.4	0.0	91.6
	* Retired (self supporting)	7.80	10.00	-2.20		0.349	X2JOB(5)	7.8	0.0	92.2
	* Other pensioner	13.20	11.30	1.90		0.507	X2JOB(6)	13.2	0.0	86.8
	* Unemployed	65.90	65.20	0.70		0.866	X2JOB(7)	65.9	0.0	34.1
		34.10	34.70	-0.60		0.889	X2JOB(8)	34.1	0.0	65.9
7	What is (was) your occupation?									
	Un-s killed Blue Collar									
	Semi-s killed Blue Collar	7.20	7.10	0.10		0.963	X2OCC(1)	7.2	0.0	92.8
	Skilled Blue Collar	12.60	10.00	2.60		0.348	X2OCC(2)	12.6	0.0	87.4
	Lower White Collar	10.80	13.60	-2.80		0.3	X2OCC(3)	10.8	0.0	89.2
	Upper White Collar	30.50	26.80	3.70		0.334	X2OCC(4)	30.5	0.0	69.5
	Senior Upper White Collar	7.80	11.60	-3.80		0.103	X2OCC(5)	7.8	0.0	92.2
8	What industry do (did) you work in?	0.00	1.40	-1.40		is	X2OCC(6)	0.0	0.0	100.0
9	Were you or your parents born overseas?	40.70	27.80	12.90	* p	0.001	X3F(9)	31.1	19.2	49.7
10	What was the main language spoken at home when you were growing up?									
	English	49.70	62.80	-13.10	* p	0.002	X2LANG(1)	49.7	0.0	50.3
	Mandarin	19.20	18.80	0.40		0.925	X2LANG(2)	19.2	0.0	80.8
	Cantonese	31.10	18.40	12.70	* p	0.001	X2LANG(3)	31.1	0.0	68.9
	Vietnamese	0.00	0.00	0.00		is	X2LANG(4)	0.0	0.0	100.0
	Spanish	0.00	0.00	0.00		is	X2LANG(5)	0.0	0.0	100.0
	Italian	0.00	0.00	0.00		is	X2LANG(6)	0.0	0.0	100.0
	Greek	0.00	0.00	0.00		is	X2LANG(7)	0.0	0.0	100.0
	Other	0.00	0.00	0.00		is	X2LANG(8)	0.0	0.0	100.0
11	Age in years	41.80	43.97	-2.17		0.114	AGE			
12	What is the gross (before tax) family income?	30.61	32.57	-1.96		0.352	INCOME			
		16.700	83.300 %*			14.458 %*				
		167.00	833.00							

Victorian Casino and Gaming Authority

Report of the 1999
Longitudinal Community
Impact Study: Mildura
regional profile

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1 Summary

Mildura is a city in northwestern Victoria, which has enjoyed strong economic growth in recent years. In contrast to many rural areas in Victoria, the population of Mildura has been increasing at a faster rate than Victoria as a whole, and is projected to continue to do so. As with other rural regions, it has a higher proportion of young and aged people, and a higher proportion of married couples, although this is declining, as is the proportion of households consisting of couples with children. The residents of Mildura are more likely to be Australian born and to be Christians, than the average of the other regions. They are generally more mobile than Victorians as a whole but are less well educated and have lower incomes, and in recent years there has been an increase in numbers of social security recipients. Mildura has a lower crime rate than Victoria as a whole, but this has been increasing in recent years.

Mildura would appear to have a relatively buoyant local economy, particularly in comparison to other Victorian rural regions. However, in common with other rural regions, its labour force participation rate is slightly below that of Victoria as a whole and its unemployment rate is above the State average. Its workforce is concentrated in agriculture, forestry and fishing and in retail trade. Reflecting these industry concentrations, there is a relatively high proportion of the workforce who work as managers and administrators (including farm owner-operators) and as labourers. House prices and sales are relatively high and tourism continues to provide considerable value to the local economy.

More than 75% of Mildura respondents believe their region is good to live in, and over 60% believe the economy is doing well. Crime and safety are lesser issues than in the average of the six regions. About 55% believe that things are better than three years ago. Mildura respondents are happier and more positive about their region than respondents in other study regions.

Mildura has a comparatively low number of EGMs per head and a low concentration of EGMs per gaming venue. Over recent years, the number of venues has been static and the number of machines has been slowly increasing. However, Mildura does face considerable competition for gambling revenue from NSW venues. Gaming expenditure has grown in Mildura from \$3.53M in 1992/1993 to \$16.99M in 1998/1999. However, annual gaming expenditure per adult in Mildura is 94% higher than the average of non-metropolitan LGAs but is 11% lower than the State average.

In our survey, 56% of respondents in Mildura gambled in the last 6 months. Playing poker machines is the most popular form of gambling, with the most popular venue being an RSL club. While gamblers in Mildura patronise the Crown Casino less frequently than local gambling venues, on average they spend more money there per daily visit. Mildura gamblers spend approximately a third of their time in gaming venues playing pokies, with the majority of gamblers choosing venues on the basis of the restaurant, to relax and because it is a good place to socialise. Gamblers in Mildura travel 3.2km on average to get to a venue (0.9km more than in the other regions). The majority of gamblers arrive at gaming venues between 4pm and 8pm. Anecdotal evidence suggests there is high participation in gaming among the elderly, Aborigines, unemployed and welfare recipients, farmers and labourers and low income workers from ethnic backgrounds.

About 1% of residents in Mildura are at risk of problem gambling, and 8% of all Mildura gamblers said that they, or a member of their family, had at some time experienced

difficulties with excessive gambling. In our survey, Mildura respondents had fewer negative experiences with gaming than in the other regions, although the number of problem gamblers continues to grow, with increasing numbers of clients at problem gambling services, and substantial community concern regarding problem gambling in the Aboriginal community and among farm families.

During the course of our consultations, the following costs and benefits were identified with gaming in recent years.

Benefits

Venue operators were generally of the view that the introduction of EGMs had a number of significant benefits for the Mildura community, including:

- Significant economic flow-ons through increased levels of expenditure on food, beverage and entertainment at licensed venues;
- Increased employment in licensed venues;
- Increased financial support for community, sporting and charitable associations through the distribution of profits from EGMs.

A number of attendees at public meetings indicated that the community had benefited through the availability of improved entertainment and recreational facilities and services. Further, with the introduction of EGMs, the flow of money across the border to NSW licensed venues had reduced significantly, so that gambling expenditure by Mildura residents now stayed in the local community.

Costs

Venue operators generally did not highlight many perceived costs associated with the introduction of EGMs, however a few did recognise that there had been an increase in social problems associated with problem gamblers. Also, the introduction of EGMs in Mildura had had a significant negative impact on the trading performance of NSW border clubs due to increased competition.

Some local tourism operators said that since the introduction of EGMs in Victoria, there had been a significant decline in the number of tourists coming to Mildura to play the poker machines in NSW licensed clubs over the border. However, official statistics indicate that tourism accommodation takings in Mildura have continued to grow from the mid-1990's (although the number of establishments has declined).

Community service organisations highlighted a range of perceived costs associated with the introduction of EGMs including:

- increased incidence of problem gambling amongst at risk groups such as the elderly, welfare recipients, Aborigines, and the unemployed;

- increased incidence of social problems within family units such as domestic violence, homelessness, food shortages and a lack of financial resources to meet the normal costs of living;
- increased demand for community support services, which has meant that financial resources are stretched to the limit;
- a reduction in social interaction throughout the broader Mildura community; and
- increased crime due to people being desperate to fund their gambling habits. Official data indicates that there has been an increase in crime, but it is unclear if this is related to gaming or if it is an on-going feature of the region.

2 Description of the Local Government area of Mildura

2.1 Data sources

Data for this profile has been sourced from:

- a range of different government departments and agencies;
- consultations; and
- KPMG surveyed 1000 residents in six local government areas, of which 167 respondents lived in Mildura. The survey was conducted in October 1999. The full results of the survey are reported in Supporting Paper No.1, and the results for Mildura are attached to this paper.

It should be noted that while percentages have been included in the following tables, the total percentage for a number of tables does not equal one hundred per cent due to rounding.

2.2 The geography

The Mildura Local Government Area is a large rural geographic region encompassing an area of 22,250 km² and includes the following Statistical Local Areas:

- Mildura (RC) Pt A
- Mildura (RC) Pt B

The City of Mildura is bounded by the Murray River to the north, the South Australian border to the west, Swan Hill to the east and Yarriambiack and Hindmarsh to the South. The main town of Mildura is located approximately 550km to the northwest of the CBD of Melbourne. Figure 2.1 illustrates the Mildura Local Government Area.

Figure 2.1: Mildura LGA

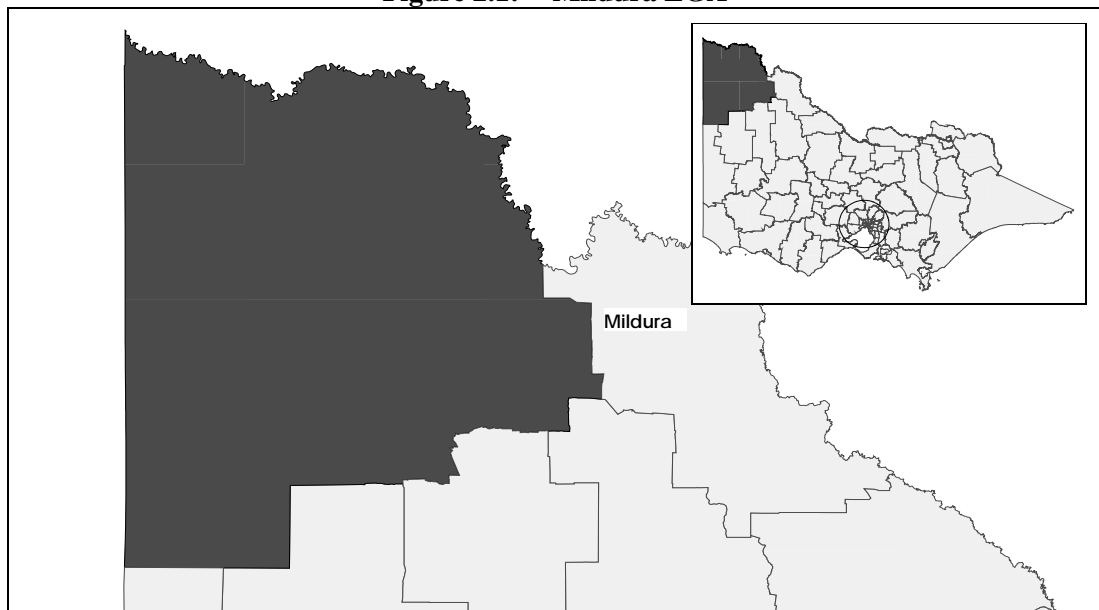
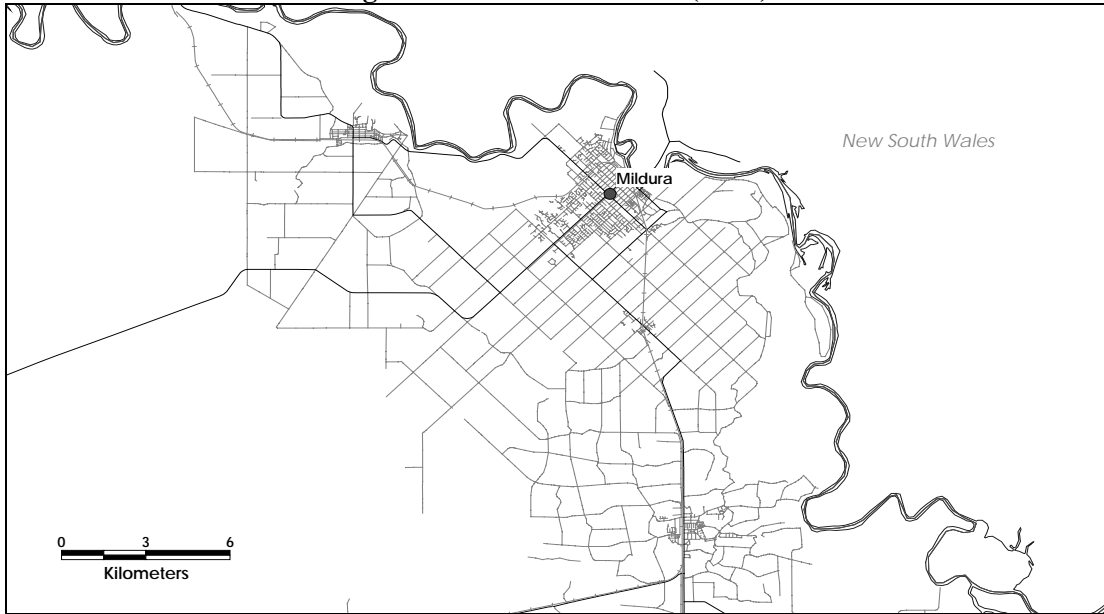


Figure 2.2: Mildura LGA (cont.)



3 Demographic profile of Mildura

3.1 The population

The population of Mildura grew 0.95% annually for the period between 1991 and 1996, which was significantly higher than the level of population growth experienced for Victoria over the same period. During the period between 1986 and 1991 the population of Mildura grew by almost 1.42% annually and was higher than the State average for the same period of 1.22%.

Population and housing forecasts prepared by the Victorian Department of Infrastructure predict that the resident population of Mildura will grow at an average annual rate of 1.02% for the period between 1996 and 2001 and 0.84% from 2001 to 2011. Additionally, housing stock is also anticipated to increase by an average annual rate of 1.26% for the period between 1996 and 2001 and 1.14% from 2001 to 2011, indicating a trend toward smaller household sizes within Mildura which is consistent with the trends expected for Victoria. The levels of average annual growth projected for the population and housing numbers of Mildura is marginally less than that forecast for the State, although it is higher than the level of growth anticipated for Regional Victoria. Population projections obtained from the Department of Infrastructure for Mildura, Regional Victoria and Victoria are presented in Table 3.1 below.

Table 3.1: Projections of household numbers and estimated resident population

Population and household forecasts						
Number of households = number of occupied private dwellings						
Year	Mildura		Regional Victoria		Victoria	
	Population	Households	Population	Households	Population	Households
Actual 1981	38,344	11,521	1,090,996	338,514	3,851,094	1,238,617
1986	41,506	13,788	1,193,447	384,965	4,160,785	1,355,308
1991	44,537	15,583	1,264,078	426,546	4,420,298	1,476,047
1996	46,683	18,138	1,297,976	500,042	4,539,400	1,699,920
Forecast 2001	49,121	19,314	1,356,830	530,329	4,735,710	1,799,383
2011	53,388	21,634	1,470,627	590,961	5,092,312	1,990,051
2021	57,787	23,945	1,576,162	648,882	5,399,730	2,163,024
Annual change (%) 1981-1986	1.60	3.66	1.81	2.61	1.56	1.82
1986-1991	1.42	2.48	1.16	2.07	1.22	1.72
1991-1996	0.95	3.08	0.53	3.23	0.53	2.86
Forecast annual change (%) 1996-2001	1.02	1.26	0.89	1.18	0.85	1.14
Forecast annual change (%) 2001-2011	0.84	1.14	0.81	1.09	0.73	1.01
2011-2021	0.79	1.02	0.70	0.94	0.59	0.84

Annual percentage change measured as a compound growth rate
Source: Department of Infrastructure 1991 projections. Revised data for 1996 shown.

3.2 Age distribution

At the time of the 1996 Census, the Mildura resident population had a similar age profile to that of Regional Victoria. Compared to Victoria as a whole, most rural regions have a higher proportion of young and old residents, reflecting the movement to urban areas of young adults for work and education. The age profile of the Mildura resident population remained

relatively stable over the period 1991 to 1996 with the only notable changes being a reduction in the proportion of the population aged 20 to 29 and an increase in the proportion of the population aged between 40 and 49. Table 2.2 summarises the age distribution for the resident population of Mildura, Regional Victoria and Victoria in 1991 and 1996.

Table 3.2: Age structure, 1991 and 1996

Age group	Mildura		Regional Victoria		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
0 – 9	16.2	16.0	16.3	15.4	14.7	14.2
10 – 19	14.8	14.3	16.0	15.3	15.2	14.1
20 – 29	14.3	12.7	13.8	12.4	16.4	15.4
30 – 39	15.4	15.2	15.6	15.0	16.0	15.9
40 – 49	12.6	13.8	12.8	14.5	13.3	14.5
50 – 59	9.6	10.2	9.0	10.0	9.1	10.0
60 – 69	9.2	9.0	8.5	8.2	7.9	7.5
70 +	8.0	9.0	8.1	9.3	7.4	8.4
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: ABS Census data 1996

3.3 Marital status

The proportion of married persons in Mildura has declined from 1991 to 1996, however this trend is consistent across Regional Victoria and Victoria. The proportion of residents from Mildura who have never been married increased marginally which is also consistent with the trend across Regional Victoria and Victoria. Similarly, the proportions of separated, divorced and widowed persons in Mildura demonstrated an increasing trend from 1991 to 1996, consistent with the general trend in Victoria. The marital status of the resident population of Mildura, Regional Victoria and Victoria as at the 1991 Census and 1996 Census are presented in Table 3.3.

Table 3.3: Marital status, 1991 and 1996

Status	Mildura		Regional Victoria		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
Married	60.0	57.4	59.3	56.2	56.4	53.6
Never Married	25.6	26.0	26.7	27.6	29.9	30.9
Separated	2.7	3.2	2.6	3.2	2.6	3.2
Divorced	4.7	6.1	4.5	5.7	4.7	5.8
Widowed	7.0	7.4	6.9	7.3	6.3	6.6
Total persons	100.0	100.0	100.0	100.0	100.0	100.0

Source: ABS Census data 1996

3.4 Birthplace

Mildura (87.2%) and Regional Victoria (86.6%) have a higher proportion of Australian born residents and have a lower level of ethnic diversity in comparison with Victoria (72.8%). From 1991 to 1996 there were no significant changes in the composition of the country of birth profile of Mildura residents, with United Kingdom remaining the primary country of origin. The country of birth of the resident population of Mildura, Regional Victoria and Victoria as a whole is presented in Table 3.4 for 1991 and 1996.

Table 3.4: Country of birth, 1991 and 1996

	Mildura		Regional Victoria		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
English-speaking countries	92.1	90.3	93.2	91.6	81.3	79.6
Non-English speaking countries	7.9	9.7	6.8	8.4	18.7	20.4
Six top ranking in Mildura:						
Australia	88.7	87.2	88.0	86.6	73.9	72.8
United Kingdom	2.5	2.3	4.2	3.9	5.5	4.9
Italy	2.4	2.1	1.0	0.9	2.5	2.3
Turkey	0.9	1.0	0.1	0.1	0.3	0.3
Greece	0.7	0.5	0.2	0.2	1.6	1.4
Croatia	n/a	0.3	0.0	0.2	n/a	0.4
All other countries	3.4	3.3	5.1	4.8	14.0	14.5
Not stated	1.4	3.3	1.5	3.2	2.1	3.3
Total persons	100.0	100.0	100.0	100.0	100.0	100.0

Source: ABS Census data 1996

3.5 Religion

While the resident population of Mildura is predominantly Christian (71%), the proportions of Christians living in Mildura and Regional Victoria are higher than the Victorian average reflecting the lower levels of ethnic diversity. The proportions of Christians declined from 1991 and 1996, while persons following the Uniting Church, Anglican and Presbyterian and reformed faiths decreased significantly. This trend was consistent in both rural Victoria and across the state as a whole. Mildura recorded an increasing proportion of persons with no religious following, however, this was consistent with the trend throughout Victoria. Table 3.5 presents the top five ranking professed religions of the resident population of Mildura in comparison to regional Victoria and the State of Victoria.

Table 3.5: Professed religion of residents, 1991 and 1996

Five top ranking in Mildura	Mildura		Regional Victoria		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
Catholic	24.9	24.7	25.9	25.8	29.2	29.0
Anglican	21.7	19.3	21.8	20.2	18.2	16.5
Uniting Church	14.3	12.7	13.6	12.4	8.1	7.3
Presbyterian and Reformed	4.5	3.8	6.5	5.6	4.6	3.9
Lutheran	2.1	2.1	1.6	1.5	1.0	1.0
Total Christian	75.3	70.6	75.3	71.8	70.7	67.6
Total Non-Christian	1.4	1.8	0.5	0.7	3.4	4.5
No Religion	13.3	18.9	13.0	18.0	14.4	18.7
Inadequately Described and Not-Notated	9.9	8.8	11.1	9.5	11.4	9.1
Total persons	100.0	100.0	100.0	100.0	100.0	100.0

Source: ABS Census data 1996

3.6 Mobility

Residents of Mildura demonstrated a comparatively high level of mobility from 1991 to 1996. At 1996, only 49.1% of residents lived at the same address as they did in 1991, compared with 53.6% of residents in Regional Victoria and 53.7% in Victoria. The

following table shows the mobility of the population of Mildura, Regional Victoria and Victoria as a whole.

Table 3.6: Mobility of the population (% of population, aged 15 and over), 1996

Usual residence	Mildura	Regional Victoria	Victoria
	%	%	%
Same address 5 years prior	49.1	53.6	53.7
Different address 5 years prior	39.4	35.9	35.8
Not stated	11.5	10.5	10.5
Total persons	100.0	100.0	100.0

Source: ABS Census data1996

3.7 Household structure

As was the case in Regional Victoria and across the state as a whole, the household structure of Mildura residents changed substantially over the period 1991 to 1996, with a marked reduction in the proportion of households comprising of couples with children, offset by a significant increase in couples without children and lone person households. As at the time of the 1996 Census, the household structure of Mildura residents was similar to that of Regional Victoria and Victoria as a whole. Table 3.7 provides a comparative summary of the demographic profile by household type and composition for Mildura, Regional Victoria and Victoria as at 1991 and 1996.

Table 3.7: Household type and composition, number of persons, 1991 and 1996

	Mildura		Regional Victoria		Victoria	
	1991	1996	1991	1996	1991	1996
One family:	%	%	%	%	%	%
Couple with children	59.6	55.4	61.0	55.8	60.9	56.6
Couple without children	18.5	20.6	18.1	20.0	16.2	17.6
One parent family	9.3	9.8	8.7	9.8	8.9	9.8
Other one family households	0.8	0.7	0.9	0.8	1.1	1.1
Total number of persons in one family households	88.2	86.6	88.6	86.4	87.2	85.1
Two or more families	0.8	1.4	0.7	1.1	1.5	2.3
Lone person households	8.3	9.6	8.1	9.7	7.7	9.0
Group households	2.7	2.4	2.6	2.9	3.6	3.6
Total persons	100.0	100.0	100.0	100.0	100.0	100.0

Source: Census data1996

3.8 Tenure

There was little change in the dwelling tenure profile of Mildura residences over the period 1991 to 1996, with a slight increase in the proportion of residents either owning or purchasing their residence. At the time of the 1996 Census, Mildura's resident population had a lower proportion of persons owning or purchasing their residence (68.0%) than Regional Victoria (74.2%) and Victoria (74.0%). Conversely, Mildura had a higher proportion of the resident population renting, compared to Regional Victoria and Victoria. The dwelling tenure profile of Mildura, Regional Victoria and Victoria is presented in Table 3.8 following.

Table 3.8: Dwelling tenure by type of landlord, 1991 and 1996

	Number of persons for each type of dwelling					
	Mildura		Regional Victoria		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
Fully owned	39.1	39.4	41.4	42.6	39.0	41.5
Being purchased	28.1	28.6	32.6	31.6	34.8	32.5
Rented (government)	6.1	5.1	5.0	4.1	3.9	3.1
Rented (other)	20.7	21.4	15.4	16.4	16.8	17.9
Other	6.0	5.5	5.6	5.2	5.6	5.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: ABS Census data 1996. In 1996, persons living in manufactured home estates and accommodation for the retired have been excluded for comparability with 1991. The 'Other' category includes 'being occupied free', 'being occupied under a life tenure scheme' and 'other/not-stated'.

3.9 Education

Over the period 1991 to 1996 there has been a marginal increase in the proportion of the Mildura population which has obtained a higher educational qualification. However as at the 1996 Census, Mildura still had a comparatively lower proportion of residents with a post-school educational qualification compared to Regional Victoria and Victoria as a whole. Table 3.9 provides a summary of the level of education attained for Mildura, Regional Victoria and Victoria in 1991 and 1996.

Table 3.9: Levels of education attainment, 1991 and 1996

Highest qualification obtained	Persons aged 15 years and over					
	Mildura		Regional Victoria		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
Higher degree	0.2	0.3	0.4	0.6	1.0	1.3
Postgraduate diploma	0.8	1.0	1.0	1.3	1.2	1.7
Bachelor degree	2.7	4.0	3.9	5.1	6.2	8.4
Undergraduate diploma	3.6	2.9	4.1	3.4	3.9	3.5
Associate diploma	1.0	1.8	1.2	2.3	1.3	2.6
Vocational qualification	11.3	11.6	13.5	13.7	12.5	12.4
No qualification	69.9	67.6	65.1	62.1	61.9	58.3
Not stated	10.3	10.8	10.8	11.5	12.1	11.7
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: ABS Census data 1996

3.10 Household income

Mildura is primarily comprised of households earning mid to low levels of gross annual household income. At the 1996 Census, 44.8% of the City's households earned a gross annual income of less than \$26,000, compared with 43.3% for Regional Victoria and 34.9% for Victoria. Correspondingly, the proportion of households in Mildura and Regional Victoria earning more than \$52,000 per annum in gross income is significantly less than that for Victoria as a whole. Table 3.10 provides a comparative summary of gross annual income per household for Mildura, Regional Victoria and Victoria as at the 1996 Census.

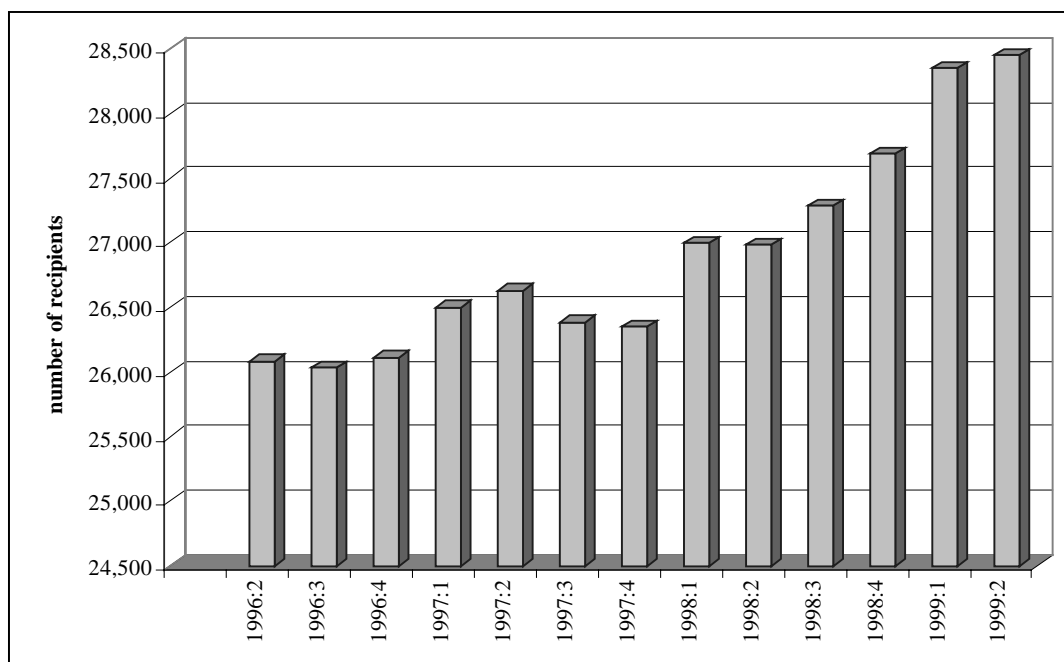
Table 3.10: Gross annual income per household (\$), 1996

Number of households			
	Mildura % of total	Regional Victoria % of total	Victoria % of total
Negative/nil income	0.7	0.8	0.7
\$52-\$6,239	0.9	1.0	0.8
\$6,240-\$15,599	22.4	21.9	17.5
\$15,600-\$25,999	20.8	19.6	15.9
\$26,000-\$36,399	15.5	14.7	13.5
\$36,400-\$51,999	14.8	15.0	16.1
\$52,000-\$77,999	9.6	10.8	14.5
\$78,000-\$103,999	2.4	3.0	5.2
\$104,000 plus	1.8	2.2	4.8
Partial/incomplete records	10.9	11.2	11.0
Total	100.0	100.0	100.0

Source: ABS Census data 1996

3.11 Social security recipients

Figure 3.1 indicates that the number of social security claimants in Mildura has increased by just under 10 per cent over the last three years. This is primarily due to growth in the number of recipients of labour market payments and other social security payments, with the increase in the latter being more prominent. The number of recipients of family payments and pension payments has remained fairly constant, despite anecdotal evidence that Mildura has become a popular retirement centre. It may be that a high proportion of new retirees are self-funded, or else continue to claim pensions from other addresses. The number of recipients of parenting payments has fallen marginally. Over the border, the number of social security recipients in Wentworth has also increased but at a lower rate (5%).

Figure 3.1: Number of Mildura-based claimants of social security benefits, 1996 to 1999

Source: Centrelink. Some individuals receive multiple payments so a degree of double-counting occurs.

3.12 Vehicle ownership

According to 1996 Census data, vehicle ownership in Mildura is relatively comparable with the State average. At 1996, approximately 85% of Mildura households owned at least one vehicle, compared with 87% for Regional Victoria and 84% for Victoria. Similarly, 46% of households owned two or more vehicles, compared with 50% for Regional Victoria and 48% for Victoria. The vehicle ownership profile for Mildura, Regional Victoria and Victoria as at 1996 is presented in Table 3.11 below.

Table 3.11: Vehicle ownership, 1996

Vehicles	Households		
	Mildura %	Regional Victoria %	Victoria %
No vehicle	9.7	8.7	10.5
One vehicle	36.5	36.7	36.6
Two vehicles	36.0	36.3	35.2
Three or more vehicles	12.9	13.7	12.6
Not stated	4.8	4.6	5.2
Total (no.)	100.0	100.0	100.1

Source: ABS Census data 1996

3.13 Crime statistics

Mildura is an area of relatively low crime incidence, although there have been substantial increases (above the State average) in recorded crime in recent years.

Table 3.12: Crime trends: Number of offences reported in Mildura and Victoria, 1995 to 1998

Year	Mildura	% growth	Incidents per thousand persons	Victoria	% growth	Incidents per thousand persons
1995	3,384	-	74.6	374,241	-	84.8
1996	3,344	-1.2	73.0	399,237	6.7	89.5
1997	3,400	1.7	73.2	404,817	1.4	89.9
1998	3,859	13.5	81.6	413,836	2.2	90.7

Source: Victoria Police

3.14 Summary

In contrast to many rural areas in Victoria, the population of Mildura has been increasing at a faster rate than Victoria as a whole, and is projected to continue to do so. Similar to other rural regions, however, it has an age structure which has a higher proportion of young and aged, and a higher proportion of married couples, although this is declining, as is the proportion of households consisting of couples with children. The residents of Mildura are more likely to be Australian born and Christian. They are more mobile than Victorians as a whole but are less well educated and have lower incomes, and in recent years there has been an increase in numbers of social security recipients. Mildura has a lower crime rate than Victoria as a whole, but this has been increasing in recent years.

4 The regional economic profile

Agriculture is the major industry in Mildura, employing one-fifth of Mildura's workforce. The area is the centre of Victoria's dried fruit industry and its agriculture is reliant on irrigation from the Murray River. Mildura is also a major regional centre, providing a full range of retail outlets, services and government agencies.

4.1 Employment and labour force participation

As at December 1999, the labour force participation rate in Mildura was 63.2%, lower than the State average of 68%. The unemployment rate in Mildura in December 1999 was 8%, higher than the State average of 6.7%. More detailed but dated information on labour force participation and employment is provided in the 1996 Census, and reproduced below in Table 4.1 and Table 4.2. As at June 1996, Mildura had a higher unemployment rate (9.3%) in comparison to the State level of 9.4%.

Table 4.1: Labour force participation by sex, 1996

Age group Persons 15 years and over	Percentage employed or seeking work			
	Mildura Males		Females	
	Mildura %	Vic %	Mildura %	Vic %
15-19 years	48.8	43.8	51.1	45.1
20-24 years	87.5	80.8	72.7	74.7
25-34 years	88.8	89.7	62.9	68.0
35-44 years	88.3	89.9	70.0	69.8
45-54 years	81.1	86.0	64.8	67.0
55-64 years	58.3	60.3	31.1	29.9
65-69 years	22.5	17.0	10.0	6.9
70-74 years	11.8	8.7	3.4	3.1
75 years and over	5.6	4.3	1.3	1.3
All age groups	68.1	70.0	49.2	51.9
Not in the labour force	29.5	27.4	48.9	45.8
Not stated/overseas visitors	2.5	2.9	2.0	2.6
Adult population	100.0	100.0	100.0	100.0

Source: ABS Census data1996.

Table 4.2: Labour force status, 1996

	Males		Females		Persons	
	Mildura %	Vic %	Mildura %	Vic %	Mildura %	Vic %
Full-time employed	72.6	72.6	45.5	47.9	61.1	61.7
Part-time employed	15.0	15.4	43.2	41.2	27.0	26.7
Employed (not-stated)	2.5	2.0	2.7	2.2	2.6	2.1
Unemployed	9.9	9.9	8.6	8.8	9.3	9.4
No. of persons in the labour force	11,622	1,167,357	8,598	913,712	20,220	2,081,069
Not in the labour force	5,045	458,927	8,562	810,421	13,607	1,269,348
Not stated/overseas visitors	429	49,116	358	46,558	787	95,674
Adult population	100.0	100.0	100.0	100.0	100.0	100.0

Source: ABS Census data1996

4.2 Industry of employment

At the 1996 Census, agriculture, forestry and fishing (19.4%) and retail trade (14.3%) were the principal sectors for employment for the Mildura population. There was a marginal change in the proportion of residents employed in these sectors from 1991 to 1996 with a decline in employment experienced in agriculture, forestry and fishing, while retail trade employment increased. Other significant employment sectors for Mildura include health and community services (9.3%) and wholesale trade (8.6%). The proportion of residents employed in these sectors increased from 1991 to 1996. The increase in the proportion of residents employed in health and community services was in line with the trend experienced across Victoria, while the increase in wholesale trade was against the trend experienced throughout Victoria.

There was an increase in the number of employed persons residing in Mildura from 17,756 in 1991 to 18,331 in 1996. Employment in most sectors increased from 1991 to 1996. However, employment decreased in the following sectors:

- Electricity, gas and water supply;
- Accommodation, cafes and restaurants;
- Finance and insurance; and
- Government administration and defence.

The main difference between the employment profile of Mildura and that of Victoria as a whole, is a greater proportion of employment in the primary industries of agriculture, forestry and fishing and a much lower level of employment in the manufacturing sectors. The following table provides a summary of the industry of employment profile for Mildura and Victoria as at 1991 and 1996.

Table 4.3: Industry of employment, 1991 and 1996

Industry	Mildura		Victoria		Mildura		Victoria	
	1991		1991		1996		1996	
	Persons	%	Persons	%	Persons	%	Persons	%
Agriculture, Forestry and Fishing	3,569	20.1	70,556	3.9	3,554	19.4	72,924	3.9
Mining	19	0.1	5,633	0.3	39	0.2	5,531	0.3
Manufacturing	1,193	6.7	289,266	16.0	1,448	7.9	307,029	16.3
Electricity, Gas and Water Supply	275	1.5	25,666	1.4	242	1.3	13,408	0.7
Construction	821	4.6	96,695	5.4	944	5.1	110,482	5.9
Wholesale Trade	1,202	6.8	111,684	6.2	1,577	8.6	115,336	6.1
Retail Trade	2,434	13.7	241,324	13.4	2,621	14.3	260,829	13.8
Accommodation, Cafes and Restaurants	849	4.8	59,525	3.3	797	4.3	72,236	3.8
Transport and Storage	520	2.9	74,762	4.1	644	3.5	73,238	3.9
Communication Services	197	1.1	34,330	1.9	195	1.1	42,848	2.3
Finance and Insurance	443	2.5	84,427	4.7	380	2.1	77,378	4.1
Property and Business Services	692	3.9	126,156	7.0	984	5.4	186,245	9.9
Government Administration and Defence	645	3.6	94,015	5.2	562	3.1	71,662	3.8
Education	1,176	6.6	122,760	6.8	1,238	6.8	131,119	7.0
Health and Community Services	1,601	9.0	153,744	8.5	1,703	9.3	175,123	9.3
Cultural and Recreational Services	259	1.5	30,289	1.7	321	1.8	44,486	2.4
Personal and Other Services	420	2.4	55,915	3.1	504	2.7	65,294	3.5
Non-classifiable economic units	45	0.3	6,791	0.4	245	1.3	29,288	1.6
Not stated	1,396	7.9	123,023	6.8	333	1.8	30,424	1.6
Total	17,756	100	1,806,561	100	18,331	100	1,884,880	100

Source: ABS Census data 1996.

4.3 Employment by occupation

The employment profile of Mildura is reasonably diverse, with a significant proportion of the population employed as Managers and Administrators and Professionals. Over the period 1991 to 1996 there has been little change in the employment by occupation for the region with the exception of an increase in the proportion of people employed as professionals and associate professionals and people employed in clerical and sales related activities. As at the 1996 Census the main areas of difference between the employment by occupation profile of Mildura and that of Regional Victoria and Victoria were:

- higher proportion of people employed as managers and administrators;
- lower proportion of professionals and associate professionals; and
- higher proportion of labour and labour related activities.

Table 4.4 provides a summary of employment by occupation for Mildura, Regional Victoria and Victoria as a whole for 1991 and 1996.

Table 4.4: Employment by occupation, 1991 and 1996

Occupation	Mildura		Regional Victoria		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
Managers and Administrators	18.6	16.8	15.1	14.0	10.0	9.5
Professionals	11.5	12.6	12.9	14.2	15.6	17.8
Associate Professionals	6.9	10.0	7.8	11.4	7.5	11.4
Tradespersons and Related Workers	11.0	10.9	14.4	13.7	13.7	12.9
Advanced Clerical and Service Workers	4.5	3.1	4.7	3.2	6.5	4.3
Intermediate Clerical, Sales and Service Workers	9.7	12.6	9.5	13.0	11.6	15.4
Intermediate Production and Transport Workers	6.1	7.1	9.0	9.1	8.7	8.9
Elementary Clerical, Sales and Service Workers	10.1	8.8	9.9	8.6	10.8	8.9
Labourers and Related Workers	13.9	15.2	10.0	10.0	8.8	8.3
Not stated/inadequately described	7.8	3.1	6.7	2.8	6.8	2.7
Total employment	100.0	100.0	100.0	100.0	100.0	100.0

Source: ABS Census data 1996

4.4 Businesses by industry and size

According to the September 1998 ABS Business Register, Mildura had a total of 4,201 businesses. Approximately 97% of these businesses were small entities with the majority of businesses operating within the agriculture, forestry and fishing industry and retail trade. Table 4.5 provides an overall summary of the nature of businesses that are located within Mildura as at the September 1998 ABS Business Register.

Table 4.5: The structure of business in Mildura: Distribution of businesses by industry and firm size, 1998

Industry to which business is assigned ANZSIC Division	Number of business locations by firm size			
	Small	Medium	Large	Total
A AGRICULTURE FORESTRY AND FISHING	2,024	15	0	2,039
B MINING	9	0	0	9
21 Food Beverage & Tobacco Manufacturing	27	3	0	30
22 Textile Clothing Footwear Manufacturing	4	0	0	4
23 Wood & Paper Product Manufacturing	11	0	0	11
24 Printing Publishing & Recorded Media	10	0	0	10
25 Petroleum Coal & Chemical Manufacturing	8	0	0	8
26 Non-Metallic Mineral Product Manufacturing	6	0	0	6
27 Metal Product Manufacturing	14	0	0	14
28 Machinery & Equipment Manufacturing	20	0	0	20
29 Other Manufacturing	13	0	0	13
C MANUFACTURING	113	3	0	116
D ELECTRICITY GAS AND WATER SUPPLY	13	4	0	17
E CONSTRUCTION	266	1	0	267
F WHOLESALE TRADE	156	13	1	170
51 Food Retailing	106	9	2	117
52 Personal & Household Good Retailing	238	1	2	241
53 Motor Vehicle Retailing & Services	119	3	0	122
G RETAIL TRADE	463	13	4	480
H ACCOMMODATION CAFES AND RESTAURANTS	113	15	1	129
I TRANSPORT AND STORAGE	156	4	0	160
J COMMUNICATION SERVICES	12	2	0	14
K FINANCE AND INSURANCE	72	3	0	75
L PROPERTY AND BUSINESS SERVICES	211	10	1	222
M GOVERNMENT ADMINISTRATION AND DEFENCE	20	8	0	28
N EDUCATION	51	15	1	67
O HEALTH AND COMMUNITY SERVICES	171	13	3	187
P CULTURAL AND RECREATIONAL SERVICES	60	3	1	64
Q PERSONAL AND OTHER SERVICES	151	6	0	157
ALL INDUSTRIES	4,054	132	15	4,201

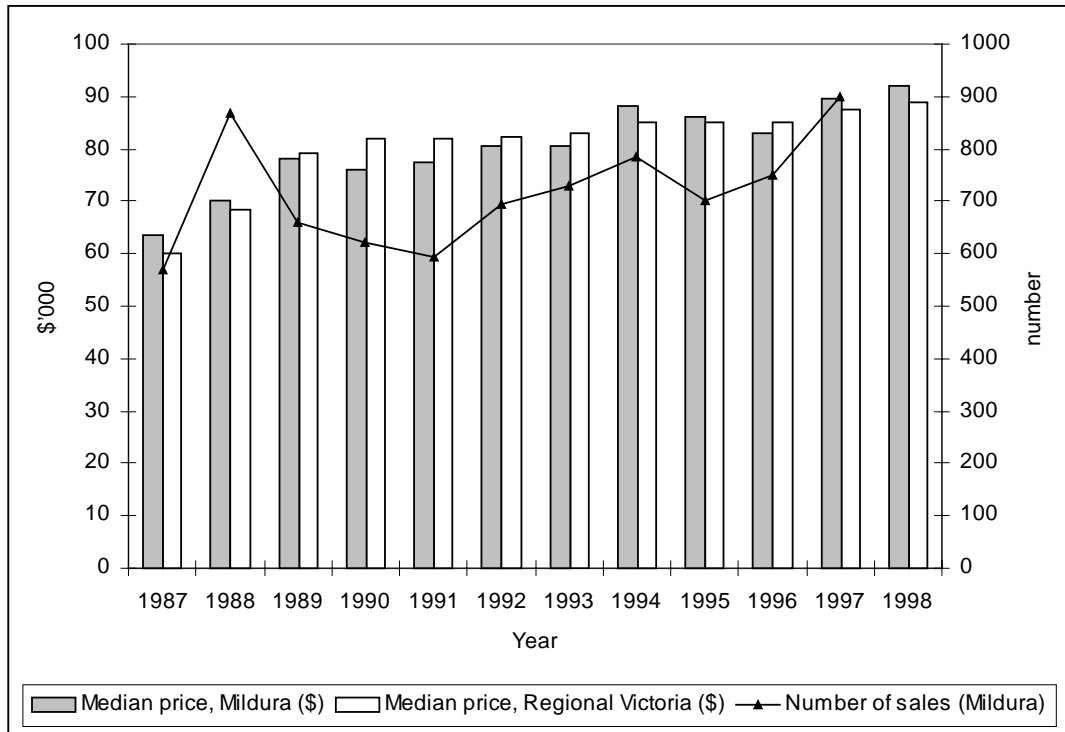
Source: ABS Business register.

The ANZSIC industry classification is used. Most industries are shown at the divisional level (one-digit). However manufacturing and retailing industries are presented also at the sub-divisional (two-digit) level. The definition of business size is as follows: Small business, <20 employees; Medium-sized business, 20-99 employees; Large business, 100+ employees.. However, for manufacturing industry: Small business = <100 employees; Medium-sized business = 100-499 employees; Large business = 500+ employees

4.5 House sales and prices

House prices in Mildura have increased steadily and consistently since 1987, although there was a slight downturn in 1990. Prices recovered marginally in 1991 because potential vendors withdrew their houses from the market, resulting in some falls in the number of dwellings transacted. Since 1994, Mildura house prices have been consistently higher than the average for Country Victoria. This is a reflection of the buoyancy of the local economy, particularly in the viticultural and tourism sectors.

Figure 4.1: Median house prices, Mildura and Country Victoria, 1987 to 1998

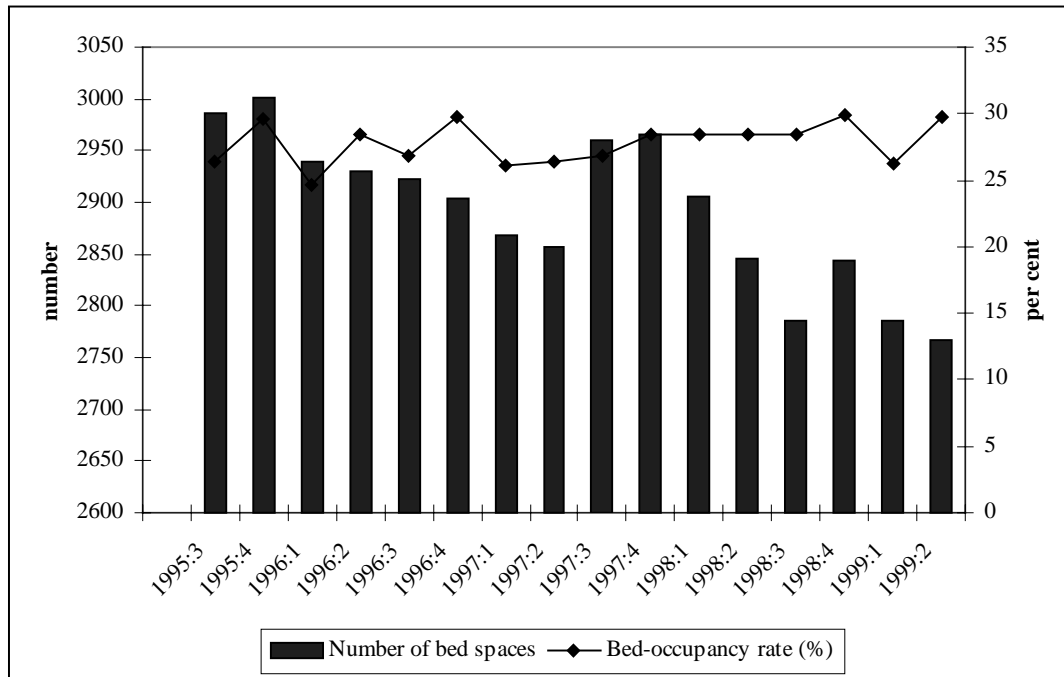


Source: Land Victoria, 1997-98.

4.6 Tourism

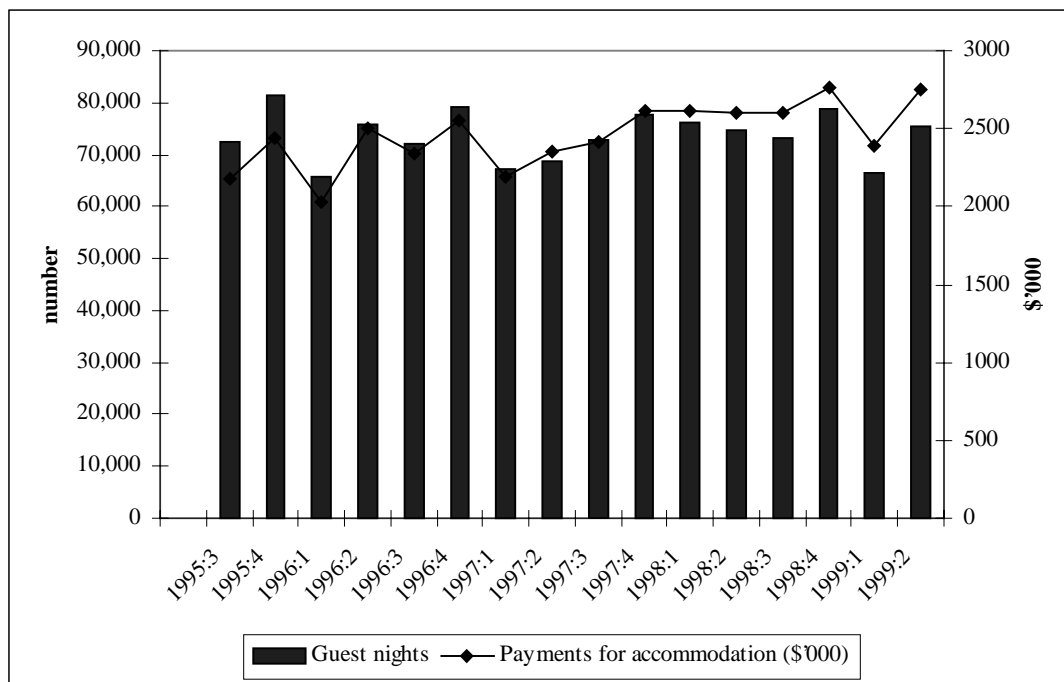
A major element of Mildura’s economy relates to tourism. In recent years, there has been a substantial fall in the number of accommodation establishments, but maintenance of occupancy rates of around 30%. The number of guest nights has also been relatively stable, but accommodation revenues have increased in the past few years. Similar trends have been experienced over the NSW town of Wentworth.

Figure 4.2: Accommodation establishments in Mildura, 1995 to 1999



Source: ABS, cat. 8635.2. Bed-occupancy rate = Bed nights occupied / (Bed spaces) × (No. of days in period)

Figure 4.3: Number of guest nights and takings from accommodation in Mildura, 1995 to 1999



Source: ABS, cat. 8635.2 and unpublished statistics. Guest nights is the total number of nights each guestroom or unit was occupied during the survey period (of three months).

4.7 Summary

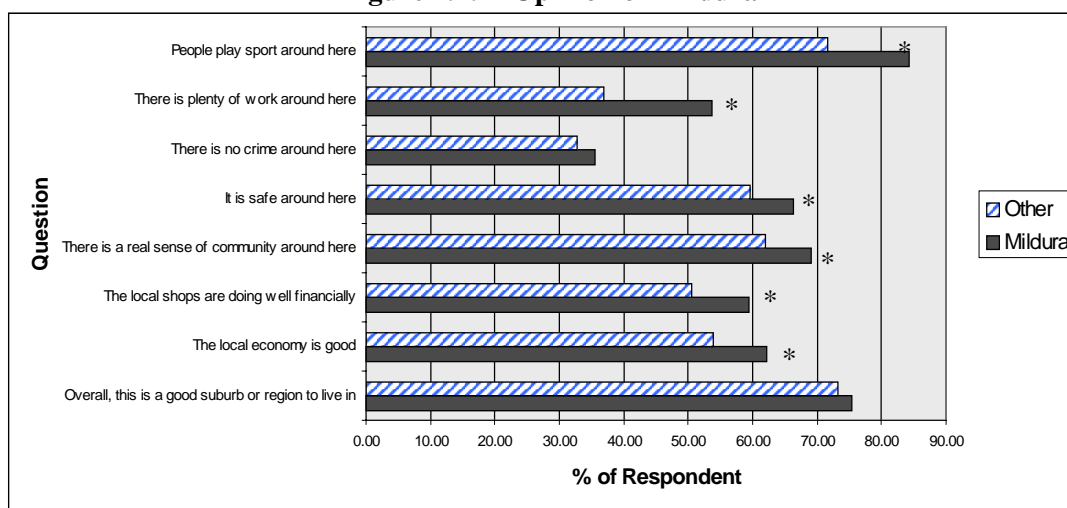
The City of Mildura would appear to have a relatively buoyant economy, particularly in comparison to other Victorian rural regions. However, in common with other rural regions, its labour force participation rate is slightly below that of Victoria as a whole and its unemployment rate is above the State average. Its workforce is concentrated in agriculture, forestry and fishing and in retail trade. Reflecting these industry concentrations, there is a relatively high proportion of the workforce who work as managers and administrators (including farm owner-operators) and as labourers. House prices and sales are relatively high and tourism continues to provide a boost to the local economy.

4.8 Community perceptions of the region

In our survey of 167 adults living in the City of Mildura, conducted in October 1999, we asked questions about residents' opinions of the region. While the sample size is sufficiently large to enable us to draw conclusions about Mildura, it does not allow us to draw statistically significant conclusions about the differences between Mildura and the other regions surveyed for many of the survey questions¹. As a result, comparisons between Mildura and other regions can only be made where differences are statistically significant, and have been denoted by an asterisk (*) on the relevant graph.

More respondents in Mildura believe that their region has or incorporates the attributes listed in Figure 4.4, when contrasted against respondents in other regions. Importantly, over 75% of the respondents believe that overall the region is good to live in, and that over 80% of the respondents believe people play sport. Other major positive differences between Mildura and other regions include the sense of community and safety, although over 60% of respondents believe there is crime in the region. Mildura respondents generally perceive that local shops and the local economy are doing well and that there is plenty of work in the region.

Figure 4.4: Opinion of Mildura

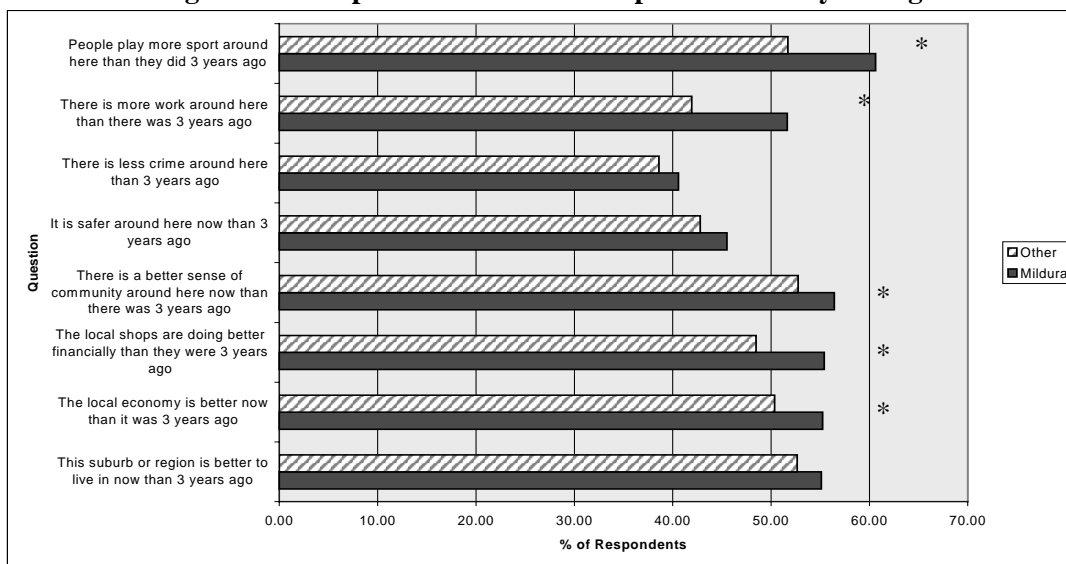


(*) Statistically significant difference between Mildura and the average of the other regions.

¹ The regions surveyed were the local government areas of Mildura, Geelong, Wellington, Maribymong, Moreland and Dandenong. KPMG surveyed about 167 adults in each of these regions.

There is a general consensus amongst residents in Mildura that the suburb has improved over the last three years. More Mildura respondents believe that there has been an improvement over the last three years in safety, the financial performance of local shops and the local economy when compared to the perception of respondents in the other regions. For all questions, Mildura respondents are quite optimistic about the performance of their region, indicating that their region is better now than it was three years ago. The results compared to other regions are set out in Figure 4.5

Figure 4.5: Opinion of Mildura compared to three years ago



(*) Statistically significant difference between Mildura and the average of the other regions.

In summary, more than 75% of Mildura respondents believe their region is good to live in, and over 60% believe the local economy is doing well. Crime and safety are lesser issues than in the average of the other six regions considered. About 55% believe that Mildura is a better place in which to live than it was three years ago. Mildura respondents are happier and more positive about their region than respondents in the other study regions.

5 Participation in gaming in Mildura

5.1 Gambling defined

The Productivity Commission² suggests that the following characteristics distinguish gambling from other, apparently similar activities:

- as a group, gamblers necessarily lose money as a result of the activity, because the total “prize” is equal to the accumulated stakes of punters, less taxes to government and profits and costs for operators; and
- gambling is typically presented as a form of entertainment.

Gambling is the (lawful) placement of a wager or bet on the outcome of a future uncertain event. It is treated as an activity than can be clearly divided into two distinct areas – **racing** related and **gaming** related. Where the word *gambling* is referred to in this publication, it is intended to imply the total of racing and gaming activities.³

5.2 EGMs and venues

The supply of EGMs and venues with EGMs in Mildura and Victoria is presented in the following table.

Table 5.1: EGMs and gaming venues in Mildura in Victoria, 1992 to 1999

Mildura	Sep-92	Jun-93	Jun-94	Jun-95	Jun-96	Jun-97	Jun-98	Jun-99	Dec-99	AAG %
EGMs	251	251	275	285	218	224	253	255	290	
EGM Growth %	n/a	0.0	9.6	3.6	-23.5	2.8	12.9	0.8	13.7	2.4%
Venues	4	4	5	7	7	7	7	7	7	
Venue Growth %	n/a	0.0	25.0	40.0	0.0	0.0	0.0	0.0	0.0	11.5%
Average # of EGMs per venue	63	63	55	41	31	32	36	36	41	
Victoria	Sep-92	Jun-93	Jun-94	Jun-95	Jun-96	Jun-97	Jun-98	Jun-99	Dec-99	AAG %
EGMs	3,929	13,661	17,537	21,268	23,478	25,962	26,965	27,811	27,208	
EGM Growth %	n/a	247.7	28.4	21.3	10.4	10.6	3.9	3.1	-2.2	15.2%
Venues	59	251	365	468	521	554	559	573	556	
Venue Growth %	n/a	325.4	45.4	28.2	11.3	6.3	0.9	2.5	3.0	18.7%
Average # of EGMs per venue	67	54	48	45	45	47	48	48	48.9	

Source: VCGA

AAG = average annual growth (using June 1993 base)

The number of EGMs and venues with EGMs has grown by an average annual rate of 2.4% and 11.5% respectively since 1993, which is significantly below the growth experienced in Victoria as a whole of 15.2% and 18.7% respectively. Mildura experienced a substantial decrease in the number of EGMs during 1995-96, and the second half of 1999 again saw the number of EGMs increase.

² Productivity Commission (1999), *Final Report*, Productivity Commission, Melbourne.

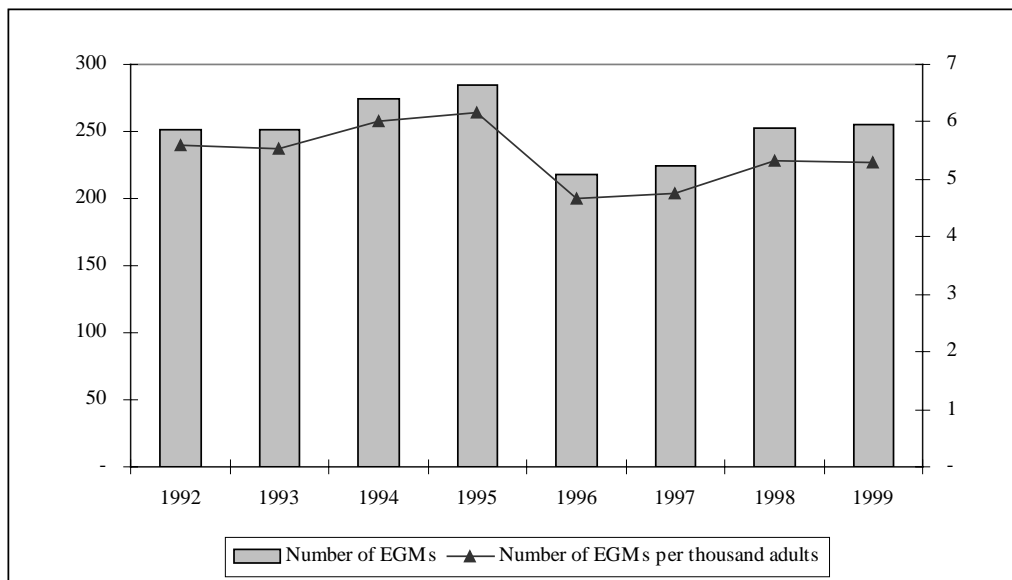
³ Tasmanian Gaming Commission, *Australian Gaming Statistics 1972-73 to 1997-98*, page 4

The slower than average growth in EGMs in Mildura is probably a reflection of its location on the border with New South Wales. EGMs have been readily available to the Mildura population for some time due to the presence of a number of significant licensed clubs located on the New South Wales side of the border.

The number of EGMs per venue in Mildura has overall demonstrated a declining trend from 63 machines in September 1992 to 41 machines per venue in December 1999. The average number of EGMs per venue in Mildura has consistently been below the Victorian average since September 1992.

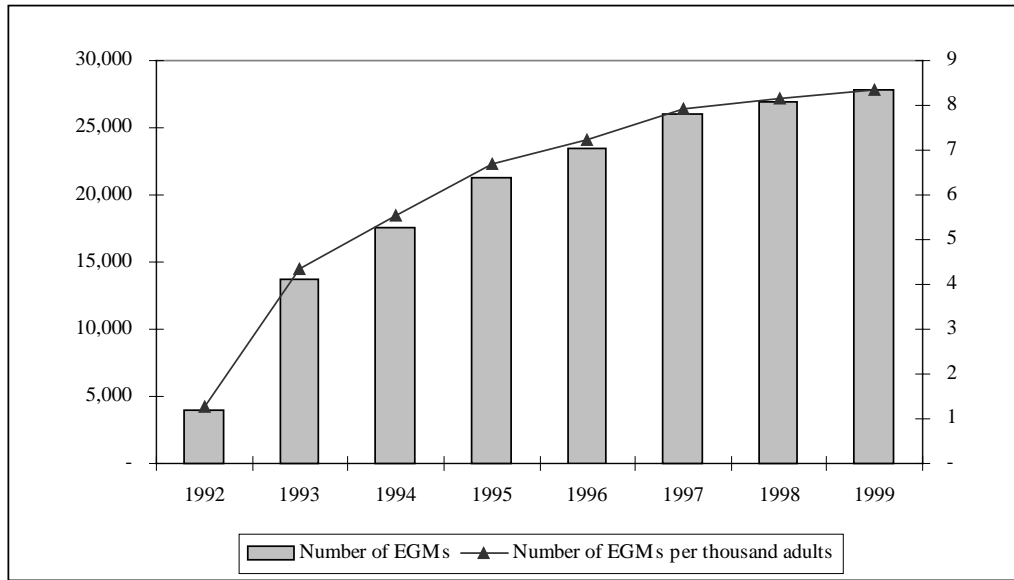
As shown in Figure 5.1, the number of EGMs per 1,000 adults in Mildura has declined from 5.6 in 1992 to 5.3 in June 1999 and peaking at 6.2 in 1995. This is substantially below the average for Victoria as a whole, which increased from 1.3 in 1992 to 8.6 in June 1999 (as shown in Figure 5.2).

Figure 5.1: EGM density in Mildura (EGMs/'000 adults), 1992 to 1999



Source: VCGA

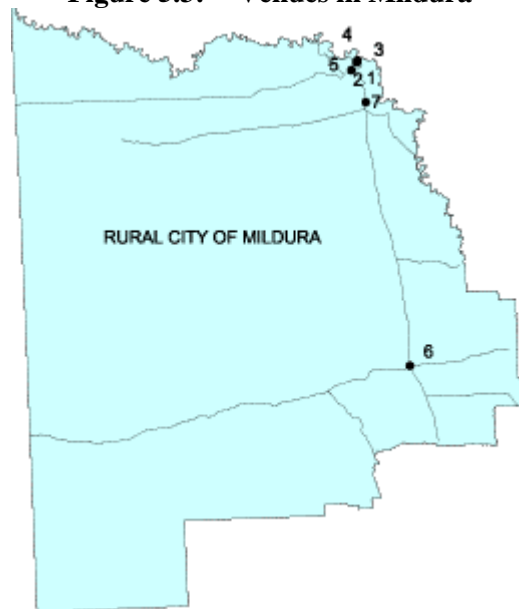
Figure 5.2: EGM density in Victoria (EGMs/'000 adults), 1992 to 1999



Source: VCGA

As at 31 December 1999, Mildura had 7 licensed gaming venues offering a total of 290 EGMs of which 3 venues were hotels and 4 were clubs. The following map illustrates the location of each of these venues within Mildura.

Figure 5.3: Venues in Mildura



The supply of Hotel EGMs represents 34% of the total number of EGMs in Mildura with Club EGMs accounting for 66%. The average size of an EGM installation for Hotels and Clubs was 49.5 and 38 respectively as at December 1999, as shown in the following tables.

Table 5.2: Venue Mix

Venue	Venue Type	Address	Operator
1 Mildura Gateway Tavern	Hotel	Mildura	Tattersalls
2 Mildura Golf Club	Club	Mildura	Tabcorp
3 Mildura Grand Hotel	Hotel	Mildura	Tabcorp
4 Mildura RSL Memorial Club	Club	Mildura	Tattersalls
5 Mildura Workingmans Club	Club	Mildura	Tattersalls
6 Ouyen & District Community Club	Club	Ouyen	Tabcorp
7 Red Cliffs Club	Club	Red Cliffs	Tabcorp
Source: VCGA			

Table 5.3: Gaming venue details in Mildura

Venue	EGMs	% Clubs EGMs	% Total EGMs
Mildura Gateway Tavern	75	76%	26%
Mildura Grand Hotel	24	24%	8%
TOTAL Hotels	99	100%	34%
Venue	EGMs	% Clubs EGMs	% Total EGMs
Mildura Golf Club	40	21%	14%
Mildura RSL Memorial Club	45	24%	16%
Mildura Workingmans Club	67	35%	23%
Ouyen & District Community Club	5	3%	2%
Red Cliffs Club	34	18%	12%
TOTAL Clubs	191	100%	66%
GRAND TOTAL	290		100%
Source: VCGA			

In summary, Mildura has a comparatively low number of EGMs per head and a low concentration of EGMs per gaming venue. Over recent years, the number of venues has been static and the number of machines has been slowly increasing. One might have expected that Mildura, being a tourist destination, may have had a higher concentration of EGMs. However, it does face stiff competition from venues across the border.

5.3 Gaming expenditure

Based on VCGA figures, Mildura's expenditure on gaming increased from \$3.53M in 1992/1993 to \$16.99M in 1998/1999. During 1998/1999 Mildura's expenditure on gaming was 94% higher than that of the average non-metropolitan Local Government Area (LGA). However, Mildura's expenditure on gaming per adult (\$500.73) was 11% lower than the State average (\$562.56). Expenditure on gaming in Mildura is summarised in the table below.

Table 5.4: Expenditure on gaming in Mildura, 1992 to 1999

	92-93	93-94	94-95	95-96	96-97	97-98	98-99
Total Expenditure Mildura	\$3,531,354	\$7,147,614	\$10,093,229	\$13,032,229	\$14,411,796	\$15,365,177	\$16,998,177
Total Expenditure – Metropolitan *	\$211,319,751	\$551,431,696	\$745,524,325	\$963,832,773	\$1,131,288,009	\$1,306,707,971	\$1,542,948,218
Average Expenditure per Metropolitan LGA	\$6,816,766	\$17,788,119	\$24,049,171	\$31,091,379	\$36,493,161	\$42,151,870	\$49,772,523
Total Expenditure- Non Metropolitan **	\$43,309,135	\$131,167,765	\$207,627,542	\$281,533,049	\$325,195,095	\$362,925,551	\$411,322,997
Average Expenditure per Non Metropolitan LGA	\$921,470	\$2,790,803	\$4,417,607	\$5,990,064	\$6,919,044	\$7,721,820	\$8,751,553
Total Expenditure – Victoria	\$254,628,886	\$682,599,461	\$953,151,867	\$1,245,365,822	\$1,456,483,104	\$1,669,633,522	\$1,954,271,215
Average Expenditure per Victorian LGA	\$3,264,472	\$8,751,275	\$12,219,895	\$15,966,228	\$18,672,860	\$21,405,557	\$25,054,759
Adult Population – Mildura#	32,057	32,246	32,861	33,094	33,384	33,726	33,947
Expenditure per adult - Mildura	\$110	\$221	\$307	\$393	\$431	\$455	\$500
% increase/decrease – Mildura##	n/a	101%	39%	28%	10%	6%	10%
Adult Population – Victoria #	3,293,135	3,318,245	3,343,108	3,373,447	3,408,503	3,446,886	3,473,879
Expenditure per adult – Victoria	\$77	\$205	\$285	\$369	\$427	\$484	\$562
% increase/decrease – State##	n/a	166%	39%	29%	16%	13%	16%
\$ difference per adult+	\$32	\$15	\$22	\$24	\$4	-\$28	-\$61
% difference per adult++	42%	8%	8%	7%	1%	-6%	-11%

Source: VCGA

* 31 Metropolitan LGAs as defined by the Melbourne Statistical Division

** 47 Non-metropolitan LGAs as defined by all LGAs not part of the Melbourne Statistical Division

Population defined as number of adults over the age of 18. (Source VCGA figures as at June of each year except for 1992/1993 which represents population as at September.)

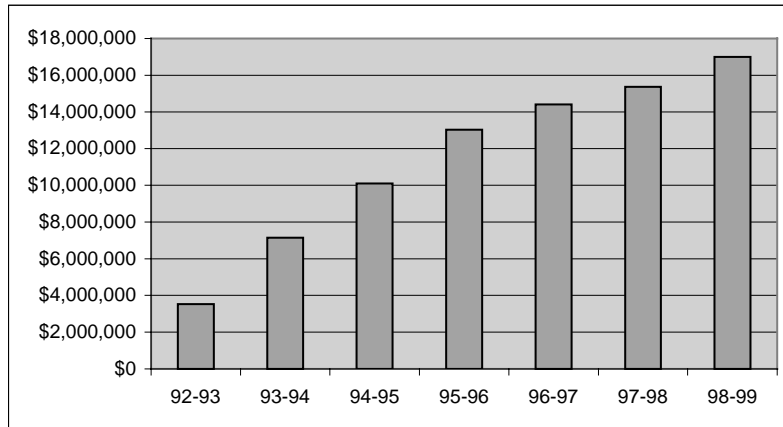
Increase/decrease relative to previous year's gaming expenditure

+ Difference between Mildura LGA and State per adult expenditure levels. A positive figure indicates that gaming expenditure per adult in Mildura is above the State average

++ Percentage difference between LGA and State per adult expenditure levels

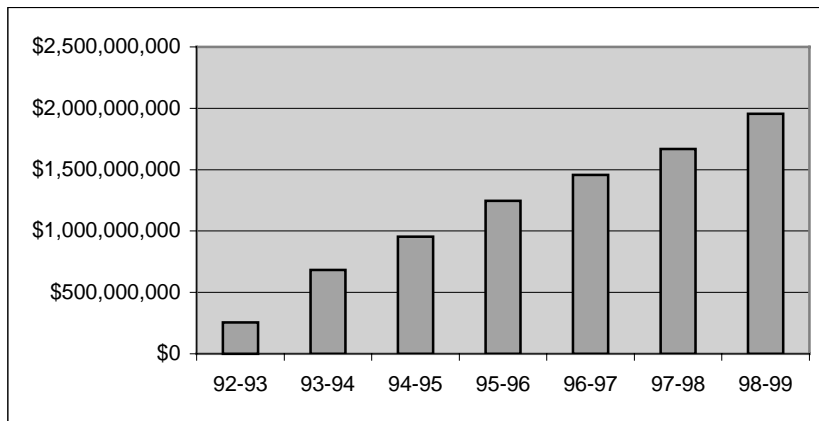
During the period 1992-1999, expenditure on gaming increased consistently for both Mildura and the State (all LGAs) as a whole. These findings are presented graphically below.

Figure 5.4: Expenditure on gaming for Mildura 1992-1999



Source: VCGA

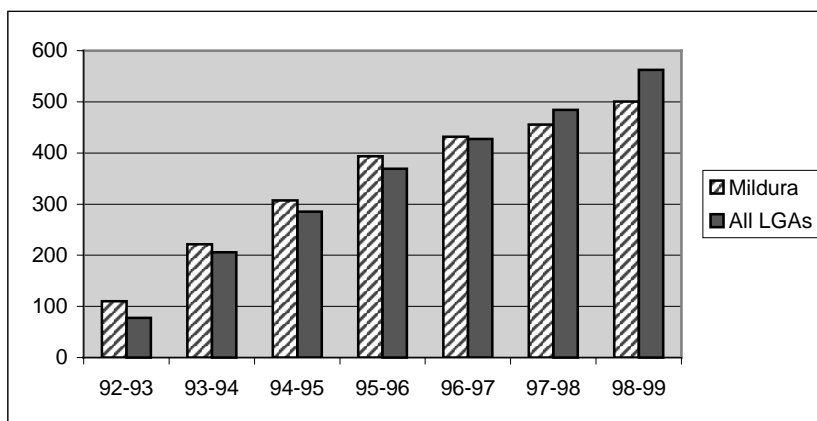
Figure 5.5: Expenditure on gaming for Victoria 1992-1999



Source: VCGA

In comparing average expenditure by adults over the age of 18 years in Mildura against that of adults across the State (all LGAs), we found that the average amount spent on gaming was higher in Mildura than the State average until 1997/98. However, since 1997-98 gaming expenditure per adult in Mildura has been below the State average. This comparison is presented in Figure 5.6.

Figure 5.6: Gaming expenditure per adult (\$) – Mildura, Victoria, 1992-1999



Source: VCGA

Over the seven years of data collection, the number of EGMs in Mildura increased from 251 in 1992/1993 to 255 in 1998/1999. During the same period average expenditure per EGM increased from \$14,069 in 1992/1993 to \$66,660 in 1998/1999. These figures are summarised in Table 5.5.

Table 5.5: Expenditure, number of EGMs and average expenditure per EGM – 1992-1999

	92-93	93-94	94-95	95-96	96-97	97-98	98-99
Expenditure	\$3,531,354	\$7,147,614	\$10,093,229	\$13,032,229	\$14,411,796	\$15,365,177	\$16,998,177
EGMs	251	275	285	218	224	253	255
Av. Exp/EGM	\$14,069.14	\$25,991.32	\$35,414.84	\$59,780.87	\$64,338.38	\$60,731.93	\$66,659.52

Source: VCGA

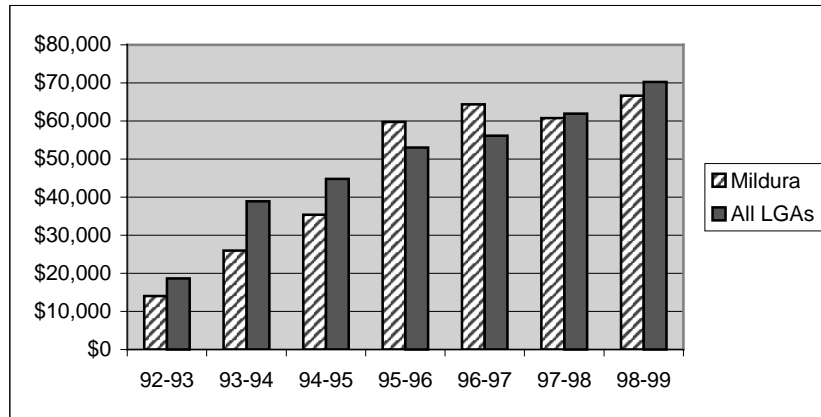
Comparing expenditure per EGM in Mildura against expenditure per EGM across the State, expenditure in Mildura has usually been lower than expenditure across the State although no clear trend is evident (see Table 5.6 and Figure 5.7).

Table 5.6: Average expenditure per EGM – 1992-1999

	92-93	93-94	94-95	95-96	96-97	97-98	98-99
Av. Exp/EGM - Mildura	\$14,069.14	\$25,991.32	\$35,414.84	\$59,780.87	\$64,338.38	\$60,731.93	\$66,659.52
Av. Exp/EGM - State	\$18,639.11	\$38,923.39	\$44,816.24	\$53,043.95	\$56,100.57	\$61,918.54	\$70,269.72
% change for Mildura	n/a	85%	36%	69%	8%	-6%	10%
% change State	n/a	109%	15%	18%	6%	10%	13%

Source: VCGA

Figure 5.7: Average expenditure per EGM – 1992-1999

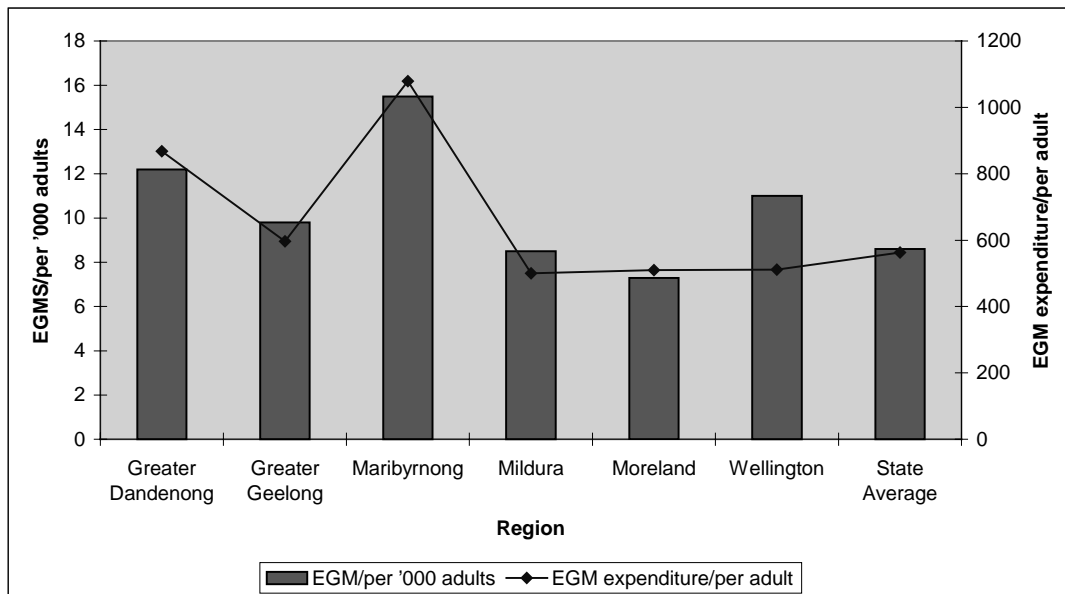


Source: VCGA

5.4 Gaming: comparison between Mildura and other regions

Figure 5.8 compares the number of EGMs and EGM expenditure per thousand adults between Mildura, the other study regions, and the State average. These measures indicate that the level of gaming in Mildura is below the State average.

Figure 5.8: Number of EGMs per thousand adults and EGM expenditure per adult, 1999



5.5 Who gambles and frequency of gambling?

Our understanding of the profile of residents of the Mildura region who use EGMs is drawn from:

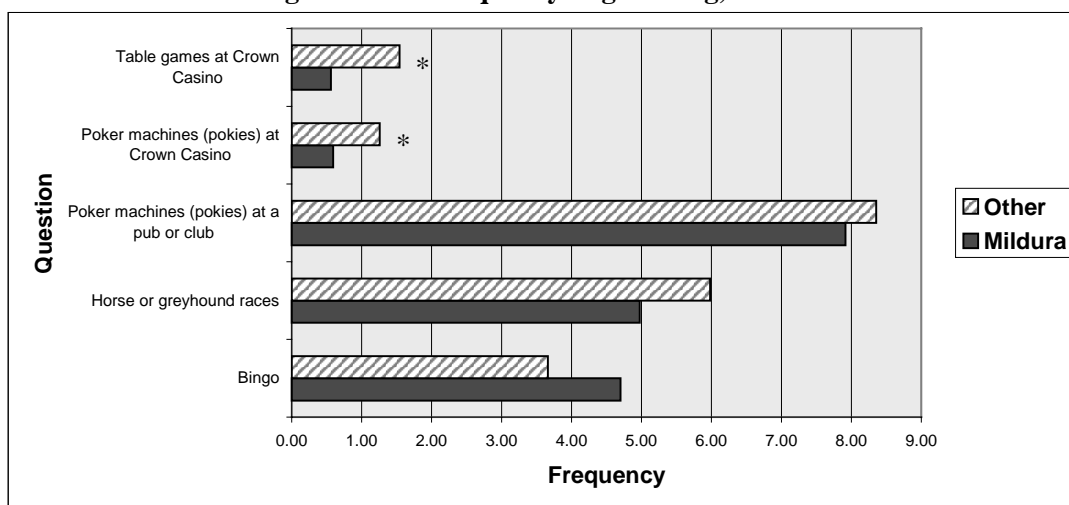
- our survey of 167 adults living in Mildura, conducted in October 1999; and

- opinions expressed during our consultations by venues, community groups and in public forums.

Of the 167 people surveyed in the Mildura region, just over 56% participated in gambling activities in the last six months, compared to the ‘Patterns’ Survey findings which suggests that 75% of Victorians have gambled in the last 12 months⁴.

Figure 5.9 details the frequency of gambling among Mildura respondents. The most popular gambling activity is playing the poker machines at a pub or club. Mildura respondents participated in this almost 8 times a year. Greyhound, horse races and bingo are the next most popular gambling activities. Significantly fewer respondents in Mildura played poker machines and table games at the Crown Casino than respondents in the other regions.

Figure 5.9: Frequency of gambling, Mildura



(*) Statistically significant difference between Mildura and other regions for these questions.

We also gathered information in our consultations regarding the most prevalent gamers in Mildura, which indicated they tended to be:

- the elderly, particularly lonely, single people, retirees and pensioners, who tend to game during the day;
- unemployed and welfare recipients, who also game more in pension week;
- farmers who may be having slow times (eg., rain preventing work) or facing difficulties on their farms;
- labourers and low income workers from Italian and other ethnic groups, some of which are seasonal workers;
- young people, who game mostly at nights and weekends in big social groups; and

⁴ The full title of the ‘Patterns’ survey is the “Sixth Survey of Community Gambling Patterns and Perceptions”, April 1999, conducted by Roy Morgan Research for the Victorian Casino and Gaming Authority.

- an even spread of men and women gaming, with the women tending to be older and preferring to game in the clubs, which was a point of difference between Mildura and the other study regions.

The nature of gaming in Mildura is affected by the presence of a large number of gaming machines in neighbouring NSW towns, which serve to increase the availability and accessibility of EGMs for Mildura residents. At the Mildura public meeting, attendees noted that there were now more young people gambling compared to 1992 when EGMs were introduced to Victoria. Also some NSW rural people now come into Victoria to gamble, as well as people from outlying areas.

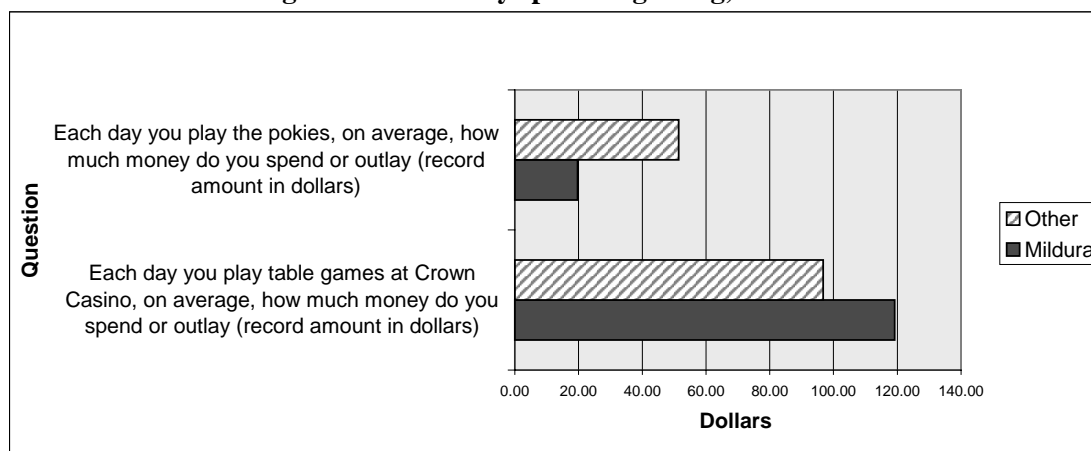
5.6 Gamblers in our survey

In our survey, gamblers are defined as those people who had participated in gambling in the last six months. They make up 56% of Mildura residents. We asked this sub-sample more detailed questions about their gaming behaviour (see sections 5.7 to 5.11), and also asked about their gambling behaviour to check for the prevalence of problem gambling (see section 5.12).

5.7 Time and money spent on gaming

Gamblers in Mildura spend on average \$20 at the pokies per daily visit. While Mildura gamblers patronise Crown Casino less frequently than local gaming venues. However, when they play table games at Crown Casino, they spend about six times as much, as expenditure on poker machines at local venues. Mildura residents would generally visit Crown on a holiday or business visit to Melbourne, so it is not surprising that expenditure on these visits is higher than when they are gaming locally. (Note that respondents who are patrons at the Crown Casino were answering with respect to table games and not pokies).

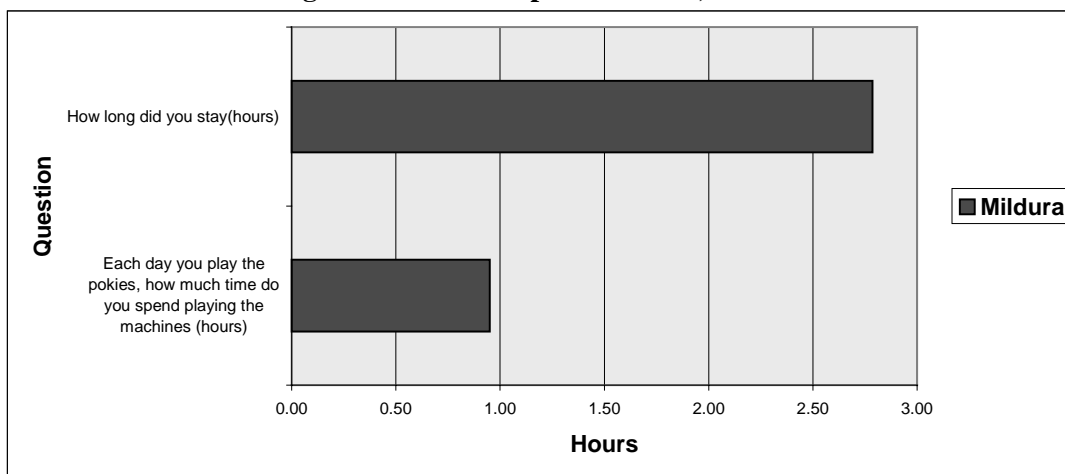
Figure 5.10: Money spent on gaming, Mildura



(There is no statistically significant difference between Mildura and other regions for these questions).

Our survey indicates that in Mildura gamblers spend approximately a third of their time in gaming venues playing pokies. This suggests that gamblers in Mildura are attracted to gaming venues for additional reasons than using poker machines.

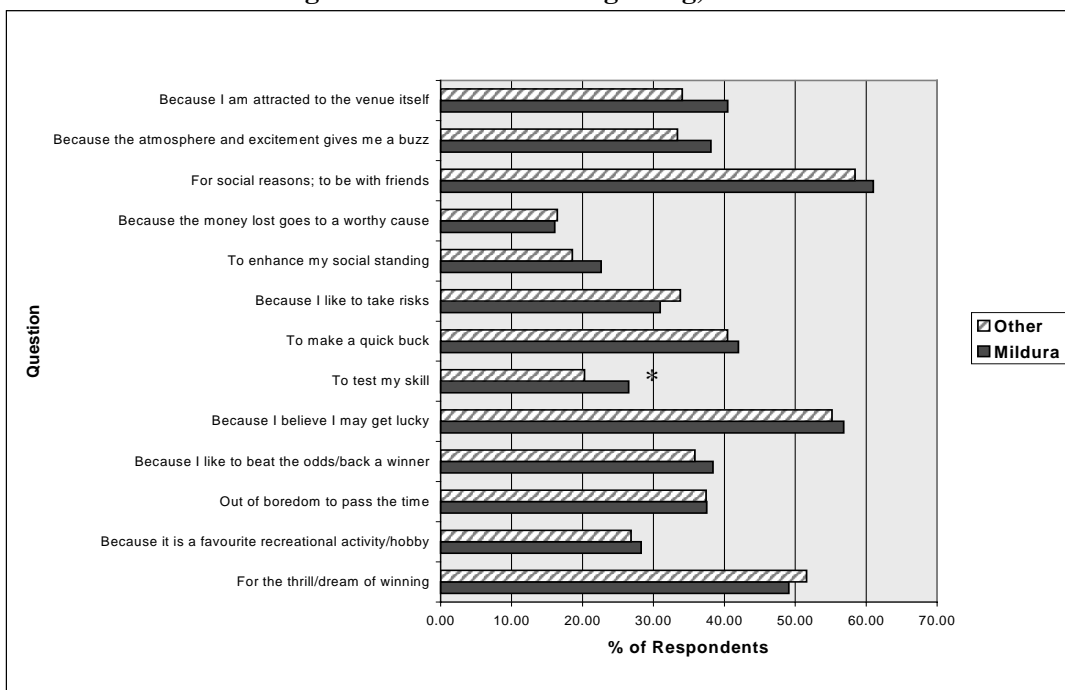
Figure 5.11: Time spent at venue, Mildura



5.8 Reasons for gaming

Our survey indicates that in Mildura the main reason gamblers play poker machines are for ‘social reasons; to be with friends’. Figure 5.12 indicates that in Mildura the prospect of having a lucky win, the thrill of winning and making a “quick buck” are major influences in gamblers choosing to play poker machines. While individuals testing their skill are a less significant reason for playing the pokies, Mildura gamblers play for this reason more than gamblers in other regions.

Figure 5.12: Reasons for gaming, Mildura

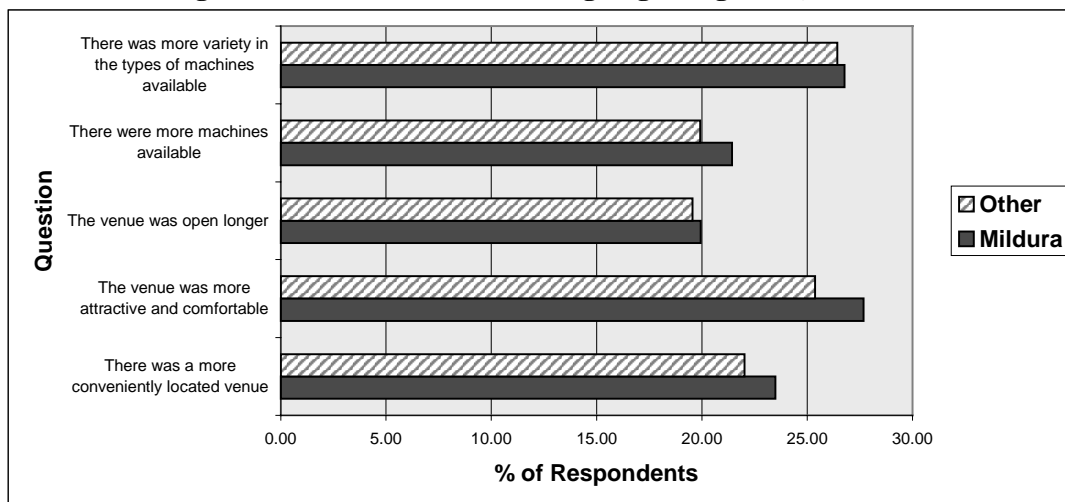


(*) Statistically significant difference between Mildura and the average of the other regions.

Gamers were asked what would make them game more. Overall, most gamblers indicated that the factors we suggested would not make them game more. Venue attractiveness and

ambience, the variety and quantity of machines available, the extended operating hours of venues and the convenient location of venues were considered to be minor factors for gaming more.

Figure 5.13: Factors contributing to gaming more, Mildura.

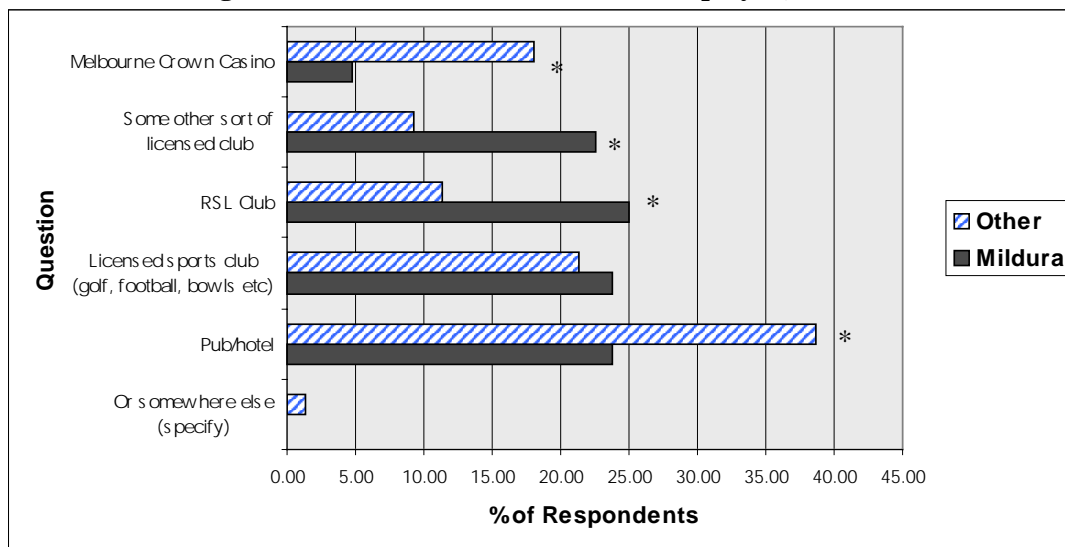


(There is no statistically significant difference between Mildura and other regions for these questions.)

5.9 Venues at which EGMs are played

The most popular venue for poker machine players in Mildura is the Mildura RSL Memorial Club. Other licensed clubs are also popular in Mildura with 22% of respondents choosing this option. Fewer respondents in Mildura, however, suggested they play the pokies at Crown Casino (which is understandable, given its distance from Mildura) or a pub or hotel. The results of gamers' choices of venue are set out in Figure 5.14.

Figure 5.14: Venue at which EGMs are played, Mildura



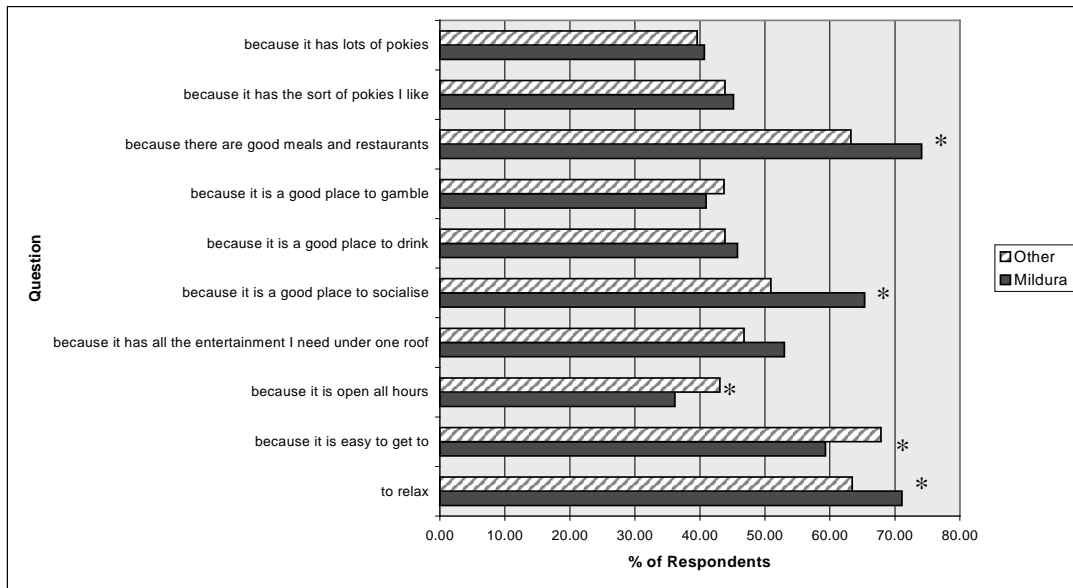
(*) Statistically significant difference between Mildura and the average of the other regions.

Our survey found that most gamblers game locally. Gamblers from the Mildura region travel on average 3.2km to gaming venues, which is slightly further than the 2.3km travelled by

respondents in the other regions. The majority of respondents in Mildura depart from home to get to the gaming venue. This is more pronounced than in other regions. Fewer respondents in Mildura travel to a venue from somewhere else (not including on the way to or from work), than in the other regions.

In our survey, over 70% of gamblers in Mildura choose gaming venues in order to relax and because there are good meals and restaurants. Being a good place to socialise, proximity and convenience were also cited as major reasons for venue choice. More gamblers in other regions frequent venues because they are open all hours than residents in Mildura. The social ambience and the presence of various forms of entertainment under the one roof are also major factors for choosing gaming venues.

Figure 5.15: Reason for venue choice, Mildura

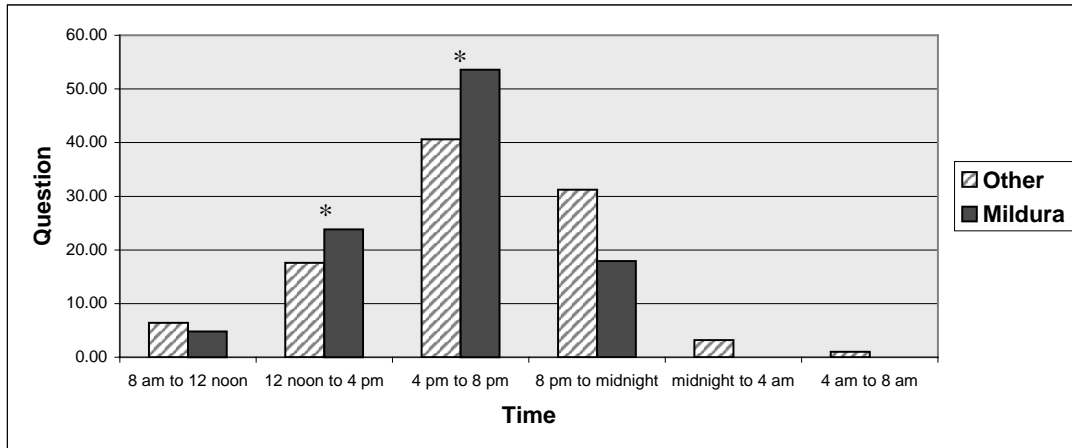


(*) Statistically significant difference between Mildura and the average of the other regions.

5.10 Utilisation of poker machines

Figure 5.16 indicates that attendance at venues varies over the day. The majority of respondents in Mildura arrive between 4pm and 8pm, which is higher than the average of the other regions. Other high responses included 8pm to midnight and noon to 4pm. No patrons indicated that they arrived between the hours of midnight and 8am reflecting that many venues are closed at this time.

Figure 5.16: Time of arrival at venue, Mildura

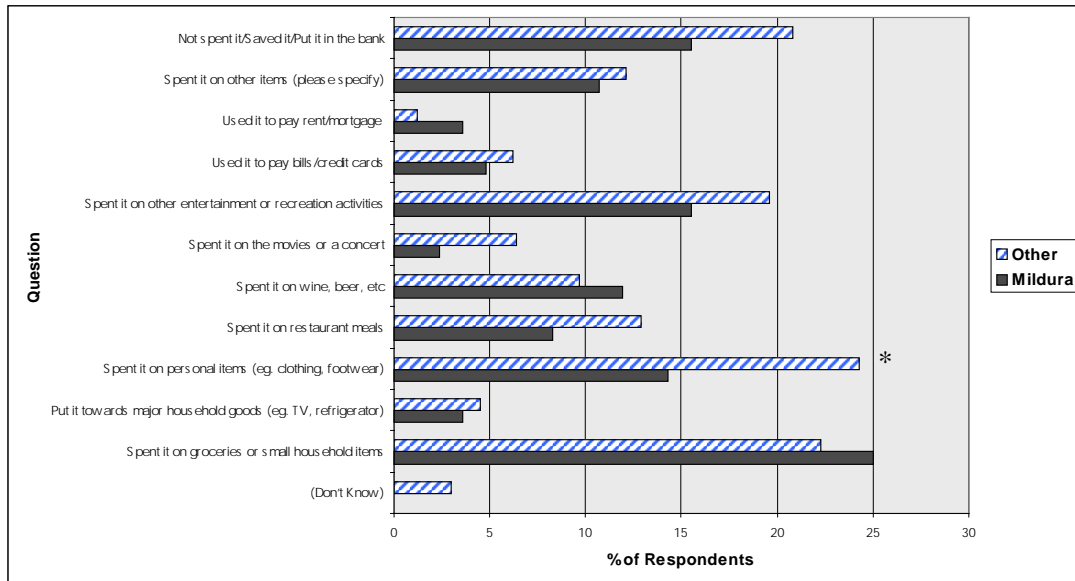


(*) Statistically significant difference between Mildura and the average of the other regions

5.11 Alternative Use of EGM funds

Figure 5.17 details what gaming respondents indicated they would spend their money on had they not spent it on gaming. Approximately 25% of Mildura gamers would have spent it on groceries or small household items and 15.5% on entertainment/recreation and saving. In our survey, only about 14% of respondents in Mildura would use money not spent of gaming on personal items, which is substantially less than the average for the other regions (24.3%). Less than 5% of gamers in Mildura said they would spend their money on essentials such as rent, mortgage, credit cards or paying bills, if they had not spent it on gambling.

Figure 5.17: Alternative uses for EGM Funds, Mildura



(*) Statistically significant difference between Mildura and the average of the other regions.

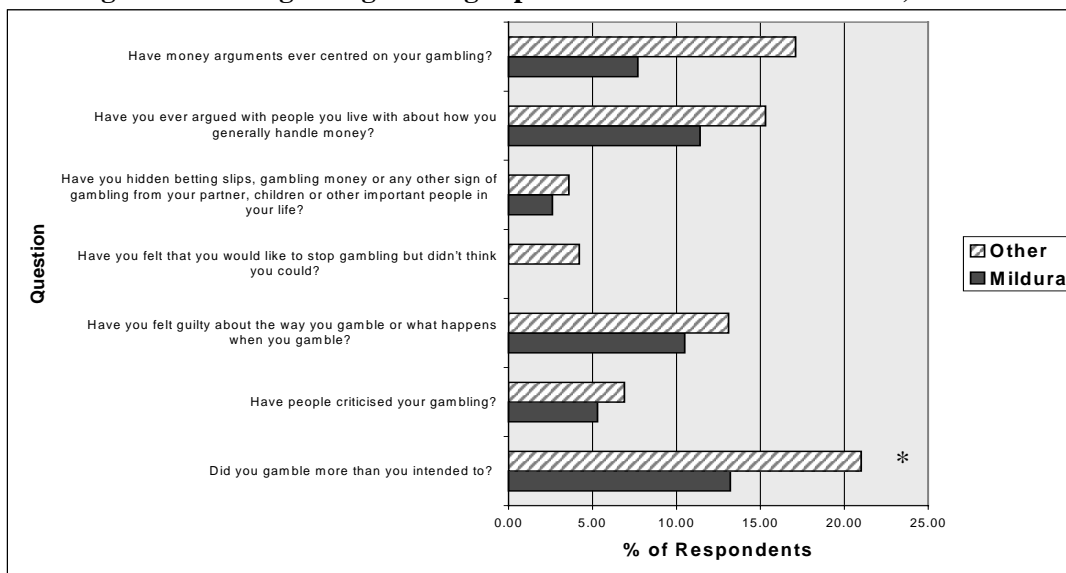
5.12 Problem Gambling

The respondents who had gambled in the last six months were asked the battery of questions from the South Oaks Gambling Screen, which is a tool used to identify gambling risks in the total population. We derived a score to identify the percentage of people ‘at risk’ of gambling problems in our survey regions using the approach adopted in the state-wide survey, ‘Sixth survey of community gambling patterns and perceptions’ (hereafter referred to as the Patterns Survey).⁵

Our survey found that only 1.2% of residents in Mildura fall into the ‘at risk’ category having SOGS scores of 5 or more. Only 1% of gamblers in Mildura feel they have had a problem with gambling or that their gambling was out of control. However, approximately 8% of all residents in Mildura said that they or a member of their family had experienced difficulties with excessive gambling at some time, with 85% of this group having experienced difficulties in the last six months.

Only a small percentage of gamblers in Mildura had negative gambling experiences. Only 13% of gamblers felt that they gambled more than they intended, which is substantially less than the 20% of respondents in other regions. (See Figure 5.18)

Figure 5.18: Negative gambling experiences in the last six months, Mildura



(*) Statistically significant difference between Mildura and the average of the other regions.

In order to probe the issue of problem gambling further, a series of questions was asked in relation to whether gambling activities were financed through borrowing. In Mildura very little gambling activity is financed by credit. Less than 4% of gamblers in Mildura admitted

⁵ Ref: ‘Definition and Incidence of Problem Gambling including the Socio-Economic Distribution of Gamblers’ Australian Institute for Gambling Research (1997) commissioned by the VCGA. In this report, the Institute recommended that the SOGS was the best currently available instrument to measure the prevalence of problem gambling and that it should be used in the short term for the VCGA ongoing survey series of community gambling patterns and perceptions.

The VCGA has included the SOGS in the last three of its ongoing Community Gambling Patterns surveys.

to having borrowed money to finance gambling, including borrowing from relatives, credit cards or selling personal property to finance gambling.

Our consultations provided some insights into community perceptions of problem gambling. The Break Even Agency which covers the Mildura region (Mallee Family Care) reported 83 cases and 385 client contacts in 1997-98 of problem gambling. These figures are an increase on the previous year (66% and 22% respectively). Note, these figures relate to a much wider area than Mildura.

Mildura venue operators were generally aware of problem gambling and felt that the issue was now more widely known within the community than in the past. Many discussed the self-exclusion program. We were advised that of the 670 excluded people in Victoria, 4.6% are in Mildura, which has only 1% of the total number of machines in Victoria. One hotel reported 20 people on self-exclusion programs, while two clubs reported 25 and 19 people respectively. Some venue operators believed that the G-Line gambling program material was made more accessible in some venues than others and more so locally than throughout the State. Consequently, the number of people in self-exclusion programs may seem higher than average. One club manager noted that the self-exclusion program was only effective in Victoria and not in NSW clubs, which made it harder for problem gamblers living in border towns such as Mildura. Two venue operators said that in terms of enforcing self-exclusion, all they could do was approach and remind patrons of their self-exclusion agreement, but nothing else. One manager said that he had approached a few patrons that he had suspected were problem gamblers.

Most venue operators said that the key sign of problem gamblers were those who regularly spent a great deal of time (eg. 5 to 6 hours or all day) at the EGMs and could not afford it. Community service agencies tended to define gambling problems in terms of when gambling affects people's ability to afford basic necessities. The agencies identify four main groups of problem gamblers in Mildura: retired pensioners, the unemployed, Aborigines and farmers. The common characteristics of these groups noted by the agencies are an abundance of time combined with financial disadvantage. The typical personal problems of problem gamblers include homelessness, being behind in rent and bills, relationship problems, family conflict and violence, family breakdown, child neglect (health, school, social development), substance abuse, legal problems, depression, low self esteem, and shame. One agency said that problem gamblers' debts average \$15,000 to \$25,000, but they can be higher, with some people losing homes and businesses. Gambling had also led to crimes such as theft and assault.

From the perspective of the community service organisations, problem gambling usually presented itself along with a range of other problems in the form of requests for material aid (assistance with rent, food and bills), housing and legal aid, and assistance with relationship and family problems. Problem gamblers rarely admit to the problem and only present for help to address the material or relationship problems caused by gambling. Many people with financial problems hide the reason, therefore it is difficult to identify whether their problems are due to gambling. People only admit to a gambling problem when they become desperate. A major issue in small towns is that it is difficult to hide a problem, so most problem gamblers are very reluctant to seek help. Often it is up to family members or the community to report a problem gambler to a service agency. The typical explanation from problem gamblers is that they "just had a bit of bad luck"

Although horse racing and bingo have contributed to the gambling problem, it is regarded as only becoming a widespread problem since the introduction of EGMs. All agencies and non-venue attendees at the public meeting said one of the biggest issues for gamblers trying to manage a problem is that EGMs are so accessible and visible, and there are few non-gaming venues. Prior to 1992 when EGMs were introduced into Victoria, problem gamblers only gambled once or twice per year (in NSW), but now they can access EGMs every day. Further, the machines accept notes (rather than coins) which encourages problem gamblers and some gaming venues offer Automatic Teller Machines (ATMs) and Electronic Funds Transfer Point Of Sale (EFTPOS), so gamblers do not have to stop when they run out of the cash they have brought with them.

Another issue reported by community service agencies for rural gamblers is the need to preserve privacy and anonymity due to the negative stigma associated with gambling. A number of agencies reported that the success rate with problem gamblers is very low. Many drop out of counselling because they don't want to admit that they are a problem gambler. Many clients don't self-exclude because of privacy issues. Some hotels were reported to have separate rooms, hidden carparks, and back entrances so that gamblers could access and use EGMs anonymously.

Problem gambling is considered to be particularly severe amongst the Aboriginal community. The Mildura Aboriginal Corporation said that a large number of the Aboriginal population are spending a significant share of their incomes on EGMs. Aborigines are said to gamble because of boredom, a "hope for the big win", depression, addiction and to get out of their houses. The Corporation estimates that 90% of the community are directly and indirectly disadvantaged due to gaming machines, and that most of the people who access their welfare and counselling services have problems which include gambling. Gambling amongst Aborigines was considered to be an insignificant issue prior to the introduction of EGMs, except for some minor problems with bingo, but many are now problem gamblers and are encountering extreme financial problems. As with other problem gamblers, Aboriginal gambling problems are often raised by family members or community rather than the gambler. Characteristics of secondary problems associated with problem gamblers include family violence, emergency funding, food requests, electricity bill requests, rent money requests, eviction, child neglect and school truancy (resulting from no money for lunches, inappropriate clothing, lack of parental support).

The Mildura Aboriginal Corporation considered a possible reason for high participation in gaming was that Aboriginal people felt accepted at gaming venues, where they felt part of the larger Mildura population. Another factor leading to high participation in gaming was that the Mildura Aboriginal Corporation is a focus for Aboriginal people, and the Corporation is a few doors from the Mildura RSL, a pokie venue.

Another group said to be experiencing substantial problems are farm families, where the wives typically seek help over financial problems caused by the husband's gambling. The gambling problem is usually hidden because of fears that the farmers could lose their "Farm Family Restart" support from Centrelink.

The culture of gambling is also said to be changing, with women and people with mental illness now more likely to face gambling problems. In the past, problems were mainly related to men with horse racing problems, but now men and women are gambling on EGMs. Examples were given by community service agencies of people gambling their whole

pension, and landlords are taking rent by direct debit from their tenant's pension accounts so that the money can't be gambled.

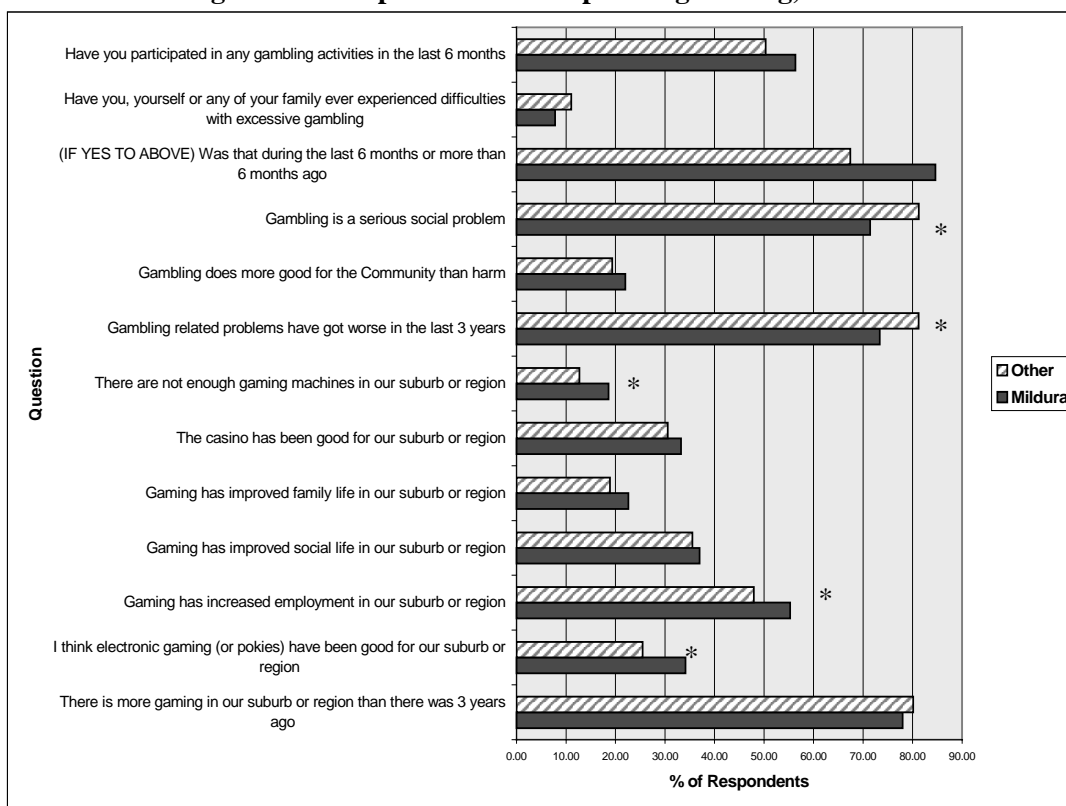
A representative of the Mildura City Council said that drinking is more of a problem than gambling in Mildura, and noted that the Council had not received any anti-gambling sentiment or letters of complaint. Similarly several venues noted that Mildura had not experienced the same problems as other areas because the community already had access to gaming machines in NSW.

6 Social and economic impact of gaming

6.1 Impacts on the community

According to our survey, 72% of Mildura respondents agree that gaming is a serious social problem, less than the 80% percent of all Victorians who feel this way as reported in the 'Patterns' survey. Thirty-four percent of Mildura residents believe that gaming has been of benefit to their region, compared to only 25% of respondents in the other regions. Fifty-five percent of Mildura residents believe that gaming has increased employment in their region, more than in other regions.

Figure 6.1: Opinion on the impact of gambling, Mildura



(*) Statistically significant difference between Mildura and the average of the other regions.

Victorian venue operators generally believe that EGMs have helped to contribute to the Mildura community in the following ways:

- the Mildura RSL has had huge growth in membership since 1992 in response to improvements in facilities and has been able to undertake a range of projects to assist the veteran community, including contribution to construction and maintenance of 20 RSL retirement units, sponsoring an Honour Roll for those who served, a POW reunion and a trip to Malaysia;
- the Mildura Working Man’s Club said that gaming machines have expanded people’s social opportunities, enhanced club life and encouraged socialising and meeting people, especially in the clubs (as opposed to the hotels). The club encourages sports

participation through funding of local sport, and is supporting the construction of homes for retirees;

- the Gateway Tavern believes that there are now more recreational opportunities within Mildura, but there was also plenty to do before EGMs were introduced. Sporting groups come into the Tavern on Saturday night (eg. after bowls); and
- the Mildura Grand Hotel indicated that it supported many events in Mildura: arts, sport, concerts and festivals.

However, non-gaming venues, such as the Merbein Citizens Club, and the Lions Club is also associated with recreational and community activities, hosting social games, supporting sport teams, charities and providing entertainment, music, dancing and bistro facilities. The Merbein Citizens Club is considering whether to introduce EGMs in the future, depending on a ballot of members, of whom approximately 60% (mostly older members) don't want EGMs as it may change the club when people can game elsewhere if they wish.

In contrast to the gaming venues, a number of the community service organisations believed that EGMs detracted from the social opportunities available in Mildura. They said that there is little other recreational activity in Mildura. One agency noted that EGMs are a social leveller – pensioners and business people sit next to one another. One agency was scathing about the social benefits of EGMs:

“We have a wonderful new underclass of ‘disadvantaged’ who live for the money they can get (fair means or foul) to help the government and local gaming venues.”

EGMs provide recreational opportunities. For some, it is simply something to enjoy, while for others, it is an addiction. Some attendees at the Mildura public meeting said that since the introduction of EGMs, clubs had made less effort in providing entertainment opportunities to members, and that participation in traditional club activities such as bowls had declined.

Most of the community service organisations commented on the lack of funding available to address gambling related problems. Most agencies commented that there was greater pressure on welfare agencies, with increased demand for financial, material and legal assistance. One agency reported that clients manipulated agencies to gain support from multiple agencies.

6.2 Economic effects

Venue operators all reported greater business and economic flow-ons with the introduction of EGMs. Some clubs had substantial debts prior to 1992, but are now performing well and report funding major club renovations from the proceeds of EGMs. The venues also described the economic benefits to local suppliers of food and building services due to the expansion of gaming venues. One hotel also said that before EGMs, business was cyclical, subject to weather and flooding. The hotel has definitely become busier since introducing EGMs.

On the other hand, NSW border clubs had suffered a massive loss in trade since Victoria had introduced EGMs, with one NSW club going bankrupt. Wentworth Services Club spent over

\$10 million on renovations and went bankrupt 2 years after EGMs came into Victoria. Non-EGM venues have also noticed a loss in trade.

Two venues reported no significant increase in employment due to EGMs, although the Mildura RSL has increased staff by 10 full time equivalents since 1991.

There was concern amongst community service agencies regarding the economic impact of EGMs. The government is felt to rely too much on funds generated by gambling with too little being put back into the community, especially in rural areas. One agency argued that gambling taxes made no economic contribution as the money is spread Victoria-wide and concentrated very much into the city areas. The agency also said that social gains are few, and only benefit a small percentage of the community. One agency commented on the economic benefits of EGMs:

“Wow – the RSL has been able to expand and renovate. So has the Working Man’s Club, etc – this is just great and positive – I have families living on the river bank to make sure they can do this!”

At the Public Meeting, people said that gamblers were spending less on groceries and more on pokies. Prior to 1992, many Victorian tourists stayed in Mildura to visit NSW pokies. Now that Victoria has introduced pokies, tourism has declined (because tourists don’t have to go to NSW to gamble, and therefore don’t need to stay in Mildura). Mildura is now trying to rebuild itself as an events town.

6.3 Perceived benefits and costs

To summarise, during our consultations, the following costs and benefits of gaming were identified.

6.3.1 Benefits

Venue operators were generally of the view that the introduction of EGMs had had a number of significant benefits for the Mildura community including:

- Significant economic flow-ons through increased levels of expenditure on food, beverage and entertainment at licensed venues;
- Increased employment in licensed venues; and
- Increased financial support for community, sporting and charitable associations through the distribution of profits from EGMs.

A number of attendees at public meetings indicated that the community had benefited through the availability of improved entertainment and recreational facilities and services. Further, with the introduction of EGMs, the flow of money across the border to NSW licensed venues had reduced significantly, so that gambling expenditure by Mildura residents now stayed in the local community.

6.3.2 Costs

Venue operators did not highlight many perceived costs associated with the introduction of EGMs, however a few did recognise that there had been an increase in social problems associated with problem gamblers. Also, the introduction of EGMs in Mildura had had a significant negative impact on the trading performance of NSW border clubs due to increased competition.

Representatives of the City Councils also noted that since the introduction of EGMs in Victoria, there had been a significant decline in the number of tourists travelling to Mildura to play the poker machines available in NSW licensed clubs located on the border adjacent to Mildura. Official statistics indicate that tourism accommodation takings have continued to grow from the mid-1990's (although the number of establishments has declined).

Community service organisations highlighted a range of perceived costs associated with the introduction of EGMs, including:

- increased incidence of problem gambling amongst at risk groups such as the elderly, welfare recipients, Aborigines, and the unemployed;
- increased incidence of social problems within family units such as domestic violence, homelessness, food shortages and a lack of financial resources to meet the normal costs of living;
- increased demand for community support services which has meant that resources are stretched to the limit;
- a reduction in social interaction throughout the broader Mildura community; and
- increased crime due to people being desperate to fund their gambling additions. Official data indicates that there has been an increase in crime, but it is unclear if this is related to gaming or if it is an on-going feature of the region.

Appendix 1

VCGA Gaming Survey		Mildura	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree	
ref: VCGA99-BDT09-Reports.xls					(word)						
PART B - PERSONAL VALUES											
Life in general											
	1	I am really happy with life	74.40	73.95	0.45		0.807	X5B(1)	74.8	19.8	5.4
	2	The Australian economy is doing well	48.65	54.10	-5.45	p	0.009	X5B(2)	29.9	38.3	31.8
	3	The Australian economy is getting better	50.15	53.43	-3.28		0.098	X5B(3)	33.5	39.5	27.0
	4	My life will be better in the next year than it was last year	66.33	67.25	-0.93		0.67	X5B(4)	60.5	25.7	13.8
	5	My family's financial situation is good	63.78	65.33	-1.55		0.499	X5B(5)	60.5	21.0	18.6
	6	I feel that where I end up in life will be more a matter of luck than planning	43.58	44.05	-0.48		0.854	X5B(6)	33.0	15.0	52.1
	7	I believe rules should never be broken	57.18	51.50	5.68	p	0.029	X5B(7)	45.5	24.6	30.0
	8	I seek out the latest things	48.05	49.00	-0.95		0.695	X5B(8)	33.6	27.5	38.9
	9	I am healthy	72.75	72.40	0.35		0.865	X5B(9)	78.4	9.6	12.0
	10	I rarely feel stressed	44.00	46.45	-2.45		0.317	X5B(10)	32.9	19.2	47.9
Belonging and friendship											
	11	I have a good family life	78.60	79.45	-0.85		0.69	X5B(11)	84.4	7.8	7.8
	12	Security is of concern to me	69.75	72.63	-2.88		0.233	X5B(12)	70.6	12.6	16.8
	13	I am hardly ever lonely	70.50	68.53	1.98		0.429	X5B(13)	71.2	13.2	15.6
Levels of activity											
	14	I am always busy	80.40	78.18	2.23		0.287	X5B(14)	83.8	8.4	7.8
Fun and going out											
	15	I have a full social life	61.23	62.15	-0.93		0.7	X5B(15)	56.3	21.0	22.8
	16	I like crowds	45.20	47.50	-2.30		0.371	X5B(16)	30.6	23.4	46.1
	17	I am hardly ever bored	73.05	67.70	5.35	p	0.01	X5B(17)	76.6	13.2	10.2
Risk											
	18	Taking risks gives me a thrill	44.90	46.10	-1.20		0.646	X5B(18)	31.8	21.0	47.3
Trust											
	19	I believe most people can be trusted	43.58	46.75	-3.18		0.168	X5B(19)	28.7	26.9	44.3
Income											
	20	I always have enough money to go around	49.55	53.05	-3.50		0.158	X5B(20)	43.7	17.4	38.9
	21	I buy luxuries	42.68	42.25	0.43		0.872	X5B(21)	30.0	20.4	49.7
Shopping											
	22	I am a spender, not a saver	45.80	49.40	-3.60		0.165	X5B(22)	29.4	22.8	47.9
Thinking about your suburb or region											
	23	Overall, this is a good suburb or region to live in	75.45	73.20	2.25		0.267	X5B(23)	86.2	6.0	7.8
	24	The local economy is good	62.13	53.85	8.28	* p	0	X5B(24)	58.7	24.0	17.4
	25	The local shops are doing well financially	59.43	50.50	8.93	* p	0	X5B(25)	49.7	33.5	16.8
	26	There is a real sense of community around here	69.00	61.95	7.05	p	0	X5B(26)	71.3	19.2	9.6
	27	It is safe around here	66.33	59.53	6.80	p	0.001	X5B(27)	68.3	18.0	13.8
	28	There is no crime around here	35.48	32.83	2.65		0.263	X5B(28)	21.0	19.2	59.9
	29	There is plenty of work around here	53.75	36.83	16.93	** p	0	X5B(29)	46.7	22.2	31.2
	30	People play sport around here	84.28	71.58	12.70	* p	0	X5B(30)	92.8	5.4	1.8
Thinking about your life 3 years ago											
	31	I was living in this suburb or region 3 years ago	82.93	77.40	5.53	p	0.02	X5B(31)	87.4	2.4	10.2

VCGA Gaming Survey		Mildura	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
Life in general										
32	I am happier than I was 3 years ago	72.45	66.38	6.08	p	0.008	X5B(32)	71.2	16.8	12.0
33	The Australian economy is better now than it was 3	60.78	60.78	0.00		0.998	X5B(33)	50.9	29.3	19.8
34	My family's financial situation is better than it was 3	60.78	61.38	-0.60		0.797	X5B(34)	54.5	26.9	18.6
35	I am healthier now than I was 3 years ago	55.40	54.60	0.80		0.731	X5B(35)	39.0	34.7	26.4
36	I feel less stressed now than I did 3 years ago	53.30	51.65	1.65		0.5	X5B(36)	46.1	18.6	35.3
Belonging and friendship										
37	I have a better family life now than I did 3 years ago	64.38	59.53	4.85	p	0.021	X5B(37)	55.1	32.3	12.6
38	I am less concerned with security now than I was 3	48.65	45.15	3.50		0.132	X5B(38)	34.1	28.1	37.7
39	I am less lonely now than I was 3 years ago	57.18	53.63	3.55		0.112	X5B(39)	42.5	35.3	22.2
Levels of activity										
40	I am busier now than I was 3 years ago	67.38	65.73	1.65		0.478	X5B(40)	62.2	22.2	15.6
Fun and going out										
41	I have a better social life now than I did 3 years ago	54.65	52.83	1.83		0.409	X5B(41)	34.8	41.9	23.4
42	I am less bored now than I was 3 years ago	59.13	57.88	1.25		0.541	X5B(42)	47.3	34.7	18.0
Risk										
43	I take more risks now than I did 3 years ago	43.28	43.70	-0.43		0.85	X5B(43)	23.4	25.7	50.9
Trust										
44	I trust people more now than I did 3 years ago	38.03	38.15	-0.13		0.954	X5B(44)	15.6	32.3	52.1
Income										
45	My money goes further now than it did 3 years ago	37.43	37.38	0.05		0.982	X5B(45)	23.4	20.4	56.2
46	I buy more luxuries now than I did 3 years ago	36.38	37.83	-1.45		0.559	X5B(46)	21.6	22.8	55.7
Thinking about your suburb or region compared to how it was 3 years ago										
47	This suburb or region is better to live in now than 3 years	55.10	52.65	2.45		0.194	X5B(47)	35.3	47.3	17.4
48	The local economy is better now than it was 3 years ago	55.25	50.35	4.90	p	0.01	X5B(48)	41.3	38.3	20.4
49	The local shops are doing better financially than they	55.40	48.48	6.93	p	0	X5B(49)	41.3	41.3	17.4
50	There is a better sense of community around here now than there was 3 years ago	56.43	52.75	3.68	p	0.042	X5B(50)	40.7	42.5	16.8
51	It is safer around here now than 3 years ago	45.50	42.80	2.70		0.13	X5B(51)	19.8	46.7	33.5
52	There is less crime around here than 3 years ago	40.58	38.60	1.98		0.336	X5B(52)	18.6	34.7	46.7
53	There is more work around here than there was 3 years	51.65	41.93	9.73	* p	0	X5B(53)	38.9	31.7	29.4
54	People play more sport around here than they did 3 years	60.63	51.70	8.93	* p	0	X5B(54)	45.5	40.1	14.4
Gaming- explain that gaming is electronic gaming machines or pokies and the games played at the casino										
55	There is more gaming in our suburb or region than there was 3 years ago	78.00	80.13	-2.13		0.285	X5B(55)	80.2	13.8	6.0
56	I think electronic gaming (or pokies) have been good for our suburb or region	34.13	25.45	8.68	* p	0	X5B(56)	18.6	24.6	56.8
57	Gaming has increased employment in our suburb or	55.25	47.93	7.33	p	0.002	X5B(57)	49.7	23.4	27.0
58	Gaming has improved social life in our suburb or region	36.98	35.53	1.45		0.535	X5B(58)	18.6	26.9	54.5
59	Gaming has improved family life in our suburb or region	22.60	18.88	3.73		0.051	X5B(59)	5.4	15.6	79.0
60	The casino has been good for our suburb or region	33.23	30.53	2.70		0.199	X5B(60)	8.4	38.9	52.7
61	There are not enough gaming machines in our suburb or	18.58	12.73	5.85	p	0.003	X5B(61)	4.8	11.4	83.8
62	Gambling related problems have got worse in the last 3	73.35	81.20	-7.85	* p	0.001	X5B(62)	77.8	10.2	12.0
63	Gambling does more good for the Community than harm	22.00	19.33	2.68		0.18	X5B(63)	6.0	14.4	79.6
64	Gambling is a serious social problem	71.40	81.25	-9.85	* p	0	X5B(64)	72.4	10.2	17.4
65	Have you, yourself or any of your family ever experienced difficulties with excessive gambling	7.80	11.10	-3.30		0.172	X2B(65)	7.8	0.0	92.2
66	(IF YES TO ABOVE) Was that during the last 6 months or more than 6 months ago	84.60	67.40	17.20	**	0.152	X2B(66)	84.6	0.0	15.4
67	Have you participated in any gambling activities in the last	56.30	50.30	6.00		0.157	X2B(67)	56.3	0.0	43.7

VCGA Gaming Survey		Mildura	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
PART C - FREQUENCY OF CONSUMPTION										
In the last month, how many times did you visit.....?										
	1	Department stores	4.28	4.34	-0.07		0.86	XFC(1)		
	2	Shopping centres	6.57	6.57	0.00		0.995	XFC(2)		
In the last month, how many of the items in any of the following categories did you buy..?										
	3	Clothing	3.93	3.35	0.58		0.129	XFC(3)		
	4	Fashion accessories	1.14	0.77	0.37		0.078	XFC(4)		
	5	Books	1.95	2.00	-0.05		0.877	XFC(5)		
	6	Cds	1.06	1.20	-0.14		0.486	XFC(6)		
	7	Computer softw are, hardw are and accessories	0.48	0.55	-0.07		0.642	XFC(7)		
	8	Homew ares	1.14	1.15	0.00		0.989	XFC(8)		
In the last month, how many times did you.....?										
	9	Go to a BYO or licensed restaurant	1.84	2.18	-0.34		0.134	XFC(9)		
	10	Eat takeaw ays	3.44	4.09	-0.64	p	0.046	XFC(10)		
	11	See a movie at a cinema	0.40	0.84	-0.44	p	0	XFC(11)		
	12	Go to a pub or bar for drinks only	1.40	1.49	-0.10		0.716	XFC(12)		
	13	Go to a night club or disco	0.32	0.66	-0.34	p	0.002	XFC(13)		
In the last six months, have you										
	14	Bought or built a house or flat	5.99	5.04	0.95		0.635	XFC(14)		
	15	Carried out renovations of more than \$5,000	5.39	8.04	-2.65		0.183	XFC(15)		
	16	Bought a car (new or used)	14.97	13.81	1.16		0.7	XFC(16)		
How often do you gamble on or play.....?										
	17	Bingo	4.70	3.66	1.04		0.506	XFC(17)		
	18	Horse or greyhound races	4.98	5.98	-1.01		0.545	XFC(18)		
	19	Poker machines (pokies) at a pub or club	7.92	8.36	-0.44		0.806	XFC(19)		
	20	Poker machines (pokies) at Crow n Casino	0.59	1.26	-0.66	p	0	XFC(20)		
	21	Table games at Crow n Casino	0.56	1.54	-0.98	p	0.005	XFC(21)		
		Average frequency of Pokies,Horses and Bingo	5.88	5.94	-0.06		0.957	X_GFREQ3		
		Average frequency of Pokies,Horses, Bingo, Crow n	3.78	3.99	-0.22		0.758	X_GFREQ5		
	22	I am gambling less now than I was 3 years ago	57.63	55.35	2.28		0.358	X5C(22)	37.8	44.3
									18.0	

VCGA Gaming Survey		Mildura	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
PART D - GAMING										
1	Would you say you are satisfied or dissatisfied with your experience of playing table games at Crown Casino	50.00	66.83	-16.83	**	0.104	X5D(1)	30.0	40.0	30.0
2	Each day you play table games at Crown Casino, how much time do you spend at the gaming tables (record	89.00	74.79	14.22	*	0.698	XND(2)			
3	Each day you play table games at Crown Casino, on average, how much money do you spend or outlay	119.20	96.75	22.45	**	0.676	XND(3)			
4	Would you say you are satisfied or dissatisfied with your experience of playing the pokies (vsatisfied=100)	49.70	46.00	3.70		0.316	X5D(4)	41.6	22.6	35.7
5	Each day you play the pokies, how much time do you spend playing the machines (record time in minutes)	54.48	54.68	-0.20		0.973	XND(5)			
6	Each day you play the pokies, on average, how much money do you spend or outlay (record amount in dollars)	19.68	51.40	-31.73	****	0.235	XND(6)			
7	What are the main motivations, attractions or reasons you play the pokies?									
a	Thrill/dream rewards of winning	10.70	15.40	-4.70		0.226	X2D7(1)	10.7	0.0	89.3
b	Atmosphere/excitement/gives a buzz	10.70	9.00	1.70		0.653	X2D7(2)	10.7	0.0	89.3
c	Beating the odds/back a winner	0.00	4.00	-4.00		is	X2D7(3)	0.0	0.0	100.0
d	Exchange of money/handling money	0.00	0.30	-0.30		is	X2D7(4)	0.0	0.0	100.0
e	Upbringing/family background	1.20	0.30	0.90		0.45	X2D7(5)	1.2	0.0	98.8
f	Ego/self esteem	0.00	0.00	0.00		is	X2D7(6)	0.0	0.0	100.0
g	Favourite recreational activity/hobby	2.40	10.90	-8.50	* p	0	X2D7(7)	2.4	0.0	97.6
h	Social reasons/see friends	47.60	44.90	2.70		0.66	X2D7(8)	47.6	0.0	52.4
i	Compulsions/addiction	1.20	0.80	0.40		0.759	X2D7(9)	1.2	0.0	98.8
j	Like taking risks/risk taker	1.20	0.30	0.90		0.45	X2D7(10)	1.2	0.0	98.8
k	Belief in luck/may get lucky	13.10	12.50	0.60		0.884	X2D7(11)	13.1	0.0	86.9
l	Want to be successful	0.00	2.90	-2.90		is	X2D7(12)	0.0	0.0	100.0
m	Boredom/pass time	20.20	22.60	-2.40		0.63	X2D7(13)	20.2	0.0	79.8
n	Other (specify)	10.70	6.40	4.30		0.234	X2D7(14)	10.7	0.0	89.3
o	(Don't know)	2.40	1.10	1.30		0.455	X2D7(15)	2.4	0.0	97.6
I play the pokies:										
8	For the thrill/dream of winning	49.10	51.60	-2.50		0.566	X5D(8)	45.3	13.1	41.7
9	Because it is a favourite recreational activity/hobby	28.28	26.85	1.43		0.693	X5D(9)	19.1	7.1	73.8
10	Out of boredom to pass the time	37.50	37.43	0.08		0.986	X5D(10)	26.2	17.9	56.0
11	Because I like to beat the odds/back a winner	38.40	35.85	2.55		0.478	X5D(11)	26.2	14.3	59.5
12	Because I believe I may get lucky	56.85	55.18	1.68		0.677	X5D(12)	58.4	9.5	32.2
13	To test my skill	26.50	20.28	6.23	p	0.04	X5D(13)	9.5	16.7	73.8
14	To make a quick buck	41.98	40.43	1.55		0.714	X5D(14)	36.9	9.5	53.6
15	Because I like to take risks	30.95	33.78	-2.83		0.405	X5D(15)	19.1	11.9	69.1
16	To enhance my social standing	22.63	18.55	4.08		0.138	X5D(16)	6.0	15.5	78.6
17	Because the money lost goes to a worthy cause	16.08	16.43	-0.35		0.892	X5D(17)	4.8	6.0	89.3
18	For social reasons; to be with friends	61.00	58.45	2.55		0.453	X5D(18)	58.3	19.0	22.7
19	Because the atmosphere and excitement gives me a	38.10	33.38	4.73		0.217	X5D(19)	34.6	8.3	57.2
20	Because I am attracted to the venue itself	40.48	34.05	6.43		0.067	X5D(20)	29.8	16.7	53.6

VCGA Gaming Survey		Mildura	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
Other gambling questions										
	Thinking of the last week in which you spent money on pokies or table games. If you hadn't spent the money on gambling, could you please tell me in what other ways you might have used it? (Don't read out, circle yes as									
21	Spent it on groceries or small household items	25.00	22.30	2.70		0.601	X2D(21)	25.0	0.0	75.0
22	Put it towards major household goods (eg. TV,	3.60	4.50	-0.90		0.699	X2D(22)	3.6	0.0	96.4
23	Spent it on personal items (eg. clothing, footwear)	14.30	24.30	-10.00	* p	0.025	X2D(23)	14.3	0.0	85.7
24	Spent it on restaurant meals	8.30	12.90	-4.60		0.192	X2D(24)	8.3	0.0	91.7
25	Spent it on wine, beer, etc	11.90	9.70	2.20		0.56	X2D(25)	11.9	0.0	88.1
26	Spent it on the movies or a concert	2.40	6.40	-4.00		0.052	X2D(26)	2.4	0.0	97.6
27	Spent it on other entertainment or recreation activities	15.50	19.60	-4.10		0.359	X2D(27)	15.5	0.0	84.5
28	Used it to pay bills/credit cards	4.80	6.20	-1.40		0.588	X2D(28)	4.8	0.0	95.2
29	Used it to pay rent/mortgage	3.60	1.20	2.40		0.272	X2D(29)	3.6	0.0	96.4
30	Spent it on other items (please specify)	10.70	12.10	-1.40		0.708	X2D(30)	10.7	0.0	89.3
31	Not spent it/Saved it/Put it in the bank	15.50	20.80	-5.30		0.235	X2D(31)	15.5	0.0	84.5
32	(Don't know)	0.00	3.00	-3.00		is	X2D(32)	0.0	0.0	100.0
Which type of venue do you play pokies at (MULTIPLE										
33	Pub/hotel	27.40	45.20	-17.80	** p	0.002	X2D(33)	27.4	0.0	72.6
34	Licensed sports club (golf, football, bowls etc)	27.40	26.90	0.50		0.924	X2D(34)	27.4	0.0	72.6
35	RSL Club	28.60	15.70	12.90	* p	0.017	X2D(35)	28.6	0.0	71.4
36	Some other sort of licensed club	29.80	12.80	17.00	** p	0.002	X2D(36)	29.8	0.0	70.2
37	Melbourne Crown Casino	4.80	26.60	-21.80	** p	0	X2D(37)	4.8	0.0	95.2
38	Or somewhere else (specify)	1.20	1.90	-0.70		0.627	X2D(38)	1.2	0.0	98.8
Which type of venue do you go to the most to play pokies (single response):										
40	Pub/hotel	23.80	38.60	-14.80	* p	0.006	X2D(40)	23.8	0.0	76.2
41	Licensed sports club (golf, football, bowls etc)	23.80	21.30	2.50		0.622	X2D(41)	23.8	0.0	76.2
42	RSL Club	25.00	11.40	13.60	* p	0.008	X2D(42)	25.0	0.0	75.0
43	Some other sort of licensed club	22.60	9.30	13.30	* p	0.007	X2D(43)	22.6	0.0	77.4
44	Melbourne Crown Casino	4.80	18.10	-13.30	* p	0	X2D(44)	4.8	0.0	95.2
45	Or somewhere else (specify)	0.00	1.30	-1.30		is	X2D(45)	0.0	0.0	100.0
Thinking of the last time you played the pokies at a club or pub (not including Crown Casino)										
47	How far did you travel to get to this venue? (km)	3.22	2.36	0.86	p	0	XND(47)			
48	Did you go to this venue									
	* From home	44.30	29.80	14.50	* p	0.001	2START(1)	44.3	0.0	55.7
	* On the way to or from work	1.20	2.30	-1.10		0.275	2START(2)	1.2	0.0	98.8
	* From somewhere else	4.20	10.00	-5.80	p	0.002	2START(3)	4.2	0.0	95.8
49	I visit that venue more than other venues	59.65	52.08	7.58	*	0.065	X5D(49)	59.1	12.0	28.9
50	I really like visiting the venue	58.73	53.85	4.88		0.141	X5D(50)	53.0	26.5	20.5
51	I have lots of good luck there	31.63	28.08	3.55		0.284	X5D(51)	13.2	24.1	62.6
52	It is enjoyable and thrilling	48.20	43.35	4.85		0.155	X5D(52)	38.5	24.1	37.3
53	I had a meal	62.05	58.65	3.40		0.411	X5D(53)	69.9	4.8	25.3
I went to the venue..										
54	to relax	71.08	63.43	7.65	* p	0.007	X5D(54)	83.2	6.0	10.8
55	because it is easy to get to	59.33	67.85	-8.53	* p	0.019	X5D(55)	57.9	13.3	28.9
56	because it is open all hours	36.15	43.08	-6.93	p	0.046	X5D(56)	20.5	18.1	61.5
57	because it has all the entertainment I need under one roof	53.00	46.78	6.23		0.091	X5D(57)	48.2	14.5	37.3
58	because it is a good place to socialise	65.35	50.93	14.43	* p	0	X5D(58)	68.6	18.1	13.2
59	because it is a good place to drink	45.78	43.85	1.93		0.622	X5D(59)	36.1	19.3	44.6
60	because it is a good place to gamble	40.98	43.73	-2.75		0.435	X5D(60)	30.1	16.9	53.0
61	because there are good meals and restaurants	74.10	63.23	10.88	* p	0	X5D(61)	81.9	12.0	6.0
62	because it has the sort of pokies I like	45.18	43.85	1.33		0.721	X5D(62)	37.3	16.9	45.8
63	because it has lots of pokies	40.68	39.58	1.10		0.762	X5D(63)	27.7	20.5	51.8

VCGA Gaming Survey		Mildura	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
	On your last visit to a gaming venue									
64	What time did you arrive:									
	8 am to 12 noon	4.80	6.40	-1.60		0.527	X2TIME(1)	4.8	0.0	95.2
	12 noon to 4 pm	23.80	17.60	6.20		0.219	X2TIME(2)	23.8	0.0	76.2
	4 pm to 8 pm	53.60	40.60	13.00	* p	0.032	X2TIME(3)	53.6	0.0	46.4
	8 pm to midnight	17.90	31.20	-13.30	* p	0.006	X2TIME(4)	17.9	0.0	82.1
	midnight to 4 am	0.00	3.20	-3.20		is	X2TIME(5)	0.0	0.0	100.0
	4 am to 8 am	0.00	1.00	-1.00		is	X2TIME(6)	0.0	0.0	100.0
65	How long did you stay(hours)	2.79	2.38	0.41	p	0.009	XND(65)			
	Thinking about w hen you last played the pokies									
66	How much did you w in? (a lot=100)	40.18	40.15	0.03		0.995	X5D(66)	23.8	25.0	51.2
67	I had really good luck	41.08	33.45	7.63	* p	0.044	X5D(67)	29.7	15.5	54.7
68	I enjoyed myself	63.10	62.63	0.48		0.879	X5D(68)	64.3	20.2	15.5
	I would game more if:									
69	There w as a more conveniently located venue	23.50	22.03	1.48		0.593	X5D(69)	8.3	14.3	77.4
70	The venue w as more attractive and comfortable	27.68	25.38	2.30		0.448	X5D(70)	11.9	17.9	70.2
71	The venue w as open longer	19.95	19.55	0.40		0.869	X5D(71)	3.6	8.3	88.1
72	There w ere more machines available	21.43	19.93	1.50		0.566	X5D(72)	6.0	10.7	83.3
73	There w as more variety in the types of machines	26.78	26.43	0.35		0.907	X5D(73)	13.1	13.1	73.8
PART E										
	Which any of these statements applied to you personally in the last 6 months.									
1	When you gamble, how often do you go back another day to w in back money you lost?	1.15	1.17	-0.02		0.615	XNE(1)			
2	Have you ever claimed to be WINNING money w hen you	1.11	1.10	0.00		0.945	XNE(2)			
3	Do you feel you have had a problem w ith gambling or that your gambling w as out of control?	1.09	1.11	-0.02		0.644	XNE(3)			
	The following questions still relate to the last 6 months and only require a yes or no answer.									
4	Did you gamble more than you intended to?	13.20	21.00	-7.80	* p	0.033	X2E(4)	13.2	0.0	86.8
5	Have people criticised your gambling?	5.30	6.90	-1.60		0.487	X2E(5)	5.3	0.0	94.7
6	Have you felt guilty about the way you gamble or w hat happens w hen you gamble?	10.50	13.10	-2.60		0.43	X2E(6)	10.5	0.0	89.5
7	Have you felt that you would like to stop gambling but didn't think you could?	0.00	4.20	-4.20		is	X2E(7)	0.0	0.0	100.0
8	Have you hidden betting slips, gambling money or any other sign of gambling from your partner, children or other important people in your life?	2.60	3.60	-1.00		0.59	X2E(8)	2.6	0.0	97.4
9	Have you ever argued w ith people you live w ith about how you generally handle money?	11.40	15.30	-3.90		0.246	X2E(9)	11.4	0.0	88.6
10	Have money arguments ever centred on your gambling?	7.70	17.10	-9.40	*	0.297	X2E(10)	7.7	0.0	92.3
11	Have you borrow ed money from someone and not paid them back because of your gambling?	0.00	1.10	-1.10		is	X2E(11)	0.0	0.0	100.0
12	Have you lost time from work or study because of	0.00	0.90	-0.90		is	X2E(12)	0.0	0.0	100.0
13	Have you ever borrow ed money to gamble or pay off	3.50	2.20	1.30		0.495	X2E(13)	3.5	0.0	96.5
14	Have you ever borrow ed money to gamble or to pay gambling debts from household money?	0.90	2.20	-1.30		0.209	X2E(14)	0.9	0.0	99.1
15	Have you borrow ed money to gamble or to pay gambling debts from your spouse or partner?	3.50	1.30	2.20		0.224	X2E(15)	3.5	0.0	96.5
16	(Have you borrow ed money to gamble or to pay gambling debts) from other relatives or in-laws?	0.90	0.80	0.10		0.896	X2E(16)	0.9	0.0	99.1
17	(Have you borrow ed money to gamble or to pay gambling debts) from banks, finance companies or credit unions?	0.00	0.40	-0.40		is	X2E(17)	0.0	0.0	100.0
18	(Have you borrow ed money to gamble or to pay gambling debts) from credit cards?	3.50	1.10	2.40		0.185	X2E(18)	3.5	0.0	96.5
19	(Have you borrow ed money to gamble or to pay gambling debts) from high interest rate finance companies?	0.00	0.00	0.00		is	X2E(19)	0.0	0.0	100.0
20	(Have you borrow ed money to gamble or to pay gambling debts) from cashing in stocks, bonds or other securities?	0.00	0.70	-0.70		is	X2E(20)	0.0	0.0	100.0
21	(Have you borrow ed money to gamble or to pay gambling debts) from selling personal or company property?	1.80	0.20	1.60		0.212	X2E(21)	1.8	0.0	98.2
22	(Have you borrow ed money to gamble or to pay gambling debts) by w riting cheques knowing there w as no money	0.00	0.00	0.00		is	X2E(22)	0.0	0.0	100.0
	SOGs score	0.40	0.50	-0.10		0.255	SOG			
	No risk (score<=4)	98.80	97.80	1.00		0.328	X2SOG(1)	98.8	0.0	1.2
	One in 5 risk (score>=5 and score<=6)	1.20	1.30	-0.10		0.895	X2SOG(2)	1.2	0.0	98.8
	One in 2 risk (score>=7 and score<=9)	0.00	0.50	-0.50		is	X2SOG(3)	0.0	0.0	100.0
	One in 1 risk (score>=10)	0.00	0.40	-0.40		is	X2SOG(4)	0.0	0.0	100.0

VCGA Gaming Survey		Mildura	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
PART A - SAMPLE AND DEMOGRAPHICS										
1	Gender (male=0 female=100)	49.70	51.40	-1.70		0.693	X2A(1)	49.7	0.0	50.3
2	Region									
	Dandenong	0.00	20.00	-20.00	**	is	X2LOC(1)	0.0	0.0	100.0
	Geelong	0.00	20.00	-20.00	**	is	X2LOC(2)	0.0	0.0	100.0
	Maribyrnong	0.00	20.00	-20.00	**	is	X2LOC(3)	0.0	0.0	100.0
	Mildura	100.00	0.00	100.00	***	***	is	X2LOC(4)	100.0	0.0
	Moreland	0.00	19.90	-19.90	**	is	X2LOC(5)	0.0	0.0	100.0
	Wellington/ South Gippsland	0.00	19.90	-19.90	**	is	X2LOC(6)	0.0	0.0	100.0
1	Do you live with a partner or spouse? (No=0 Yes=100)	70.10	53.80	16.30	**	p	0	X2F(1)	70.1	0.0
2	Do you have dependent children living at home? (No=0	46.70	34.10	12.60	*	p	0.003	X2F(2)	46.7	0.0
3	Do you receive a government pension or benefit? (No=0	43.70	37.10	6.60			0.116	X2F(3)	43.7	0.0
4	Are you the main income earner? (No=0 Yes=100)	62.90	62.90	0.00			0.994	X2F(4)	62.9	0.0
5	Highest education level? (1=primary 4=year 12	3.49	4.01	-0.53	p		0	XNF(5)		
	Less than year 12	65.30	47.10	18.20	**	p	0	X2ED(1)	65.3	0.0
	Year 12	16.20	24.80	-8.60	*	p	0.008	X2ED(2)	16.2	0.0
	Trade or diploma	9.00	15.50	-6.50	p		0.011	X2ED(3)	9.0	0.0
	Degree	9.60	12.60	-3.00			0.238	X2ED(4)	9.6	0.0
6	Work status?									
	* Work full time (for money)	41.90	43.20	-1.30			0.757	X2JOB(1)	41.9	0.0
	* Work part time(for money)	19.80	18.70	1.10			0.76	X2JOB(2)	19.8	0.0
	* Household duties only	12.60	7.40	5.20			0.061	X2JOB(3)	12.6	0.0
	* Full time student	1.80	5.80	-4.00	p		0.003	X2JOB(4)	1.8	0.0
	* Retired (self supporting)	7.20	10.10	-2.90			0.201	X2JOB(5)	7.2	0.0
	* Other pensioner	13.20	11.30	1.90			0.507	X2JOB(6)	13.2	0.0
	* Unemployed	65.30	65.30	0.00			0.993	X2JOB(7)	65.3	0.0
		34.70	34.60	0.10			0.969	X2JOB(8)	34.7	0.0
7	What is (was) your occupation?									
	Un-skill ed Blue Collar									
	Semi-skill ed Blue Collar	10.80	6.40	4.40			0.085	X2OCC(1)	10.8	0.0
	Skill ed Blue Collar	9.00	10.70	-1.70			0.49	X2OCC(2)	9.0	0.0
	Lower White Collar	8.40	14.00	-5.60	p		0.022	X2OCC(3)	8.4	0.0
	Upper White Collar	28.70	27.10	1.60			0.675	X2OCC(4)	28.7	0.0
	Senior Upper White Collar	10.20	11.20	-1.00			0.704	X2OCC(5)	10.2	0.0
8	What industry do (did) you work in?	0.00	1.40	-1.40			is	X2OCC(6)	0.0	0.0
9	Were you or your parents born overseas?	11.70	33.60	-21.90	**	p			5.4	12.6
10	What was the main language spoken at home when you were growing up?						0	X3F(9)		
	English	82.00	56.30	25.70	***	p	0	X2LANG(1)	82.0	0.0
	Mandarin	12.60	20.20	-7.60	*	p	0.01	X2LANG(2)	12.6	0.0
	Cantonese	5.40	23.50	-18.10	**	p	0	X2LANG(3)	5.4	0.0
	Vietnamese	0.00	0.00	0.00			is	X2LANG(4)	0.0	0.0
	Spanish	0.00	0.00	0.00			is	X2LANG(5)	0.0	0.0
	Italian	0.00	0.00	0.00			is	X2LANG(6)	0.0	0.0
	Greek	0.00	0.00	0.00			is	X2LANG(7)	0.0	0.0
	Other	0.00	0.00	0.00			is	X2LANG(8)	0.0	0.0
11	Age in years	44.44	43.44	1.00			0.413	AGE		
12	What is the gross (before tax) family income?	29.38	32.80	-3.42			0.052	INCOME		
		16.700	83.300	%*			25.301	%*		
		167.00	833.00							

Victorian Casino and Gaming Authority

Report of the 1999
Longitudinal Community
Impact Study: Wellington
regional profile

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1 Summary

The major population centres of the Wellington Shire are the towns of Sale and Maffra. The Shire's population is relatively young, but has been declining in recent years, although it is projected to grow slightly in the future. A proportion leave the region in early adulthood for employment and study elsewhere. Residents are more likely to be Australian born than the Victorian average, and there is a relatively high (but declining) proportion of families comprising couples with children.

The Shire of Wellington is an agriculturally based economy. There is slightly lower participation in the workforce, and higher unemployment in Wellington than the State average. Wellington residents are also generally less well educated than the Victorian average. The income profile of residents is similar to that for regional Victoria, although less prosperous than metropolitan areas. The majority of people are employed in agriculture, forestry and fishing, with manufacturing, retail trade and government administration and defence representing the next largest employment sectors. Despite the presence of the large oil and gas facilities, the East Sale RAAF Base and Fulham Correctional Centre, some 97% of businesses in the Shire of Wellington are small.

Only about 45% of people in Wellington believe their local economy is doing well, but 80% believe the region is good to live in. Crime and safety are less of a concern for Wellington respondents than the average in other regions. About 49% of residents believe that Wellington is better to live in now than three years ago, and 39% believe the local economy is better now than three years ago. In general, Wellington respondents are happier with living in their region, but are less optimistic than other regions about their local economy and its current state.

The Shire of Wellington has a comparatively high level of EGMs per head, but a low concentration of EGMs per gaming venue, being more concentrated in clubs than in hotels. Over recent years, the numbers of machines and venues has been static. Wellington's expenditure on gaming has increased from \$0.135M in 1992/93 to \$15.448M in 1998/99. Average annual gaming expenditure per adult in Wellington is 9% lower than the State average, but there is a higher concentration of EGMs.

According to our survey, 45% of the residents of Wellington gambled in the last 6 months. Playing poker machines is the most popular form of gambling, with the most popular venues being pubs or clubs. While Wellington gamblers patronise Crown Casino less frequently than in other regions, on average they spend more money per visit there than at local gaming venues. Wellington gamblers spend approximately a third of their time in gaming venues playing pokies with the majority of gamblers choosing venues on the basis of the meals, proximity and to relax. Wellington gamblers travel 3km on average to get to a venue, with the majority of gamblers arriving at venues between 4pm and 8pm. In our consultations, we were told gamers generally like to game locally and are more likely to be older people and to be of lower income levels.

About 0.6% of gamblers in Wellington are at risk of problem gambling, significantly lower than the State average, and 8% of Wellington residents said that they, or a member of their family, had at some time experienced difficulties with excessive gambling. There was concern regarding problem gambling from both venues and community agencies. While requests for material aid have grown, high unemployment, the number of recent retrenchments from major employers and the influx of high-need single parent and low-income families seeking cheap accommodation in the region have also been factors contributing to this increase.

Our consultations identified a number of costs and benefits of gaming.

Benefits

The benefits of gaming included:

- many of the gaming venues in Wellington have undertaken substantial facility improvements since the introduction of EGMs, with a large amount of money having been spent on renovations and other building improvements. Some gaming venues also report that surrounding businesses have benefited from a general increase in trade as a result of gaming;
- gaming venues employ a large number of staff and particularly provide opportunities for young people and part time and casual employment within the local community. The number of staff employed at the gaming venues visited in Wellington was 60 people;
- social benefits of gaming include increased opportunities for socialising, particularly for older women, in a safe environment;
- the sporting clubs within the region, which have introduced electronic gaming machines, report better facilities available for members and a general view that profits from EGMs is distributed back into the community.

Costs

The costs of gaming included:

- negative impacts on the trade of retail outlets, such as supermarkets, especially in the smaller towns;
- the social and financial problems that are caused by gambling, including increased requests for material aid and counselling services; and
- each venue operator acknowledged they had experience of problem gambling, with a number of people entering the self-exclusion register. Venue operators indicated they would intervene where they thought a problem might arise or might be evident.

2 Description of the Local Government Area of Wellington

2.1 Data sources

Data for this profile has been sourced from:

- a range of different government departments and agencies;
- consultations; and
- KPMG surveyed 1,000 residents in six local government areas, of which 166 respondents lived in Wellington. The survey was conducted in October 1999. The full results of the are reported in Supporting Paper No. 1, and the results for Wellington are attached to this paper.

It should be noted that while percentages have been included in the following tables, the total percentage for a number of tables does not equal one hundred per cent due to rounding.

2.2 The geography

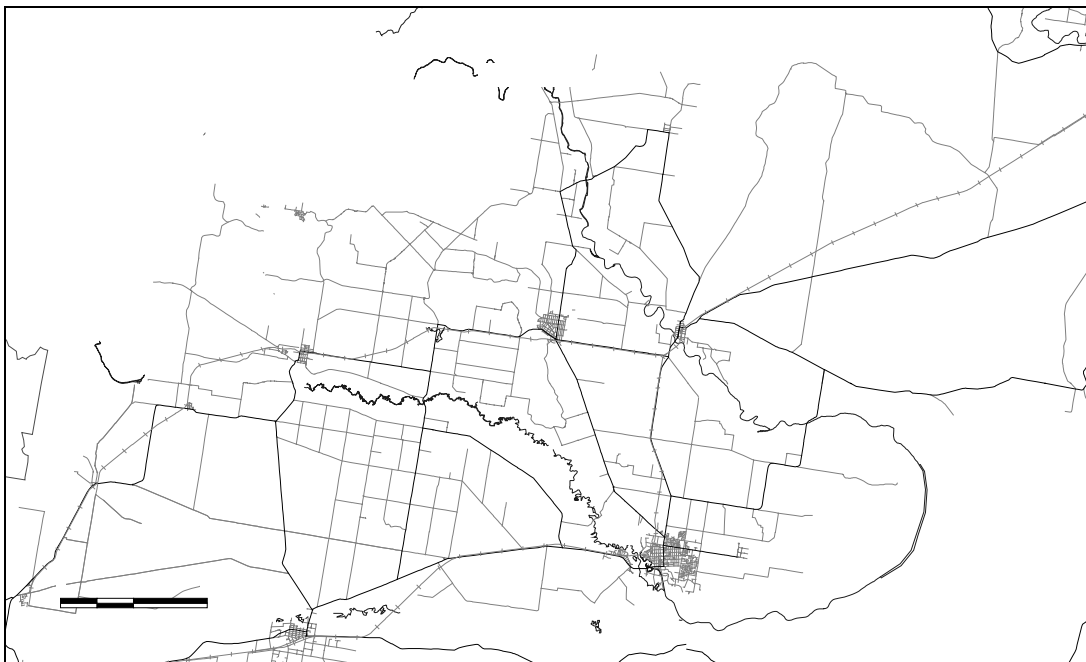
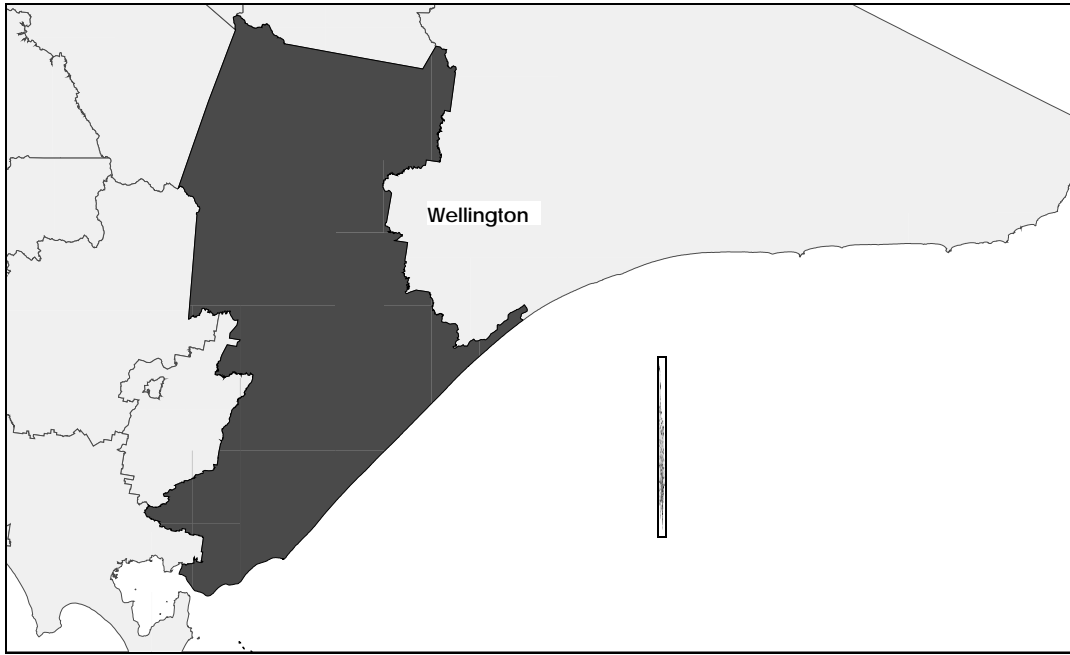
The major towns in the Wellington Shire are Sale, Maffra, Yarram, Heyfield, Stratford and Rosedale. The population for each of these localities is shown in Table 2.1 below.

Table 2.1: Population of the major towns in the Wellington Shire, 1996

Town	Population 1996 Census
Sale	13,366
Maffra	4,033
Yarram	1,807
Heyfield	1,602
Stratford	1,350
Rosedale	1,134
Source: ABS Census data96	

The Shire stretches from its northern boundaries in the Great Dividing ranges, north of the high country towns of Licola and Dargo, to the irrigated flats of Maffra and Stratford. Further south is the Ninety-Mile Beach encompassing the western end of the Gippsland Lakes and finishing at the most southern point – the township of Port Albert. Figure 2.1 illustrates the Wellington Local Government Area.

Figure 2.1: Shire of Wellington



3 Demographic profile of Wellington

3.1 The population

According to the 1996 Census of Population and Housing, Wellington's resident population declined by 3% from 40,923 in 1991 to 39,703 in 1996. Wellington Shire had previously experienced a growing population during the 10-year period between 1981 and 1991.

Population and housing forecasts prepared by the Victorian Department of Infrastructure predict that the resident population of Wellington will grow at an average annual rate of 0.36% for the period between 1996 and 2001 and 0.35% from 2001 to 2011. Housing stock will increase faster, at an average annual rate of 0.53% for the period between 1996 and 2001 and 0.56% from 2001 to 2011. This indicates a trend toward smaller household sizes within the Wellington Shire, which is consistent with the trend for Victoria. The levels of growth projected for the population and housing numbers in Wellington is less than the growth projected for both Regional Victoria and Victoria as a whole. Population projections obtained from the Department of Infrastructure for Wellington, Regional Victoria and Victoria are presented in Table 3.1 below.

Table 3.1: Projections of household numbers and estimated resident population

Population and household forecasts						
Number of households is number of occupied private dwellings						
Year	Wellington		Regional Victoria		Victoria	
	Population	Households	Population	Households	Population	Households
Actual 1981	36,703	11,126	1,090,996	338,514	3,851,094	1,238,617
1986	41,155	12,756	1,193,447	384,965	4,160,785	1,355,308
1991	43,088	14,007	1,264,078	426,546	4,420,298	1,476,047
1996	42,936	16,144	1,297,976	500,042	4,539,400	1,699,920
Forecast 2001	43,715	16,580	1,356,830	530,329	4,735,710	1,799,383
2011	45,271	17,539	1,470,627	590,961	5,092,312	1,990,051
2021	46,602	18,439	1,576,162	648,882	5,399,730	2,163,024
Annual change (%)						
1981-1986	2.32	2.77	1.81	2.61	1.56	1.82
1986-1991	0.92	1.89	1.16	2.07	1.22	1.72
1991-1996	-0.07	2.88	0.53	3.23	0.53	2.86
Forecast annual change (%) 1996-2001	0.36	0.53	0.89	1.18	0.85	1.14
Forecast annual change (%) 2001-2011	0.35	0.56	0.81	1.09	0.73	1.01
2011-2021	0.29	0.50	0.70	0.94	0.59	0.84

Annual percentage change measured as a compound growth rate
Source: Department of Infrastructure 1991 projections. Revised data for 1996 shown.

3.2 Age distribution

Wellington is characterised by a relatively young population, with a comparatively high proportion of residents aged under 20 years of age and aged between 30 and 49 years of age. However, between 1991 and 1996, Wellington experienced a decrease in the proportion of the population in all age categories under 40 years of age and increases in the proportion of residents aged over 40 years of age, indicating that segments of the population are leaving the region and other segments are ageing. Wellington has a lower proportion of residents in the age category 20 to 29 years of age in comparison to Regional Victoria and Victoria as a whole, suggesting that this segment of the population moves out of the region for either tertiary study and/or employment opportunities. Table 3.2 summarises the age distribution for the resident population of Wellington, Regional Victoria and Victoria in 1991 and 1996.

Table 3.2: Age distribution of population, 30 June 1991 and 1996

Age group	Wellington		Regional Victoria		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
0 – 9	18.7	16.3	16.3	15.4	14.7	14.2
10 – 19	16.3	16.6	16.0	15.3	15.2	14.1
20 – 29	13.1	11.2	13.8	12.4	16.4	15.4
30 – 39	16.7	15.1	15.6	15.0	16.0	15.9
40 – 49	12.7	15.3	12.8	14.5	13.3	14.5
50 – 59	8.1	9.6	9.0	10.0	9.1	10.0
60 – 69	7.6	7.6	8.5	8.2	7.9	7.5
70 +	6.8	8.3	8.1	9.3	7.4	8.4
Total	100	100	100	100	100	100

Source: ABS Census data 1996

3.3 Marital status

The Shire of Wellington is comprised of comparatively high proportions of married couples and comparatively low proportion of persons who have never been married compared with Regional Victoria and Victoria. The incidence of separated, divorced and widowed persons is comparable with the trend for Victoria.

The proportion of married persons has declined from 1991 to 1996, however this trend is consistent across Regional Victoria and Victoria. The proportion of residents from the Shire who have never been married increased marginally, while the proportion of separated, divorced and widowed persons has increased. These trends are also consistent with those experienced throughout Regional Victoria and Victoria. The marital status of the resident population of Wellington, Regional Victoria and Victoria as at the 1991 Census and 1996 Census are presented in Table 3.3.

Table 3.3: Marital status of residents, 1991 and 1996

Status	Wellington		Regional Victoria		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
Married	61.7	58.2	59.3	56.2	56.4	53.6
Never Married	25.0	25.8	26.7	27.6	29.9	30.9
Separated	2.7	3.4	2.6	3.2	2.6	3.2
Divorced	4.4	5.7	4.5	5.7	4.7	5.8
Widowed	6.2	6.9	6.9	7.3	6.3	6.6
Total persons	100	100	100	100	100	100

Source: ABS Census data 1996

3.4 Birthplace

The Shire of Wellington (87.2%) and Regional Victoria (86.6%) have a comparatively higher proportion of Australian born residents and a significantly lower level of ethnic diversity compared with Victoria as a whole (72.8%). As at the 1996 Census the majority of overseas born residents of the Shire of Wellington, Regional Victoria and Victoria as a whole were from the United Kingdom. From 1991 to 1996 there was no significant change to the composition of the country of birth profile of Wellington, Regional Victorian or Victorian residents. The country of birth of the resident population of Wellington, Regional Victoria and Victoria as a whole is presented in Table 3.4 for 1991 and 1996.

Table 3.4: Country of birth of residents, 1991 and 1996

	Wellington		Regional Victoria		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
English-speaking countries	94.2	92.6	93.2	91.6	81.3	79.6
Non-English speaking countries	5.8	7.4	6.8	8.4	18.7	20.4
Six top ranking in Wellington:						
Australia	88.7	87.2	88.0	86.6	73.9	72.8
United Kingdom	4.3	4.2	4.2	3.9	5.5	4.9
Netherlands	0.9	0.9	0.8	0.7	0.7	0.6
New Zealand	0.7	0.7	0.6	0.6	1.0	1.0
Germany	0.6	0.6	0.6	0.6	0.7	0.7
Italy	0.4	0.3	1.0	0.9	2.5	2.3
All other countries	3.1	3.1	3.4	3.4	13.6	14.4
Not stated	1.2	2.8	1.5	3.2	2.1	3.3
Total	100	100	100	100	100	100

Source: ABS Census data 1996

3.5 Religion

The resident population of the Shire of Wellington is predominantly Christian (73%), and the proportion of Christians living within the Shire is higher than for Regional Victoria and Victoria, reflecting the lower level of ethnic diversity within the Shire. The proportions of

Christians experienced a decline from 1991 to 1996, offset by an increase in the proportion of persons with no religious following. However, this trend was consistent with the trend experienced throughout Regional Victoria and Victoria. Table 3.5 presents the top five ranking professed religions of the resident population of Wellington Shire in comparison to Regional Victoria and for the State of Victoria.

Table 3.5: Professed religion of residents, 1991 and 1996

Five top ranking in Wellington	Wellington		Regional Victoria		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
Anglican	28.8	27.7	21.8	20.2	18.2	16.5
Catholic	24.5	24.4	25.9	25.8	29.2	29.0
Uniting Church	11.3	11.0	13.6	12.4	8.1	7.3
Presbyterian and Reformed	5.7	4.8	6.5	5.6	4.6	3.9
Baptist	1.2	1.1	1.4	1.3	1.4	1.4
Total Christian	75.7	73.2	75.3	71.8	70.7	67.6
Total Non-Christian	0.4	0.7	0.5	0.7	3.4	4.5
No Religion	13.0	17.8	13.0	18.0	14.4	18.7
Inadequately Described and Not-Stated	10.9	8.4	11.1	9.5	11.4	9.1
Total	100	100	100	100	100	100

Source: ABS Census data 1996

3.6 Mobility

The population of the Shire of Wellington demonstrated a comparatively high level of mobility from 1991 to 1996. At 1996, only 50.7% of residents lived at the same address in 1991, compared with 53.6% for Regional Victoria and 53.7% for Victoria. The following table shows the mobility of the population of Wellington, Regional Victoria and Victoria as a whole.

Table 3.6: Mobility of the population (% of population, aged 15 and over), 1996

Usual residence	Wellington	Regional Victoria	Victoria
	%	%	%
Same address 5 years prior	50.7	53.6	53.7
Different address 5 years prior	38.4	35.9	35.8
Not stated	10.8	10.5	10.5
Total	100	100	100

Source: ABS Census data 1996

3.7 Household structure

The Shire of Wellington has a comparatively high but declining proportion of households of "couples with children" in contrast to Regional Victoria and Victoria. The proportion of "couples with children" in Wellington Shire has declined significantly over the period 1991

to 1996, however the proportion of household types represented by this grouping still remains higher than for Regional Victoria and Victoria as a whole. Table 3.7 provides a comparative summary of the demographic profile by household type and composition for Wellington, Regional Victoria and Victoria as at 1991 and 1996.

Table 3.7: Household type and composition, number of persons, 1991 and 1996

Household Type	Wellington		Regional Victoria		Victoria	
	1991	1996	1991	1996	1991	1996
	%	%	%	%	%	%
Couple with children	64.6	58.0	61.0	55.8	60.9	56.6
Couple without children	16.9	20.2	18.1	20.0	16.2	17.6
One parent family	7.9	9.4	8.7	9.8	8.9	9.8
Other one family households	0.7	0.5	0.9	0.8	1.1	1.1
Total number of persons in one family households	90.0	88.0	88.6	86.4	87.2	85.1
Two or more families	0.6	0.8	0.7	1.1	1.5	2.3
Lone person households	7.2	9.3	8.1	9.7	7.7	9.0
Group households	2.2	1.8	2.6	2.9	3.6	3.6
Total	100	100	100	100	100	100

Source: ABS Census data 1996

3.8 Tenure

The Shire of Wellington has a relatively comparable dwelling tenure profile with that for both Regional Victoria and Victoria. However, the Shire has a comparatively smaller and declining proportion of households that are purchasing dwellings in the Shire, which is consistent with the ageing profile of the population and the lower proportion of residents aged 20-40 years of age. Additionally, the proportion of other properties being rented in Wellington experienced a decline from 1991 to 1996, against the trend experienced throughout Rural Victoria and Victoria. The dwelling tenure profile of Wellington, Regional Victoria and Victoria is presented in Table 3.8 below.

Table 3.8: Dwelling tenure by type of landlord, 1991 and 1996

	Number of persons for each type of dwelling					
	Wellington		Regional Victoria		Victoria	
	1991	1996	1991	1996	1991	1996
	%	%	%	%	%	%
Fully owned	38.2	41.3	41.4	42.6	39.0	41.5
Being purchased	31.9	30.5	32.6	31.6	34.8	32.5
Rented (government)	5.2	3.9	5.0	4.1	3.9	3.1
Rented (other)	18.5	17.8	15.4	16.4	16.8	17.9
Other	6.1	6.5	5.6	5.2	5.6	5.0
Total	100	100	100	100	100	100

Source: ABS Census data 1996. In 1996, persons living in manufactured home estates and accommodation for the retired have been excluded for comparability with 1991. The 'Other' category includes 'being occupied free', 'being occupied under a life tenure scheme' and 'other/not-stated'.

3.9 Education

The education profile of Wellington residents is generally in line with that of Regional Victoria, with a slightly lower level of persons obtaining Bachelor degree qualifications and a marginally higher proportion of persons obtaining vocational qualifications. Compared to the State population, Wellington has a significantly lower proportion of the population who have obtained Bachelor Degree and higher qualifications. Table 3.9 provides a summary of the level of education attained for Wellington, Regional Victoria and Victorian residents at June 1991 and 1996.

Table 3.9: Levels of education attainment, 1991 and 1996

Persons aged 15 years and over						
Highest qualification obtained	Wellington		Regional Victoria		Victoria	
	1991	1996	1991	1996	1991	1996
	%	%	%	%	%	%
Higher degree	0.3	0.3	0.4	0.6	1.0	1.3
Postgraduate diploma	0.9	1.2	1.0	1.3	1.2	1.7
Bachelor degree	4.0	4.6	3.9	5.1	6.2	8.4
Undergraduate diploma	4.3	3.4	4.1	3.4	3.9	3.5
Associate diploma	1.3	2.0	1.2	2.3	1.3	2.6
Vocational qualification	15.1	15.2	13.5	13.7	12.5	12.4
No qualification	63.6	61.5	65.1	62.1	61.9	58.3
Not stated	10.5	11.9	10.8	11.5	12.1	11.7
Total	100	100	100	100	100	100

Source: ABS Census data 1996

3.10 Household income

The average household income profile of Wellington was similar to that of Regional Victoria at June 1996. However, as might be expected compared to Victoria, the average household income in Wellington is significantly lower, with 43.2% of households with an average annual income of \$26,000 or lower, compared to 34.9% for Victoria as a whole. Correspondingly, the proportion of households in Wellington and Regional Victoria earning more than \$52,000 per annum in gross income is significantly less than the Victorian average. Table 3.10 provides a comparative summary of gross annual income per household for Wellington, Regional Victoria and Victoria as at the 1996 Census.

Table 3.10: Gross annual income per household (\$), 1996

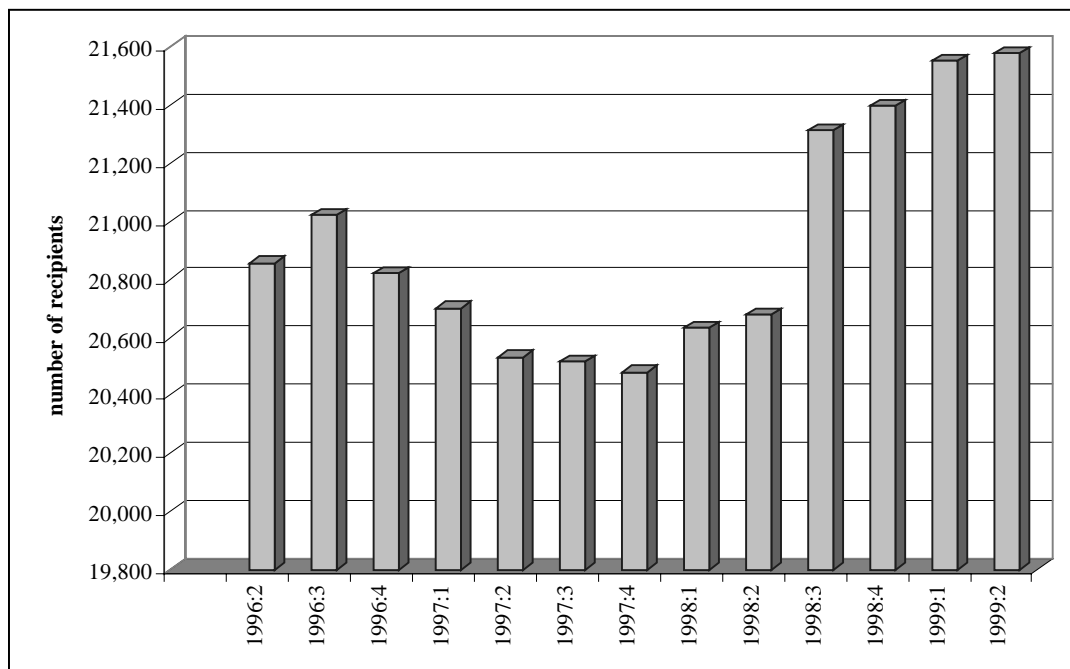
	Number of households		
	Wellington % of total	Regional Victoria % of total	Victoria % of total
Negative/nil income	1.0	0.8	0.7
\$52-\$6,239	1.2	1.0	0.8
\$6,240-\$15,599	21.8	21.9	17.5
\$15,600-\$25,999	19.2	19.6	15.9
\$26,000-\$36,399	14.0	14.7	13.5
\$36,400-\$51,999	14.2	15.0	16.1
\$52,000-\$77,999	11.1	10.8	14.5
\$78,000-\$103,999	2.9	3.0	5.2
\$104,000 plus	2.7	2.2	4.8
Partial/incomplete records	12.1	11.2	11.0
Total	100	100	100

Source: ABS Census data 1996

3.11 Social security recipients

There has been substantial growth in the number of social security recipients in Wellington in the late 1990s. This is consistent with the high unemployment in the area.

Figure 3.1: Number of claimants of social security benefits, 1996 to 1999



Source: Centrelink. Some individuals receive multiple payments so a degree of double counting occurs.

3.12 Vehicle ownership

At 1996, vehicle ownership in Wellington was high compared with both Regional Victoria and Victoria. According to 1996 Census data only 7.9% of households did not own a vehicle compared with 8.7% for Regional Victoria and 10.5% for Victoria as a whole. Further, both Wellington (48.7%) and Regional Victoria (50.0%) have a higher proportion of households that own two or more vehicles compared with Victoria (47.5%). The vehicle ownership profile for Wellington, Regional Victoria and Victoria as at 1996 is presented in Table 3.11 below.

Table 3.11: Vehicle ownership, 1996

Vehicles	Households		
	Wellington %	Regional Victoria %	Victoria %
No vehicle	7.9	8.7	10.5
One vehicle	39.0	36.7	36.6
Two vehicles	35.4	36.3	35.2
Three or more vehicles	13.3	13.7	12.6
Not stated	4.3	4.6	5.2
Total	100	100	100

Source: ABS Census data1996

3.13 Travel to work

The most common method of travelling to work for Wellington residents as at the 1996 Census was by car as driver, followed by other modes of transport. Both Wellington and Regional Victoria have a significantly higher proportion of employed persons working at home in comparison to the State average. The following table presents a summary of the method of travel to work for Wellington, Regional Victoria and Victorian residents as at the 1996 Census.

Table 3.12: Mode of travel to work, 1996

Includes multi-mode journeys	Employed persons		
	Wellington %	Regional Victoria %	Victoria %
Train	0.1	0.7	5.5
Bus	0.7	0.8	1.3
Tram	0.0	0.0	1.2
Car, as driver	53.2	58.2	61.4
Car, as passenger	6.1	6.2	6.1
Other modes	12.9	10.0	6.8
Worked at home	13.6	10.4	5.7
Did not go to work	11.3	11.5	10.2
Not stated	2.0	2.2	1.8
Total	100.0	100.0	100.0

Source: ABS Census data1996

3.14 Crime rates

Compared to Victoria as a whole, Wellington has a low crime rate.

Table 3.13: Crime trends: Number of offences reported in Wellington and Victoria, 1995 to 1998

Year	Wellington	% growth	Incidents per thousand adults	Victoria	% growth	Incidents per thousand adults
1995	3,195	-	76.2	374,241	-	84.8
1996	3,231	1.1	77.8	399,237	6.7	89.5
1997	3,404	5.3	81.7	404,817	1.4	89.9
1998	3,281	-3.6	78.6	413,836	2.2	90.7

Source: Victoria Police.

3.15 Summary

Those who live in Wellington Shire predominantly live in the major towns of Sale and Maffra or in a number of smaller townships and the surrounding hinterland. The population has been declining, (but is projected to grow slightly in the future,) and is relatively young, with a proportion leaving the region in early adulthood for employment and study elsewhere. Residents are more likely to be Australian born, and there is a relatively high proportion of families comprising couples with children.

4 The regional economic profile

4.1 Major economic features

Agriculture is the major industry in Wellington Shire and includes dairy farming in the Macalister Irrigation District and other areas, and dry land farming for beef cattle, wool and lamb. The agriculture industry is complemented by processing companies such as Murray Goulburn Ltd., who have a milk processing plant from which export of dry milk products occurs. The timber industry also operates extensive facilities in the Wellington Shire.

Bass Strait, south of Wellington Shire, produces 82% of Australia's oil and 55% of its gas. Esso, in partnership with BHP, operates 18 oil and gas production platforms in Bass Strait. The oil and gas is processed at Longford.

Fulham Correctional Centre opened in March 1997. This centre is a 600 bed male prison with minimum and medium security classifications. Sale is also the home of the East Sale RAAF Base, which is a major training facility for the defence forces in Australia.

4.2 Employment and labour force participation

As at December 1999, the labour force participation rate in Wellington was 57%, lower than the State average of 68%. The unemployment rate in Wellington in December 1999 was 7.9%, higher than the State average of 6.7%. More detailed but dated information on labour force participation and employment is provided in the 1996 Census, and reproduced below in Table 4.1 and Table 4.2. As at June 1996, Wellington Shire had a higher unemployment rate (10.8%) in comparison to the State level of 9.4%.

Table 4.1: Labour force participation by sex, 1996

Age group Persons 15 years and over	Percentage employed or seeking work			
	Males		Females	
	Wellington %	Vic %	Wellington %	Vic %
15-19 years	44.6	43.8	43.8	45.1
20-24 years	84.7	80.8	72.6	74.7
25-34 years	88.1	89.7	58.3	68.0
35-44 years	90.0	89.9	69.9	69.8
45-54 years	84.4	86.0	64.3	67.0
55-64 years	61.5	60.3	31.4	29.9
65-69 years	20.5	17.0	12.4	6.9
70-74 years	12.8	8.7	4.8	3.1
75 years and over	8.7	4.3	1.9	1.3
All age groups	69.3	70.0	49.0	51.9
Not in the labour force	27.4	27.4	48.9	45.8
Not stated/overseas visitors	3.5	2.9	2.3	2.6

Source: ABS Census data 1996

Table 4.2: Labour force status, June 1996

	Males		Females		Persons	
	Wellington %	Vic %	Wellington %	Vic %	Wellington %	Vic %
Full-time employed	72.1	72.6	43.1	47.9	60.0	61.7
Part-time employed	14.2	15.4	45.1	41.2	27.1	26.7
Employed (not-stated)	1.9	2.0	2.3	2.2	2.1	2.1
Unemployed	11.8	9.9	9.5	8.8	10.8	9.4
No. of persons in the labour force	10,152	1,167,357	7,276	913,712	17,428	2,081,069
Not in the labour force	4,018	458,927	7,299	810,421	11,317	1,269,348
Not stated/overseas visitors	509	49,116	340	46,558	849	95,674
Adult population	14,679	1,675,400	14,915	1,770,691	29,594	3,446,091

Source: ABS Census data 1996

4.3 Industry of employment

As would be expected there is a marked difference in the employment profile of Wellington Shire compared to the state of Victoria, due to its rural economic base. At the 1996 Census, agriculture, forestry and fishing (17.6%) and retail trade (13.2%) remained the principal sector for employment for the Wellington population, and there was an increase in the proportion of residents employed in these sectors from 1991 to 1996. Other significant employment sectors include health and community services (8.8%) and manufacturing (8.0%). The proportion of residents employed in these sectors also increased from 1991 to 1996, in line with the trends experienced across Victoria. There was an increase in the number of Wellington residents employed in property and business services and personal and other services from 1991 to 1996. However, employment decreased in the following sectors:

- Mining;
- Electricity, gas and water supply; and
- Government administration and defence.

Table 4.3 provides a summary of the industry of employment profile for Wellington and Victoria as at 1991 and 1996.

Table 4.3: Industry of employment of residents, 1991 and 1996

Industry	Wellington		Victoria		Wellington		Victoria	
	1991 Persons	%	1991 Persons	%	1996 Persons	%	1996 Persons	%
Agriculture, Forestry and Fishing	2,524	15.6	70,556	3.9	2,743	17.6	72,924	3.9
Mining	776	4.8	5,633	0.3	541	3.5	5,531	0.3
Manufacturing	1,074	6.7	289,266	16.0	1,245	8.0	307,029	16.3
Electricity, Gas and Water Supply	434	2.7	25,666	1.4	202	1.3	13,408	0.7
Construction	928	5.8	96,695	5.4	971	6.2	110,482	5.9
Wholesale Trade	597	3.7	111,684	6.2	587	3.8	115,336	6.1
Retail Trade	2,017	12.5	241,324	13.4	2,058	13.2	260,829	13.8
Accommodation, Cafes and Restaurants	584	3.6	59,525	3.3	617	4.0	72,236	3.8
Transport and Storage	342	2.1	74,762	4.1	369	2.4	73,238	3.9
Communication Services	241	1.5	34,330	1.9	185	1.2	42,848	2.3
Finance and Insurance	339	2.1	84,427	4.7	319	2.1	77,378	4.1
Property and Business Services	740	4.6	126,156	7.0	842	5.4	186,245	9.9
Government Administration and Defence	1,544	9.6	94,015	5.2	1,141	7.3	71,662	3.8
Education	1,169	7.2	122,760	6.8	1,170	7.5	131,119	7.0
Health and Community Services	1,229	7.6	153,744	8.5	1,370	8.8	175,123	9.3
Cultural and Recreational Services	192	1.2	30,289	1.7	192	1.2	44,486	2.4
Personal and Other Services	433	2.7	55,915	3.1	534	3.4	65,294	3.5
Non-classifiable economic units	37	0.2	6,791	0.4	186	1.2	29,288	1.6
Not stated	928	5.8	123,023	6.8	274	1.8	30,424	1.6
Total	16,128	100	1,806,561	100	15,546	100	1,884,880	100

4.4 Employment by occupation

Wellington has a higher proportion of managers and administrators than regional Victoria and Victoria as a whole. This reflects the classification of owner-farmers and the presence of defence, prison and oil and gas operations. Table 4.4 provides a summary of employment by occupation for Wellington, Regional Victoria and Victoria as a whole for 1991 and 1996.

Table 4.4: Employment by occupation of residents, 1991 and 1996

Occupation	Wellington		Regional Victoria		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
Managers and Administrators	18.1	17.9	15.1	14.0	10.0	9.5
Professionals	13.0	13.4	12.9	14.2	15.6	17.8
Associate Professionals	7.7	11.5	7.8	11.4	7.5	11.4
Tradespersons and Related Workers	15.7	14.8	14.4	13.7	13.7	12.9
Advanced Clerical and Service Workers	4.7	3.3	4.7	3.2	6.5	4.3
Intermediate Clerical, Sales and Service Workers	8.9	11.8	9.5	13.0	11.6	15.4
Intermediate Production and Transport Workers	7.6	7.7	9.0	9.1	8.7	8.9
Elementary Clerical, Sales and Service Workers	9.6	8.0	9.9	8.6	10.8	8.9
Labourers and Related Workers	8.8	8.8	10.0	10.0	8.8	8.3
Not stated/inadequately described	5.9	2.7	6.7	2.8	6.8	2.7
Total	100	100	100	100	100	100

Source: ABS Census data 1996

4.5 Businesses by industry and size

According to the September 1998 ABS Business Register, Wellington had a total of 3,263 businesses located within the Shire. Approximately 97% of the total number of businesses were categorised as small, with the majority of businesses operating within the agriculture, forestry and fishing and retail trade industries. This structure is consistent with the employment data set out above. Table 4.5 provides an overall summary of the nature of businesses that are located within the Wellington Shire as at the September 1998 ABS Business Register.

**Table 4.5: The structure of business in Wellington:
Distribution of businesses by industry and firm size, 1998**

Industry to which business is assigned ANZSIC Division	Number of businesses by firm size			
	Small	Medium	Large	Total
A AGRICULTURE FORESTRY AND FISHING	1554	3	0	1557
B MINING	17	5	0	22
21 Food Beverage & Tobacco Manufacturing	9	1	0	10
22 Textile Clothing Footwear Manufacturing	2	0	0	2
23 Wood & Paper Product Manufacturing	14	0	0	14
24 Printing Publishing & Recorded Media	7	1	0	8
25 Petroleum Coal & Chemical Manufacturing	1	0	0	1
26 Non-Metallic Mineral Product Manufacturing	15	0	0	15
27 Metal Product Manufacturing	24	0	0	24
28 Machinery & Equipment Manufacturing	13	1	0	14
29 Other Manufacturing	7	0	0	7
C MANUFACTURING	92	3	0	95
D ELECTRICITY GAS AND WATER SUPPLY	12	1	0	13
E CONSTRUCTION	214	1	0	215
F WHOLESALE TRADE	90	1	0	91
51 Food Retailing	92	6	4	102
52 Personal & Household Good Retailing	155	2	1	158
53 Motor Vehicle Retailing & Services	76	2	0	78
G RETAIL TRADE	323	10	5	338
H ACCOMMODATION CAFES AND RESTAURANTS	100	3	0	103
I TRANSPORT AND STORAGE	86	2	0	88
J COMMUNICATION SERVICES	13	1	0	14
K FINANCE AND INSURANCE	48	3	0	51
L PROPERTY AND BUSINESS SERVICES	228	2	0	230
M GOVERNMENT ADMINISTRATION AND DEFENCE	19	13	0	32
N EDUCATION	62	14	1	77
O HEALTH AND COMMUNITY SERVICES	128	4	2	134
P CULTURAL AND RECREATIONAL SERVICES	56	2	0	58
Q PERSONAL AND OTHER SERVICES	142	3	0	145
ALL INDUSTRIES	3175	77	11	3263

Source: ABS Business register.

The ANZSIC industry classification is used. Most industries are shown at the divisional level (one-digit).

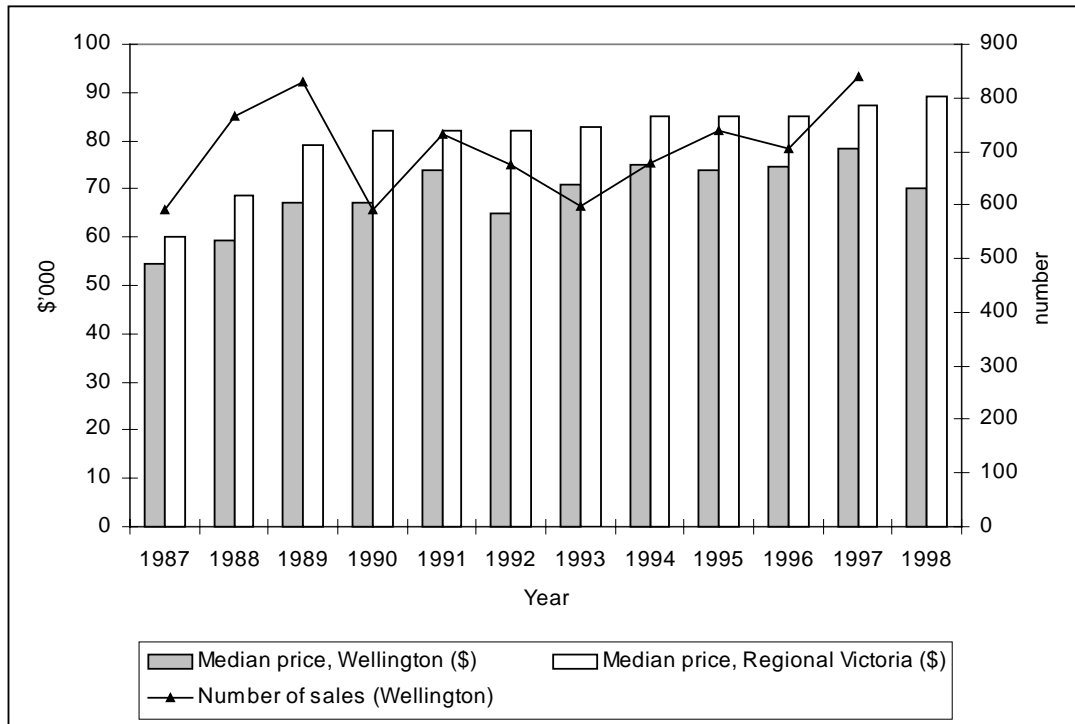
However manufacturing and retailing industries are presented also at the sub-divisional (two-digit) level.

The definition of business size is as follows: Small business, <20 employees; Medium-sized business, 20-99 employees; Large business, 100+ employees. However, for manufacturing industry: Small business = <100 employees; Medium-sized business = 100-499 employees; Large business = 500+ employees.

4.6 House sales and prices

Figure 4.1 shows that the number of house sales in Wellington has fluctuated, with sales on an increasing trend since 1993. House prices grew in the late 1980s but have been static in recent years and have always been below the median prices in the rest of country Victoria.

Figure 4.1: Median house prices, Wellington and Country Victoria, 1997 to 1998



Source: Land Victoria, 1997-98

4.7 Summary

The Shire of Wellington is an agriculturally based economy. There is lower participation in the workforce in Wellington, and the unemployment rate is above the State average. Wellington residents are less well educated than the Victorian average. The income profile of residents is similar to that for regional Victoria, although less prosperous than metropolitan areas. The majority of people are employed in agriculture, forestry and fishing, with manufacturing, retail trade and government administration and defence representing the next largest employment sectors. Despite the presence of the large oil and gas facilities, the East Sale RAAF Base and Fulham Correctional Centre, some 97% of businesses are small.

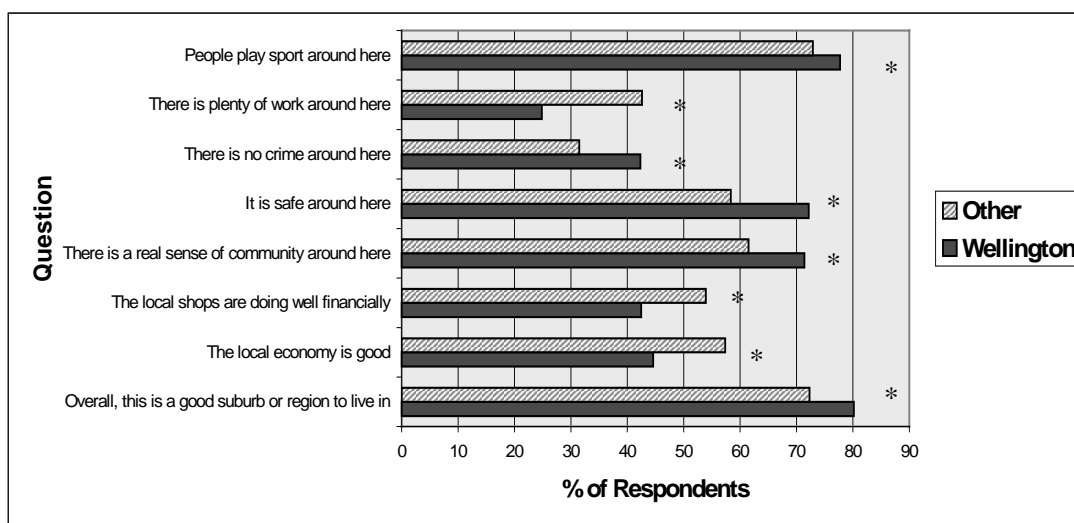
4.8 Community perceptions of the region

In our survey of 166 adults living in the Shire of Wellington, conducted in October 1999, we asked questions about residents' opinions of their region. While the sample size is sufficiently large to enable us to draw conclusions about the region itself, it does not allow us to draw statistically significant differences between Wellington and the other regions for

many of the survey questions¹. As a result, comparisons between the Shire of Wellington and other regions can only be made where differences are statistically significant, and have been denoted by an asterix (*) on the relevant graph.

Our survey of Wellington residents indicated generally positive perceptions of their community. Relatively more residents in Wellington have the opinion that the region is 'good', specifically in the areas of crime, safety and the sense of community. The reverse is true of the respondents' opinion of the state of the local economy, compared with other regions. Fewer respondents believe that local shops are doing well financially and fewer believe that there is sufficient work in the region.

Figure 4.2: Opinion of Wellington

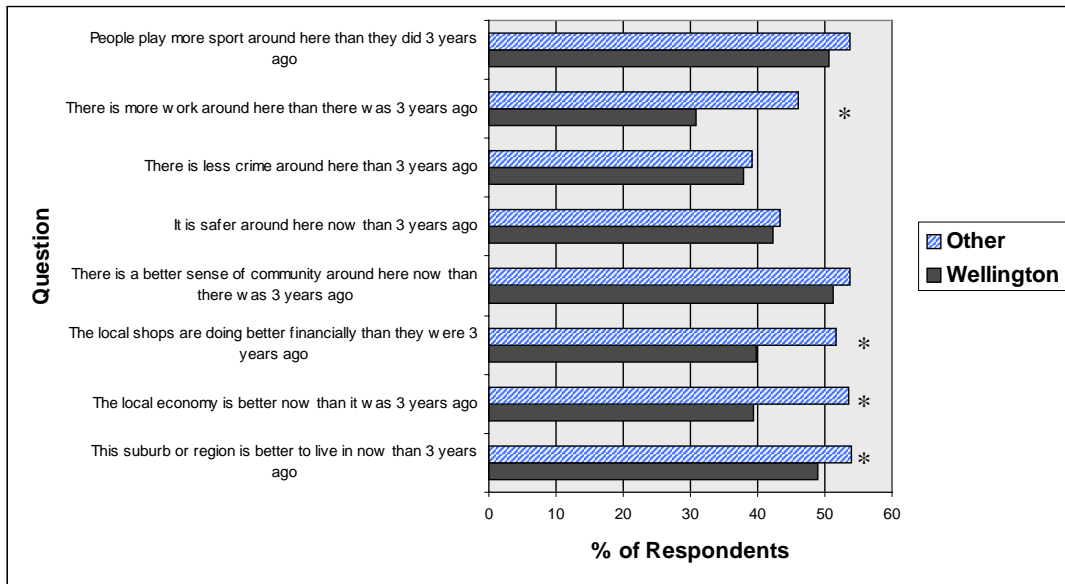


*) Statistically significant difference between Wellington and the average of the other regions.

We asked people in Wellington how their region compared with three years ago (see Figure 4.3). About half of respondents considered Wellington was a better place to live in now than three years ago, and about 40% considered the local economy was doing better.

¹ The regions surveyed were the local government areas of Mildura, Geelong, Wellington, Maribyrnong, Moreland, and Dandenong. KPMG surveyed about 167 adults in each of these regions.

Figure 4.3: Opinion of Wellington compared to three years ago



(*) Statistically significant difference between Wellington and the average of the other regions.

In summary, about 45% of the people in Wellington believe their local economy is doing well, but 80% believe the region is good to live in. Crime and safety are less of a concern for Wellington respondents than the average in other regions. Only about 40% of residents believe that Wellington is a better place to live in now than three years ago. In general, Wellington respondents are happier with living in their region but are less positive about their local economy, than residents in the five other regions of our study.

5 Participation in gaming in Wellington

5.1 Gambling defined

The Productivity Commission² suggests that the following characteristics distinguish gambling from other, apparently similar activities:

- as a group, gamblers necessarily lose money as a result of the activity, because the total “prize” is equal to the accumulated stakes of punters, less taxes to government and profits and costs for operators; and
- gambling is typically presented as a form of entertainment.

Gambling is the (lawful) placement of a wager or bet on the outcome of a future uncertain event. It is treated as an activity that can be clearly divided into two distinct areas – **racing** related and **gaming** related. Where the word *gambling* is referred to in this publication, it is intended to imply the total of racing and gaming activities.³

5.2 EGMs and venues

The supply of EGMs and venues with EGMs in Wellington and Victoria is presented in the following table.

² Productivity Commission (1999), *Final Report*, Productivity Commission, Melbourne.

³ Tasmanian Gaming Commission, *Australian Gaming Statistics 1972-73 to 1997-98*, page 4

Table 5.1: EGMs and gaming venues in Wellington, 1992 to 1999

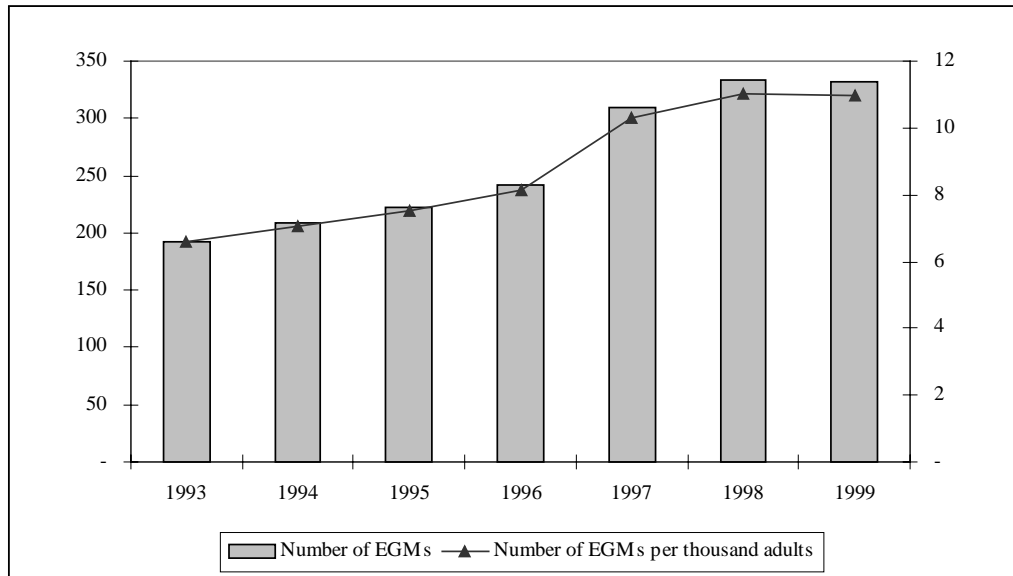
Wellington	Sep-92	Jun-93	Jun-94	Jun-95	Jun-96	Jun-97	Jun-98	Jun-99	Dec-99	AAG %
EGMs	0	193	209	222	242	309	333	332	332	
EGM Growth %	n/a	n/a	8.3	6.2	9.0	27.7	7.8	-0.3	0.0	11.1%
Venues	0	3	5	5	7	10	10	10	10	
Venue Growth %	n/a	n/a	66.7	0.0	40.0	42.9	0.0	0.0	0.0	35.9%
Average No. EGMs per venue	0	64.3	41.8	44.4	34.6	30.9	33.3	33.2	33.2	
Victoria	Sep-92	Jun-93	Jun-94	Jun-95	Jun-96	Jun-97	Jun-98	Jun-99	Jun-99	AAG%
EGMs	3,929	13,661	17,537	21,268	23,478	25,962	26,965	27,811	27,208	
EGM Growth %	n/a	247.7	28.4	21.3	10.4	10.6	3.9	3.1	-2.2	15.2%
Venues	59	251	365	468	521	554	559	573	556	
Venue Growth %	n/a	325.4	45.4	28.2	11.3	6.3	0.9	2.5	3.0	18.7%
Average No. EGMs per venue	66.6	54.4	48.0	45.4	45	46.8	48.2	48.5	48.9	
Source: VCGA										
AAG = average annual growth (using June 1993 as base)										

The number of EGMs and venues with EGMs in Wellington has grown by an average annual rate of 11.1 and 35.9% respectively since 1993. Growth for Victoria across the same time period was 15.2% and 18.7% respectively.

The number of EGMs per venue in Wellington has demonstrated a general declining trend from 64.3 machines per venue in June 1993 to 33.2 machines per venue in December 1999. The average number of EGMs per venue has consistently been below the Victorian average since September 1992.

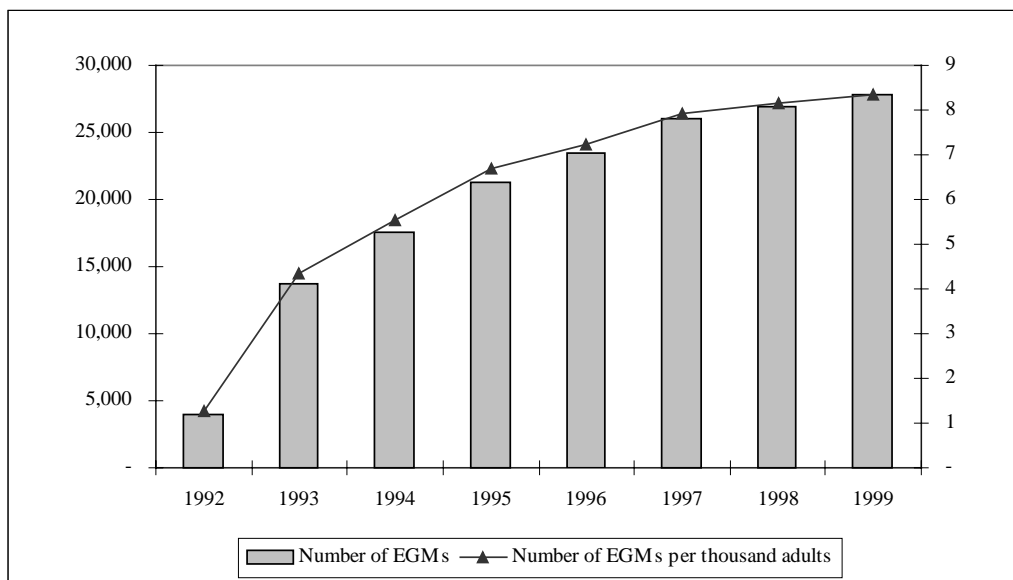
As shown in Figure 5.1, the number of EGMs per 1,000 adults in Wellington increased from 6.58 in 1993 to 10.96 in June 1999 after peaking at 11.03 in 1998. This is above the density for Victoria as a whole of 8.6 per 1,000 adults, as shown in Figure 5.2.

Figure 5.1: EGM density in Wellington (EGMs/'000 adults), 1993 to 1999



Source: VCGA

Figure 5.2: EGM density in Victoria (EGMs/'000 adults), 1993 to 1999



Source: VCGA

As at 31 December 1999, Wellington had 10 licensed gaming venues situated around Sale and in smaller towns within the Shire, offering a total of 332 EGMs. Of the 10 venues, 2

venues were hotels and 8 were clubs. The following map illustrates the location of each of these venues within Wellington.

Figure 5.3: Venues in Wellington



Table 5.2: Venue Type

Venue	Venue Type	Address	Operator
1 Bundalaguah Cricket Social Club (Legends)	Club	Sale	Tabcorp
2 Lochsport R & S Social Recreation Club	Club	Lochsport	Tattersalls
3 Maffra Community Sports Club	Club	Maffra	Tabcorp
4 Sale & District Greyhound Racing Complex	Club	Sale	Tabcorp
5 Sale Bowls Club Inc	Club	Sale	Tabcorp
6 Sale Community Sports Club	Club	Sale	Tattersalls
7 Sale RSL Club And Fitness Centre	Club	Sale	Tattersalls
8 Star Hotel	Hotel	Sale	Tattersalls
9 Yarram Club Hotel	Hotel	Yarram	Tabcorp
10 Yarram Club Inc	Club	Yarram	Tattersalls

Source: VCGA

The supply of Hotel EGMs represents 13.9% of the total number of EGMs in Wellington with Club EGMs accounting for 86.1%. The average size of an EGM installation for Hotels and Clubs was 23 and 36 respectively as at December 1999.

The following table illustrates the supply of EGMs by venue in Wellington and their respective share of either hotel or club EGM supply and the total supply of EGMs.

Table 5.3: Gaming venue details in Wellington, December 1999

Venue	EGMs	% Hotel EGMs	% Total EGMs
Star Hotel	29	63.0	8.7
Yarram Club Hotel	17	37.0	5.1
TOTAL Hotels	46	100.0	13.9
Venue	EGMs	% Club EGMs	% Total EGMs
Bundalaguah Cricket Social Club (Legends)	65	22.7	19.6
Lochsport R & S Social Recreation Club	5	1.7	1.5
Maffra Community Sports Club	35	12.2	10.5
Sale & District Greyhound Racing Complex	70	24.5	21.1
Sale Bowls Club Inc	20	7.0	6.0
Sale Community Sports Club	33	11.5	9.9
Sale RSL Club And Fitness Centre	36	12.6	10.8
Yarram Club Inc	22	7.7	6.6
TOTAL Clubs	286	100.0	86.1
GRAND TOTAL	332	100.0	100.0

Source: VCGA

In summary, the Shire of Wellington has a comparatively high level of EGMs per head, but a low concentration of EGMs per gaming venue, being more concentrated in clubs than in hotels. Over recent years the number of machines and venues has been static.

5.3 Gaming expenditure

Wellington's expenditure on gaming increased from \$0.13M in 1992/1993 to \$15.44M in 1998/1999. During 1998/1999, Wellington's expenditure on gaming was 77% higher than that of the average non-metropolitan Local Government Area (LGA). However, Wellington's expenditure on gaming per adult (\$511.65) was 9% lower than the State average (\$562.56). Expenditure on gaming in Wellington is summarised below.

Table 5.4: Expenditure on gaming in Wellington 1992 to 1999

	92-93	93-94	94-95	95-96	96-97	97-98	98-99
Total Expenditure Wellington	\$135,107	\$5,823,567	\$7,966,680	\$9,921,423	\$11,847,080	\$13,491,941	\$15,448,176
Total Expenditure – Metropolitan *	\$211,319,751	\$551,431,696	\$745,524,325	\$963,832,773	\$1,131,288,009	\$1,306,707,971	\$1,542,948,218
Average Expenditure per Metropolitan LGA	\$6,816,766	\$17,788,119	\$24,049,171	\$31,091,379	\$36,493,161	\$42,151,870	\$49,772,523
Total Expenditure - Non Metropolitan **	\$43,309,135	\$131,167,765	\$207,627,542	\$281,533,049	\$325,195,095	\$362,925,551	\$411,322,997
Average Expenditure per Non Metropolitan LGA	\$921,470	\$2,790,803	\$4,417,607	\$5,990,064	\$6,919,044	\$7,721,820	\$8,751,553
Total Expenditure –Victoria	\$254,628,886	\$682,599,461	\$953,151,867	\$1,245,365,822	\$1,456,483,104	\$1,669,633,522	\$1,954,271,215
Average Expenditure per Victorian LGA	\$3,264,472	\$8,751,275	\$12,219,895	\$15,966,228	\$18,672,860	\$21,405,557	\$25,054,759
Adult Population – Wellington #	29,487	29,319	29,513	29,595	29,817	30,027	30,193
Expenditure per adult – Wellington	\$4	\$198	\$269	\$335	\$397	\$449	\$511
% increase/decrease – Wellington ##	n/a	4235%	36%	24%	19%	13%	14%
Adult Population –Victoria #	3,293,135	3,318,245	3,343,108	3,373,447	3,408,503	3,446,886	3,473,879
Expenditure per adult - Victoria	\$77	\$205	\$285	\$369	\$427	\$484	\$562
% increase/decrease – State ##	n/a	166%	39%	29%	16%	13%	16%
\$ difference per adult +	-\$72	-\$7	-\$15	-\$33	-\$29	-\$35	-\$50
% difference per adult ++	-94%	-3%	-5%	-9%	-7%	-7%	-9%

Source: VCGA

* 31 Metropolitan LGAs as defined by the Melbourne Statistical Division

** 47 Non-metropolitan LGAs as defined by all LGAs not part of the Melbourne Statistical Division

Population is defined as the number of adults over the age of 18. (Source VCGA figures as at June of each year except for 1992/1993 which represents population as at September.)

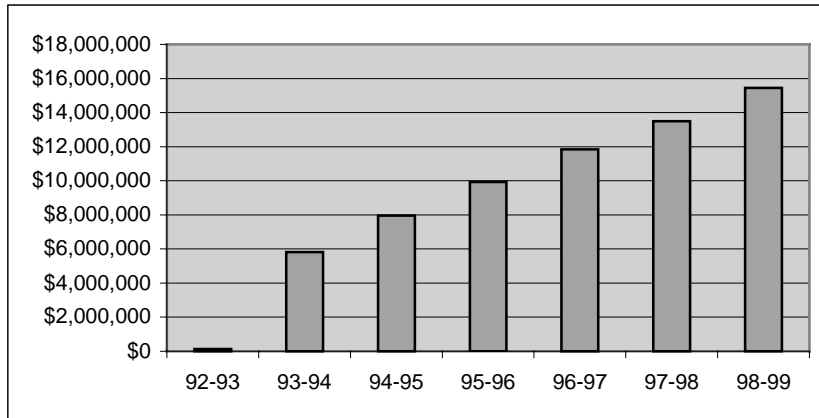
Increase/decrease relative to previous year's gaming expenditure

+ Difference between Mildura LGA and State per head expenditure levels. A positive figure indicates that gaming expenditure per head in the local region is above the State average.

++ Percentage difference between Mildura and State per head expenditure levels

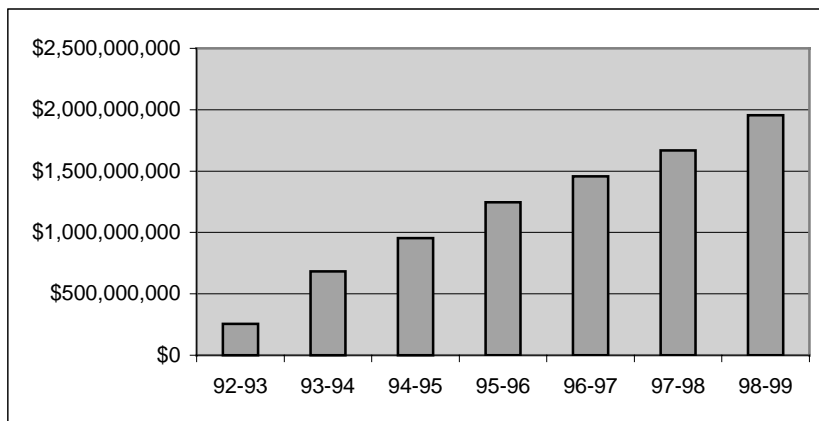
During the period 1992-1999, expenditure on gaming increased each year for both Wellington and Victoria as a whole. These findings are presented graphically below.

Figure 5.4: Expenditure on gaming for Wellington 1992-1999



Source: VCGA

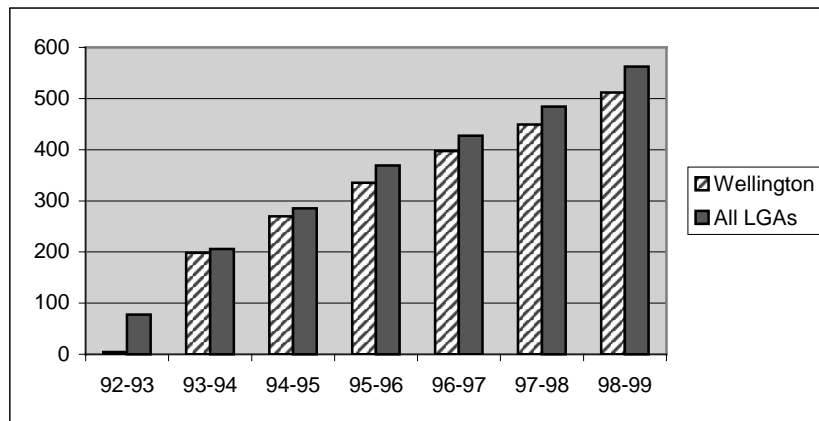
Figure 5.5: Expenditure on gaming, Victoria 1992-1999



Source: VCGA

In comparing average expenditure per adult in Wellington against the Victorian average we found that the average amount spent on gaming was lower in Wellington over the entire data collection period. This comparison is presented in Figure 5.6.

Figure 5.6: Gaming expenditure per adult (\$) – Wellington, Victoria, 1992-1999



Source: VCGA

As shown in Table 5.5, over the seven years of data collection, the number of EGMs in Wellington increased from 193 in 1992/1993 to 332 in 1998/1999. During the same period average expenditure per EGM increased from \$700 in 1992/1993 to \$46,531 in 1998/1999.

Table 5.5: Expenditure, EGMs and average expenditure per EGM – 1992/1999

	92-93	93-94	94-95	95-96	96-97	97-98	98-99
Expenditure	\$135,107	\$5,823,567	\$7,966,680	\$9,921,423	\$11,847,080	\$13,491,941	\$15,448,176
EGMs	193	209	222	242	309	333	332
Av. Exp/EGM	\$700.04	\$27,863.96	\$35,885.95	\$40,997.62	\$38,340.07	\$40,516.34	\$46,530.65

Source: VCGA

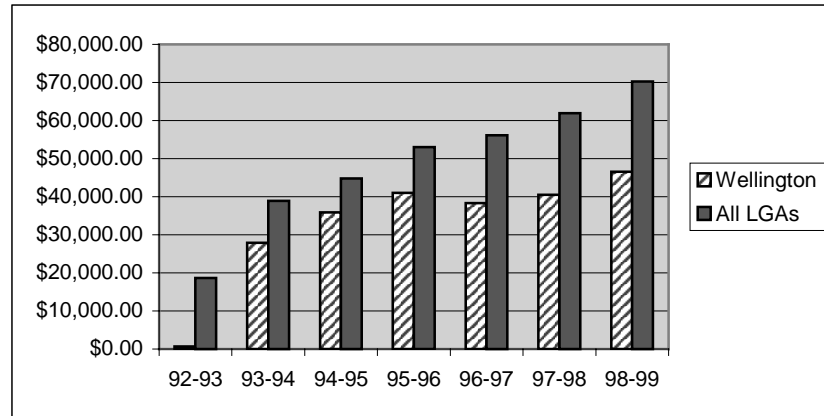
Comparing expenditure per EGM in Wellington against expenditure per EGM across the State, expenditure in Wellington has been consistently lower than the State average (see Table 5.36).

Table 5.6: Average expenditure per EGM – 1992 - 1999

	92-93	93-94	94-95	95-96	96-97	97-98	98-99
Av. Exp/EGM - Wellington	\$700.04	\$27,863.96	\$35,885.95	\$40,997.62	\$38,340.07	\$40,516.34	\$46,530.65
Av. Exp/EGM – State	\$18,639.11	\$38,923.39	\$44,816.24	\$53,043.95	\$56,100.57	\$61,918.54	\$70,269.72
% change for Wellington	n/a	3880%	29%	14%	-6%	6%	15%
% change - State	n/a	109%	15%	18%	6%	10%	13%

Source: VCGA

Figure 5.7: Average expenditure per EGM – 1992 - 1999

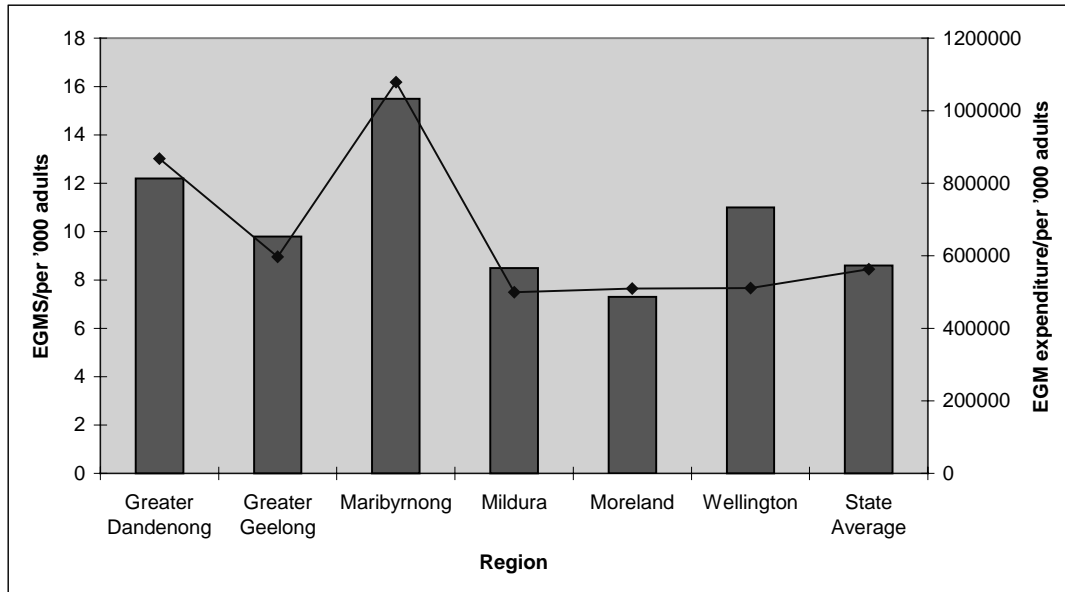


Source: VCGA

5.4 Gaming: Comparison between Wellington and other regions

Figure 5.8 compares EGMs and EGM expenditure per thousand adults between Wellington, the other study regions and the State average, which shows that the level of gaming expenditure in Wellington is below and the concentration of EGMs is higher, than the State average.

Figure 5.8: Number of EGMs and EGM expenditure per thousand adults



Source: VCGA

5.5 Who gambles and frequency of gambling?

Our understanding of the profile of residents of the Shire of Wellington who use EGMs is drawn from:

- our survey of 166 adults living in the Shire of Wellington, conducted in October 1999; and
- opinions expressed during our consultations by venues, community groups and in public forums.

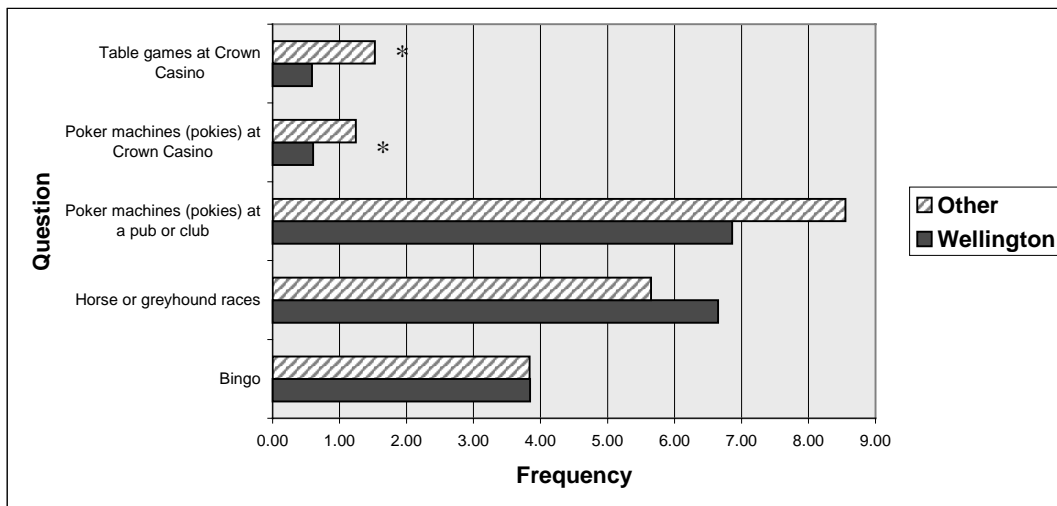
Of the 166 people surveyed in the Wellington region, just over 45% participated in gaming activities in the last six months, compared to the Roy Morgan 'Patterns' survey findings which suggests that 75% of Victorians have gambled in the last 12 months⁴.

Figure 5.9 details the frequency of gambling among the Wellington respondents. The most popular gambling activity is playing the poker machines at a pub or club. Wellington respondents participated in this almost 7 times a year. Greyhound or horse races was the next most common gambling activity. Respondents in Wellington gamble approximately half as

⁴ The full title of the 'Patterns' Survey is the "Sixth Survey of Community Gambling Patterns and Perceptions", April 1999, conducted by Roy Morgan Research for the Victorian Casino and Gaming Authority.

regularly on pokies and table games at the Crown Casino, compared with respondents in other regions, which is not surprising given the three hour drive from Wellington to Crown Casino.

Figure 5.9: Frequency of gambling, Wellington



(*) Statistically significant difference between Wellington and the average of the other regions.

In our consultations, it was noted that there is little tourist trade within Wellington related to gaming. Venue managers indicated that the majority of gaming patrons reside within the local shire of Wellington, with each venue indicating that they have regular groups of patrons that frequent their facility. While it was acknowledged that some people from outside Wellington do visit the gaming venues within the area, gaming venues rely heavily on the local market for patronage. Venues noted that some patrons attend certain venues for gaming, and other venues for meals and a social drink. For example, one venue manager indicated that the principal purpose of the majority its patrons' visit to the facility was to gamble, as opposed to having a meal, while another venue indicated that a significant proportion of its bar and TAB patrons were less likely to utilise the gaming room facilities. A database of 1,200 gaming room members at a medium sized venue indicated that approximately 100 people per day visit the facility, of which approximately 50% of these patrons were regulars who are at the venue every day.

It was generally held by gaming venues, community support organisations and the public that gaming venue patrons in Wellington tended to be retired persons on the pension, with an abundance of spare time to participate in recreational and social activities. Gaming venues reported that a large part of their clientele is older women and quite often they attend gaming facilities in either groups of 2 to 3 or with their husband. Additionally, it is believed that gaming venues are seen as a key social venue for older residents, and are considered to be a safe place for women to go during the daytime. Non-gaming venues concurred that the majority of people who participate in gaming within Wellington are also predominantly an older demographic segment who are relatively lonely and attend venues for free coffee,

cheap meals and for social interaction. Participants at the public meeting identified gaming venue patrons as: “on average people who are aged 45 years and older, 70% women and prefer daylight hours.”

Some venues attracted specific groups of gamers. One venue operator indicated that shift workers and defence force personnel were frequent patrons at gaming venues within the region, another’s patronage was predominantly middle-aged women during the day, in addition to retired persons and pensioners, and another venue attracted a younger demographic profile, particularly on Thursday and Friday nights. We were repeatedly told that those who could least afford to gamble were doing so.

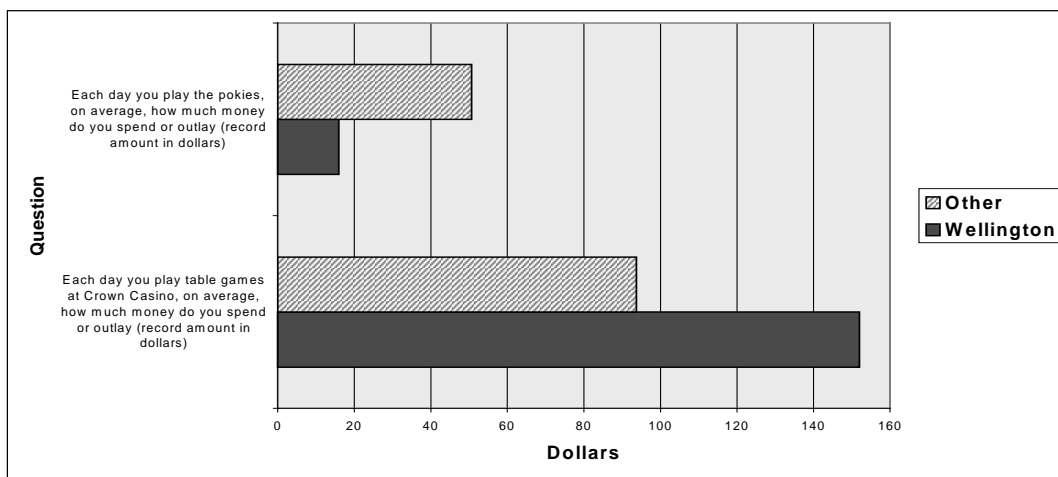
5.6 Gambling in our survey

In our survey, gamblers are defined as those people who had participated in gambling in the last six months. They make up 45% of Wellington residents. We asked this sub-sample more detailed questions about their gaming behaviour (see sections 5.7 to 5.11), and also asked about their gambling behaviour to check for the prevalence of problem gambling (see section 5.12).

5.7 Time and money spent on gaming

Wellington gamblers spend on average \$16 dollars per daily visit at the pokies. Wellington gamblers patronise Crown Casino less frequently than other gaming venues. However, when they play table games at Crown Casino, they spend over 9 times as much as they spend on poker machines at local venues.

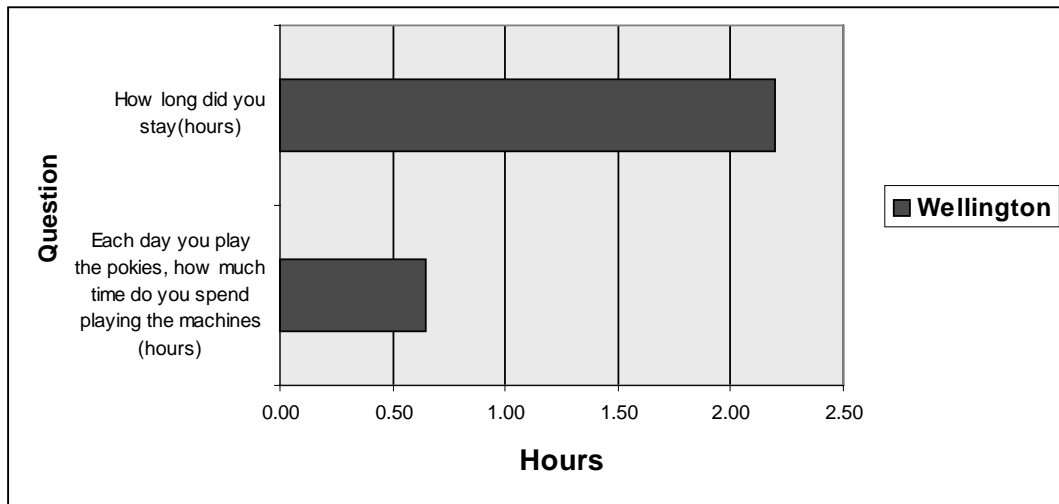
Figure 5.10: Money spent on gaming, Wellington



(There is no statistically significant difference between Wellington and other regions for these questions.)

Our survey indicates that Wellington gamblers spend approximately a third of the time in gaming venues playing pokies. This suggests that gamblers in Wellington are attracted to gaming venues for additional reasons than using poker machines.

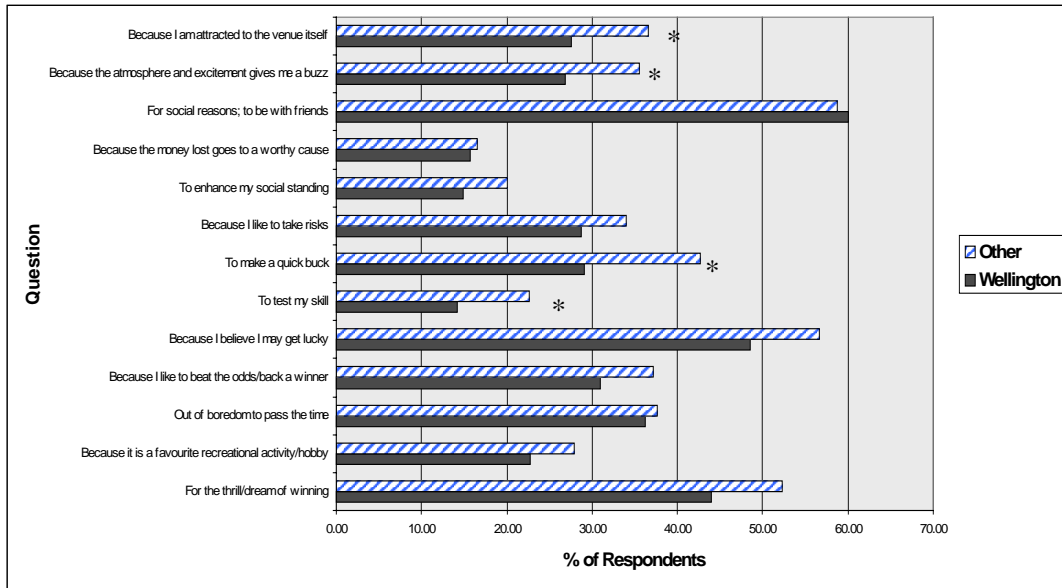
Figure 5.11: Time spent at venue, Wellington.



5.8 Reasons for gaming

Our survey indicates that in Wellington the main reason respondents play poker machines are for 'social reasons; to be with friends'. Figure 5.12 indicates that the thrill of winning and the prospect of a lucky win are also important factors. The reasons given as to why respondents from Wellington frequent the venues seem quite different from other regions. Fewer respondents in Wellington than in other regions are influenced by factors such as the atmosphere and excitement of the venue, to test their skill, to make a "quick buck", or the attractiveness of the venue.

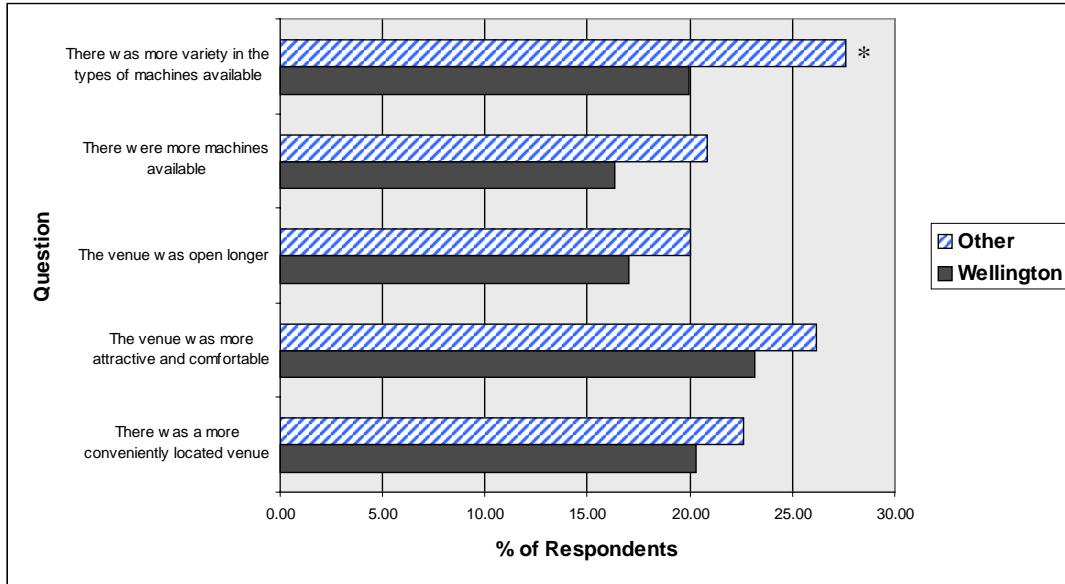
Figure 5.12: Reasons for gaming, Wellington



(*) Statistically significant difference between Wellington and the average of the other regions.

Gamers were asked what would make them game more. Overall most gamers indicated that the factors we suggested would not make them game more. However, venue attractiveness and ambience, the quantity of machines available, the quantity of machines available (less so than in other regions), the extended operating hours of venues and the convenient location of venues were considered as minor factors for gaming more.

Figure 5.13: Factors that make people game more, Wellington

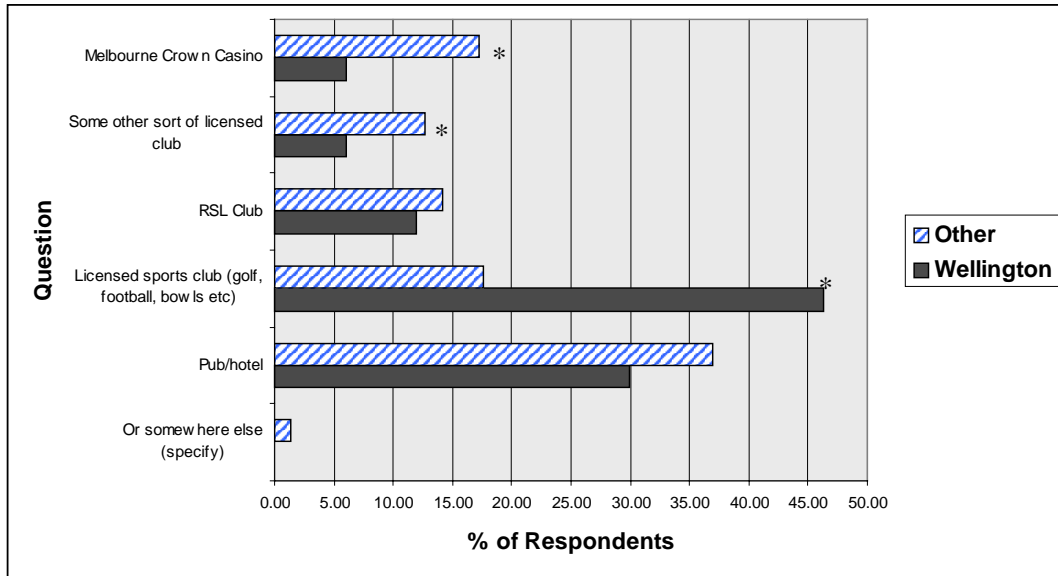


(*) Statistically significant difference between Wellington and the average of the other regions.

5.9 Venues at which EGMs are played

The venues where the pokies are most commonly played within the Wellington Shire are different to that seen in other regions. Many more respondents frequent licensed sports clubs than in other regions and fewer frequent other licensed clubs and pubs and hotels. Approximately 18% of respondents visit the Crown Casino to play the pokies.

Figure 5.14: Venues at which EGMs are played, Wellington

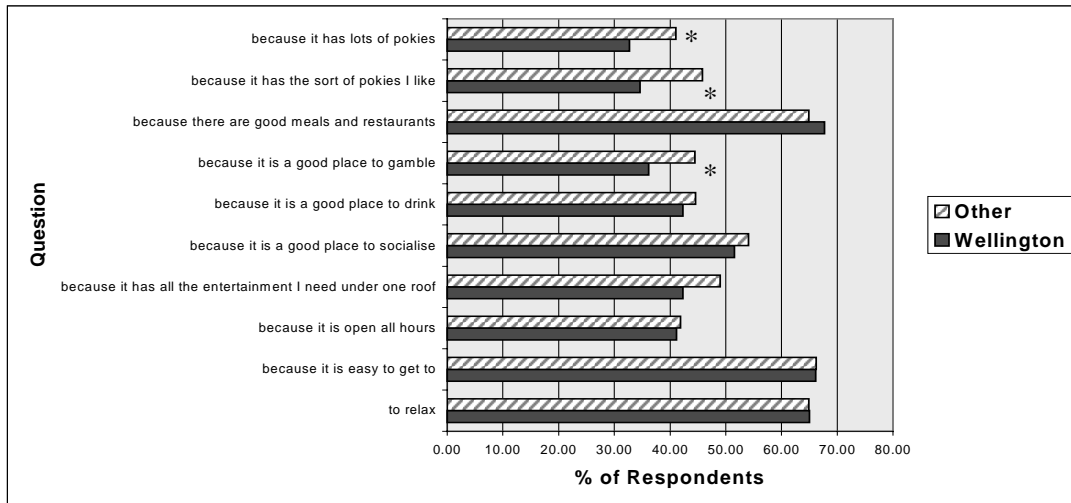


(*) Statistically significant difference between Wellington and the average of the other regions.

Our survey found that most people game locally. Gamblers from the Wellington region travel on average 3km to gaming venues. The majority of respondents in Wellington depart from home to get to a gaming venue.

In our survey, over 64% of gamblers in Wellington choose gaming venues on the basis of proximity and convenience, for relaxation and because there are good meals and restaurants. The majority of Wellington gamblers also choose venues because they are a good place to socialise. Fewer gamblers in Wellington than in other regions frequent gaming venues for the quantity and variety of pokies or because it's considered a good place to gamble.

Figure 5.15: Reasons for venue choice, Wellington

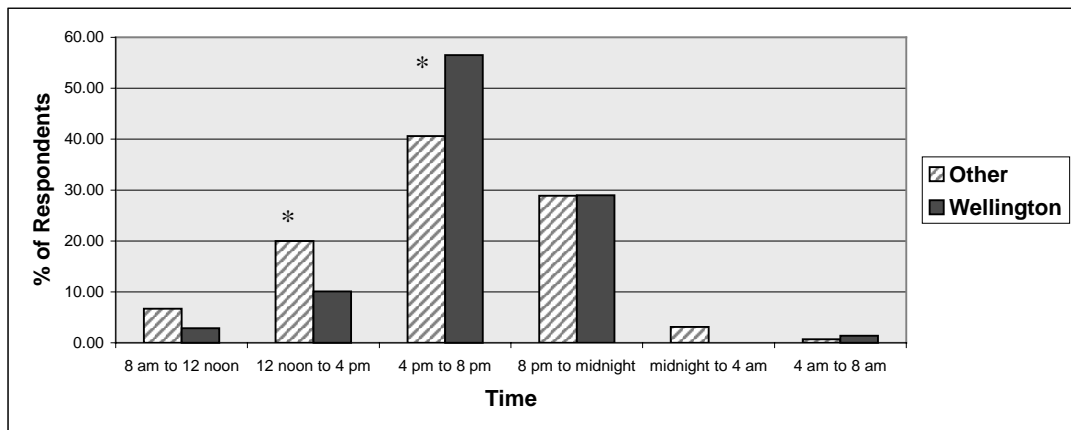


(*) Statistically significant difference between Wellington and the average of the other regions.

5.10 Utilisation of poker machines

Figure 5.16 indicates that attendance at venues varies over the day. The majority of Wellington gamblers arrive between 4pm and 8pm, however more do so than the average of the other regions. Other times of high arrival included between 8pm and midnight and between noon and 4pm. Less than 5% of patrons arrive between the hours of midnight and 8am reflecting that many venues are closed at this time.

Figure 5.16: Time of arrival at venue, Wellington

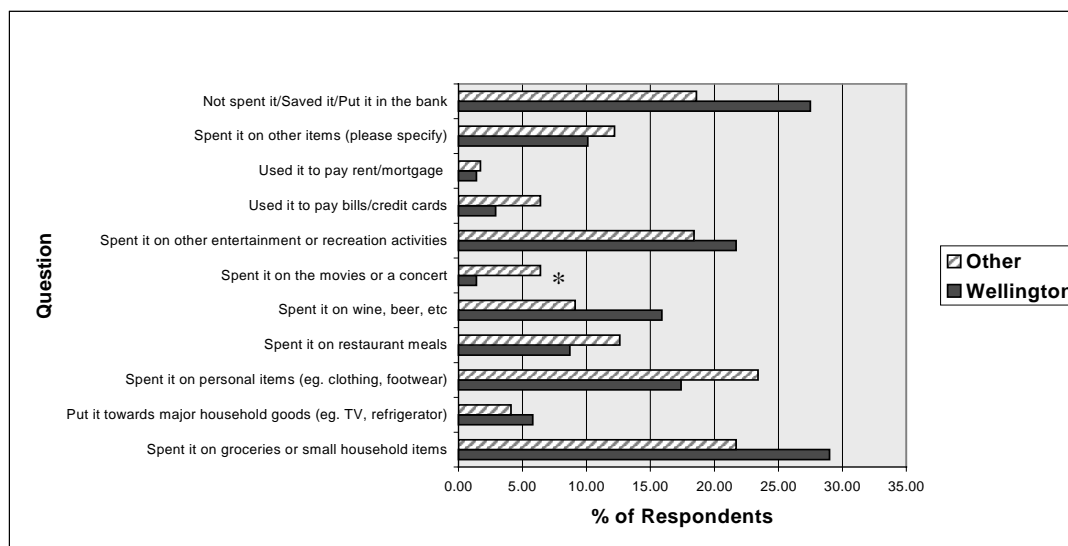


(*) Statistically significant difference between Wellington and the average of the other regions.

5.11 Alternative use of EGM funds

Figure 5.17 details what gaming respondents indicated they would spend their money on had they not spent it on gaming. Around 29% of Wellington gamers would have spent it on groceries or small household items, approximately 28% would have saved the money, about 22% would have been spent it on recreation and entertainment and 17.5% of gamers would have spent it on personal items. Fewer Wellington respondents would have spent this money on the movies or a concert than in the other regions.

Figure 5.17: Alternative use of EGM funds, Wellington



(*) Statistically significant difference between Wellington and the average of the other regions.

5.12 Problem gambling

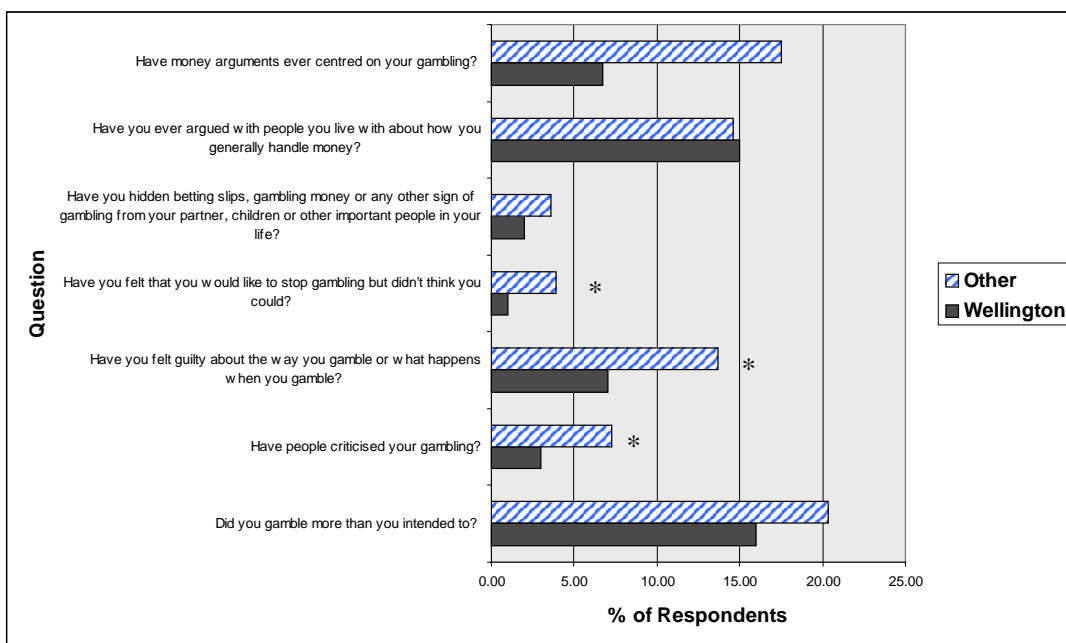
The respondents who had gambled in the last six months were asked the battery of questions from the South Oaks Gambling Screen (SOGS), which is a tool used to identify gambling risks in the total population. We derived a score to identify the percentage of people ‘at risk’ of gambling problems in our survey regions using the approach adopted in the state-wide survey. ‘Sixth survey of community gambling patterns and perceptions’ (hereafter referred to as the ‘Patterns’ Survey).⁵

⁵ Ref: ‘Definition and Incidence of Problem Gambling including the Socio-Economic Distribution of Gamblers’ Australian Institute for Gambling Research (1997) commissioned by the VCGA. In this report, the institute recommended that the SOGS was the best currently available instrument to measure the prevalence of problem gambling and that it should be used in the short term for the VCGA ongoing survey series of community gambling patterns and perceptions. The VCGA has included the SOGS in the last three of its ongoing Community Gambling Patterns surveys.

Our survey found that only 0.6% of Wellington residents fall into the ‘at risk’ category, (having SOGS scores of 5 or more), significantly lower than the State average. Only 1% of gamblers feels they have had a problem with gambling or that their gambling was out of control. However, 7.8% of Wellington residents said that they, or a member of their family, had experienced difficulties with excessive gambling at some time, with 85% of this group having experienced difficulties in the last six months.

In our survey, Wellington gamblers’ experiences with respect to gambling are significantly different to those experienced by respondents in other regions. Specifically, fewer Wellington residents had experienced feelings of guilt, been criticised or gambled more than they intended to, compared to our five other study regions. Approximately 6.7% of Wellington respondents have had money arguments centred on gambling. This is consistent with the relatively low spend level and time spent playing the pokies.

Figure 5.18: Negative gambling experiences in the last six months, Wellington



(*) Statistically significant difference between Wellington and the average of the other regions.

In order to probe the issue of problem gambling further, a series of questions was asked in relation to whether gambling activities were financed through borrowing. In Wellington very little gambling activity is financed by credit. Less than 2% of respondents admitted to having borrowed money to finance gambling, including borrowing money from relatives, credit cards or selling personal property to finance gambling.

Our consultations provided some insights into community perceptions of gambling. Venue operators acknowledged that there is a growing concern in the community about the adverse

effects of gaming, and that they had experience with problem gambling in their venue, which is evidenced through the self-exclusion program. One medium sized venue indicated that they currently had no self-excluded members or clients at their facility. A large venue currently has only one self-excluded patron and has had a total of 5 self-excluded patrons over a period of 4 years. This venue believed that the introduction of paying players winnings by cheque, had helped. Another medium sized venue indicated that they have 10 self-exclusions. They consider that their venue has a personal atmosphere and because of this they generally know how much their customers are spending. One venue operator indicated they would intervene if it was evident that a patron had a gambling problem, while another hotel venue operator indicated that they consider that it is not their responsibility to intervene under any circumstance, as they can not identify if a person has a problem or not.

Overall, community service organisations indicated that the majority of cases of problem gambling related to EGMs and some horseracing. The Break Even agency which covers the Shire of Wellington (Gippsland Family Care) reported 180 cases and 870 client contacts of problem gambling in 1997-98. These figures are an increase over the previous year (44% and 15% respectively). It should be noted that these figures relate to a much wider area than the Wellington Shire. Community service organisations in Wellington have seen a substantial growth in material aid requests in recent times. It was estimated by one agency that around one-quarter of the demand for material aid was gambling related, and by another that 10% of its clients were problem gamblers, with 3-4% receiving counselling for gambling related problems. However, it was noted that statistics from community service agencies could be misleading as recipients of aid do not always declare they have gambling problems. It was generally held that people with gambling problems who seek assistance often do not reveal their problem as being gambling related, but make excuses as to why they are unable to manage themselves financially. Once a client has built up a rapport with the community service organisation and developed a certain level of trust and comfort with their situation, they are more likely to disclose that they have a gambling problem. This may take a number of counselling sessions before they reveal the true extent of their problem.

However, high unemployment and the number of recent retrenchments from major employers in the region appear to be the primary factors affecting the need for material aid in the Wellington Shire, rather than gambling related problems. Additionally, a large number of retrenched employees have left the region resulting in excess housing stock, which has attracted high need single parent and low income families into the region. The congruence of the incidence of redundancy and the introduction of gaming machines in Wellington has had the effect of compounding the problems associated with having a large sum of money (retrenchment pay) and spare time. One community service organisation stated that this combination of events has proven to be difficult for a number of people to manage.

Community agencies reported a range of potential consequences of gambling, including:

- an inability to pay bills and rent, the disconnection of utilities, and an inability to buy food for the family;

- no funds for school excursions, presents for Christmas or birthdays;
- criminal activity, including embezzlement of funds;
- loss of businesses and homes, leading to bankruptcy;
- suicide; and
- family violence.

There is a concurrence amongst community support agencies in Wellington that in general gambling is a means of coping with other problems such as boredom, loneliness, stress and other significant underlying personal problems. Accordingly, it was inferred that the incidence of problem gambling is often a symptom of a much bigger personal problem.

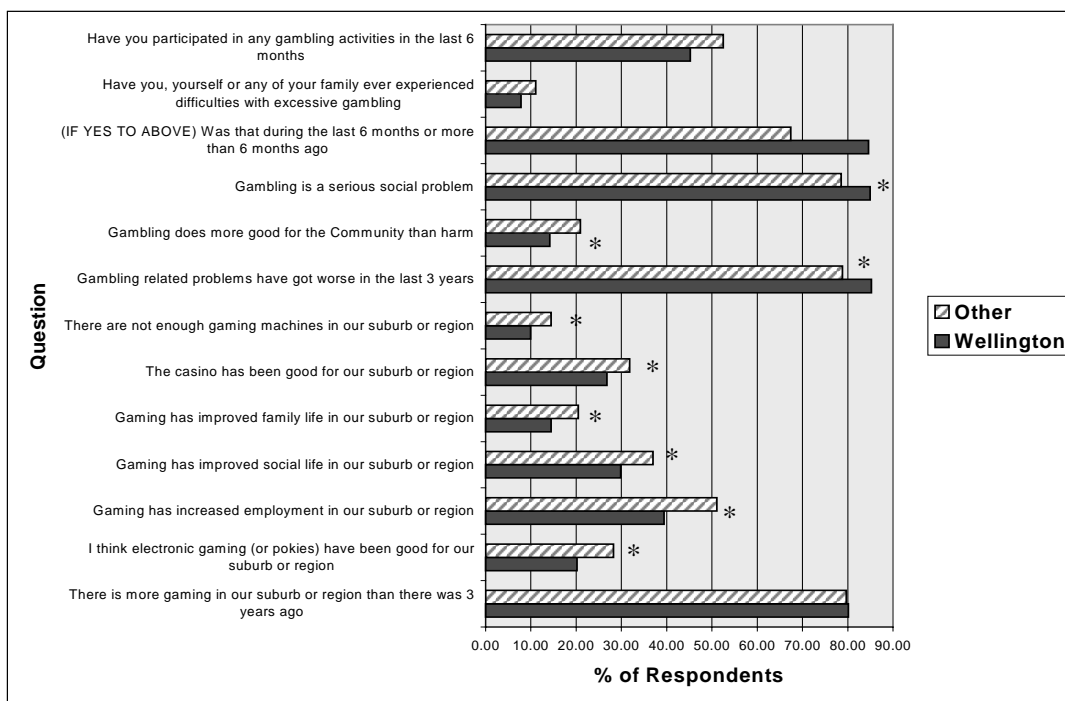
6 Social and economic impact of gaming

6.1 Impacts on the community

In our survey, 85% of Wellington respondents agreed that gaming is a serious social problem (more than the 80% percent of all Victorians who feel this way as found by the ‘Patterns’ survey). Twenty percent of Wellington residents believe that gaming has been of benefit to their region compared to 28% of residents holding this view in the other study regions.

Compared to other regions, fewer respondents believe that gaming has caused an improvement in the Wellington region, and fewer believe that gaming does more good than harm. Eighty-five percent of respondents are of the opinion that gambling related problems have become worse in the past three years. It should be noted, however, that just over 40% of respondents have participated in gambling. Fewer respondents than in other regions believe that gaming has been beneficial to employment, social life, or family life in the region over the past three years. Similarly, more Wellington respondents than in the other regions believe the casino and gambling has been harmful to the community.

Figure 6.1: Opinion on the impact of gaming, Wellington



(*) Statistically significant difference between Wellington and the average of the other regions.

Community service organisations all report that the need for services such as material aid, financial aid, and other counselling has increased markedly since the introduction of machine gaming. However, it is not clear whether the increased demand for community services is directly attributable to gambling related problems or to a number of other community social problems, such as unemployment and drugs. Some organisations associated an increasing prevalence of drugs, petty theft and violent crime within the region with the introduction of EGMs. However, others felt that the introduction of gaming venues could not directly be associated with these incidences, though anecdotal accounts of problem gambling and the consequences for some residents within the region were often cited.

The venue managers were also of the view that, in general, gaming has become more acceptable and is now seen as part of a night out for some young people. This reflects a change in people's social lives, where people no longer stay at home but spend more of their income on social activities and entertainment. Venues consider that their facilities provide a safe, friendly atmosphere in which everyone can participate and enjoy themselves. The introduction of EGMs in Wellington appears to have enabled a number of venues to improve their facilities through the implementation of redevelopment and refurbishment programs. Many venues also offer cheap meals as an incentive to attract customers.

There is a perception that the novelty of gaming has worn off amongst residents of Wellington, with a general levelling off of gaming activity and the amount of money being spent on gaming activities stabilising. One venue operator summarised the situation as follows: "In the early days people went overboard, but now are playing it for entertainment and have modified their expectations." Despite this perception, official statistics indicate that gaming expenditure per adult in Wellington continues to grow.

While the majority of venue operators consider that they assist the community by donating to clubs, charities and local schools, another perceived impact of gaming is the increased inability for community support agencies to obtain funding through donations. Accordingly, organisations have reported that they are also having more difficulty in attracting committee members.

6.2 Economic effects

Overall, the perceptions of the economic impacts of EGMs on the local community are mixed. Gaming venues argue that they have been able to improve facilities and offer increased employment opportunities for local residents, particularly young adults and women. All gaming venues reported increased employment after the introduction of EGMs:

- a medium sized club employed 3 people full-time, a green keeper and 6 people on a casual basis;
- one hotel had a total of 18 staff employed mainly on a full-time and casual basis;

- a large venue had a total of 15 people predominantly employed on a full-time and casual basis and also 9 additional ground staff; and
- another medium sized venue employed a total of 12 people excluding kitchen staff.

The Wellington Business Association identified that people from within the Shire like gambling because it is safe and fun in addition to providing cheap meals. However, a comment was also made that the introduction of gaming machines has changed consumers buying patterns and in turn has affected business turnover. The Wellington Business Association believes that gaming machines adversely affect the lower socio-economic groups who are least able to afford to gamble and have trouble managing their life.

A non-gaming venue that was visited in the region indicated that its approach to deal with EGMs is to fill a niche that is not being serviced. Accordingly, this venue is planning a major redevelopment of its premises to provide a more up-market bar and bistro incorporating accommodation targeted at the corporate market and to attract the high volume of passing traffic.

Participants at a public meeting held at Wellington identified the following factors as economic impacts resulting from the introduction of EGMs:

- significant increases in the level of business activity for hotels with dining facilities;
- smaller venues are affected by larger venues with more machines as the latter have the ability to attract larger levels of patronage; and
- higher risk of business failure, particularly local restaurants, although it was noted that business lifecycle for these types of businesses is a lot shorter than others;
- positive effect for a number of local community based organisations that receive assistance from gaming venues;
- positive effect for the community in terms of the availability of entertainment for members, guests and visitors;
- employment opportunities, although these could be greater than what is experienced; and
- there is a perception that gaming is contributing to the tough economic conditions facing the Wellington community.

6.3 Perceived benefits and costs

To summarise, during our consultations, the following costs and benefits of gaming were identified.

6.3.1 Benefits

- Many of the gaming venues in Wellington have undertaken substantial facility improvements since the introduction of electronic gaming machines with a large amount of money spent on renovations and other building improvements.
- Gaming venues employ a large number of staff and particularly provide opportunities for young people and part time and casual employment within the local community. The number of staff employed at the gaming venues visited in Wellington was 60 people.
- Some gaming venues reported that improvements were recorded in surrounding businesses resulting in an increase in trade for that part of town.
- In addition, the sporting clubs within the region, which have introduced electronic gaming machines, report better facilities available for members and a general view that profits from EGMs is distributed back into the community.
- A social benefit of gaming in Wellington was perceived to be increased opportunities for socialising, particularly for older women.

6.3.2 Costs

- The consensus in the consultations with participants from the local community during public meetings was there are social problems that are caused by gambling.
- Each venue operator acknowledged they had experience of problem gambling, which had manifested itself in a number of ways, most particularly in violence towards the machines. A number of people have entered the self-exclusion register. The response of venue operators was generally that, in some circumstances they would intervene where they thought a problem might arise or might be evident.
- Gambling has adversely affected a large number of families, with community service agencies such as the Salvation Army and St Vincent de Paul providing over 2,000 cases of material aid or financial assistance. One Minister reported at least 30 families who had been adversely affected by gaming in his community.
- At the public hearing supermarkets indicated that they found that gambling has had an impact on their trade. A participant stated that: “trading revenues fall when gaming venues are open, particularly as people stop buying discretionary items.”

Appendix 1

VCGA Gaming Survey		Wellington	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree	
ref: VCGA99-BDT09-Reports.xls					(word)						
PART B - PERSONAL VALUES											
Life in general											
	1	I am really happy with life	74.40	73.95	0.45		0.825	X5B(1)	72.3	21.1	6.6
	2	The Australian economy is doing well	51.35	53.58	-2.23		0.301	X5B(2)	34.3	38.0	27.7
	3	The Australian economy is getting better	50.00	53.45	-3.45		0.094	X5B(3)	30.7	38.6	30.7
	4	My life will be better in the next year than it was last year	67.18	67.08	0.10		0.97	X5B(4)	59.6	29.5	10.8
	5	My family's financial situation is good	64.45	65.20	-0.75		0.747	X5B(5)	63.9	19.9	16.2
	6	I feel that where I end up in life will be more a matter of luck than	40.68	44.63	-3.95		0.138	X5B(6)	29.5	18.7	51.8
	7	I believe rules should never be broken	53.93	52.15	1.78		0.516	X5B(7)	41.6	22.9	35.5
	8	I seek out the latest things	46.68	49.28	-2.60		0.285	X5B(8)	33.1	28.9	38.0
	9	I am healthy	72.75	72.40	0.35		0.877	X5B(9)	74.7	15.1	10.2
	10	I rarely feel stressed	45.93	46.08	-0.15		0.957	X5B(10)	33.7	22.3	44.0
Belonging and friendship											
	11	I have a good family life	82.98	78.58	4.40	p	0.013	X5B(11)	87.4	9.0	3.6
	12	Security is of concern to me	74.70	71.65	3.05		0.178	X5B(12)	77.7	10.8	11.4
	13	I am hardly ever lonely	70.48	68.53	1.95		0.415	X5B(13)	70.5	12.0	17.5
Levels of activity											
	14	I am always busy	79.98	78.28	1.70		0.414	X5B(14)	82.5	9.0	8.4
Fun and going out											
	15	I have a full social life	60.85	62.23	-1.38		0.58	X5B(15)	53.0	24.7	22.3
	16	I like crowds	42.78	48.00	-5.23	p	0.046	X5B(16)	27.1	25.3	47.6
	17	I am hardly ever bored	70.78	68.18	2.60		0.246	X5B(17)	69.3	16.9	13.8
Risk											
	18	Taking risks gives me a thrill	40.20	47.03	-6.83	p	0.008	X5B(18)	26.5	24.1	49.4
Trust											
	19	I believe most people can be trusted	49.85	45.50	4.35		0.064	X5B(19)	40.3	25.9	33.7
Income											
	20	I always have enough money to go around	54.38	52.10	2.28		0.388	X5B(20)	48.2	18.7	33.1
	21	I buy luxuries	38.55	43.08	-4.53		0.077	X5B(21)	25.3	20.5	54.2
Shopping											
	22	I am a spender, not a saver	46.68	49.23	-2.55		0.336	X5B(22)	30.2	29.5	40.4
Thinking about your suburb or region											
	23	Overall, this is a good suburb or region to live in	80.13	72.28	7.85	* p	0	X5B(23)	86.8	8.4	4.8
	24	The local economy is good	44.58	57.35	-12.78	* p	0	X5B(24)	31.3	27.7	41.0
	25	The local shops are doing well financially	42.48	53.90	-11.43	* p	0	X5B(25)	25.9	30.7	43.4
	26	There is a real sense of community around here	71.38	61.48	9.90	* p	0	X5B(26)	68.6	18.1	13.2
	27	It is safe around here	72.15	58.38	13.78	* p	0	X5B(27)	76.5	13.3	10.2
	28	There is no crime around here	42.33	31.48	10.85	* p	0	X5B(28)	23.5	30.1	46.3
	29	There is plenty of work around here	24.85	42.60	-17.75	** p	0	X5B(29)	7.8	19.3	72.8
	30	People play sport around here	77.70	72.90	4.80	p	0.009	X5B(30)	84.9	9.0	6.0

VCGA Gaming Survey		Wellington	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
Thinking about your life 3 years ago										
31	I was living in this suburb or region 3 years ago	84.50	77.10	7.40	p	0.001	X5B(31)	89.2	1.8	9.0
Life in general										
32	I am happier than I was 3 years ago	68.53	67.18	1.35		0.541	X5B(32)	57.8	31.3	10.8
33	The Australian economy is better now than it was 3 years ago	58.43	61.25	-2.83		0.204	X5B(33)	45.8	36.1	18.0
34	My family's financial situation is better than it was 3 years ago	61.60	61.20	0.40		0.873	X5B(34)	53.6	27.1	19.2
35	I am healthier now than I was 3 years ago	57.08	54.25	2.83		0.229	X5B(35)	38.6	41.0	20.5
36	I feel less stressed now than I did 3 years ago	53.78	51.55	2.23		0.362	X5B(36)	40.4	28.3	31.3
Belonging and friendship										
37	I have a better family life now than I did 3 years ago	61.30	60.13	1.18		0.607	X5B(37)	45.8	38.0	16.2
38	I am less concerned with security now than I was 3 years ago	47.90	45.30	2.60		0.262	X5B(38)	26.5	39.8	33.7
39	I am less lonely now than I was 3 years ago	53.63	54.35	-0.73		0.745	X5B(39)	32.0	43.4	24.7
Levels of activity										
40	I am busier now than I was 3 years ago	65.83	66.03	-0.20		0.927	X5B(40)	55.4	26.5	18.1
Fun and going out										
41	I have a better social life now than I did 3 years ago	50.45	53.65	-3.20		0.172	X5B(41)	31.9	35.5	32.5
42	I am less bored now than I was 3 years ago	57.38	58.23	-0.85		0.686	X5B(42)	39.1	43.4	17.5
Risk										
43	I take more risks now than I did 3 years ago	40.20	44.30	-4.10		0.074	X5B(43)	19.3	31.9	48.8
Trust										
44	I trust people more now than I did 3 years ago	40.98	37.55	3.43		0.082	X5B(44)	12.6	47.0	40.3
Income										
45	My money goes further now than it did 3 years ago	32.68	38.30	-5.63	p	0.031	X5B(45)	18.0	18.1	63.8
46	I buy more luxuries now than I did 3 years ago	34.18	38.25	-4.08		0.111	X5B(46)	18.6	21.1	60.2
Thinking about your suburb or region compared to how it was 3 years ago										
47	This suburb or region is better to live in now than 3 years ago	48.95	53.88	-4.93	p	0.004	X5B(47)	16.9	63.9	19.3
48	The local economy is better now than it was 3 years ago	39.30	53.53	-14.23	* p	0	X5B(48)	15.1	37.3	47.6
49	The local shops are doing better financially than they were 3	39.75	51.60	-11.85	* p	0	X5B(49)	17.5	36.7	45.8
50	There is a better sense of community around here now than	51.20	53.80	-2.60		0.161	X5B(50)	24.1	53.0	22.9
51	It is safer around here now than 3 years ago	42.33	43.43	-1.10		0.524	X5B(51)	12.0	50.0	37.9
52	There is less crime around here than 3 years ago	37.95	39.13	-1.18		0.561	X5B(52)	13.8	34.9	51.3
53	There is more work around here than there was 3 years ago	30.88	46.08	-15.20	** p	0	X5B(53)	7.8	31.9	60.2
54	People play more sport around here than they did 3 years ago	50.60	53.73	-3.13		0.074	X5B(54)	19.3	62.7	18.1
Gaming- explain that gaming is electronic gaming machines or pokies and the games played at the casino										
55	There is more gaming in our suburb or region than there was 3	80.13	79.70	0.43		0.852	X5B(55)	78.9	12.7	8.4
56	I think electronic gaming (or pokies) have been good for our	20.18	28.23	-8.05	* p	0	X5B(56)	5.4	15.7	78.9
57	Gaming has increased employment in our suburb or region	39.45	51.08	-11.63	* p	0	X5B(57)	25.9	25.9	48.2
58	Gaming has improved social life in our suburb or region	29.83	36.95	-7.13	p	0.002	X5B(58)	15.1	20.5	64.4
59	Gaming has improved family life in our suburb or region	14.45	20.50	-6.05	p	0	X5B(59)	1.8	7.8	90.3
60	The casino has been good for our suburb or region	26.80	31.80	-5.00	p	0.018	X5B(60)	4.8	32.5	62.6
61	There are not enough gaming machines in our suburb or region	9.95	14.45	-4.50	p	0.01	X5B(61)	3.0	4.8	92.2
62	Gambling related problems have got worse in the last 3 years	85.25	78.83	6.43	p	0.001	X5B(62)	87.9	8.4	3.6
63	Gambling does more good for the Community than harm	14.15	20.90	-6.75	p	0	X5B(63)	2.4	10.2	87.3
64	Gambling is a serious social problem	84.95	78.53	6.43	p	0.002	X5B(64)	86.7	7.8	5.4
65	Have you, yourself or any of your family ever experienced	7.80	11.10	-3.30		0.172	X2B(65)	7.8	0.0	92.2
66	(IF YES TO ABOVE) Was that during the last 6 months or more	84.60	67.40	17.20	**	0.152	X2B(66)	84.6	0.0	15.4
67	Have you participated in any gambling activities in the last 6	45.20	52.50	-7.30		0.085	X2B(67)	45.2	0.0	54.8

VCGA Gaming Survey		Wellington	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
PART C - FREQUENCY OF CONSUMPTION										
In the last month, how many times did you visit.....?										
	1	Department stores	3.30	4.54	-1.24	p	0.001	XFC(1)		
	2	Shopping centres	5.63	6.76	-1.13	p	0.006	XFC(2)		
In the last month, how many of the items in any of the following categories did you buy..?										
	3	Clothing	3.11	3.51	-0.41		0.243	XFC(3)		
	4	Fashion accessories	0.53	0.89	-0.36	p	0.009	XFC(4)		
	5	Books	2.02	1.98	0.03		0.904	XFC(5)		
	6	Cds	1.01	1.21	-0.20		0.287	XFC(6)		
	7	Computer software, hardware and accessories	0.61	0.52	0.09		0.52	XFC(7)		
	8	Homewares	1.42	1.09	0.32		0.132	XFC(8)		
In the last month, how many times did you.....?										
	9	Go to a BYO or licensed restaurant	1.82	2.18	-0.36		0.108	XFC(9)		
	10	Eat takeaways	3.21	4.13	-0.92	p	0.004	XFC(10)		
	11	See a movie at a cinema	0.59	0.80	-0.21		0.062	XFC(11)		
	12	Go to a pub or bar for drinks only	1.22	1.53	-0.31		0.203	XFC(12)		
	13	Go to a night club or disco	0.36	0.65	-0.28	p	0.024	XFC(13)		
In the last six months, have you										
	14	Bought or built a house or flat	3.01	5.64	-2.62		0.092	XFC(14)		
	15	Carried out renovations of more than \$5,000	6.02	7.91	-1.89		0.363	XFC(15)		
	16	Bought a car (new or used)	19.28	12.95	6.33		0.055	XFC(16)		
How often do you gamble on or play.....?										
	17	Bingo	3.85	3.84	0.01		0.995	XFC(17)		
	18	Horse or greyhound races	6.65	5.65	1.00		0.641	XFC(18)		
	19	Poker machines (pokies) at a pub or club	6.86	8.55	-1.69		0.345	XFC(19)		
	20	Poker machines (pokies) at Crown Casino	0.61	1.25	-0.64	p	0	XFC(20)		
	21	Table games at Crown Casino	0.59	1.53	-0.94	p	0.007	XFC(21)		
		Average frequency of Pokies, Horses and Bingo	5.71	5.97	-0.26		0.809	X_GFREQ3		
		Average frequency of Pokies, Horses, Bingo, Crown (pokies,	3.66	4.01	-0.35		0.598	X_GFREQ5		
	22	I am gambling less now than I was 3 years ago	56.63	55.55	1.08		0.65	X5C(22)	31.4	53.6 15.0

VCGA Gaming Survey		Wellington	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
PART D - GAMING										
1	Would you say you are satisfied or dissatisfied with your experience of playing table games at Crown Casino (very	70.00	64.95	5.05		0.381	X5D(1)	70.0	30.0	0.0
2	Each day you play table games at Crown Casino, how much time do you spend at the gaming tables (record time in minutes)	67.70	76.78	-9.08	*	0.733	XND(2)			
3	Each day you play table games at Crown Casino, on average, how much money do you spend or outlay (record amount in	152.00	93.68	58.32	*** **	0.331	XND(3)			
4	Would you say you are satisfied or dissatisfied with your experience of playing the pokies (vsatisfied=100)	44.40	47.08	-2.68		0.464	X5D(4)	31.4	28.4	40.3
5	Each day you play the pokies, how much time do you spend playing the machines (record time in minutes)	38.87	57.33	-18.47	** p	0.001	XND(5)			
6	Each day you play the pokies, on average, how much money do you spend or outlay (record amount in dollars)	15.97	50.66	-34.69	****	0.174	XND(6)			
7	What are the main motivations, attractions or reasons you play									
a	Thrill/dream rewards of winning	7.50	15.80	-8.30	* p	0.027	X2D7(1)	7.5	0.0	92.5
b	Atmosphere/excitement/gives a buzz	6.00	9.90	-3.90		0.231	X2D7(2)	6.0	0.0	94.0
c	Beating the odds/back a winner	1.50	3.60	-2.10		0.242	X2D7(3)	1.5	0.0	98.5
d	Exchange of money/handling money	0.00	0.30	-0.30		is	X2D7(4)	0.0	0.0	100.0
e	Upbringing/family background	1.50	0.30	1.20		0.416	X2D7(5)	1.5	0.0	98.5
f	Ego/self esteem	0.00	0.00	0.00		is	X2D7(6)	0.0	0.0	100.0
g	Favourite recreational activity/hobby	6.00	9.90	-3.90		0.231	X2D7(7)	6.0	0.0	94.0
h	Social reasons/see friends	50.70	44.50	6.20		0.352	X2D7(8)	50.7	0.0	49.3
i	Compulsions/addiction	0.00	1.00	-1.00		is	X2D7(9)	0.0	0.0	100.0
j	Like taking risks/risk taker	0.00	0.50	-0.50		is	X2D7(10)	0.0	0.0	100.0
k	Belief in luck/may get lucky	13.40	12.50	0.90		0.831	X2D7(11)	13.4	0.0	86.6
l	Want to be successful	1.50	2.50	-1.00		0.535	X2D7(12)	1.5	0.0	98.5
m	Boredom/pass time	25.40	21.60	3.80		0.516	X2D7(13)	25.4	0.0	74.6
n	Other (specify)	13.40	6.10	7.30		0.098	X2D7(14)	13.4	0.0	86.6
o	(Don't know)	0.00	1.50	-1.50		is	X2D7(15)	0.0	0.0	100.0
I play the pokies:										
8	For the thrill/dream of winning	44.03	52.35	-8.33	*	0.06	X5D(8)	34.4	22.4	43.3
9	Because it is a favourite recreational activity/hobby	22.75	27.88	-5.13		0.16	X5D(9)	10.5	13.4	76.2
10	Out of boredom to pass the time	36.20	37.65	-1.45		0.757	X5D(10)	32.8	7.5	59.7
11	Because I like to beat the odds/back a winner	30.98	37.23	-6.25		0.124	X5D(11)	20.9	16.4	62.7
12	Because I believe I may get lucky	48.50	56.68	-8.18	*	0.06	X5D(12)	37.3	22.4	40.3
13	To test my skill	14.18	22.65	-8.48	* p	0.003	X5D(13)	4.5	7.5	88.1
14	To make a quick buck	29.10	42.68	-13.58	* p	0.003	X5D(14)	22.4	11.9	65.7
15	Because I like to take risks	28.73	34.03	-5.30		0.195	X5D(15)	22.4	13.4	64.2
16	To enhance my social standing	14.93	20.05	-5.13		0.064	X5D(16)	3.0	11.9	85.1
17	Because the money lost goes to a worthy cause	15.68	16.48	-0.80		0.796	X5D(17)	6.0	6.0	88.1
18	For social reasons: to be with friends	60.08	58.73	1.35		0.742	X5D(18)	62.7	13.4	23.8
19	Because the atmosphere and excitement gives me a buzz	26.88	35.50	-8.63	* p	0.016	X5D(19)	10.5	22.4	67.2
20	Because I am attracted to the venue itself	27.60	36.53	-8.93	* p	0.013	X5D(20)	11.9	19.4	68.6
Other gambling questions										
	Thinking of the last week in which you spent money on pokies or table games. If you hadn't spent the money on gambling, could you please tell me in what other ways you might have used it?									
21	Spent it on groceries or small household items	29.00	21.70	7.30		0.218	X2D(21)	29.0	0.0	71.0
22	Put it towards major household goods (eg. TV, refrigerator)	5.80	4.10	1.70		0.563	X2D(22)	5.8	0.0	94.2
23	Spent it on personal items (eg. clothing, footwear)	17.40	23.40	-6.00		0.237	X2D(23)	17.4	0.0	82.6
24	Spent it on restaurant meals	8.70	12.60	-3.90		0.299	X2D(24)	8.7	0.0	91.3
25	Spent it on wine, beer, etc	15.90	9.10	6.80		0.144	X2D(25)	15.9	0.0	84.1
26	Spent it on the movies or a concert	1.40	6.40	-5.00	p	0.009	X2D(26)	1.4	0.0	98.6
27	Spent it on other entertainment or recreation activities	21.70	18.40	3.30		0.531	X2D(27)	21.7	0.0	78.3
28	Used it to pay bills/credit cards	2.90	6.40	-3.50		0.136	X2D(28)	2.9	0.0	97.1
29	Used it to pay rent/mortgage	1.40	1.70	-0.30		0.889	X2D(29)	1.4	0.0	98.6
30	Spent it on other items (please specify)	10.10	12.20	-2.10		0.613	X2D(30)	10.1	0.0	89.9
31	Not spent it/Saved it/Put it in the bank	27.50	18.60	8.90	*	0.124	X2D(31)	27.5	0.0	72.5
32	(Don't know)	2.90	2.40	0.50		0.814	X2D(32)	2.9	0.0	97.1

VCGA Gaming Survey		Wellington	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
	Which type of venue do you play pokies at (MULTIPLE RESPONSE):									
33	Pub/hotel	29.90	44.00	-14.10	* p	0.024	X2D(33)	29.9	0.0	70.1
34	Licensed sports club (golf, football, bow ls etc)	50.70	22.90	27.80	*** p	0	X2D(34)	50.7	0.0	49.3
35	RSL Club	17.90	18.10	-0.20		0.976	X2D(35)	17.9	0.0	82.1
36	Some other sort of licensed club	9.00	17.00	-8.00	* p	0.045	X2D(36)	9.0	0.0	91.0
37	Melbourne Crow n Casino	17.90	23.40	-5.50		0.291	X2D(37)	17.9	0.0	82.1
38	Or somew here else (specify)	0.00	2.00	-2.00		is	X2D(38)	0.0	0.0	100.0
	Which type of venue do you go to the most to play pokies (single									
40	Pub/hotel	29.90	36.90	-7.00		0.254	X2D(40)	29.9	0.0	70.1
41	Licensed sports club (golf, football, bow ls etc)	46.30	17.60	28.70	*** p	0	X2D(41)	46.3	0.0	53.7
42	RSL Club	11.90	14.20	-2.30		0.598	X2D(42)	11.9	0.0	88.1
43	Some other sort of licensed club	6.00	12.70	-6.70	p	0.047	X2D(43)	6.0	0.0	94.0
44	Melbourne Crow n Casino	6.00	17.30	-11.30	* p	0.001	X2D(44)	6.0	0.0	94.0
45	Or somew here else (specify)	0.00	1.30	-1.30		is	X2D(45)	0.0	0.0	100.0
	Thinking of the last time you played the pokies at a club or pub									
47	How far did you travel to get to this venue? (km)	2.94	2.45	0.49		0.069	XND(47)			
48	Did you go to this venue									
	* From home	25.30	33.60	-8.30	* p	0.029	2START(1)	25.3	0.0	74.7
	* On the way to or from work	1.80	2.20	-0.40		0.761	2START(2)	1.8	0.0	98.2
	* From somew here else	12.00	8.40	3.60		0.179	2START(3)	12.0	0.0	88.0
49	I visit that venue more than other venues	50.38	54.08	-3.70		0.462	X5D(49)	44.6	10.8	44.6
50	I really like visiting the venue	51.55	55.38	-3.83		0.307	X5D(50)	33.8	40.0	26.2
51	I have lots of good luck there	25.00	29.43	-4.43		0.147	X5D(51)	7.7	15.4	77.0
52	It is enjoyable and thrilling	40.78	44.90	-4.13		0.265	X5D(52)	23.1	32.3	44.7
53	I had a meal	61.15	58.98	2.18		0.662	X5D(53)	61.5	6.2	32.3
	I went to the venue..									
54	to relax	65.00	64.88	0.13		0.975	X5D(54)	69.2	9.2	21.5
55	because it is easy to get to	66.15	66.23	-0.08		0.984	X5D(55)	66.2	15.4	18.4
56	because it is open all hours	41.15	41.85	-0.70		0.865	X5D(56)	29.2	15.4	55.4
57	because it has all the entertainment I need under one roof	42.30	48.98	-6.68		0.133	X5D(57)	32.3	15.4	52.3
58	because it is a good place to socialise	51.55	54.08	-2.53		0.55	X5D(58)	43.1	23.1	33.9
59	because it is a good place to drink	42.30	44.58	-2.28		0.611	X5D(59)	32.3	20.0	47.7
60	because it is a good place to gamble	36.15	44.43	-8.28	* p	0.042	X5D(60)	27.7	10.8	61.5
61	because there are good meals and restaurants	67.70	64.88	2.83		0.447	X5D(61)	63.1	23.1	13.8
62	because it has the sort of pokies I like	34.63	45.80	-11.18	* p	0.001	X5D(62)	15.4	27.7	56.9
63	because it has lots of pokies	32.70	41.03	-8.33	* p	0.015	X5D(63)	13.8	26.2	60.0
	On your last visit to a gaming venue									
64	What time did you arrive:									
	8 am to 12 noon	2.90	6.70	-3.80		0.113	X2TIME(1)	2.9	0.0	97.1
	12 noon to 4 pm	10.10	20.00	-9.90	* p	0.019	X2TIME(2)	10.1	0.0	89.9
	4 pm to 8 pm	56.50	40.60	15.90	** p	0.016	X2TIME(3)	56.5	0.0	43.5
	8 pm to midnight	29.00	28.90	0.10		0.986	X2TIME(4)	29.0	0.0	71.0
	midnight to 4 am	0.00	3.10	-3.10		is	X2TIME(5)	0.0	0.0	100.0
	4 am to 8 am	1.40	0.70	0.70		0.628	X2TIME(6)	1.4	0.0	98.6
65	How long did you stay(hours)	2.22	2.49	-0.27		0.078	XND(65)			
	Thinking about w hen you last played the pokies									
66	How much did you win? (a lot=100)	40.30	40.15	0.15		0.966	X5D(66)	25.4	14.9	59.7
67	I had really good luck	35.08	34.80	0.28		0.948	X5D(67)	22.3	13.4	64.2
68	I enjoyed myself	64.18	62.48	1.70		0.64	X5D(68)	61.2	25.4	13.5
	I would game more if:									
69	There was a more conveniently located venue	20.30	22.63	-2.33		0.512	X5D(69)	10.1	10.1	79.7
70	The venue was more attractive and comfortable	23.20	26.20	-3.00		0.358	X5D(70)	10.1	11.6	78.3
71	The venue was open longer	17.03	20.05	-3.03		0.242	X5D(71)	4.3	7.2	88.4
72	There were more machines available	16.30	20.83	-4.53		0.1	X5D(72)	4.3	5.8	89.8
73	There was more variety in the types of machines available	19.93	27.58	-7.65	* p	0.018	X5D(73)	8.6	7.2	84.1

VCGA Gaming Survey		Wellington	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
PART E										
	Which any of these statements applied to you personally in the									
1	When you gamble, how often do you go back another day to win	1.05	1.19	-0.14	p	0	XNE(1)			
2	Have you ever claimed to be WINNING money when you really	1.09	1.11	-0.02		0.705	XNE(2)			
3	Do you feel you have had a problem with gambling or that your	1.10	1.10	0.00		0.938	XNE(3)			
	The following questions still relate to the last 6 months and only									
4	Did you gamble more than you intended to?	16.00	20.30	-4.30		0.297	X2E(4)	16.0	0.0	84.0
5	Have people criticised your gambling?	3.00	7.30	-4.30	p	0.037	X2E(5)	3.0	0.0	97.0
6	Have you felt guilty about the way you gamble or what happens	7.00	13.70	-6.70	p	0.025	X2E(6)	7.0	0.0	93.0
7	Have you felt that you would like to stop gambling but didn't think	1.00	3.90	-2.90	p	0.031	X2E(7)	1.0	0.0	99.0
8	Have you hidden betting slips, gambling money or any other sign	2.00	3.60	-1.60		0.312	X2E(8)	2.0	0.0	98.0
9	Have you ever argued with people you live with about how you	15.00	14.60	0.40		0.913	X2E(9)	15.0	0.0	85.0
10	Have money arguments ever centred on your gambling?	6.70	17.50	-10.80	*	0.183	X2E(10)	6.7	0.0	93.3
11	Have you borrowed money from someone and not paid them	1.00	0.90	0.10		0.935	X2E(11)	1.0	0.0	99.0
12	Have you lost time from work or study because of gambling?	0.00	0.90	-0.90		is	X2E(12)	0.0	0.0	100.0
13	Have you ever borrowed money to gamble or pay off gambling	1.00	2.70	-1.70		0.156	X2E(13)	1.0	0.0	99.0
14	Have you ever borrowed money to gamble or to pay gambling	1.00	2.20	-1.20		0.314	X2E(14)	1.0	0.0	99.0
15	Have you borrowed money to gamble or to pay gambling debts	1.00	1.80	-0.80		0.475	X2E(15)	1.0	0.0	99.0
16	(Have you borrowed money to gamble or to pay gambling debts)	1.00	0.70	0.30		0.802	X2E(16)	1.0	0.0	99.0
17	(Have you borrowed money to gamble or to pay gambling debts)	0.00	0.40	-0.40		is	X2E(17)	0.0	0.0	100.0
18	(Have you borrowed money to gamble or to pay gambling debts)	1.00	1.60	-0.60		0.573	X2E(18)	1.0	0.0	99.0
19	(Have you borrowed money to gamble or to pay gambling debts)	0.00	0.00	0.00		is	X2E(19)	0.0	0.0	100.0
20	(Have you borrowed money to gamble or to pay gambling debts)	0.00	0.70	-0.70		is	X2E(20)	0.0	0.0	100.0
21	(Have you borrowed money to gamble or to pay gambling debts)	0.00	0.50	-0.50		is	X2E(21)	0.0	0.0	100.0
22	(Have you borrowed money to gamble or to pay gambling debts)	0.00	0.00	0.00		is	X2E(22)	0.0	0.0	100.0
	by writing cheques knowing there was no money in the									
	SOGs score	0.31	0.52	-0.21	p	0.005	SOG			
	No risk (score<=4)	99.40	97.70	1.70	p	0.035	X2SOG(1)	99.4	0.0	0.6
	One in 5 risk (score>=5 and score<=6)	0.60	1.40	-0.80		0.253	X2SOG(2)	0.6	0.0	99.4
	One in 2 risk (score>=7 and score<=9)	0.00	0.50	-0.50		is	X2SOG(3)	0.0	0.0	100.0
	One in 1 risk (score>=10)	0.00	0.40	-0.40		is	X2SOG(4)	0.0	0.0	100.0

VCGA Gaming Survey		Wellington	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
PART A - SAMPLE AND DEMOGRAPHICS										
1	Gender (male=0 female=100)	50.00	51.30	-1.30		0.757	X2A(1)	50.0	0.0	50.0
2	Region									
	Dandenong	0.00	20.00	-20.00	**	is	X2LOC(1)	0.0	0.0	100.0
	Geelong	0.00	20.00	-20.00	**	is	X2LOC(2)	0.0	0.0	100.0
	Maribyrnong	0.00	20.00	-20.00	**	is	X2LOC(3)	0.0	0.0	100.0
	Mildura	0.00	20.00	-20.00	**	is	X2LOC(4)	0.0	0.0	100.0
	Moreland	0.00	19.90	-19.90	**	is	X2LOC(5)	0.0	0.0	100.0
	Wellington/ South Gippsland	100.00	0.00	100.00	***	***	is	X2LOC(6)	100.0	0.0
1	Do you live with a partner or spouse? (No=0 Yes=100)	60.80	55.60	5.20		0.213	X2F(1)	60.8	0.0	39.2
2	Do you have dependent children living at home? (No=0 Yes=100)	37.30	36.00	1.30		0.738	X2F(2)	37.3	0.0	62.7
3	Do you receive a government pension or benefit? (No=0	38.60	38.10	0.50		0.918	X2F(3)	38.6	0.0	61.4
4	Are you the main income earner? (No=0 Yes=100)	62.70	62.90	-0.20		0.942	X2F(4)	62.7	0.0	37.3
5	Highest education level? (1=primary 4=year 12	3.65	3.98	-0.33	p	0.017	XNF(5)			
	Less than year 12	57.80	48.60	9.20	* p	0.029	X2ED(1)	57.8	0.0	42.2
	Year 12	17.50	24.60	-7.10	p	0.033	X2ED(2)	17.5	0.0	82.5
	Trade or diploma	18.70	13.50	5.20		0.117	X2ED(3)	18.7	0.0	81.3
	Degree	6.00	13.30	-7.30	p	0.001	X2ED(4)	6.0	0.0	94.0
6	Work status?									
	* Work full time (for money)	39.20	43.80	-4.60		0.27	X2JOB(1)	39.2	0.0	60.8
	* Work part time(for money)	19.90	18.70	1.20		0.729	X2JOB(2)	19.9	0.0	80.1
	* Household duties only	10.20	7.90	2.30		0.36	X2JOB(3)	10.2	0.0	89.8
	* Full time student	1.80	5.80	-4.00	p	0.003	X2JOB(4)	1.8	0.0	98.2
	* Retired (self supporting)	12.70	9.00	3.70		0.188	X2JOB(5)	12.7	0.0	87.3
	* Other pensioner	12.70	11.40	1.30		0.655	X2JOB(6)	12.7	0.0	87.3
	* Unemployed	62.70	65.80	-3.10		0.44	X2JOB(7)	62.7	0.0	37.3
		37.30	34.10	3.20		0.423	X2JOB(8)	37.3	0.0	62.7
7	What is (was) your occupation?									
	Un-s skilled Blue Collar									
	Semi-s skilled Blue Collar	3.60	7.80	-4.20	p	0.016	X2OCC(1)	3.6	0.0	96.4
	Skilled Blue Collar	9.00	10.70	-1.70		0.509	X2OCC(2)	9.0	0.0	91.0
	Lower White Collar	16.30	12.50	3.80		0.221	X2OCC(3)	16.3	0.0	83.7
	Upper White Collar	29.50	27.00	2.50		0.512	X2OCC(4)	29.5	0.0	70.5
	Senior Upper White Collar	9.60	11.30	-1.70		0.522	X2OCC(5)	9.6	0.0	90.4
8	What industry do (did) you work in?	2.40	1.00	1.40		0.244	X2OCC(6)	2.4	0.0	97.6
9	Were you or your parents born overseas?	16.85	32.55	-15.70	** p			8.4	16.9	74.7
10	What was the main language spoken at home when you were									
	English	74.70	57.80	16.90	** p	0	X3F(9)			
	Mandarin	16.90	19.30	-2.40		0.45	X2LANG(1)	74.7	0.0	25.3
	Cantonese	8.40	22.90	-14.50	* p	0	X2LANG(2)	16.9	0.0	83.1
	Vietnamese	0.00	0.00	0.00		0	X2LANG(3)	8.4	0.0	91.6
	Spanish	0.00	0.00	0.00		is	X2LANG(4)	0.0	0.0	100.0
	Italian	0.00	0.00	0.00		is	X2LANG(5)	0.0	0.0	100.0
	Greek	0.00	0.00	0.00		is	X2LANG(6)	0.0	0.0	100.0
	Other	0.00	0.00	0.00		is	X2LANG(7)	0.0	0.0	100.0
		0.00	0.00	0.00		is	X2LANG(8)	0.0	0.0	100.0
11	Age in years	46.19	43.10	3.10	p	0.019	AGE			
12	What is the gross (before tax) family income?	34.55	31.76	2.79		0.179	INCOME			
		16.600 %*	83.400 %*					27.711 %*		
		166.00	834.00							

Victorian Casino and Gaming Authority

Report of the 1999
Longitudinal Community
Impact Study: Moreland
regional profile

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1 Summary

The City of Moreland is on the edge of the City of Melbourne, with characteristics of both the established inner city and the developing outer suburbs.

Compared to metropolitan Melbourne and Victoria as a whole, Moreland has an older population, which is more ethnically diverse, less mobile and less likely to own or to be buying a home. The population is relatively poorly educated and has low-income levels and high receipt of social security benefits. The residents of Moreland have lower rates of car ownership and higher rates of usage of public transport than the State average. Moreland has a lower incidence of crime than the State average.

Moreland is a city with a declining manufacturing base, a comparatively low labour force participation rate and a high rate of unemployment. Reflecting the city's gentrification, the real estate market has been strong.

The residents of Moreland are generally positive about their suburb, both now and compared to three years ago. Three quarters of Moreland respondents believe their suburb is good to live in and over half believe it is better than three years ago. More than six in ten feel a sense of community and feel safe, although just as many believe there is crime within the suburb.

The concentration of EGMs and gaming venues in the City of Moreland is below the State average, with some decline in the two years to June 1999. Moreland has the lowest number of EGMs per thousand adults of our six study regions. However, a new large venue recently opened in Moreland may change this result. We note that many respondents perceive Moreland as having a high concentration of venues and machines – whilst this is true for the suburbs of Brunswick and Coburg, it is not true for the whole region.

Based on VCGA figures, Moreland's expenditure on gaming increased from \$8.28M in 1993/1994 to \$55.44M in 1998/1999. Annual gaming expenditure in Moreland per adult was 9% lower than the State average in 1998-99.

According to our survey, half of Moreland respondents gambled in the last 6 months. Playing poker machines is the most popular form of gambling, with the most popular venue being a pub or club. Our survey indicates that gamers in Moreland participate in gaming for social reasons, and tend to frequent local venues or, more so than other regions, the Crown Casino (which is relatively close and accessible by public transport). Although the demographics of gamers vary between venues, anecdotal evidence suggests that most have an older clientele, especially women, during the day and men at night. Reflecting the high ethnicity in the suburb, high levels of gaming amongst ethnic groups were reported.

Our survey indicates that gaming is part of a broader social/recreational package. This is reflected in the fact that most Moreland gamblers spend less than a third of the time in gaming venues playing pokies, with the majority of gamers choosing venues on the basis of proximity and convenience and to relax. Gamers in Moreland travel on average 2.4km to get

to a gaming venue. The most popular time for arriving at gaming venues is between 8pm and midnight.

Eight in ten respondents regard gambling as a serious social problem in Moreland. About 1.8% of residents in Moreland are at risk of problem gambling and 13% of Moreland residents said that they, or a member of their family, had at some time experienced difficulties with excessive gambling. In the last six months almost 20% of gamblers had gambled more than they intended to and 17% had money arguments centred on gambling. However, venues in Moreland did not generally accept that there was a large amount of problem gambling in Moreland, although they noted that the brochures and cards provided to their patrons regarding problem gambling were well utilised. Community agencies and gamers at our public meetings identified a high level of problem gambling in Moreland, with significant detrimental effects on individuals family life and finances. They also noted that gamblers are now facing multiple problems leading to crime and fraud.

During the course of our consultations, the following costs and benefits were identified with gaming in recent years.

Benefits

Participants at the public meeting referred to the cheaper meals and the improved entertainment and recreational facilities as being a key benefit of the introduction of gaming. In addition, a number of participants cited the benefit of increased funding of community sporting and charitable organisations due to the distribution of club gaming profits.

Community service organisations could see few benefits associated with the introduction of gaming apart from the improved availability of entertainment and recreational facilities and services for the community.

Venue operators highlighted the following benefits as a direct result of gaming:

- urban renewal has gained impetus since gaming commenced; with a move to more residential developments attracting younger couples and families to the region;
- the venues themselves are modern and more aesthetically appealing than before;
- gaming is leading to benefits for the whole community, including increased employment and improved services and facilities for members and better entertainment all round. Any problem gamblers are relatively small in number;
- increased taxes to government, benefits the community in the longer term.

Costs

Community service organisations and some sections of the community not associated with gaming venues have serious concerns about the negative impact of gaming on the Moreland

community. While there may be a small number of problem gamblers, these groups consider that the costs of gambling are huge and reverberate across many affected individuals and businesses. Family support services indicated that there is an increasing trend in recipients of social security benefits; requests for emergency and material aid; family breakdowns; and social dysfunction (which is not conducive to family or community). There are also reported implications for crime in the community, although it is widely believed that this is mostly unreported. The community generally feels powerless to overcome gambling problems.

Whilst most venue operators indicated that they had heard of rising unemployment and crime rates, they challenged the view that these were a direct result of gambling. A number of venue operators did express some concern about the increased number of venues, which threaten the viability of other venues as well as providing relatively unrestricted access to gaming to the Moreland population. A few venue operators also expressed concern about personal safety of clients late at night.

2 Description of the Local Government area of Moreland

2.1 Data sources

Data for this profile has been sourced from:

- a range of different government departments and agencies;
- consultations; and
- KPMG surveyed 1,000 residents in six local government areas, of which 167 respondents lived in Moreland. The survey was conducted in October 1999. The full results of the survey are reported in Supporting Paper No.1, and the results for Moreland are attached to this paper.

It should be noted that while percentages have been included in the following tables, the total percentage for a number of tables does not equal one hundred per cent due to rounding.

2.2 The geography

On 22 June 1994, the City of Moreland was created by amalgamating the former Cities of Brunswick and Coburg. On 15 December 1994, the City of Moreland's boundaries were expanded to include a large section of the former City of Broadmeadows. The City of Moreland covers a land area of 51 km² and includes the following suburbs:

- | | |
|-------------------------|---------------|
| ■ Brunswick | ■ Coburg |
| ■ Merlynston | ■ Moreland |
| ■ Newlands | ■ Pascoe Vale |
| ■ Fawkner | ■ Hadfield |
| ■ Glenroy | ■ Oak Park |
| ■ Tullamarine (part of) | |

The City of Moreland is bounded by the Cities of Hume, Darebin, Yarra, Melbourne and Moonee Valley. Moreland is bound by the Merri Creek to the east, Moonee Ponds Creek to the west, Park Street in the south and the Western Ring Road to the north. The southern boundary is approximately five kilometres north of the Melbourne CBD. Figure 2.1 illustrates the Moreland Local Government Area.

Moreland is one of the most ethnically diverse parts of Australia and remains the first home for many newly arrived groups of immigrants or refugees. The ethnic diversity leads to a vibrant and interesting lifestyle with more than a third of Moreland's residents originating from an overseas country.

Figure 2.1: Moreland LGA



3 Demographic profile of Moreland

3.1 The population

The City of Moreland experienced a decline in population of 0.44% annually for the period between 1991 and 1996, whilst Victoria as a whole demonstrated growth of 0.53%. During the period between 1986 and 1991 the population of Moreland declined by 0.25% annually, also against the trend for the rest of the State, which on average grew by 1.22% annually during the same period of time.

Population and housing forecasts prepared by the Victorian Department of Infrastructure predict that the resident population of Moreland will continue to decline at an average annual rate of 0.16% for the period between 1996 and 2001 and will increase by 0.04% annually during the period between 2001 to 2011. However, housing stock is anticipated to increase by an average annual rate of 0.16% throughout the period between 1996 and 2001 and 0.33% from 2001 to 2011, indicating a trend toward smaller household sizes within the City of Moreland. This trend is consistent with that which is anticipated for Melbourne and Victoria as a whole. Overall, the levels of growth projected for population and housing numbers in Moreland is significantly less than the growth projected for both Melbourne and Victoria as a whole. Population projections obtained from the Department of Infrastructure for Moreland, Melbourne and Victoria are presented in Table 3.1 below.

Table 3.1: Projections of household numbers and estimated resident population

Population and household forecasts						
Number of households = number of occupied private dwellings						
Year	Moreland		Melbourne		Victoria	
	Population	Households	Population	Households	Population	Households
Actual 1981	148,223	48,744	2,760,098	899,259	3,851,094	1,238,617
1986	140,218	48,718	2,967,338	971,381	4,160,785	1,355,308
1991	138,489	49,245	3,156,220	1,049,110	4,420,298	1,476,047
1996	135,459	51,857	3,241,424	1,199,878	4,539,400	1,699,920
Forecast 2001	134,364	52,265	3,378,880	1,269,054	4,735,710	1,799,383
2011	134,929	54,005	3,621,685	1,399,090	5,092,312	1,990,051
2021	133,545	55,009	3,823,567	1,514,142	5,399,730	2,163,024
Annual change (%)						
1981-1986	-1.10	-0.01	1.46	1.55	1.56	1.82
1986-1991	-0.25	0.22	1.24	1.55	1.22	1.72
1991-1996	-0.44	1.04	0.53	2.72	0.53	2.86
Forecast annual change (%) 1996-2001	-0.16	0.16	0.83	1.13	0.85	1.14
Forecast annual change (%) 2001-2011	0.04	0.33	0.70	0.98	0.73	1.01
2011-2021	-0.10	0.18	0.54	0.79	0.59	0.84
Annual percentage change measured as a compound growth rate						
Source: Department of Infrastructure 1991 projections. Revised data for 1996 shown.						

3.2 Age distribution

Over the period 1991 to 1996, the age profile of Moreland's resident population has aged, with declines in the proportion of the population represented by teenagers and young adults, and an increase in the proportion over 70 years. In comparison to Melbourne and Victoria, Moreland had a greater proportion of aged population (60yo+). Table 3.2 summarises the age distribution for the resident population of Moreland, Melbourne and Victoria in 1991 and 1996.

Table 3.2: Age structure, 1991 and 1996

Age group	Moreland		Melbourne		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
0 – 9	12.0	12.2	14.1	13.7	14.7	14.2
10 – 19	12.0	10.6	14.9	13.6	15.2	14.1
20 – 29	20.4	18.7	17.4	16.6	16.4	15.4
30 – 39	15.3	17.1	16.2	16.3	16.0	15.9
40 – 49	10.2	11.5	13.6	14.5	13.3	14.5
50 – 59	10.7	9.3	9.1	10.0	9.1	10.0
60 – 69	10.9	10.2	7.6	7.3	7.9	7.5
70 +	8.6	10.4	7.1	8.0	7.4	8.4
Total	100	100	100	100	100	100

Source: ABS Cpdata1996.

3.3 Marital status

At the time of the 1996 Census, Moreland's resident population had a lower proportion of married residents than Melbourne and Victoria. Over the period 1991 to 1996 the marital status profile of Moreland's resident population had changed as follows:

- the proportion of married residents declined from 52.9% to 49.3%; and
- never married increased from 32.6% to 34.2%.

These trends are similar to those exhibited by the Melbourne and Victorian populations. The marital status of the resident population of Moreland, Melbourne and Victoria as at the 1991 Census and 1996 Census is presented in Table 3.3

Table 3.3: Marital status, 1991 and 1996

Status	Moreland		Melbourne		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
Married	52.9	49.3	55.2	52.5	56.4	53.6
Never Married	32.6	34.2	31.2	32.3	29.9	30.9
Separated	2.7	3.2	2.6	3.1	2.6	3.2
Divorced	4.7	5.8	4.9	5.9	4.7	5.8
Widowed	7.2	7.6	6.1	6.2	6.3	6.6
Total persons	100	100	100	100	100	100

Source: ABS Census data 1996

3.4 Birthplace

The City of Moreland has a high level of ethnic diversity with a significant proportion of non-Australian born residents (39.2%), compared with Melbourne (32.7%) and Victoria (27.2%). The majority of overseas born residents are from Italy, Greece, Lebanon, United Kingdom and Malta. A further 15.7% of the Moreland population originated from other overseas countries. From 1991 to 1996, the composition of the Moreland population by country of birth remained relatively unchanged. However, the proportion of residents born from other overseas countries increased marginally from 14.5% to 15.7%. The composition of the population by country of birth for Moreland, Melbourne and Victoria is presented in Table 3.4 for 1991 and 1996.

Table 3.4: Country of birth, 1991 and 1996

	Moreland		Melbourne		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
English-speaking countries	65.4	64.7	76.4	74.8	81.3	79.6
Non-English speaking countries	34.6	35.3	23.6	25.2	18.7	20.4
Six top ranking in Moreland:						
Australia	61.3	60.8	68.2	67.3	73.9	72.8
Italy	10.9	10.0	3.1	2.8	2.5	2.3
Greece	4.1	3.8	2.1	1.9	1.6	1.4
Lebanon	2.6	2.6	0.4	0.4	0.3	0.3
United Kingdom	2.6	2.4	6.0	5.3	5.5	4.9
Malta	1.4	1.2	0.8	0.7	0.6	0.6
All other countries	14.5	15.7	16.9	18.1	13.4	14.4
Not stated	2.5	3.5	2.4	3.4	2.1	3.3
Total persons	100	100	100	100	100	100

Source: ABS Census data 1996

3.5 Religion

The population of the City of Moreland is predominantly Christian (71%), a higher proportion than for both Melbourne (66%) and Victoria (68%), reflecting to some extent the Christian source countries of many of Moreland's migrants. As was the case for Melbourne

and Victoria, the proportion of Christians declined in Moreland during the period 1991 to 1996 from 73.7% to 70.8% with a corresponding increase in those residents nominating no religion (from 10.6% to 13.7%). Once again, this trend is similar to that experienced in Melbourne and Victoria. Table 3.5 presents the top five ranking professed religions of the populations of Moreland, Melbourne and Victoria.

Table 3.5: Professed religion, 1991 and 1996

Five top ranking in Moreland	Moreland		Melbourne		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
Catholic	43.3	42.3	30.5	30.2	29.2	29.0
Orthodox	10.0	9.8	6.2	6.2	4.7	4.7
Anglican	10.2	8.8	16.8	15.0	18.2	16.5
Islam	5.3	6.2	1.6	2.0	1.2	1.5
Uniting Church	3.5	3.3	5.8	5.3	8.1	7.3
Total Christian	73.7	70.8	68.9	66.0	70.7	67.6
Total Non-Christian	6.6	8.1	4.6	6.0	3.4	4.5
No Religion	10.6	13.7	15.0	19.0	14.4	18.7
Inadequately Described and Not-Stated	9.1	7.4	11.6	9.0	11.4	9.1
Total persons	100	100	100	100	100	100

Source: ABS Census data 1996

3.6 Mobility

As shown in Table 3.6 below, Moreland residents exhibited a lower level of mobility than the residents of Melbourne and Victoria at the time of the 1996 Census. In 1996, 56.3% of Moreland residents lived at the same address in 1991 compared to 53.7% for both Melbourne and Victoria.

Table 3.6: Mobility of the population (% of population, aged 15 and over), 1996

Usual residence	Moreland %	Melbourne %	Victoria %
Same address 5 years prior	56.3	53.7	53.7
Different address 5 years prior	32.7	35.8	35.8
Not stated	11.0	10.5	10.5
Total persons	100	100	100

Source: ABS Census data 1996

3.7 Household structure

As at the 1996 Census, Moreland's population had a lower proportion of households made up of couples with children than Melbourne and Victoria, with a correspondingly higher level of households comprising couples without children and lone parent households. As was the case for Melbourne and Victoria, the overall trend in household composition of Moreland during the period 1991 to 1996 was a significant decline in the proportion of households represented by couples with children (from 53.6% to 49.7%) with an increase in the proportion of population represented by couples without children (from 17.7% to 18.3%),

and lone person households (from 9.1% to 11.0%). Table 3.7 provides a comparative summary of the demographic profile by household type and composition for Moreland, Melbourne and Victoria as at 1991 and 1996.

Table 3.7: Household type and composition, number of persons, 1991 and 1996

	Moreland		Melbourne		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
One family:						
Couple with children	53.6	49.7	60.9	56.9	60.9	56.6
Couple without children	17.7	18.3	15.5	16.7	16.2	17.6
One parent family	9.7	10.4	9.0	9.7	8.9	9.8
Other one family households	1.8	1.8	1.2	1.3	1.1	1.1
Total number of persons in one family households	82.9	80.3	86.6	84.5	87.2	85.1
Two or more families	2.6	3.4	1.8	2.7	1.5	2.3
Lone person households	9.1	11.0	7.6	8.8	7.7	9.0
Group households	5.4	5.2	4.1	3.9	3.6	3.6
Total persons	100	100	100	100	100	100

Source: ABS Census data 1996

3.8 Tenure

In comparison to Melbourne and Victoria at the time of the 1996 Census, Moreland had a lower proportion of dwellings owned or being purchased by the resident population (68.2%) than Melbourne (73.8%) and Victoria (74.0%), with a correspondingly higher percentage of rented properties (23.6%) in comparison to Melbourne (18.5%) and Victoria (17.9%). The tenure profile of Moreland remained stable over the period 1991 to 1996. The dwelling tenure profile of Moreland, Melbourne and Victoria is presented in Table 3.8 below.

Table 3.8: Dwelling tenure by type of landlord, 1991 and 1996

	Number of persons for each type of dwelling					
	Moreland		Melbourne		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
Fully owned	47.4	47.5	38.0	41.0	39.0	41.5
Being purchased	21.3	20.7	35.6	32.8	34.8	32.5
Rented (government)	2.7	2.3	3.4	2.8	3.9	3.1
Rented (other)	22.2	23.6	17.4	18.5	16.8	17.9
Other	6.5	5.9	5.6	4.9	5.6	5.0
Total	100	100	100	100	100	100

Source: ABS Census data 1996. In 1996, persons living in manufactured home estates and accommodation for the retired have been excluded for comparability with 1991. The 'Other' category includes 'being occupied free', 'being occupied under a life tenure scheme' and 'other/not-stated'.

3.9 Education

In comparison to both Melbourne and Victoria the population of Moreland has fewer formal education qualifications. Over the period 1991 to 1996 there has been a significant increase in the level of formal education qualifications attained by the resident population of

Moreland. During this time the proportion of the population holding a bachelor degree has increased from 5.9% to 8.5%, to some extent reflecting the gentrification of the City.

Table 3.9 provides a summary of the level of education attained for Moreland, Melbourne and Victoria in 1991 and 1996

Table 3.9: Levels of education attainment, 1991 and 1996

	Persons aged 15 years and over					
	Moreland		Melbourne		Victoria	
	1991	1996	1991	1996	1991	1996
Highest qualification obtained	%	%	%	%	%	%
Higher degree	0.8	1.3	1.2	1.6	1.0	1.3
Postgraduate diploma	1.3	1.9	1.3	1.8	1.2	1.7
Bachelor degree	5.9	8.5	7.1	9.7	6.2	8.4
Undergraduate diploma	2.6	2.3	3.9	3.5	3.9	3.5
Associate diploma	0.9	2.4	1.3	2.8	1.3	2.6
Vocational qualification	10.4	10.1	12.2	12.0	12.5	12.4
No qualification	65.1	61.1	60.7	56.9	61.9	58.3
Not stated	13.1	12.3	12.5	11.8	12.1	11.7
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Census data 1996

3.10 Household income

The City of Moreland is predominantly comprised of households earning low to middle levels of household income. At the 1996 Census, 40.3% of the City's households earned gross annual incomes of less than \$26,000, compared with 31.6% for Melbourne and 34.9% for Victoria. Correspondingly, the proportion of households in Moreland earning more than \$52,000 per annum in gross income is significantly less than that for both Melbourne and the State average. Table 3.10 provides a comparative summary of gross annual income per household for Moreland, Melbourne and Victoria as at the 1996 Census.

Table 3.10: Gross annual income per household (\$), 1996

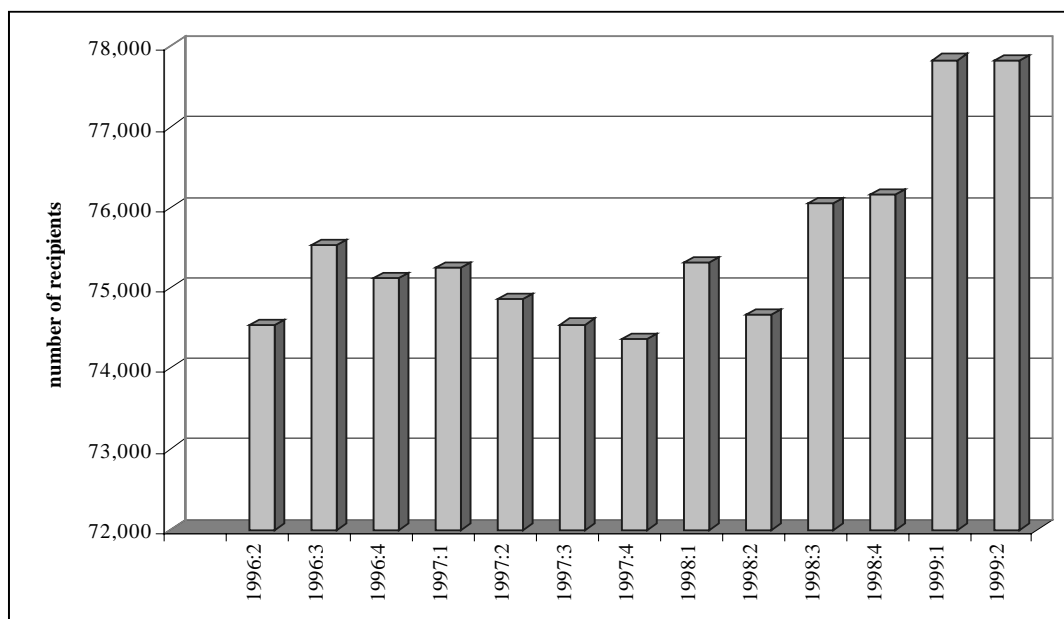
% of total	Number of households		
	Moreland %	Melbourne %	Victoria %
Negative/nil income	0.7	0.7	0.7
\$52-\$6,239	0.9	0.7	0.8
\$6,240-\$15,599	21.4	15.7	17.5
\$15,600-\$25,999	17.3	14.5	15.9
\$26,000-\$36,399	13.8	13.1	13.5
\$36,400-\$51,999	15.9	16.5	16.1
\$52,000-\$77,999	12.9	15.9	14.5
\$78,000-\$103,999	4.6	6.0	5.2
\$104,000 plus	2.5	5.9	4.8
Partial/incomplete records	10.0	10.9	11.0
Total	100.0	100.0	100.0

Source: ABS Census data 1996

3.11 Social security recipients

Moreland has a high proportion of its population in receipt of social security benefits and this has increased in recent years.

Figure 3.1: Number of claimants of social security benefits, 1996 to 1999



Source: Centrelink. Some individuals receive multiple payments so a degree of double-counting occurs.

3.12 Vehicle ownership

According to 1996 Census data, vehicle ownership for Moreland residents is very low compared with Melbourne and Victoria. At 1996, 17.1% of households didn't own a vehicle, compared with 11.2% for Melbourne and 10.5% for Victoria. Similarly, only 34% of households owned two or more vehicles, compared with 46.7% for Melbourne and 47.5% for Victoria. The vehicle ownership profile for Moreland, Melbourne and Victoria as at 1996 is presented in Table 3.11 below.

Table 3.11: Vehicle ownership, 1996

Vehicles	Households		
	Moreland %	Melbourne %	Victoria %
No vehicle	17.1	11.2	10.5
One vehicle	42.5	36.6	36.7
Two vehicles	25.8	34.6	35.0
Three or more vehicles	8.3	12.1	12.5
Not stated	6.3	5.5	5.2
Total	100.0	100.0	100.0

Source: ABS Census data96

3.13 Travel to work

The most common method of travelling to work for Moreland residents as at the 1996 Census was by car as driver, followed by other modes of transport. Moreland and Melbourne both have a higher proportion of employed persons utilising public transport, such as train, bus and tram, in comparison to the Victorian average. Correspondingly, Moreland has a lower proportion of employed residents that travel to work by car as driver in comparison to both Melbourne and Victoria. There was also a lower proportion of Moreland residents that worked from home compared to Melbourne and Victoria as a whole. The following table presents a summary of the method of travel to work for Moreland, Melbourne and Victoria as at the 1996 Census.

Table 3.12: Mode of travel to work, 1996

Includes multi-mode journeys	Employed persons		
	Moreland %	Melbourne %	Victoria %
Train	6.9	7.2	5.5
Bus	1.9	1.5	1.3
Tram	6.2	1.6	1.2
Car, as driver	57.3	62.6	61.4
Car, as passenger	6.5	6.0	6.1
Other modes	7.3	5.6	6.8
Worked at home	2.6	4.0	5.7
Did not go to work	9.4	9.8	10.2
Not stated	2.0	1.7	1.8
Total	100.0	100.0	100.0

Source: ABS Census data 96

3.14 Journey to work destination and origin

As at the 1996 Census, the City of Moreland provided employment for 33,374 people, of which local residents filled 10,735 jobs. Residents from the surrounding areas of Melbourne, Hume, Darebin, Yarra and Moonee Valley filled the majority of jobs in Moreland. Of the 46,135 residents of Moreland employed at 1996, 23.3% were employed in jobs based within the City of Moreland. 28.0% of the employed residents of Moreland worked within the City of Melbourne. A further 27.1% of employed residents of Moreland were employed in the surrounding areas of Hume, Darebin, Yarra and Moonee Valley. The following table presents a summary of the origin and destination matrix of those who work and live in Moreland as at the 1996 Census.

Table 3.13: Journey-to-Work data: Moreland and rest of Melbourne, 1996

Origin-Destination Matrix Number of workers			
Work in LGA:	Live in Moreland	Live in LGA:	Work in Moreland
Melbourne	12,916	Moreland	10,735
Moreland	10,735	Hume	3,463
Hume	4,868	Darebin	2,787
Darebin	2,746	Moonee Valley	2,509
Yarra	2,513	Whittlesea	2,236
Moonee Valley	2,379	Brimbank	1,696
Port Phillip	1,653	Banyule	1,559
Brimbank	1,205	Manningham	1,041
Maribyrnong	1,055	Other Victoria	781
Whittlesea	889	Boroondara	769
Boroondara	837	Yarra	686
Banyule	769	Nillumbik	569
Stonnington	603	Maribyrnong	485
Hobsons Bay	480	Whitehorse	422
Monash	387	Melton	380
Other	2,100	Other	3,256
Total	46,135	Total	33,374

Source: Census 1996, Working population profile, Journey-to-Work study areas

3.15 Crime rates

Apart from 1997, Moreland has had a lower incidence of crime than Victoria as a whole in recent years. However, the crime rate in Moreland has fluctuated substantially from year to year.

Table 3.14: Crime trends: Number of offences reported in Moreland and Victoria

Year	Moreland	% growth	Incidents per thousand persons	Victoria	% growth	Incidents per thousand persons
1995	11,481	-	84.4	374,241	-	84.8
1996	11,283	-1.7	82.5	399,237	6.7	89.5
1997	12,577	11.5	91.8	404,817	1.4	89.9
1998	11,830	-5.9	86.2	413,836	2.2	90.7

Source: Victoria Police

3.16 Summary

Compared to metropolitan Melbourne and Victoria as a whole, Moreland has an older population, which is ethnically diverse, less mobile and less likely to own or be buying a home. The population is relatively poorly educated and has low-income levels and high receipt of social security benefits. The residents of Moreland have lower rates of car ownership and higher rates of usage of public transport.

4 The regional economic profile

Moreland contains some of the oldest parts of Melbourne. It is a cross section of Melbourne from the tightly housed inner city of Brunswick to the housing estates of Glenroy and Fawkner. There are stately manor houses, terraces, apartments, warehouse conversions, traditional quarter acre blocks, and factories. The city is well located and enjoys excellent access to Melbourne and the surrounding regions. Moreland is serviced by tram, bus and rail transport, and by several major road transport routes, including the Hume Highway, Bell Street and the Tullamarine Freeway. The recent closure of the 25 hectare former Pentridge prison complex at Coburg presents a challenge to develop such a large area in a visionary and determined manner so close to the CBD.

4.1 Employment and labour force participation

As at December 1999, the labour force participation rate in Moreland was 58.9%, lower than the State average of 68%. The unemployment rate in Moreland in December 1999 was 11%, higher than the State average of 6.7%. More detailed but dated information on labour force participation and employment is provided in the 1996 Census, and reproduced below in Table 4.1 and Table 4.2. As at June 1996, Moreland had a higher unemployment rate (13.3%) in comparison to the State level of 9.4%.

Table 4.1: Labour force participation by sex, 1996

Age group Persons 15 years and over	Percentage employed or seeking work			
	Males		Females	
	Moreland %	Vic %	Moreland %	Vic %
15-19 years	41.3	43.8	43.1	45.1
20-24 years	76.9	80.8	73.7	74.7
25-34 years	85.9	89.7	71.0	68.0
35-44 years	84.7	89.9	66.1	69.8
45-54 years	75.9	86.0	55.9	67.0
55-64 years	48.4	60.3	19.4	29.9
65 and more years	4.9	10.0	2.0	3.3
All age groups	62.0	70.0	46.6	51.9
Not in the labour force	33.9	27.4	50.9	45.8
Not stated/overseas visitors	4.3	2.9	2.7	2.6
Adult population	100	100	100	100

Source: ABS Census data 1996.

Table 4.2: Labour force status: June 1996

	Males		Females		Persons	
	Moreland %	Vic %	Moreland %	Vic %	Moreland %	Vic %
Full-time employed	67.2	72.6	52.0	47.9	60.5	61.7
Part-time employed	15.9	15.4	34.1	41.2	24.0	26.7
Employed (not-stated)	2.4	2.0	2.1	2.2	2.2	2.1
Unemployed	14.6	9.9	11.8	8.8	13.3	9.4
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: ABS Census data 1996.

4.2 Industry of employment

Table 4.3 provides a summary of the industry of employment profile for Moreland and Victoria as at 1991 and 1996.

Table 4.3: Industry of employment, 1991 and 1996

Industry	Moreland		Victoria		Moreland		Victoria	
	1991		1991		1996		1996	
	Persons	%	Persons	%	Persons	%	Persons	%
Agriculture, Forestry and Fishing	88	0.2	70,556	3.9	91	0.2	72,924	3.9
Mining	56	0.1	5,633	0.3	71	0.1	5,531	0.3
Manufacturing	10,650	19.9	289,266	16.0	9,110	18.1	307,029	16.3
Electricity, Gas and Water Supply	464	0.9	25,666	1.4	174	0.3	13,408	0.7
Construction	2,477	4.6	96,695	5.4	2,617	5.2	110,482	5.9
Wholesale Trade	2,738	5.1	111,684	6.2	2,633	5.2	115,336	6.1
Retail Trade	6,529	12.2	241,324	13.4	6,413	12.7	260,829	13.8
Accommodation, Cafes and Restaurants	1,683	3.2	59,525	3.3	2,150	4.3	72,236	3.8
Transport and Storage	3,132	5.9	74,762	4.1	2,608	5.2	73,238	3.9
Communication Services	1,217	2.3	34,330	1.9	1,367	2.7	42,848	2.3
Finance and Insurance	2,594	4.9	84,427	4.7	2,307	4.6	77,378	4.1
Property and Business Services	3,401	6.4	126,156	7.0	5,185	10.3	186,245	9.9
Government Administration and Defence	3,292	6.2	94,015	5.2	2,229	4.4	71,662	3.8
Education	3,749	7.0	122,760	6.8	3,847	7.6	131,119	7.0
Health and Community Services	4,519	8.5	153,744	8.5	4,739	9.4	175,123	9.3
Cultural and Recreational Services	735	1.4	30,289	1.7	1,175	2.3	44,486	2.4
Personal and Other Services	1,797	3.4	55,915	3.1	1,954	3.9	65,294	3.5
Non-classifiable economic units	185	0.3	6,791	0.4	790	1.6	29,288	1.6
Not stated	4,103	7.7	123,023	6.8	941	1.9	30,424	1.6
Total	53,409	100	1,806,561	100	50,401	100	1,884,880	100

Source: ABS Census data 1996

At the 1996 Census, manufacturing (18.1%) and retail trade (12.7%) remained the principal sectors of employment for the Moreland population. However, employment in the manufacturing sector declined marginally, while the health and community services sector experienced an increase in the proportion of residents employed from 1991 to 1996. Other significant employment sectors for the City include property and business services (10.3%)

and health and community services (9.4%). The proportion of residents employed in property and business services increased significantly from 1991 to 1996, in line with the trend experienced throughout Victoria.

There was a decrease in the number of employed persons residing in the City of Moreland from 53,409 in 1991 to 50,401 in 1996. The proportion of the City's residents employed in a number of sectors experienced a marginal increase over the period, however, employment decreased in the following sectors:

- Transport and storage;
- Finance and insurance; and
- Government administration and defence.

4.3 Employment by occupation

The most common occupation of Moreland residents are professionals (29.4%) and clerical, sales and service workers (20.8%). Table 4.4 provides a summary of employment by occupation for Moreland, Melbourne and Victoria as a whole for 1991 and 1996.

Table 4.4: Employment of Moreland residents by occupation, 1991 and 1996

Occupation	Moreland		Melbourne		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
Managers and Administrators	4.4	5.0	8.2	7.8	10.0	9.5
Professionals	15.1	18.9	16.6	19.1	15.6	17.8
Associate Professionals	7.2	10.5	7.5	11.4	7.5	11.4
Tradespersons and Related Workers	14.1	12.7	13.4	12.6	13.7	12.9
Advanced Clerical and Service Workers	6.0	4.0	7.2	4.7	6.5	4.3
Intermediate Clerical, Sales and Service Workers	11.9	16.8	12.4	16.2	11.6	15.4
Intermediate Production and Transport Workers	11.4	10.6	8.6	8.8	8.7	8.9
Elementary Clerical, Sales and Service Workers	11.3	9.2	11.1	9.0	10.8	8.9
Labourers and Related Workers	10.7	9.2	8.4	7.6	8.8	8.3
Not stated/inadequately described	8.0	3.1	6.9	2.6	6.8	2.7
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: ABS Census data 1996

4.4 Businesses by industry and size

According to the September 1998 ABS Business Register, Moreland had a total of 5,313 businesses located within the City. Approximately 93% of the total number of businesses were small in size and the majority of them were operating in the retail trade, property and

business services, and manufacturing industries. Table 4.5 provides an overall summary of the nature of businesses located within Moreland as at September 1998.

Table 4.5: The structure of business in Moreland: Distribution of businesses by industry and firm size, 1998

Industry to which business is assigned ANZSIC Division	Number of businesses by firm size			
	Small	Medium	Large	Total
A AGRICULTURE FORESTRY AND FISHING	6	0	0	6
B MINING	1	0	0	1
21 Food Beverage & Tobacco Manufacturing	56	1	0	57
22 Textile Clothing Footwear Manufacturing	242	8	0	250
23 Wood & Paper Product Manufacturing	39	0	0	39
24 Printing Publishing & Recorded Media	67	0	0	67
25 Petroleum Coal & Chemical Manufacturing	27	0	1	28
26 Non-Metallic Mineral Product Manufacturing	21	1	0	22
27 Metal Product Manufacturing	82	2	0	84
28 Machinery & Equipment Manufacturing	86	2	2	90
29 Other Manufacturing	80	0	0	80
C MANUFACTURING	700	14	3	717
D ELECTRICITY GAS AND WATER SUPPLY	1	0	1	2
E CONSTRUCTION	651	18	0	669
F WHOLESALE TRADE	456	21	2	479
51 Food Retailing	219	21	5	245
52 Personal & Household Good Retailing	415	9	1	425
53 Motor Vehicle Retailing & Services	331	4	0	335
G RETAIL TRADE	965	34	6	1,005
H ACCOMMODATION CAFES AND RESTAURANTS	122	14	0	136
I TRANSPORT AND STORAGE	215	8	1	224
J COMMUNICATION SERVICES	31	4	0	35
K FINANCE AND INSURANCE	126	6	0	132
L PROPERTY AND BUSINESS SERVICES	861	18	4	883
M GOVERNMENT ADMINISTRATION AND DEFENCE	6	7	4	17
N EDUCATION	87	28	3	118
O HEALTH AND COMMUNITY SERVICES	420	37	4	461
P CULTURAL AND RECREATIONAL SERVICES	110	3	0	113
Q PERSONAL AND OTHER SERVICES	298	13	4	315
ALL INDUSTRIES	4,961	306	46	5,313

Source: ABS Business register.

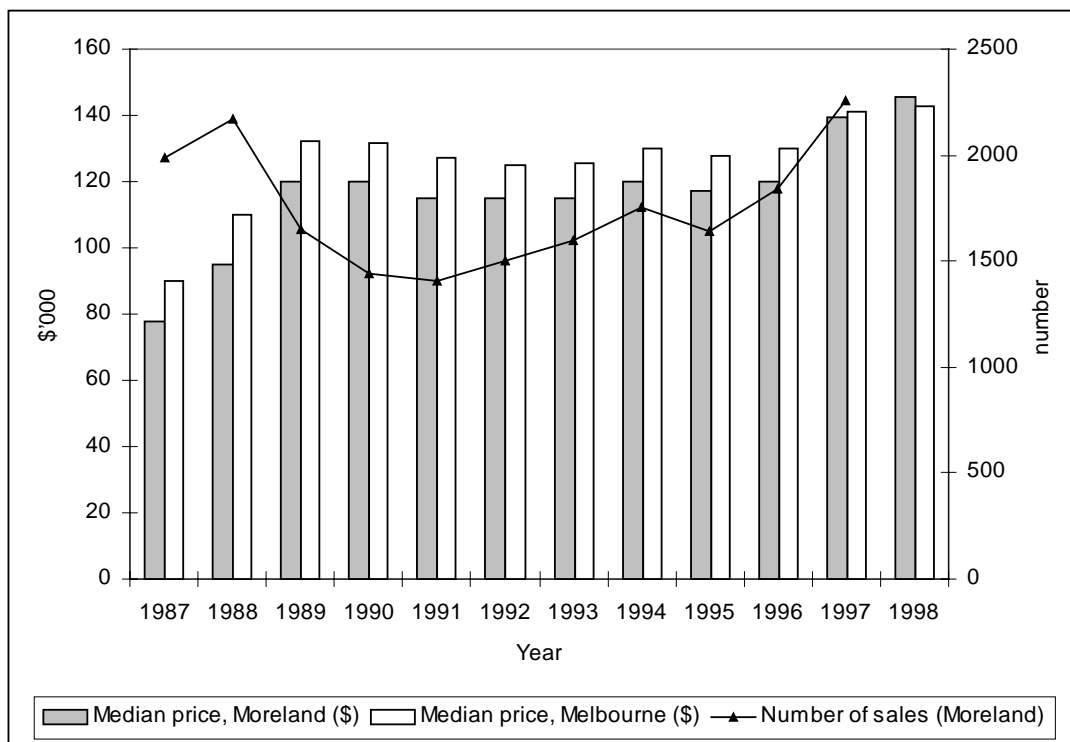
The ANZSIC industry classification is used. Most industries are shown at the divisional level (one-digit). However manufacturing and retailing industries are presented also at the sub-divisional (two-digit) level.

The definition of business size is as follows: Small business, <20 employees; Medium-sized business, 20-99 employees; Large business, 100+ employees. However, for manufacturing industry: Small business = <100 employees; Medium-sized business = 100-499 employees; Large business = 500+ employees

4.5 House sales and prices

Moreland's real estate market has expanded in recent years. Median house prices are now above that for Melbourne as a whole and the number of sales has been increasing since the early 1990s, as shown in the figure below.

Figure 4.1: Median house prices, Moreland and Melbourne, 1987 to 1998



Source: Land Victoria, 1997-98

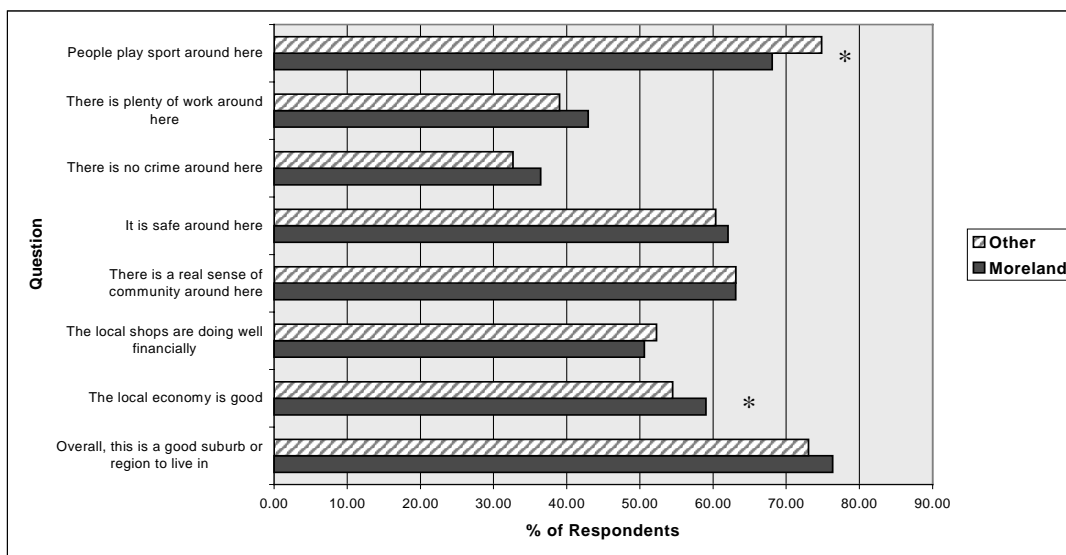
4.6 Community perceptions of the region

In our survey of 167 adults living in the City of Moreland, conducted in October 1999, we asked questions about residents' opinions of their region. While the sample size is sufficiently large to draw conclusions about Moreland, it does not allow us to draw statistically significant conclusions about differences between Moreland and the other regions for many of the survey questions¹. As a result, comparisons between the City of Moreland and other regions surveyed can only be made where differences are statistically significant, and have been denoted by an asterisk (*) on the relevant graph.

Over 75% of respondents indicated that Moreland is a good city in which to live. With respect to economic issues, approximately 50% of respondents agreed the local shops were doing well, while about 60% of respondents agreed that the local economy is good (more so than in the other regions). Over 60% felt a sense of community and felt safe, although as many believed there is crime within the City.

¹ The regions surveyed were Mildura, Geelong, Wellington, Maribyrnong, Moreland and Dandenong. KPMG surveyed about 167 adults in each of these regions.

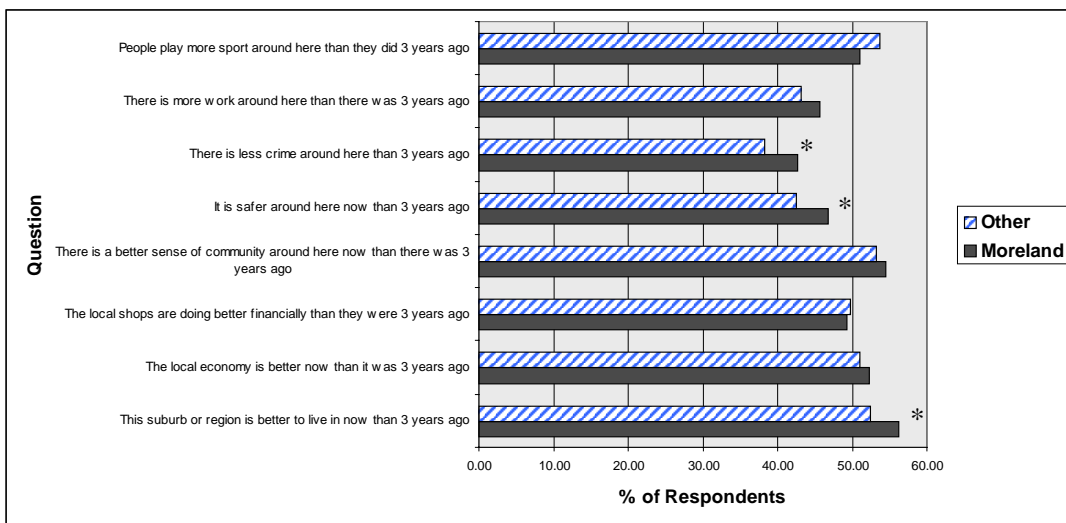
Figure 4.2: Opinion of Moreland



(*) Statistically significant difference between Moreland and the average of the other regions.

Figure 4.3 indicates that almost 60% of respondents feel that their region is better to live in now than three years ago, a perception that is more pronounced in Moreland than in the other study regions. Approximately 50% of the respondents feel that the local economy, and local shops are doing better financially than three years ago. About 46% of respondents feel that there is more work in the region than three years ago. While the majority of Moreland respondents consider that the region is less safe and has more crime than three years ago, these perceptions are less entrenched in Moreland than in the other study regions.

Figure 4.3: Opinion of Moreland compared to three years ago



(*) Statistically significant difference between Moreland and the average of the other regions.

4.7 Summary

Moreland is a City with a declining manufacturing base, low labour force participation and high unemployment. Reflecting the City's gentrification, the real estate market has been strong.

The residents of Moreland are more positive about their suburb, both now and compared to three years ago, than the average of the six regions. Three quarters of Moreland respondents believe their suburb is good to live in and over half believe it is better than three years ago. More than six in ten feel a sense of community and feel safe, although just as many believe there is crime within the suburb. Moreland residents are more positive about their local economy, with almost 60% believing that the local economy is doing well, and half believing the local economy is better than three years ago.

5 Participation in gaming in Moreland

5.1 Gambling defined

The Productivity Commission² suggests that the following characteristics distinguish gambling from other, apparently similar activities:

- as a group, gamblers necessarily lose money as a result of the activity, because the total “prize” is equal to the accumulated stakes of punters, less taxes to government and profits and costs for operators, and
- gambling is typically presented as a form of entertainment.

Gambling is the (lawful) placement of a wager or bet on the outcome of a future uncertain event. It is treated as an activity that can be clearly divided into two distinct areas – **racing** related and **gaming** related. Where the word *gambling* is referred to in this publication, it is intended to imply the total of racing and gaming activities.³

5.2 EGMs and venues

The supply of EGMs and venues with EGMs in Moreland and Victoria is presented in the following table.

² Productivity Commission (1999), *Final Report*, Productivity Commission, Melbourne.

³ Tasmanian Gaming Commission, *Australian Gaming Statistics 1972-73 to 1997-98*, page 4

Table 5.1: EGMs and gaming venues in Moreland and Victoria, 1992 to 1999

Moreland	Sep-92	Jun-93	Jun-94	Jun-95	Jun-96	Jun-97	Jun-98	Jun-99	Dec-99	AAG %
EGMs	0	91	288	469	690	808	800	721	795	
EGM Growth %	n/a	n/a	216.5	62.8	47.1	17.1	-1.0	-9.9	10.3	32%
Venues	0	3	10	15	15	17	17	16	16	
Venue Growth %	n/a	n/a	233.3	50.0	0.0	13.3	0.0	-5.9	0.0	10.9%
Average No. of EGMs per venue	0	30	29	31	46	47	47	45	50	
Victoria	Sep-92	Jun-93	Jun-94	Jun-95	Jun-96	Jun-97	Jun-98	Jun-99		AAG%
EGMs	3,929	13,661	17,537	21,268	23,478	25,962	26,965	27,811	27,208	
EGM Growth %	n/a	247.7	28.4	21.3	10.4	10.6	3.9	3.1	-2.2	15.2%
Venues	59	251	365	468	521	554	559	573	556	
Venue Growth %	n/a	325.4	45.4	28.2	11.3	6.3	0.9	2.5	3.0	18.7%
Average No. of EGMs per venue	67	54	48	45	45	47	48	49	49	

Source: VCGA
 AAG = average annual growth (using June 1994 as base)

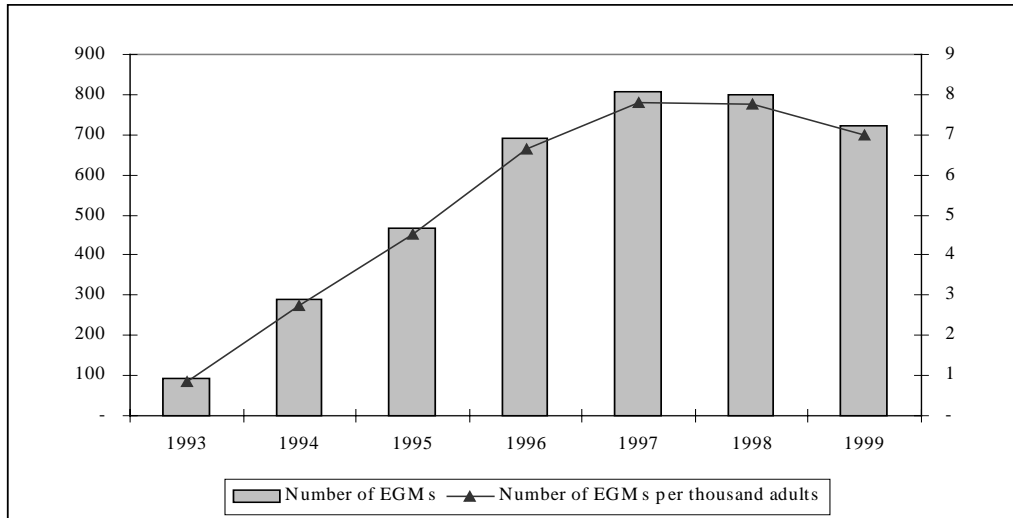
The number of EGMs and venues with EGMs in Moreland has grown by an average annual rate of 32% and 10.9% respectively since 1994. Growth for Victoria across the same time period was 15.2% and 18.7% respectively.

The average number of EGMs per venue in Moreland has increased from 30.3 machines in June 1993 to 49.7 machines per venue in December 1999, and is around the Victorian average.

The number of EGMs per 1,000 adults in Moreland increased from 0.87 in 1992 to 6.99 in June 1999 after peaking in 1997 at 7.81⁴. Figure 5.1 illustrates the growth in EGMs and the number of EGMs per thousand adults in Moreland. Moreland has a lower density of EGMs than Victoria as a whole, as shown in Figure 5.2.

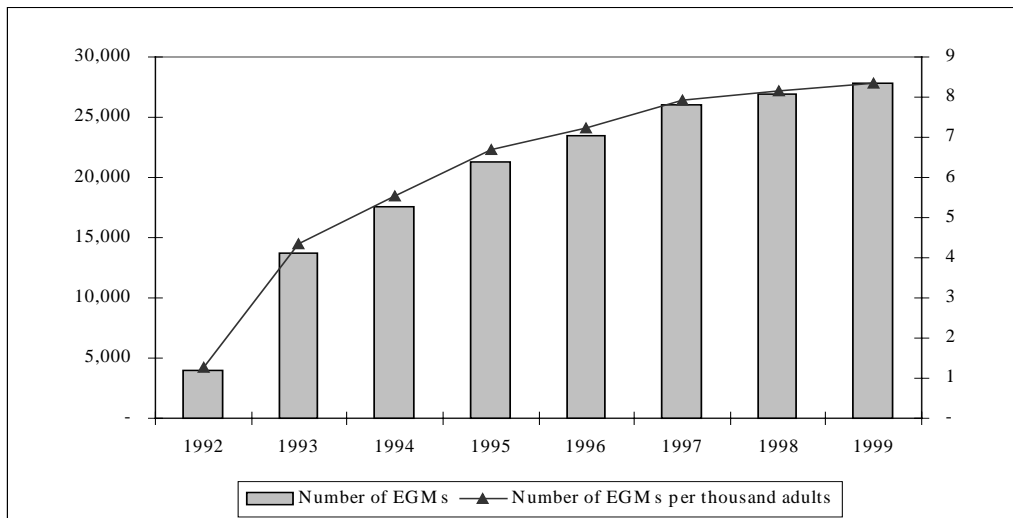
⁴ Since June 1999, there has been an increase in EGM density in Moreland following the opening of a new, large 70 EGM venue called the Moreland Hotel.

Figure 5.1: EGM density in Moreland (EGMs/'000 adults), 1993 to 1999



Source: VCGA

Figure 5.2: EGM density in Victoria (EGMs/'000 adults), 1992 to 1999



Source: VCGA

As at December 1999, Moreland had 16 licensed gaming venues offering a total of 795 EGMs of which 8 venues were hotels and 8 were clubs. The following map illustrates the location of each of these venues within the City of Moreland.

Figure 5.3: Gaming venues in Moreland

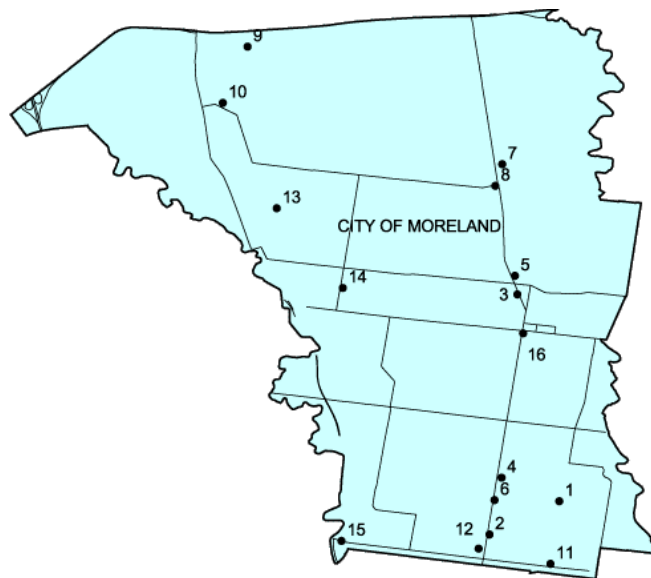


Table 5.2: Gaming venues, Moreland, December 1999

Venue	Venue Type	Address	Operator
1 Abruzzo Club	Club	East Brunswick	Tattersalls
2 Brunswick Club	Club	Brunswick	Tattersalls
3 Court House Hotel (Brunswick)	Hotel	Brunswick	Tabcorp
4 Drums Hotel	Hotel	Coburg	Tattersalls
5 Duke Of Edinburgh Hotel	Hotel	Brunswick	Tattersalls
6 Fawkner RSL	Club	Fawkner	Tattersalls
7 First & Last Hotel	Hotel	Fawkner	Tattersalls
8 Glenroy Bowls Club	Club	Glenroy	Tattersalls
9 Glenroy RSL Sub Branch	Club	Glenroy	Tattersalls
10 Lyndhurst Club Hotel	Hotel	East Brunswick	Tattersalls
11 Moreland Hotel	Hotel	Brunswick	Tabcorp
12 Northcote Park Football Club	Club	Brunswick	Tabcorp
13 Pascoe Vale Hotel	Hotel	Pascoe Vale	Tattersalls
14 Pascoe Vale RSL Club	Club	Pascoe Vale	Tattersalls
15 Reggio Calabria Club	Club	West Brunswick	Tattersalls
16 Summerworld Hotel (Corner Hotel Coburg)	Hotel	Coburg	Tabcorp

Source: VCGA

The supply of hotel EGMs represents 55% of the total number of EGMs in Moreland with club EGMs accounting for 45%. The average size of an EGM installation for hotels and clubs was 55 and 45 respectively as at December 1999. The following table illustrates the supply of EGMs by venue in Moreland and their respective share of either hotel or club EGM supply and the total supply of EGMs as at December 1999.

Table 5.3: Gaming venue details in Moreland, December 1999

Venue	EGMs	% Hotel EGMs	% Total EGMs
Court House Hotel (Brunswick)	30	7%	4%
Drums Hotel	87	20%	11%
Duke Of Edinburgh Hotel	45	10%	6%
First & Last Hotel	70	16%	9%
Lyndhurst Club Hotel	48	11%	6%
Moreland Hotel	70	16%	9%
Pascoe Vale Hotel	51	12%	6%
Summerworld Hotel (Corner Hotel Coburg)	35	8%	4%
TOTAL Hotels	436	100%	55%
Venue	EGMs	% Club EGMs	% Total EGMs
Abruzzo Club	59	16%	7%
Brunswick Club	50	14%	6%
Fawkner RSL	35	10%	4%
Glenroy Bowls Club	0	0%	0%
Glenroy RSL Sub Branch	40	11%	5%
Northcote Park Football Club	100	28%	13%
Pascoe Vale RSL Club	35	10%	4%
Reggio Calabria Club	40	11%	5%
TOTAL Clubs	359	100%	45%
GRAND TOTAL	795		100%

Source: VCGA

In summary, the City of Moreland has a concentration of EGMs and gaming venues below the State average. It has the lowest number of EGMs per thousand population of our 6 study regions. However, the new large venue recently opened in Moreland may change this result. We note that many perceive Moreland as having a high concentration of venues and machines – whilst this is true for the suburbs of Brunswick and Coburg, it is not true for the whole region.

5.3 Gaming expenditure

Based on VCGA figures, Moreland's expenditure on gaming increased from \$11.36M in 1992/1993 to \$55.44M in 1998/1999. During 1998/1999 Moreland's expenditure on gaming was 11% higher than the average metropolitan Local Government Area (LGA). However, Moreland's expenditure on gaming per adult (\$510.16) was 9% lower than the State average of \$562.56). Expenditure on gaming in Moreland is summarised in the table below.

Table 5.4: Expenditure on gaming in Moreland 1992 to 1999

	92-93	93-94	94-95	95-96	96-97	97-98	98-99
Total Expenditure - Moreland	\$11,356	\$8,275,762	\$20,914,613	\$33,416,371	\$43,579,250	\$48,486,200	\$55,442,642
Total Expenditure- Metropolitan *	\$211,319,751	\$551,431,696	\$745,524,325	\$963,832,773	\$1,131,288,009	\$1,306,707,971	\$1,542,948,218
Average Expenditure per Metropolitan LGA	\$6,816,766	\$17,788,119	\$24,049,171	\$31,091,379	\$36,493,161	\$42,151,870	\$49,772,523
Total Expenditure - Non Metropolitan **	\$43,309,135	\$131,167,765	\$207,627,542	\$281,533,049	\$325,195,095	\$362,925,551	\$411,322,997
Average Expenditure per Non Metropolitan LGA	\$921,470	\$2,790,803	\$4,417,607	\$5,990,064	\$6,919,044	\$7,721,820	\$8,751,553
Total -Victoria	\$254,628,886	\$682,599,461	\$953,151,867	\$1,245,365,822	\$1,456,483,104	\$1,669,633,522	\$1,954,271,215
Average Expenditure per Victorian LGA	\$3,264,472	\$8,751,275	\$12,219,895	\$15,966,228	\$18,672,860	\$21,405,557	\$25,054,759
Adult Population - Moreland#	109,712	110,200	109,459	108,967	108,822	109,123	108,677
Expenditure per adult - Moreland	\$0.10	\$75	\$191	\$306	\$400	\$444	\$510
% increase/decrease - Moreland ##	n/a	72453%	154%	60%	31%	11%	15%
Adult Population - Victoria #	3,293,135	3,318,245	3,343,108	3,373,447	3,408,503	3,446,886	3,473,879
Expenditure per adult - Victoria	\$77	\$205	\$285	\$369	\$427	\$484	\$562
% increase/decrease - State ##	n/a	166%	39%	29%	16%	13%	16%
\$ difference per adult +	-\$77	-\$130	-\$94	-\$62	-\$26	-\$40	-\$52
% difference per adult ++	-100%	-63%	-33%	-17%	-6%	-8%	-9%

Source: VCGA

* 31 Metropolitan LGAs as defined by the Melbourne Statistical Division

** 47 Non-metropolitan LGAs as defined by all LGAs not part of the Melbourne Statistical Division

Population defined as number of adults over the age of 18. (Source VCGA figures as at June of each year except for 1992/1993 which represents population as at September.)

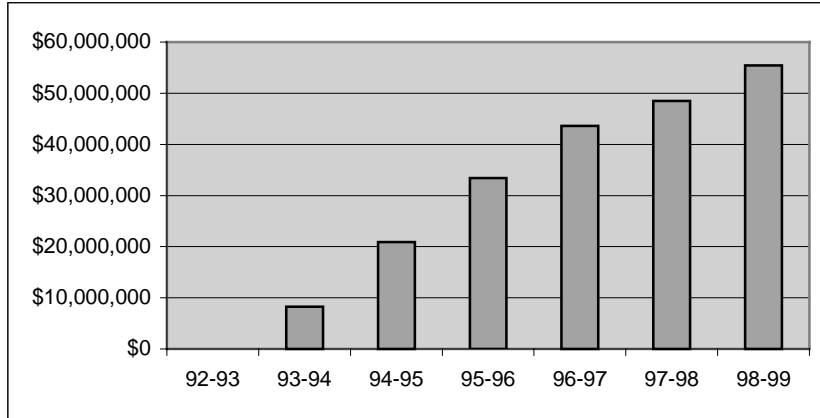
Increase/decrease relative to previous year's gaming expenditure

+ Difference between Moreland and State per adult expenditure levels. A positive figure indicates that gaming expenditure per adult in Moreland is above the State average.

++ Percentage difference between Moreland and State per adult expenditure levels

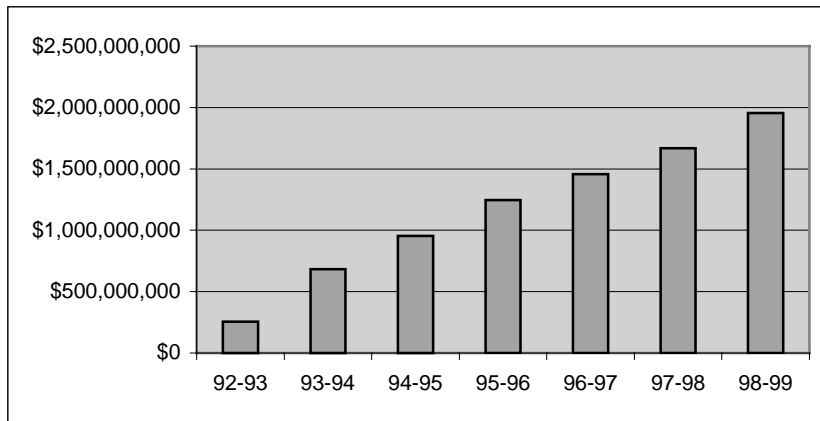
During the period 1992-1999, expenditure on gaming increased consistently for both Moreland and the State as a whole. These findings are presented graphically below.

Figure 5.4: Expenditure on gaming for Moreland 1992-1999



Source: VCGA

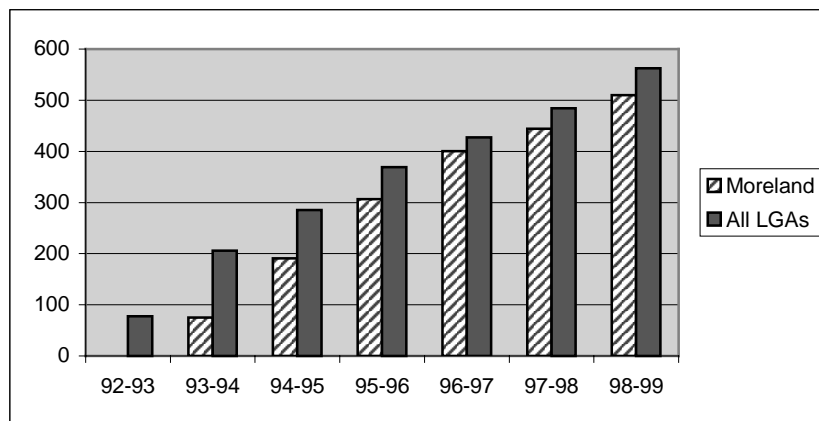
Figure 5.5: Expenditure on gaming for Victoria, 1992-1999



Source: VCGA

The average expenditure on gaming by adults in Moreland has been lower than the State average for the entire data collection period. This comparison is presented in Figure 5.3.

Figure 5.6: Gaming expenditure per adult (\$) – Moreland, Victoria, 1992-1999



Source: VCGA

Over the seven years of data collection, the number of EGMs in Moreland increased from 91 in 1992/1993 to 721 in 1998/1999. During the same period, average expenditure per EGM increased from \$125 in 1992/1993 to \$76,897 in 1998/1999. These figures are summarised in Table 5.2

Table 5.5: Expenditure, number of EGMs and average expenditure per EGM, 1992-1999

	92-93	93-94	94-95	95-96	96-97	97-98	98-99
Expenditure	\$11,356	\$8,275,762	\$20,914,613	\$33,416,371	\$43,579,250	\$48,486,200	\$55,442,642
EGMs	91	288	469	690	808	800	721
Av. Exp/EGM	\$124.79	\$28,735.28	\$44,594.06	\$48,429.52	\$53,934.72	\$60,607.75	\$76,896.87

Source: VCGA

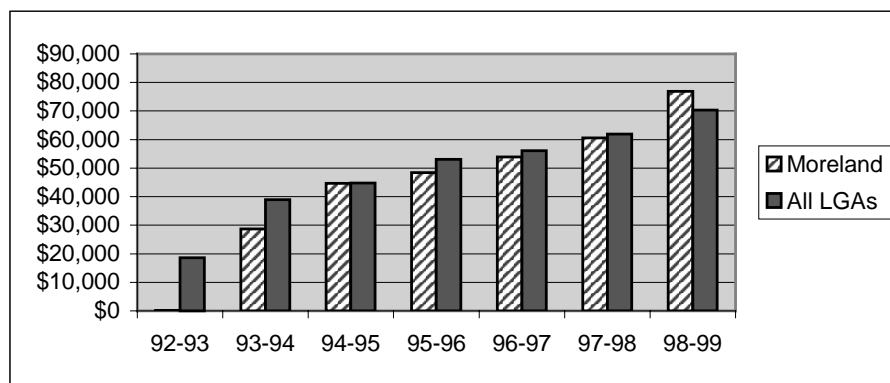
Comparing expenditure per EGM in Moreland against expenditure per EGM across the State, expenditure per EGM in Moreland has usually been below the State average, although this changed in 1998/1999 (see Table 5.6).

Table 5.6: Average expenditure per EGM, 1992-1999

	92-93	93-94	94-95	95-96	96-97	97-98	98-99
Av. Exp/EGM - Moreland	\$124.79	\$28,735.28	\$44,594.06	\$48,429.52	\$53,934.72	\$60,607.75	\$76,896.87
Av. Exp/EGM - State	\$18,639.11	\$38,923.39	\$44,816.24	\$53,043.95	\$56,100.57	\$61,918.54	\$70,269.72
% change Moreland	n/a	22927%	55%	9%	11%	12%	27%
% change - State	n/a	109%	15%	18%	6%	10%	13%

Source VCGA

Figure 5.7: Average expenditure per EGM – 1992/1999

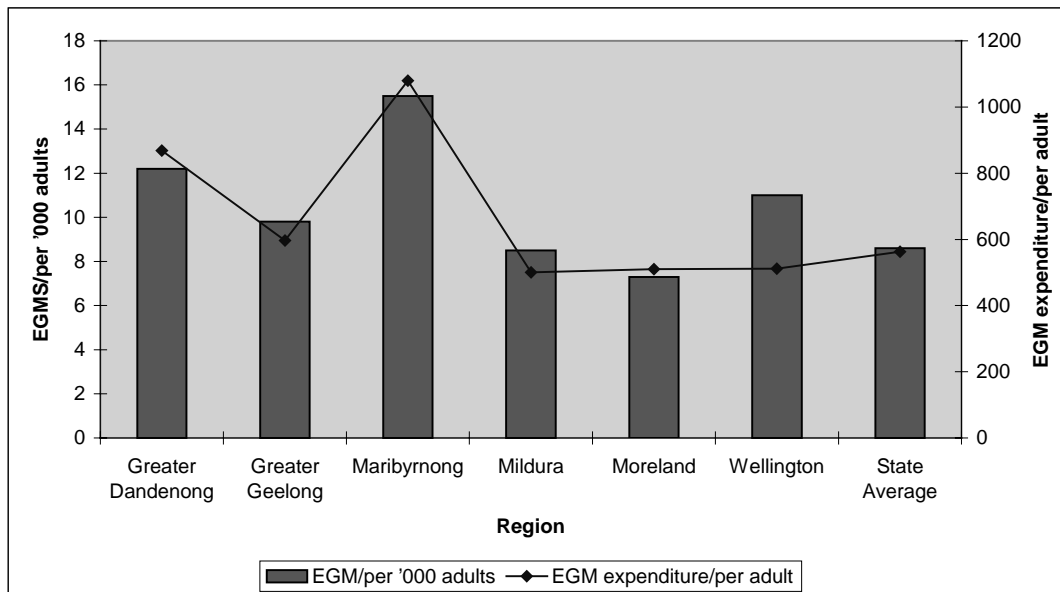


Source VCGA

5.4 Gaming: comparison between Moreland and other regions

Figure 5.8 compares the number of EGMs and EGM expenditure, per thousand adults between Moreland, the other study regions, and the State average. These measures indicate that the level of gaming in Moreland is below the State average.

Figure 5.8: Number of EGMs per thousand adults and EGM expenditure per adult, 1999



5.5 Who gambles and frequency of gambling?

Our understanding of the profile of residents of the City of Moreland who use EGMs is drawn from:

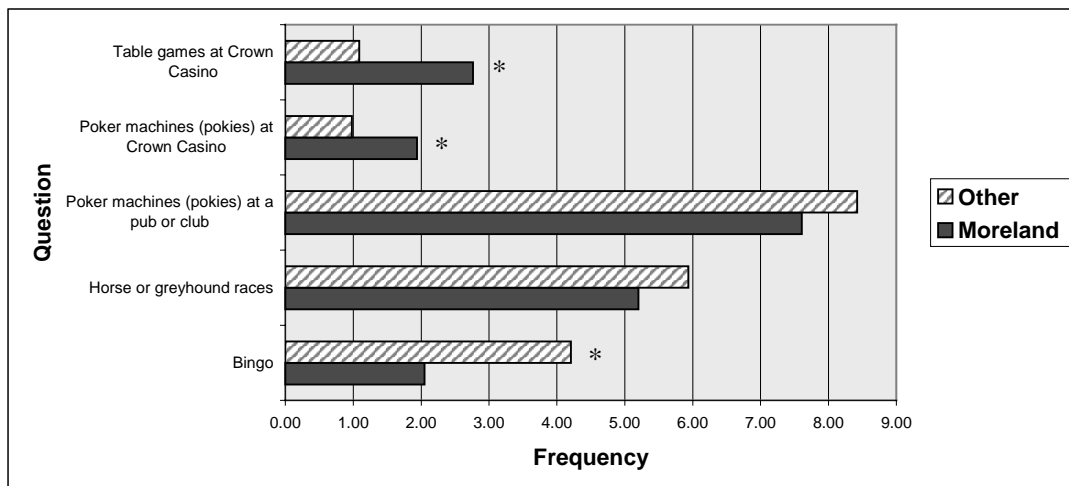
- our survey of 167 adults living in the City of Moreland, conducted in October 1999; and
- opinions expressed during our consultations by venues, community groups and in public forums.

Of the 167 people surveyed in the Moreland region, just over 51% participated in gambling activities in the last six months, compared to the 'Patterns' Survey findings which suggest that 75% of Victorians have gambled in the last 12 months.⁵

Figure 5.9 details the frequency of gambling among Moreland respondents. The most popular gambling activity is playing the poker machines at a pub or club. Moreland respondents participate in this almost 7.6 times a year. Greyhound and horse races are the next most common activity. In Moreland, approximately half as many respondents play bingo as compared to the other regions, while significantly more respondents play poker machines and table games at the Crown Casino.

⁵ The full title of the 'Patterns' survey is the 'Sixth Survey of Community Gambling Patterns and Perceptions', April 1999, conducted by Roy Morgan Research for the Victorian Casino and Gaming Authority.

Figure 5.9: Frequency of gambling, Moreland



(*) Statistically significant difference between Moreland and the average of the six regions.

In our consultations, the majority of venue operators indicated that older women are the predominant gaming group, however one hotel reported their clientele primarily consisted of older men. All venue operators reported a preponderance of ethnic background gamers including Turks, Greeks, Italians, Lebanese and some Asians, with some suggesting these groups represent up to 90% of all gamers. Most indicated that women use gaming as an opportunity for recreation and socialising during the day, whereas men tended to game at night.

Participants at the public meeting were of the view that older people represented the major population group participating in gaming. Ethnic groups were considered to be most at risk of problem gambling, particularly new arrivals who thought gambling was a recreational activity promoted by the government. These people gamed to assist their assimilation into Australian society. Several attendees suggested single parents and unemployed persons were high-risk gamers.

Representatives of community service organisations made the following comments with respect to the demographic profile of gambling participants:

- one community service organisation suggested that sole parent families, women on social security, women aged 20-40, and unemployed older males, including retirees, were affected by problem gambling; and
- a number of community service organisations commented that they felt that older people often use gambling as a means of coping with loneliness and grief.

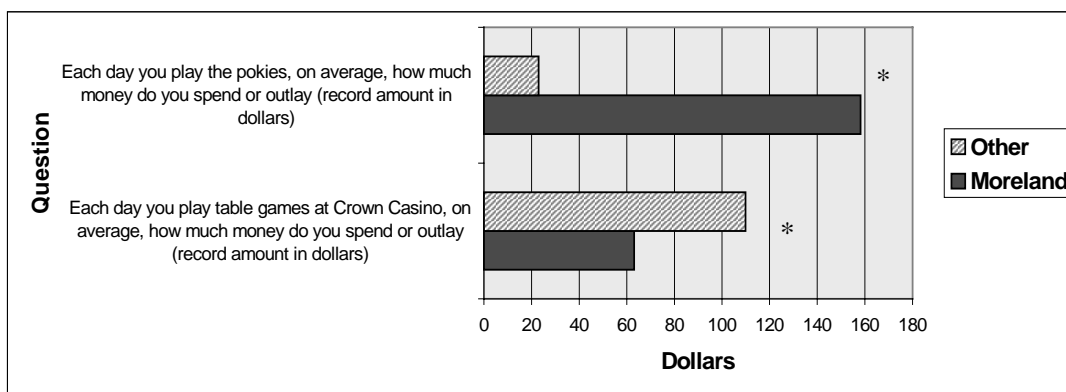
5.6 Gamblers in our survey

In our survey, gamblers are defined as those people who had participated in gambling in the last six months. They make up 51% of Moreland residents. We asked this sub-sample more detailed questions about their gaming behaviour (see sections 5.7 to 5.11), and also asked about their gambling behaviour to check for the prevalence of problem gambling (see section 5.12).

5.7 Time and money spent on gaming

Moreland gamers spend on average \$158 per daily visit at the pokies, which is dramatically higher than the average of other regions. It is also significantly higher than what they spend at the Crown Casino, which on average amounts to \$63 per daily visit. (Note that respondents who are patrons at the Crown Casino were answering with respect to table games and not pokies).

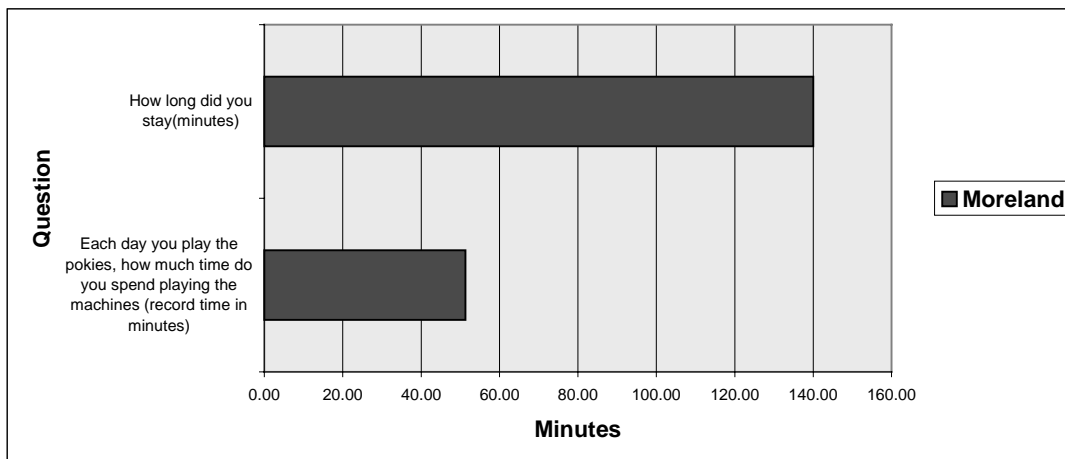
Figure 5.10: Money spent on gaming, Moreland



(*) Statistically significant difference between Moreland and the average of the other regions.

Our survey indicates that Moreland gamers spend less than a third of their time in gaming venues playing pokies. This suggests that gamers in Moreland are attracted to gaming venues for a range of social and recreational experiences.

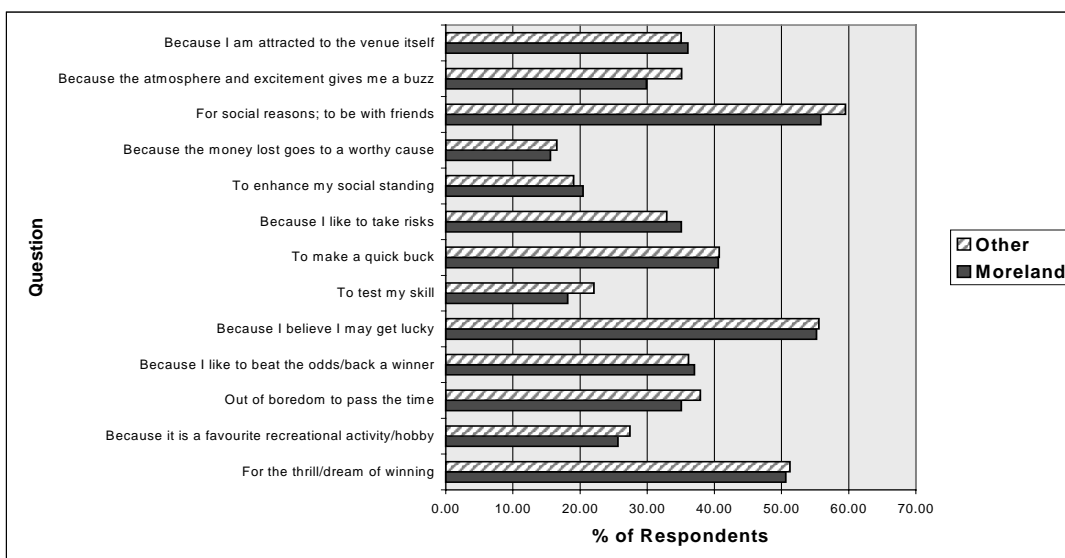
Figure 5.11: Time Spent at Venue, Moreland



5.8 Reasons for gaming

In our survey, than main reason respondents in Moreland play poker machines is for ‘social reasons; to be with friends’. Figure 5.12 indicates that the prospect of a lucky win, the thrill of winning and making a ‘quick buck’ are also major influences in respondents choosing to play poker machines.

Figure 5.12: Reasons for gaming, Moreland

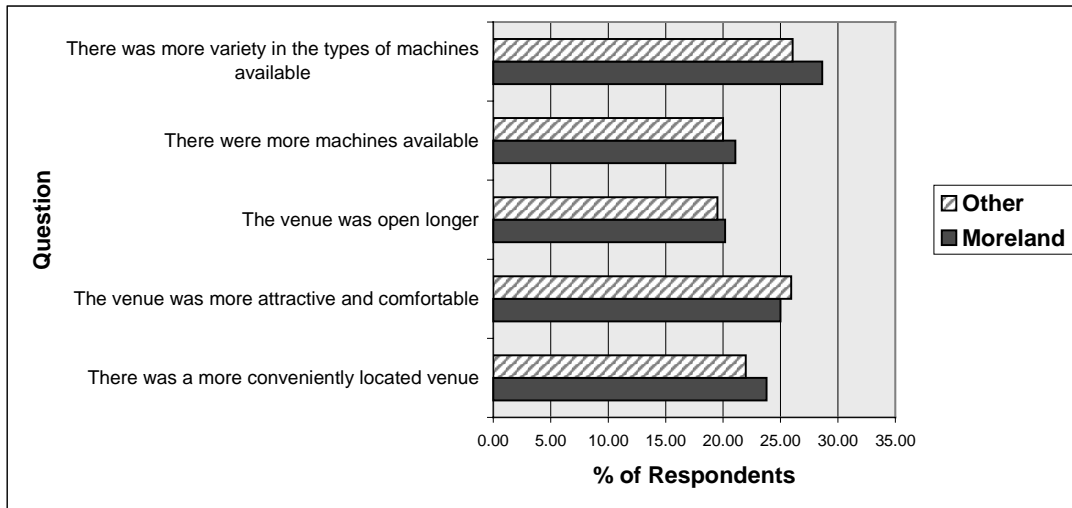


(There is no statistically significant difference between Moreland and other regions for these questions.)

Gamers were asked what would make them game more. Overall, most gamers indicated that the factors we suggested would not make them game more. While the variety of machines available is a minor reason for the choice of gaming venue, it featured as the main factor,

relative to the others suggested, that would contribute to people gaming more. Venue attractiveness and ambience, the quantity of machines available, longer operating hours and more convenient location of venues were considered as minor factors for gaming more.

Figure 5.13: Factors contributing to gaming more, Moreland

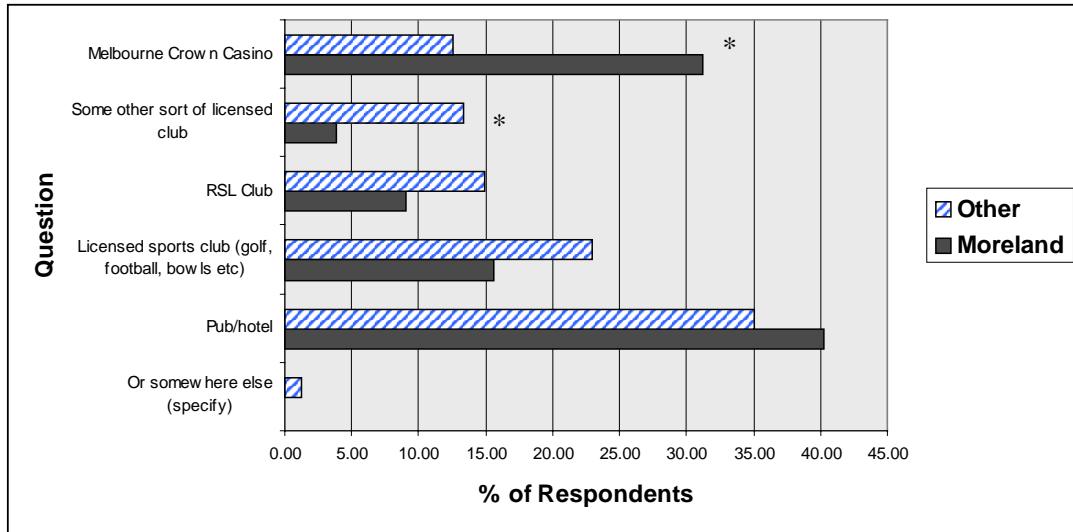


(There is no statistically significant difference between Moreland and the other regions for these questions.)

5.9 Venues at which EGMs are played

Figure 5.14 indicates the most common venue among poker machine players is a pub or hotel with over 40% of Moreland respondents choosing this option. In comparison to the other regions, a higher percentage of respondents in Moreland patronise the Crown Casino (which is very close) to play the pokies, and a lower percentage frequent other licensed clubs.

Figure 5.14: Venues at which EGMs are played, Moreland

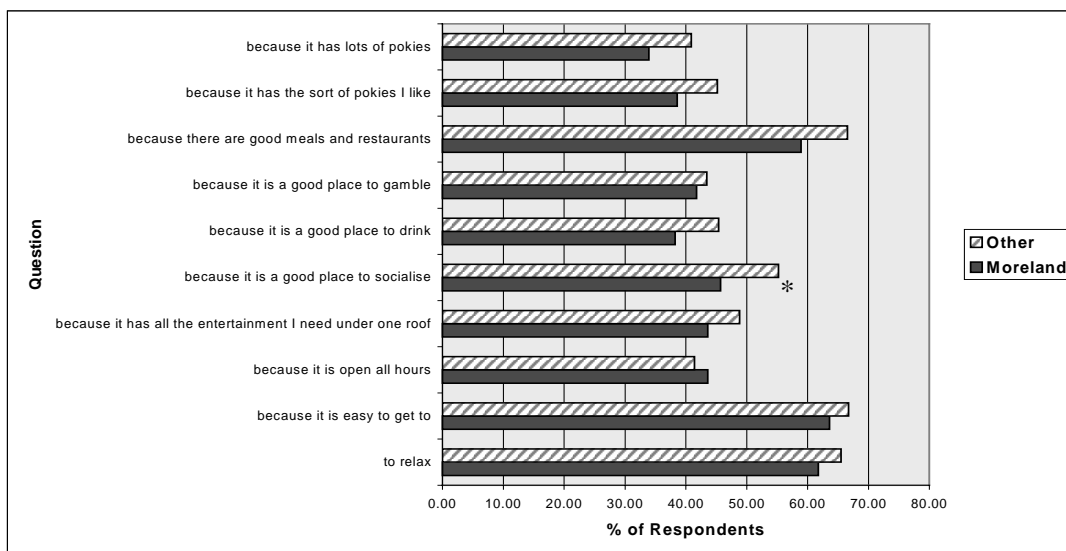


(*) Statistically significant difference between Moreland and the average of the other regions.

Our survey found that most gamers game locally. Gamers from the Moreland region travel on average 2.4km to gaming venues with the majority of gamers in Moreland departing from home to get to the gaming venue.

In our survey, over 60% of gamers in Moreland choose gaming venues on the basis of proximity and to relax. Good meals and restaurants are also a major reason for venue choice. The number and variety of poker machines, and venue operating hours are less significant in venue choice compared to other regions. Fewer gamers in Moreland choose gaming venues because they consider them to be a good place to socialise.

Figure 5.15: Reasons for Venue Choice, Moreland

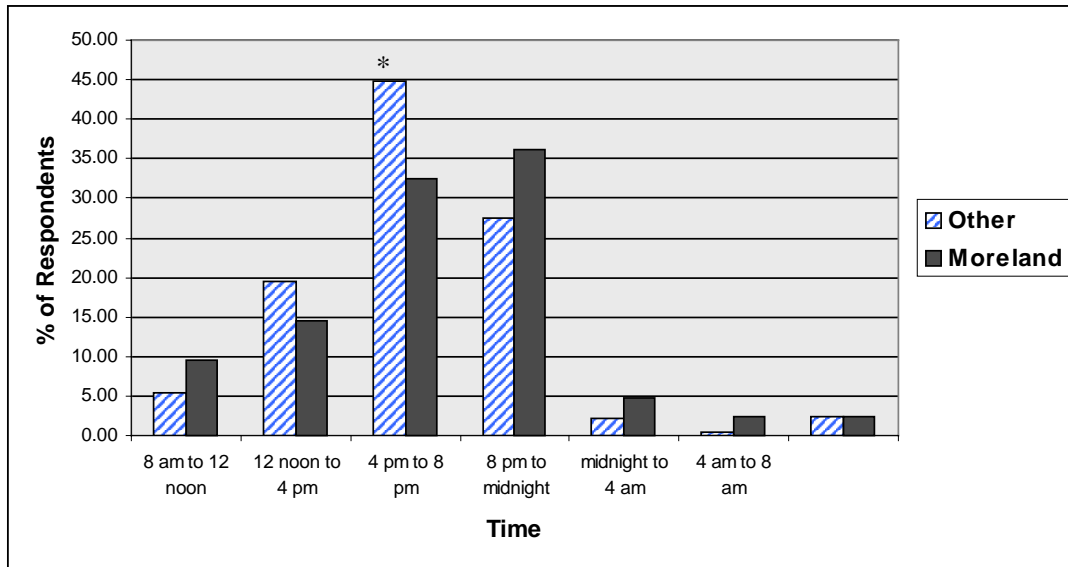


(*) Statistically significant difference between Moreland and the average of the other regions.

5.10 Utilisation of poker machines

Figure 5.16 indicates that the use of venues varies over the day. The peak arrival time at venues is between 8pm and midnight with 36% of Moreland respondents arriving at venues during this time. Fewer respondents in Moreland arrive at venues between 4pm and 8pm than in the other regions. Less than 5% of respondents arrive between the hours of 4am and 8am, although this finding may also reflect that many venues are closed at this time.

Figure 5.16: Time of arrival at Venue, Moreland

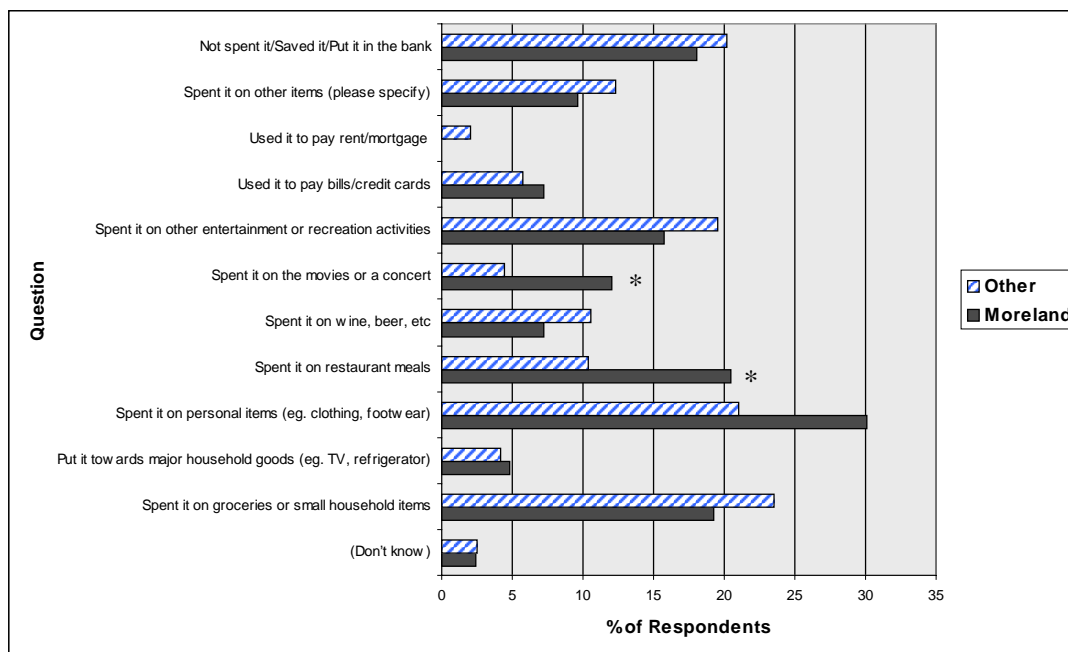


(*) Statistically significant difference between Moreland and the average of the other regions.

5.11 Alternative use of EGM funds

Figure 5.17 details what gaming respondents indicated they would spend their money on had they not spent it on gaming. Around 30% of Moreland gamers would have spent the money on personal items, approximately 19% on groceries or small household items and about 18% would have saved the money. In Moreland, more respondents than in the other regions suggest that the money that they have spent on gaming would otherwise be spent on restaurant meals and movies or a concert. Less than 10% of Moreland gamers said they would spend their money on paying bills, credit cards and rent or mortgage.

Figure 5.17: Alternative uses for EGM funds, Moreland



(*) Statistically significant difference between Moreland and the average of the other regions.

5.12 Problem gambling

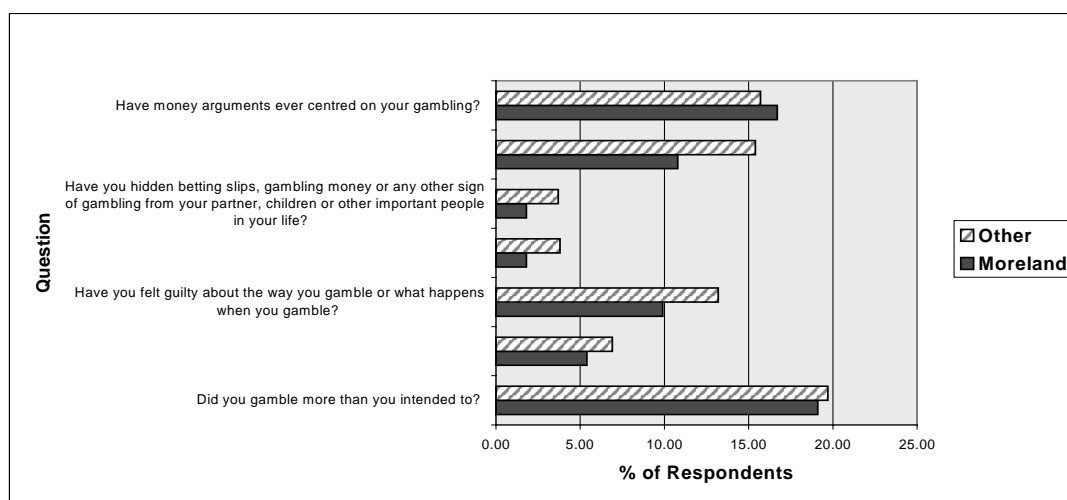
The respondents who had gambled in the last six months were asked the battery of questions from the South Oaks Gambling Screen, which is a tool used to identify the prevalence of problem gambling in the population. We derive a score to identify the percentage of people ‘at risk’ of gambling problems in our survey regions using the approach adopted in the state-wide ‘Patterns’ Survey.⁶

Our survey found that only 1.8% of Moreland residents fall into the ‘at risk’ category, having SOGS scores of 5 or more. This is similar to the State-wide average. Only 1% of Moreland gamblers feel that they have had a problem with gambling or that their gambling was out of control. However, 13% of all Moreland residents said that they, or a member of their family had experienced difficulties with excessive gambling at some time, with 59% of this group having experienced difficulties in the last six months.

⁶ Ref: ‘Definition and Incidence of Problem Gambling including the Socio-Economic Distribution of Gamblers’ Australian Institute for Gambling Research (1997) commissioned by the VCGA. In this report, the Institute recommended that despite having some limitations, the SOGS was the best currently available instrument to measure the prevalence of problem gambling and that it should be used in the short term for the VCGA’s ongoing survey series of community gambling patterns and perceptions. The VCGA has included the SOGS in the last three of its ongoing Community Gambling Patterns surveys.

In the last six months, approximately one in five Moreland gamblers indicated that they had gambled more than they intended to, and about 16% had money arguments centred on gambling.

Figure 5.18: Negative gambling experiences in the last six months, Moreland



(There is no statistically significant difference between Moreland and other regions for these questions.)

In order to probe the issue of problem gambling further, a series of questions was asked in relation to whether gambling activities were financed through credit and borrowing. In Moreland very little gambling activity is financed by credit. Less than 2% of Moreland gamblers admitted to having borrowed money to finance gambling, including borrowing money from relatives, credit cards or selling personal property to finance gambling.

The Break Even Agency which covers the City of Moreland (Banyule Community Health Centre) reported 537 cases and 1,639 client contacts in 1997-98. These figures are an increase on the previous year (36% increase in cases, but a 20% decrease in client contacts). Note these figures relate to a much wider area than Moreland.

Our consultations provided some insights into community perceptions about problem gambling. Venue operators raised the following issues with respect to problem gambling:

- most of the venue operators contended there is little problem gambling in Moreland. However, a couple said they have their “regulars” who come late at night (usually males) who complain that the EGMs do not pay out enough;
- one operator noted that problem gambling manifests itself with certain clients who “are here all the time, waiting for the place to open”.

Participants at the public meeting expressed the following opinions with respect to problem gambling:

- large expenditure on gambling was a serious problem for some individuals. As a consequence of excessive expenditure on gambling, families are left with insufficient food and less money for necessary retail spending;
- problem gamblers put their personal satisfaction and leisure enjoyment as a priority, rather than the needs of their wider family unit. Many families are adversely affected by gambling but do not like to admit it, with children and teenagers being the hardest hit as victims of gambling by parent/s;
- whilst demand for counselling services was primarily from English speaking residents, Breakeven made the point that they had seen increased demand from residents of Arabic, Greek, Italian, Vietnamese, and Turkish backgrounds, suggesting that these immigrant populations are also at risk;
- people are now starting to have multiple problems linked to excessive gambling expenditure, including increased crime and fraudulent activities. A number of attendees indicated they know of cases where the gamblers embezzled money from their families leaving them virtually destitute – with one case of suicide as a direct result. It was the general view of many that these ancillary problems largely went unreported;
- strategies suggested to overcome problem gambling included:
 - clubs encouraging non-gambling patrons;
 - increased education; and
 - removal of ATMs from venues.

Prohibition was considered unviable to counteract problem gambling.

Representatives of community service organisations expressed the following concerns:

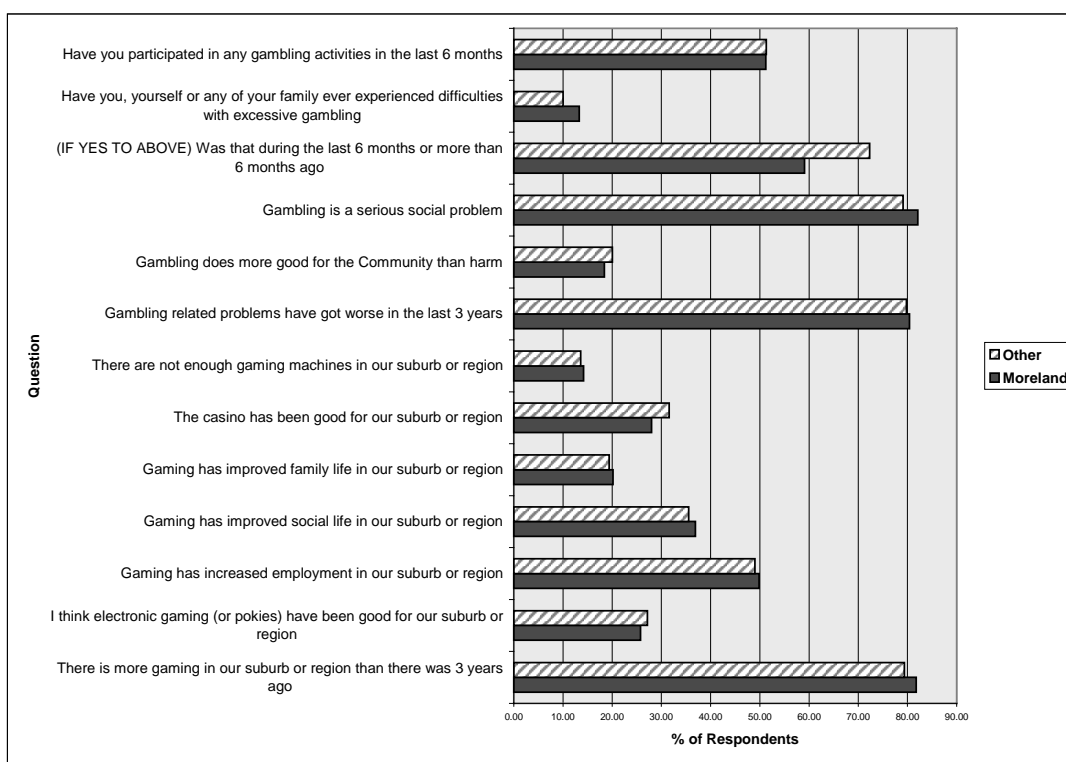
- increased demand for counselling services has meant that many community organisations are stretched beyond their capacity;
- generally, problem gamblers have problems with family relationships;
- it was stated by one organisation that police claim that problem gambling is as much a cause of crime as drugs; and
- bankruptcies in small businesses, have increased since the introduction of gaming machines.

6 Social and economic impact of gaming

6.1 Community impact

According to our survey, eighty-two percent of Moreland respondents agree that gambling is a serious social problem and has become worse in the past three years. Respondents in Moreland generally do not think that gaming has been good for their region.

Figure 6.1: Opinions on the impact of gambling, Moreland



(There is no statistically significant difference between Moreland and the other regions for these questions.)

In our consultations, community service organisations and non-venue participants at the public meeting expressed the following views with respect to the community impact of gaming:

- gaming has had detrimental impacts on the community as a whole, not just the problem gamblers themselves;
- the Local Council (as a community regulator) has a limited capacity to affect the number of machines and venues. This is of concern given the impact on open space and alternative leisure activities. There was also concern that planning for new venues does not have a focus on the family;

- hotel gaming outlets, as opposed to clubs, do not return profits from gaming for the benefit of the broader community. For instance, RSL funds/profits would be channelled to provide assistance, services and activities for members and returned soldiers;
- gaming was seen as having a negative impact on other forms of wider community recreation as it was largely a pastime targeted at individuals and did not include family units;
- about half the people who seek counselling or assistance from agencies do so because of gambling problems, which have a major personal and community impact.

Representatives of community service organisations highlighted the following impacts on the Moreland community as a direct result of gambling:

- families and time spent with families are adversely affected. Problem gamblers do not seek assistance until they and their families are in dire financial straits;
- changing societal values for the worse are evident when gamblers have to tell lies to get credit; children are less valued and left unsupervised etc; it is now more acceptable to “go to the pub” than to spend quality time with the family. Family support services suggested people are becoming dissatisfied with the family unit and life generally;
- the criminal impact of gambling, whilst relatively small compared to drugs, is nevertheless increasing. Crime generally takes the forms of fraud (to feed the gambling habit) and loan “sharking” (with interest rates of 30-40% and the perceived possibility of physical violence if the borrower defaults).

A number of venue operators expressed the following views with respect to the community impact of gambling:

- most suggested that their clientele were financially responsible and could not detect any adverse individual impacts;
- many venue operators admitted that since gaming commenced in Moreland, there has been a downturn in community-based activities. People tend to spend more of their leisure time gambling rather than with their family or community; for example, husbands and wives seemed to be going out together less frequently. However, this was regarded as personal choice and not necessarily resulting in adverse impacts on family life;
- some said that gaming has brought bigger and better recreational facilities to Moreland.

A representative of retail traders highlighted a number of community impacts of gambling including that:

- gambling is a major cause of crime, similar to drugs;
- the level of unemployment and school “dropouts” is rising;

- shopping centres are being used as “drop off” points for children by parents, with occasional announcements over loud speakers prompting parents to collect their children.

6.2 Economic impacts

Non-venue participants at the public meetings and community service organisations were of the view that increased gambling expenditure had caused increased unemployment, and a reduction in the level of retail expenditure and closures and bankruptcies of small businesses in the region. Whilst gaming leads to property development, the type of development tends to be “big and glitzy” and not necessarily in keeping with community ambience.

A number of venue operators admitted that the discretionary dollar being diverted to gaming may be having an adverse impact on local retailers and leisure service providers, but they queried whether closures of some small businesses would have occurred in any case. For their own part, venues now have more staff – in some cases increased by a factor of 4 or 5.

Retail traders agreed that increased gambling expenditure had reduced discretionary expenditure on other forms of retail and entertainment. In addition, the cross subsidisation of food and entertainment by licensed venues from gaming profits made it difficult for other entertainment and food outlets to compete.

6.3 Perceived benefits and costs

The costs and benefits of gaming are summarised below.

6.3.1 Benefits

Participants at the public meeting referred to the cheaper meals and the improved entertainment and recreational facilities as being a key benefit of the introduction of gaming. In addition, a number of participants cited the benefit of increased funding of community sporting and charitable organisations due to the distribution of club gaming profits.

Community service organisations could see few benefits associated with the introduction of gaming apart from the improved availability of entertainment and recreational facilities and services for the community.

Venue operators highlighted the following benefits as a direct result of gaming:

- urban renewal has gained impetus since gaming commenced; with a move to more residential developments attracting younger couples and families to the region;
- the venues themselves are modern and more ascetically appealing than before;

- gaming is leading to benefits for the whole community, including increased employment and improved services and better entertainment all round. Any problem gamblers are relatively small in number;
- increased taxes to government, benefits the community in longer term.

6.3.2 Costs

Community service organisations and those not associated with venues have serious concerns about the negative impact of gaming on the Moreland community. While there may be a small number of problem gamblers, the costs that they face are huge and reverberate across many affected individuals and businesses. Family support services indicated that there is an increasing trend in recipients of social security benefits; requests for emergency and material aid; family breakdowns; and social dysfunction (which is not conducive to family or community). There are also reported implications for crime in the community, although it is widely believed that this is mostly unreported. The community generally feels powerless to overcome the gambling problems.

Whilst most venue operators indicated that they had heard of rising unemployment and crime rates, they challenged the view that these were a direct result of gambling. A number of venue operators did express some concern as to the increased number of venues, which threaten the viability of other venues as well as providing relatively unrestricted access to gaming to the Moreland population. A few expressed concern about personal safety of clients late at night.

Appendix 1

VCGA Gaming Survey		Moreland	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree	
ref: VCGA99-BDT09-Reports.xls					(word)						
PART B - PERSONAL VALUES											
Life in general											
	1	I am really happy with life	73.35	74.15	-0.80		0.67	X5B(1)	77.1	14.5	8.4
	2	The Australian economy is doing well	54.98	52.85	2.13		0.291	X5B(2)	42.8	32.5	24.7
	3	The Australian economy is getting better	52.70	52.90	-0.20		0.918	X5B(3)	35.5	39.2	25.3
	4	My life will be better in the next year than it was last year	67.63	67.00	0.63		0.77	X5B(4)	64.5	22.3	13.2
	5	My family's financial situation is good	64.45	65.20	-0.75		0.745	X5B(5)	65.1	16.9	18.1
	6	I feel that where I end up in life will be more a matter of luck than	47.90	43.20	4.70		0.075	X5B(6)	39.1	14.5	46.3
	7	I believe rules should never be broken	47.15	53.50	-6.35	p	0.017	X5B(7)	34.4	17.5	48.1
	8	I seek out the latest things	50.75	48.48	2.28		0.326	X5B(8)	40.3	22.3	37.3
	9	I am healthy	72.00	72.55	-0.55		0.784	X5B(9)	81.3	7.2	11.4
	10	I rarely feel stressed	44.88	46.28	-1.40		0.569	X5B(10)	34.3	15.1	50.6
Belonging and friendship											
	11	I have a good family life	75.30	80.10	-4.80	p	0.019	X5B(11)	79.5	13.3	7.2
	12	Security is of concern to me	69.28	72.73	-3.45		0.157	X5B(12)	69.3	13.3	17.5
	13	I am hardly ever lonely	66.58	69.30	-2.73		0.274	X5B(13)	63.8	16.3	19.9
Levels of activity											
	14	I am always busy	78.00	78.65	-0.65		0.747	X5B(14)	80.8	12.7	6.6
Fun and going out											
	15	I have a full social life	61.60	62.08	-0.48		0.84	X5B(15)	58.5	18.1	23.5
	16	I like crowds	48.05	46.95	1.10		0.669	X5B(16)	33.1	27.1	39.8
	17	I am hardly ever bored	66.13	69.10	-2.98		0.191	X5B(17)	65.7	18.1	16.2
Risk											
	18	Taking risks gives me a thrill	47.45	45.60	1.85		0.488	X5B(18)	37.3	20.5	42.2
Trust											
	19	I believe most people can be trusted	44.43	46.58	-2.15		0.352	X5B(19)	31.9	21.1	46.9
Income											
	20	I always have enough money to go around	56.18	51.75	4.43		0.076	X5B(20)	54.2	16.3	29.5
	21	I buy luxuries	42.33	42.33	0.00		0.998	X5B(21)	30.1	18.7	51.3
Shopping											
	22	I am a spender, not a saver	50.30	48.50	1.80		0.483	X5B(22)	36.2	24.1	39.7
Thinking about your suburb or region											
	23	Overall, this is a good suburb or region to live in	76.35	73.03	3.33		0.072	X5B(23)	84.3	10.8	4.8
	24	The local economy is good	59.03	54.48	4.55	p	0.015	X5B(24)	47.6	36.1	16.3
	25	The local shops are doing well financially	50.60	52.28	-1.68		0.386	X5B(25)	28.3	47.0	24.7
	26	There is a real sense of community around here	63.10	63.13	-0.03		0.989	X5B(26)	60.2	25.9	13.8
	27	It is safe around here	62.05	60.38	1.68		0.41	X5B(27)	58.4	26.5	15.0
	28	There is no crime around here	36.45	32.65	3.80		0.077	X5B(28)	14.4	26.5	59.1
	29	There is plenty of work around here	42.93	39.00	3.93		0.057	X5B(29)	18.7	38.6	42.7
	30	People play sport around here	68.08	74.83	-6.75	p	0	X5B(30)	71.6	18.7	9.6
Thinking about your life 3 years ago											
	31	I was living in this suburb or region 3 years ago	73.05	79.38	-6.33	p	0.025	X5B(31)	79.5	1.2	19.2

VCGA Gaming Survey		Moreland	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
Life in general										
32	I am happier than I was 3 years ago	66.43	67.60	-1.18		0.599	X5B(32)	59.0	25.9	15.1
33	The Australian economy is better now than it was 3 years ago	59.80	60.98	-1.18		0.555	X5B(33)	49.4	34.3	16.3
34	My family's financial situation is better than it was 3 years ago	61.60	61.20	0.40		0.864	X5B(34)	56.1	24.1	19.9
35	I am healthier now than I was 3 years ago	54.98	54.68	0.30		0.9	X5B(35)	40.4	32.5	27.1
36	I feel less stressed now than I did 3 years ago	48.05	52.70	-4.65		0.066	X5B(36)	36.1	22.3	41.5
Belonging and friendship										
37	I have a better family life now than I did 3 years ago	59.03	60.58	-1.55		0.49	X5B(37)	41.6	37.3	21.1
38	I am less concerned with security now than I was 3 years ago	47.90	45.30	2.60		0.244	X5B(38)	31.9	28.9	39.1
39	I am less lonely now than I was 3 years ago	53.00	54.48	-1.48		0.513	X5B(39)	32.6	37.3	30.1
Levels of activity										
40	I am busier now than I was 3 years ago	68.08	65.60	2.48		0.304	X5B(40)	65.6	15.1	19.3
Fun and going out										
41	I have a better social life now than I did 3 years ago	55.13	52.73	2.40		0.306	X5B(41)	37.4	34.3	28.3
42	I am less bored now than I was 3 years ago	59.18	57.85	1.33		0.516	X5B(42)	43.4	39.8	16.9
Risk										
43	I take more risks now than I did 3 years ago	48.80	42.60	6.20	p	0.008	X5B(43)	33.7	25.9	40.3
Trust										
44	I trust people more now than I did 3 years ago	38.55	38.05	0.50		0.792	X5B(44)	13.8	36.7	49.3
Income										
45	My money goes further now than it did 3 years ago	42.18	36.43	5.75	p	0.031	X5B(45)	32.5	13.3	54.2
46	I buy more luxuries now than I did 3 years ago	39.75	37.15	2.60		0.273	X5B(46)	25.3	19.9	54.9
Thinking about your suburb or region compared to how it was 3 years ago										
47	This suburb or region is better to live in now than 3 years ago	56.18	52.43	3.75	p	0.05	X5B(47)	33.1	49.4	17.5
48	The local economy is better now than it was 3 years ago	52.25	50.95	1.30		0.428	X5B(48)	25.9	56.0	18.1
49	The local shops are doing better financially than they were 3 years ago	49.25	49.70	-0.45		0.8	X5B(49)	24.1	48.8	27.1
50	There is a better sense of community around here now than there was	54.53	53.15	1.38		0.423	X5B(50)	31.3	53.0	15.7
51	It is safer around here now than 3 years ago	46.83	42.53	4.30	p	0.011	X5B(51)	17.5	55.4	27.1
52	There is less crime around here than 3 years ago	42.63	38.20	4.43	p	0.013	X5B(52)	13.9	48.8	37.3
53	There is more work around here than there was 3 years ago	45.63	43.13	2.50		0.18	X5B(53)	15.7	54.8	29.5
54	People play more sport around here than they did 3 years ago	51.05	53.63	-2.58		0.09	X5B(54)	23.5	59.0	17.5
Gaming- explain that gaming is electronic gaming machines or pokies and the games played at the casino										
55	There is more gaming in our suburb or region than there was 3 years ago	81.78	79.38	2.40		0.182	X5B(55)	85.0	10.8	4.2
56	I think electronic gaming (or pokies) have been good for our suburb or	25.75	27.13	-1.38		0.495	X5B(56)	6.0	24.1	69.8
57	Gaming has increased employment in our suburb or region	49.85	49.00	0.85		0.716	X5B(57)	39.7	28.9	31.3
58	Gaming has improved social life in our suburb or region	36.90	35.55	1.35		0.553	X5B(58)	18.1	29.5	52.4
59	Gaming has improved family life in our suburb or region	20.18	19.38	0.80		0.64	X5B(59)	2.4	16.3	81.4
60	The casino has been good for our suburb or region	28.00	31.58	-3.58		0.095	X5B(60)	7.8	27.7	64.4
61	There are not enough gaming machines in our suburb or region	14.15	13.60	0.55		0.74	X5B(61)	1.2	11.4	87.3
62	Gambling related problems have got worse in the last 3 years	80.43	79.80	0.63		0.764	X5B(62)	83.1	11.4	5.4
63	Gambling does more good for the Community than harm	18.38	20.05	-1.68		0.341	X5B(63)	1.8	13.9	84.4
64	Gambling is a serious social problem	82.08	79.10	2.98		0.119	X5B(64)	86.8	6.6	6.6
65	Have you, yourself or any of your family ever experienced difficulties	13.30	10.00	3.30		0.238	X2B(65)	13.3	0.0	86.7
66	(IF YES TO ABOVE) Was that during the last 6 months or more than 6	59.10	72.30	-13.20	*	0.273	X2B(66)	59.1	0.0	40.9
67	Have you participated in any gambling activities in the last 6 months	51.20	51.30	-0.10		0.979	X2B(67)	51.2	0.0	48.8

VCGA Gaming Survey		Moreland	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree	
ref: VCGA99-BDT09-Reports.xls											
PART C - FREQUENCY OF CONSUMPTION						(word)					
In the last month, how many times did you visit.....?											
	1	Department stores	4.28	4.34	-0.07		0.852	XFC(1)			
	2	Shopping centres	5.97	6.69	-0.72		0.068	XFC(2)			
In the last month, how many of the items in any of the following categories did you buy..?											
	3	Clothing	3.97	3.34	0.63		0.103	XFC(3)			
	4	Fashion accessories	0.90	0.82	0.08		0.625	XFC(4)			
	5	Books	1.77	2.03	-0.27		0.348	XFC(5)			
	6	Cds	1.02	1.21	-0.19		0.231	XFC(6)			
	7	Computer software, hardware and accessories	0.50	0.54	-0.04		0.739	XFC(7)			
	8	Homewares	1.01	1.17	-0.16		0.365	XFC(8)			
In the last month, how many times did you.....?											
	9	Go to a BYO or licensed restaurant	2.49	2.05	0.45		0.089	XFC(9)			
	10	Eat takeaways	4.31	3.91	0.40		0.234	XFC(10)			
	11	See a movie at a cinema	1.03	0.71	0.32		0.059	XFC(11)			
	12	Go to a pub or bar for drinks only	1.75	1.42	0.33		0.26	XFC(12)			
	13	Go to a night club or disco	0.61	0.60	0.01		0.956	XFC(13)			
In the last six months, have you											
	14	Bought or built a house or flat	7.83	4.68	3.16		0.156	XFC(14)			
	15	Carried out renovations of more than \$5,000	9.04	7.31	1.72		0.475	XFC(15)			
	16	Bought a car (new or used)	10.24	14.75	-4.51		0.091	XFC(16)			
How often do you gamble on or play.....?											
	17	Bingo	2.05	4.21	-2.16	p	0.04	XFC(17)			
	18	Horse or greyhound races	5.20	5.93	-0.74		0.667	XFC(18)			
	19	Poker machines (pokies) at a pub or club	7.61	8.42	-0.81		0.652	XFC(19)			
	20	Poker machines (pokies) at Crown Casino	1.94	0.98	0.96	p	0.025	XFC(20)			
	21	Table games at Crown Casino	2.77	1.09	1.68	p	0.031	XFC(21)			
		Average frequency of Pokies,Horses and Bingo	4.95	6.13	-1.18		0.276	X_GFREQ3			
		Average frequency of Pokies,Horses, Bingo, Crown (pokies, tables)	3.91	3.97	-0.05		0.943	X_GFREQ5			
	22	I am gambling less now than I was 3 years ago	53.18	56.23	-3.05		0.225	X5C(22)	33.2	39.8	27.1

VCGA Gaming Survey		Moreland	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
PART D - GAMING										
1	Would you say you are satisfied or dissatisfied with your experience of playing table games at Crown Casino (very satisfied=100)	64.28	65.73	-1.45		0.809	X5D(1)	60.7	17.9	21.5
2	Each day you play table games at Crown Casino, how much time do you spend at the gaming tables (record time in minutes)	70.18	77.83	-7.65	*	0.649	XND(2)			
3	Each day you play table games at Crown Casino, on average, how much money do you spend or outlay (record amount in dollars)	63.04	109.88	-46.84	* **	0.002	XND(3)			
4	Would you say you are satisfied or dissatisfied with your experience of playing the pokies (vsatisfied=100)	50.33	45.95	4.38		0.236	X5D(4)	40.3	22.1	37.7
5	Each day you play the pokies, how much time do you spend playing the machines (record time in minutes)	51.31	55.31	-4.00		0.53	XND(5)			
6	Each day you play the pokies, on average, how much money do you spend or outlay (record amount in dollars)	158.20	22.98	135.22	*** **	0.3	XND(6)			
7	What are the main motivations, attractions or reasons you play the									
a	Thrill/dream rewards of winning	14.30	14.60	-0.30		0.939	X2D(7)(1)	14.3	0.0	85.7
b	Atmosphere/excitement/gives a buzz	13.00	8.60	4.40		0.291	X2D(7)(2)	13.0	0.0	87.0
c	Beating the odds/back a winner	2.60	3.40	-0.80		0.698	X2D(7)(3)	2.6	0.0	97.4
d	Exchange of money/handling money	0.00	0.30	-0.30		is	X2D(7)(4)	0.0	0.0	100.0
e	Upbringing/family background	0.00	0.50	-0.50		is	X2D(7)(5)	0.0	0.0	100.0
f	Ego/self esteem	0.00	0.00	0.00		is	X2D(7)(6)	0.0	0.0	100.0
g	Favourite recreational activity/hobby	10.40	9.10	1.30		0.742	X2D(7)(7)	10.4	0.0	89.6
h	Social reasons/see friends	50.60	44.40	6.20		0.32	X2D(7)(8)	50.6	0.0	49.4
i	Compulsions/addiction	0.00	1.00	-1.00		is	X2D(7)(9)	0.0	0.0	100.0
j	Like taking risks/risk taker	0.00	0.50	-0.50		is	X2D(7)(10)	0.0	0.0	100.0
k	Belief in luck/may get lucky	15.60	12.00	3.60		0.427	X2D(7)(11)	15.6	0.0	84.4
l	Want to be successful	3.90	2.10	1.80		0.441	X2D(7)(12)	3.9	0.0	96.1
m	Boredom/pass time	16.90	23.20	-6.30		0.189	X2D(7)(13)	16.9	0.0	83.1
n	Other (specify)	6.50	7.30	-0.80		0.794	X2D(7)(14)	6.5	0.0	93.5
o	(Don't know)	1.30	1.30	0.00		0.996	X2D(7)(15)	1.3	0.0	98.7
I play the pokies:										
8	For the thrill/dream of winning	50.65	51.25	-0.60		0.891	X5D(8)	46.8	11.7	41.6
9	Because it is a favourite recreational activity/hobby	25.65	27.43	-1.78		0.594	X5D(9)	11.7	15.6	72.8
10	Out of boredom to pass the time	35.08	37.93	-2.85		0.458	X5D(10)	23.4	15.6	61.1
11	Because I like to beat the odds/back a winner	37.03	36.15	0.88		0.812	X5D(11)	22.1	20.8	57.2
12	Because I believe I may get lucky	55.20	55.55	-0.35		0.932	X5D(12)	53.3	11.7	35.1
13	To test my skill	18.18	22.08	-3.90		0.17	X5D(13)	6.5	5.2	88.4
14	To make a quick buck	40.58	40.73	-0.15		0.973	X5D(14)	33.8	13.0	53.3
15	Because I like to take risks	35.08	32.90	2.18		0.511	X5D(15)	15.6	22.1	62.4
16	To enhance my social standing	20.45	19.05	1.40		0.58	X5D(16)	3.9	11.7	84.5
17	Because the money lost goes to a worthy cause	15.58	16.53	-0.95		0.711	X5D(17)	2.6	10.4	87.0
18	For social reasons; to be with friends	55.85	59.53	-3.68		0.357	X5D(18)	57.2	6.5	36.4
19	Because the atmosphere and excitement gives me a buzz	29.88	35.13	-5.25		0.108	X5D(19)	14.3	15.6	70.2
20	Because I am attracted to the venue itself	36.05	35.05	1.00		0.784	X5D(20)	22.1	15.6	62.4
Other gambling questions										
Thinking of the last week in which you spent money on pokies or table games. If you hadn't spent the money on gambling, could you please tell me in what other ways you might have used it? (Don't read out, circle										
21	Spent it on groceries or small household items	19.30	23.50	-4.20		0.389	X2D(21)	19.3	0.0	80.7
22	Put it towards major household goods (eg. TV, refrigerator)	4.80	4.20	0.60		0.809	X2D(22)	4.8	0.0	95.2
23	Spent it on personal items (eg. clothing, footwear)	30.10	21.00	9.10	*	0.097	X2D(23)	30.1	0.0	69.9
24	Spent it on restaurant meals	20.50	10.40	10.10	* p	0.034	X2D(24)	20.5	0.0	79.5
25	Spent it on wine, beer, etc	7.20	10.60	-3.40		0.298	X2D(25)	7.2	0.0	92.8
26	Spent it on the movies or a concert	12.00	4.40	7.60	* p	0.045	X2D(26)	12.0	0.0	88.0
27	Spent it on other entertainment or recreation activities	15.70	19.50	-3.80		0.392	X2D(27)	15.7	0.0	84.3
28	Used it to pay bills/credit cards	7.20	5.70	1.50		0.616	X2D(28)	7.2	0.0	92.8
29	Used it to pay rent/mortgage	0.00	2.00	-2.00		is	X2D(29)	0.0	0.0	100.0
30	Spent it on other items (please specify)	9.60	12.30	-2.70		0.459	X2D(30)	9.6	0.0	90.4
31	Not spent it/Saved it/Put it in the bank	18.10	20.20	-2.10		0.644	X2D(31)	18.1	0.0	81.9
32	(Don't know)	2.40	2.50	-0.10		0.975	X2D(32)	2.4	0.0	97.6
Which type of venue do you play pokies at (MULTIPLE RESPONSE):										
33	Pub/hotel	49.40	40.50	8.90	*	0.159	X2D(33)	49.4	0.0	50.6
34	Licensed sports club (golf, football, bowls etc)	19.50	28.50	-9.00	*	0.081	X2D(34)	19.5	0.0	80.5
35	RSL Club	14.30	18.80	-4.50		0.316	X2D(35)	14.3	0.0	85.7
36	Some other sort of licensed club	9.10	17.20	-8.10	* p	0.035	X2D(36)	9.1	0.0	90.9
37	Melbourne Crown Casino	44.20	18.30	25.90	*** p	0	X2D(37)	44.2	0.0	55.8
38	Or somewhere else (specify)	2.60	1.60	1.00		0.595	X2D(38)	2.6	0.0	97.4

VCGA Gaming Survey		Moreland	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
	Which type of venue do you go to the most to play pokies (single response):									
40	Pub/hotel	40.30	35.00	5.30		0.392	X2D(40)	40.3	0.0	59.7
41	Licensed sports club (golf, football, bow ls etc)	15.60	23.00	-7.40		0.117	X2D(41)	15.6	0.0	84.4
42	RSL Club	9.10	14.90	-5.80		0.127	X2D(42)	9.1	0.0	90.9
43	Some other sort of licensed club	3.90	13.30	-9.40	*	p 0.001	X2D(43)	3.9	0.0	96.1
44	Melbourne Crown Casino	31.20	12.50	18.70	**	p 0.001	X2D(44)	31.2	0.0	68.8
45	Or somew here else (specify)	0.00	1.30	-1.30		is	X2D(45)	0.0	0.0	100.0
	Thinking of the last time you played the pokies at a club or pub (not									
47	How far did you travel to get to this venue? (km)	2.36	2.55	-0.20		0.333	XND(47)			
48	Did you go to this venue									
	* From home	30.10	32.60	-2.50		0.526	2START(1)	30.1	0.0	69.9
	* On the way to or from work	0.00	2.50	-2.50		is	2START(2)	0.0	0.0	100.0
	* From somew here else	12.00	8.40	3.60		0.179	2START(3)	12.0	0.0	88.0
49	I visit that venue more than other venues	47.50	54.68	-7.18		0.106	X5D(49)	45.7	7.1	47.2
50	I really like visiting the venue	47.15	56.28	-9.13	*	p 0.018	X5D(50)	37.1	22.9	40.0
51	I have lots of good luck there	21.78	30.10	-8.33	*	p 0.007	X5D(51)	5.7	14.3	80.0
52	It is enjoyable and thrilling	37.50	45.60	-8.10	*	p 0.022	X5D(52)	20.0	24.3	55.7
53	I had a meal	57.85	59.58	-1.73		0.714	X5D(53)	60.0	5.7	34.2
	I went to the venue..									
54	to relax	61.78	65.50	-3.73		0.318	X5D(54)	61.4	14.3	24.3
55	because it is easy to get to	63.58	66.73	-3.15		0.403	X5D(55)	65.7	14.3	20.0
56	because it is open all hours	43.58	41.40	2.18		0.548	X5D(56)	22.9	30.0	47.1
57	because it has all the entertainment I need under one roof	43.58	48.83	-5.25		0.203	X5D(57)	31.4	18.6	50.0
58	because it is a good place to socialise	45.73	55.23	-9.50	*	p 0.015	X5D(58)	37.1	15.7	47.2
59	because it is a good place to drink	38.23	45.38	-7.15		0.074	X5D(59)	25.7	17.1	57.1
60	because it is a good place to gamble	41.78	43.45	-1.68		0.639	X5D(60)	28.6	18.6	52.8
61	because there are good meals and restaurants	58.93	66.53	-7.60	*	0.071	X5D(61)	57.1	14.3	28.6
62	because it has the sort of pokies I like	38.58	45.18	-6.60		0.099	X5D(62)	24.2	21.4	54.3
63	because it has lots of pokies	33.93	40.90	-6.98		0.051	X5D(63)	17.2	17.1	65.7
	On your last visit to a gaming venue									
64	What time did you arrive:									
	8 am to 12 noon	9.60	5.40	4.20		0.225	X2TIME(1)	9.6	0.0	90.4
	12 noon to 4 pm	14.50	19.50	-5.00		0.249	X2TIME(2)	14.5	0.0	85.5
	4 pm to 8 pm	32.50	44.90	-12.40	*	p 0.032	X2TIME(3)	32.5	0.0	67.5
	8 pm to midnight	36.10	27.40	8.70	*	0.131	X2TIME(4)	36.1	0.0	63.9
	midnight to 4 am	4.80	2.20	2.60		0.297	X2TIME(5)	4.8	0.0	95.2
	4 am to 8 am	2.40	0.50	1.90		0.271	X2TIME(6)	2.4	0.0	97.6
65	How long did you stay(hours)	2.35	2.47	-0.12		0.394	XND(65)			
	Thinking about w hen you last played the pokies									
66	How much did you win? (a lot=100)	35.08	41.20	-6.13		0.059	X5D(66)	18.2	13.0	68.8
67	I had really good luck	29.88	35.83	-5.95		0.105	X5D(67)	16.9	7.8	75.4
68	I enjoyed myself	59.75	63.33	-3.58		0.282	X5D(68)	58.5	19.5	22.1
	I would game more if:									
69	There was a more conveniently located venue	23.80	21.98	1.83		0.457	X5D(69)	3.6	16.9	79.5
70	The venue was more attractive and comfortable	25.00	25.93	-0.93		0.718	X5D(70)	6.0	10.8	83.1
71	The venue was open longer	20.18	19.50	0.68		0.74	X5D(71)	2.4	6.0	91.5
72	There were more machines available	21.08	20.00	1.08		0.618	X5D(72)	2.4	9.6	87.9
73	There was more variety in the types of machines available	28.63	26.05	2.58		0.395	X5D(73)	14.5	9.6	75.9

VCGA Gaming Survey		Moreland	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
PART E										
	Which any of these statements applied to you personally in the last 6									
1	When you gamble, how often do you go back another day to win back	1.21	1.16	0.05		0.332	XNE(1)			
2	Have you ever claimed to be WINNING money when you really had lost?	1.11	1.10	0.01		0.863	XNE(2)			
3	Do you feel you have had a problem with gambling or that your gambling	1.05	1.12	-0.07	p	0.011	XNE(3)			
	The following questions still relate to the last 6 months and only require a									
4	Did you gamble more than you intended to?	19.10	19.70	-0.60		0.883	X2E(4)	19.1	0.0	80.9
5	Have people criticised your gambling?	5.40	6.90	-1.50		0.543	X2E(5)	5.4	0.0	94.6
6	Have you felt guilty about the way you gamble or what happens when	9.90	13.20	-3.30		0.306	X2E(6)	9.9	0.0	90.1
7	Have you felt that you would like to stop gambling but didn't think you	1.80	3.80	-2.00		0.209	X2E(7)	1.8	0.0	98.2
8	Have you hidden betting slips, gambling money or any other sign of gambling from your partner, children or other important people in your	1.80	3.70	-1.90		0.205	X2E(8)	1.8	0.0	98.2
9	Have you ever argued with people you live with about how you	10.80	15.40	-4.60		0.169	X2E(9)	10.8	0.0	89.2
10	Have money arguments ever centred on your gambling?	16.70	15.70	1.00		0.934	X2E(10)	16.7	0.0	83.3
11	Have you borrowed money from someone and not paid them back	0.90	0.90	0.00		0.976	X2E(11)	0.9	0.0	99.1
12	Have you lost time from work or study because of gambling?	0.90	0.70	0.20		0.873	X2E(12)	0.9	0.0	99.1
13	Have you ever borrowed money to gamble or pay off gambling debts?	0.90	2.80	-1.90		0.1	X2E(13)	0.9	0.0	99.1
14	Have you ever borrowed money to gamble or to pay gambling debts	0.90	2.20	-1.30		0.228	X2E(14)	0.9	0.0	99.1
15	Have you borrowed money to gamble or to pay gambling debts from	1.80	1.70	0.10		0.928	X2E(15)	1.8	0.0	98.2
16	(Have you borrowed money to gamble or to pay gambling debts) from	0.90	0.70	0.20		0.875	X2E(16)	0.9	0.0	99.1
17	(Have you borrowed money to gamble or to pay gambling debts) from banks, finance companies or credit unions?	0.90	0.20	0.70		0.439	X2E(17)	0.9	0.0	99.1
18	(Have you borrowed money to gamble or to pay gambling debts) from	0.90	1.70	-0.80		0.465	X2E(18)	0.9	0.0	99.1
19	(Have you borrowed money to gamble or to pay gambling debts) from high interest rate finance companies?	0.00	0.00	0.00		is	X2E(19)	0.0	0.0	100.0
20	(Have you borrowed money to gamble or to pay gambling debts) from cashing in stocks, bonds or other securities?	0.00	0.70	-0.70		is	X2E(20)	0.0	0.0	100.0
21	(Have you borrowed money to gamble or to pay gambling debts) from selling personal or company property?	0.00	0.60	-0.60		is	X2E(21)	0.0	0.0	100.0
22	(Have you borrowed money to gamble or to pay gambling debts) by writing cheques knowing there was no money in the account?	0.00	0.00	0.00		is	X2E(22)	0.0	0.0	100.0
	SOGs score	0.39	0.50	-0.11		0.313	SOG			
	No risk (score<=4)	98.20	98.00	0.20		0.84	X2SOG(1)	98.2	0.0	1.8
	One in 5 risk (score>=5 and score<=6)	1.20	1.30	-0.10		0.903	X2SOG(2)	1.2	0.0	98.8
	One in 2 risk (score>=7 and score<=9)	0.00	0.50	-0.50		is	X2SOG(3)	0.0	0.0	100.0
	One in 1 risk (score>=10)	0.60	0.20	0.40		0.563	X2SOG(4)	0.6	0.0	99.4

VCGA Gaming Survey		Moreland	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree	
ref: VCGA99-BDT09-Reports.xls					(word)						
PART A - SAMPLE AND DEMOGRAPHICS											
1	Gender (male=0 female=100)	53.00	50.70	2.30		0.59	X2A(1)	53.0	0.0	47.0	
2	Region										
	Dandenong	0.00	20.00	-20.00	**	is	X2LOC(1)	0.0	0.0	100.0	
	Geelong	0.00	20.00	-20.00	**	is	X2LOC(2)	0.0	0.0	100.0	
	Maribyrnong	0.00	20.00	-20.00	**	is	X2LOC(3)	0.0	0.0	100.0	
	Mildura	0.00	20.00	-20.00	**	is	X2LOC(4)	0.0	0.0	100.0	
	Moreland	100.00	0.00	100.00	***	is	X2LOC(5)	100.0	0.0	0.0	
	Wellington/ South Gippsland	0.00	19.90	-19.90	**	is	X2LOC(6)	0.0	0.0	100.0	
1	Do you live with a partner or spouse? (No=0 Yes=100)	49.40	57.90	-8.50	*	p	0.046	X2F(1)	49.4	0.0	50.6
2	Do you have dependent children living at home? (No=0 Yes=100)	34.90	36.50	-1.60			0.711	X2F(2)	34.9	0.0	65.1
3	Do you receive a government pension or benefit? (No=0 Yes=100)	36.10	38.60	-2.50			0.549	X2F(3)	36.1	0.0	63.9
4	Are you the main income earner? (No=0 Yes=100)	66.30	62.20	4.10			0.32	X2F(4)	66.3	0.0	33.7
5	Highest education level? (1=primary 4=year 12 7=degree)	4.31	3.85	0.46	p		0.002	XNF(5)			
	Less than year 12	37.30	52.60	-15.30	**	p	0	X2ED(1)	37.3	0.0	62.7
	Year 12	28.30	22.40	5.90			0.122	X2ED(2)	28.3	0.0	71.7
	Trade or diploma	19.30	13.40	5.90			0.077	X2ED(3)	19.3	0.0	80.7
	Degree	15.10	11.50	3.60			0.237	X2ED(4)	15.1	0.0	84.9
6	Work status?										
	* Work full time (for money)	41.60	43.30	-1.70			0.683	X2JOB(1)	41.6	0.0	58.4
	* Work part time (for money)	18.70	18.90	-0.20			0.935	X2JOB(2)	18.7	0.0	81.3
	* Household duties only	8.40	8.30	0.10			0.946	X2JOB(3)	8.4	0.0	91.6
	* Full time student	9.00	4.30	4.70	p		0.045	X2JOB(4)	9.0	0.0	91.0
	* Retired (self supporting)	8.40	9.80	-1.40			0.56	X2JOB(5)	8.4	0.0	91.6
	* Other pensioner	10.20	11.90	-1.70			0.533	X2JOB(6)	10.2	0.0	89.8
	* Unemployed	63.30	65.70	-2.40			0.55	X2JOB(7)	63.3	0.0	36.7
		36.10	34.30	1.80			0.651	X2JOB(8)	36.1	0.0	63.9
7	What is (was) your occupation?										
	Un-s killed Blue Collar										
	Semi-s killed Blue Collar	3.60	7.80	-4.20	p		0.016	X2OCC(1)	3.6	0.0	96.4
	Skilled Blue Collar	12.00	10.10	1.90			0.472	X2OCC(2)	12.0	0.0	88.0
	Lower White Collar	10.20	13.70	-3.50			0.196	X2OCC(3)	10.2	0.0	89.8
	Upper White Collar	26.50	27.60	-1.10			0.776	X2OCC(4)	26.5	0.0	73.5
	Senior Upper White Collar	13.90	10.40	3.50			0.238	X2OCC(5)	13.9	0.0	86.1
8	What industry do (did) you work in?	1.80	1.10	0.70			0.508	X2OCC(6)	1.8	0.0	98.2
9	Were you or your parents born overseas?							23.5	28.9	47.6	
10	What was the main language spoken at home when you were growing	37.95	28.35	9.60	*	p	0.006	X3F(9)			
	English	47.60	63.20	-15.60	**	p	0	X2LANG(1)	47.6	0.0	52.4
	Mandarin	28.90	16.90	12.00	*	p	0.002	X2LANG(2)	28.9	0.0	71.1
	Cantonese	23.50	19.90	3.60			0.317	X2LANG(3)	23.5	0.0	76.5
	Vietnamese	0.00	0.00	0.00			is	X2LANG(4)	0.0	0.0	100.0
	Spanish	0.00	0.00	0.00			is	X2LANG(5)	0.0	0.0	100.0
	Italian	0.00	0.00	0.00			is	X2LANG(6)	0.0	0.0	100.0
	Greek	0.00	0.00	0.00			is	X2LANG(7)	0.0	0.0	100.0
	Other	0.00	0.00	0.00			is	X2LANG(8)	0.0	0.0	100.0
11	Age in years	41.68	44.00	-2.31			0.093	AGE			
12	What is the gross (before tax) family income?	32.93	32.11	0.81			0.694	INCOME			
		16.600	83.400 %*				19.277 %*				
		166.00	834.00								

Victorian Casino and Gaming Authority

Report of the 1999
Longitudinal Community
Impact Study: Dandenong
regional profile

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1 Summary

The City of Greater Dandenong is a major outer urban centre, 45 kms to the south east of the City of Melbourne, which has been experiencing a slowing in population growth that is projected to continue in the future. The City has similar demographic characteristics to the rest of metropolitan Melbourne, except for its greater ethnic diversity. Compared to the average for metropolitan Melbourne, the region does, however, have a higher proportion of couple and single parent families with children, lower educational and income levels, higher receipt of social security benefits, lower levels of home ownership and car ownership and higher rates of crime.

The economy of Greater Dandenong is characterised by its strong manufacturing base and its above average unemployment. It is a region that has undergone economic decline in recent years. About half the people of Dandenong believe their economy is doing well and 60% believe the suburb is good to live in. However, more than half have concerns about safety and crime. Only half or less of the population believe that the region is better than three years ago. In general, Dandenong respondents are less positive about their region and less satisfied than the average of our six regions.

The City of Greater Dandenong has a comparatively high level of EGMs per head, with a high concentration of EGMs per gaming venue. There is a particular concentration in clubs rather than hotels. Over recent years, the numbers of machines and venues has been static. Gaming expenditure has grown in Dandenong from \$13.63M in 1992/93 to \$85.59M in 1998/99. Average annual gaming expenditure per adult in Dandenong is 54% higher than the State average.

According to our survey, just over half of Dandenong respondents gambled in the last six months. Playing poker machines is the most popular form of gambling, with the most popular venue being a pub or club. While Dandenong gamers patronise the Crown Casino less frequently than other gaming venues, on average more money is spent per daily visit at the Casino than elsewhere. Gamers in Dandenong are more likely than those in other regions to believe they may have a lucky win, and many play for social reasons and for the thrill of winning.

Our survey findings indicate that Dandenong gamers go to gaming venues for a broad social and entertainment experience, of which gaming is one component. Dandenong gamers spend less than half the time in gaming venues playing pokies with the majority of gamers choosing venues on the basis of entertainment value, the social ambience and good meals and restaurants. More gamers in the Dandenong regions frequent venues because they are easy to get to than in the other regions, with respondents travelling on average 2km to get to a venue (0.5km less than in the other regions). The majority of Dandenong gamers arrive at gaming venues between 4pm and 8pm.

Gaming appears to be undertaken by a broad range of people, although anecdotal evidence suggests that older women, people from lower socio-economic groups and people of Vietnamese origin are high gamers.

Problem gambling is regarded as a major issue by community agencies, and venue operators in Dandenong have a high awareness of this problem. About 2.4% of residents in Dandenong

are at risk of problem gambling compared to the State average of 1.5%. There was no statistically significant difference between the percentage of 'at risk' residents in Dandenong compared to our other five study regions. Eleven per cent of all Dandenong residents said that they, or a member of their family, had at some time experienced difficulties with excessive gambling, which is in line with the results for our other study regions. More than one in five of those who gamble in Dandenong indicate personal gambling problems, such as money arguments centred on gambling and guilt as a result of their gambling, in the last six months. In Dandenong, very little gambling activity is financed by credit.

During our consultations, the following costs and benefits of gaming were identified.

Benefits

- Venues with gaming machines are more profitable and have been able to finance expansion and upgrading of facilities. For clubs, there has also been the potential to cross-subsidise other activities for club members, whilst generating trading surpluses that can be donated to welfare groups.
- Successful venues provide employment, training and new career paths for young people.
- In some areas, the introduction of EGMs has brought with it significant improvements in the appearance of an area and has injected life back into the streets. However, in other areas, there has been a decline in the retail environment and street amenity, reflecting a shift in the location of economic activity.
- For many people, gaming has become a form of entertainment and a means to get away from the demands of family life and to relax. For others it is an avenue to escape from other social problems, such as loneliness. The resulting change in the overall mix of social and recreational alternatives available for people is seen by some to be of benefit.
- Community support agencies have recognised some benefits associated with the introduction of EGMs, including the ability for venues to provide donations and sponsorship to community groups, clubs and charities and an increase in the number of community support agencies and other health and welfare services funded through gaming taxes.

Costs

- There are substantial costs to some businesses as a result of the introduction of EGMs. Non-EGM venues and sporting clubs become less viable and the control over EGM placements by the two EGM operators can impact on the viability of gaming venues.
- There is a concern that money generated from machine gaming is going outside the region, rather than staying in the local community.
- Eighty per cent of Dandenong residents believe that gaming is a serious social problem that does more harm than good for the community and that gaming problems have become worse in the past three years.

- Community support agencies consider that family breakdowns and relationship problems are major costs of problem gambling. Additionally, problem gamblers tend to be diverting funds away from items such as food, rent and school expenses.

2 Description of the Local Government Area of Dandenong

2.1 Data sources

Data for this profile has been sourced from:

- a range of different government departments and agencies;
- consultations; and
- KPMG surveyed 1,000 residents in six local government areas, of which 167 respondents lived in Dandenong. The survey was conducted in October 1999. The full results of the survey are reported in Supporting Paper No. 1, and the results for Dandenong are attached to this paper.

It should be noted that while percentages have been included in the following tables, the total percentage for a number of tables does not equal one hundred per cent due to rounding.

2.2 The geography

The City of Greater Dandenong is an urbanised Local Government Area and is comprised of the following localities:

- | | |
|--------------------|-------------------|
| ■ Bangholme | ■ Keysborough |
| ■ Cleeland | ■ Lyndale |
| ■ Dandenong | ■ Lyndhurst |
| ■ Dandenong East | ■ Noble Park |
| ■ Dandenong North | ■ Noble Park East |
| ■ Dandenong South | ■ Sandown Park |
| ■ Dunearn | ■ Sandown Village |
| ■ Harrisfield | ■ Springvale |
| ■ Springvale South | |

Dandenong is located 45 kilometres from the Melbourne CBD. Dandenong was formed in December 1994, as a result of the re-amalgamation of the former municipalities of Springvale and Dandenong together with small parts of the former Cities of Berwick and Cranbourne. Figure 2.1 illustrates the location of the Dandenong LGA.

Figure 2.1: Dandenong LGA



3 Demographic profile of Dandenong

3.1 The population

According to the 1996 Census of Population and Housing, the City of Greater Dandenong experienced a decline in population of 0.28% annually for the period between 1991 and 1996, which was against the trend experienced for Victoria as a whole. During the previous 5-year period between 1986 and 1991 the population of Dandenong grew by almost 1% annually which was lower than the State average for the same period of 1.22%.

Population and housing forecasts prepared by the Victorian Department of Infrastructure predict that the resident population of Dandenong will continue to decline at an average annual rate of 0.17% for the period between 1996 and 2001 and 0.15% from 2001 to 2011. Housing stock is anticipated to increase by an average annual rate of 0.22% for the period between 1996 and 2001 and 0.23% from 2001 to 2011, indicating a trend toward smaller household sizes within the City of Greater Dandenong, which is consistent with the trend for Victoria as a whole. Population projections obtained from the Department of Infrastructure for Dandenong, Melbourne and Victoria and are presented in Table 3.1 below.

Table 3.1: Projections of household numbers and estimated resident population

Population and household forecasts (Number of households are number of occupied private dwellings)						
Year	Greater Dandenong		Melbourne		Victoria	
	Population	Households	Population	Households	Population	Households
Actual 1981	124,774	37,359	2,760,098	899,259	3,851,094	1,238,617
1986	126,854	39,686	2,967,338	971,381	4,160,785	1,355,308
1991	133,041	41,566	3,156,220	1,049,110	4,420,298	1,476,047
1996	131,221	45,565	3,241,424	1,199,878	4,539,400	1,699,920
Forecast 2001	130,097	46,067	3,378,880	1,269,054	4,735,710	1,799,383
2011	128,211	47,125	3,621,685	1,399,090	5,092,312	1,990,051
2021	127,604	48,188	3,823,567	1,514,142	5,399,730	2,163,024
Annual change (%)						
1981-1986	0.33	1.22	1.46	1.55	1.56	1.82
1986-1991	0.96	0.93	1.24	1.55	1.22	1.72
1991-1996	-0.28	1.85	0.53	2.72	0.53	2.86
Forecast annual change (%) 1996-2001	-0.17	0.22	0.83	1.13	0.85	1.14
Forecast annual change (%) 2001-2011	-0.15	0.23	0.70	0.98	0.73	1.01
2011-2021	-0.05	0.22	0.54	0.79	0.59	0.84
Annual percentage change measured as a compound growth rate						
Source: Department of Infrastructure 1991 projections. Revised data for 1996 shown						

In summary, the City of Greater Dandenong is a major outer urban centre, which has been experiencing a slowing in growth that is projected to continue in the future.

3.2 Age distribution

Dandenong had a similar age distribution as that of Melbourne and Victoria at the time of the 1996 Census. Over the period 1991 to 1996 there has been some ageing of the resident population of Dandenong - in 1991, 21.9% of the resident population was aged 50 years and over, while in 1996, 25.3% of the resident population was in this age category. This trend is also evident in the Melbourne and Victorian resident populations. Table 3.2 summarises the age distribution for the resident population of Dandenong, Melbourne and Victoria in 1991 and 1996.

Table 3.2: Age structure of Dandenong population, 1991 and 1996

Age group	Greater Dandenong		Melbourne		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
0 - 9	14.0	13.4	14.1	13.7	14.7	14.2
10 - 19	16.7	14.9	14.9	13.6	15.2	14.1
20 - 29	17.6	16.6	17.4	16.6	16.4	15.4
30 - 39	15.5	15.1	16.2	16.3	16.0	15.9
40 - 49	14.3	14.7	13.6	14.5	13.3	14.5
50 - 59	9.4	10.6	9.1	10.0	9.1	10.0
60 - 69	7.1	7.7	7.6	7.3	7.9	7.5
70 +	5.4	7.0	7.1	8.0	7.4	8.4
Population	100.0	100.0	100.0	100.0	100.0	100.0

Source: ABS Census data 1996

3.3 Marital status

At 1996, the marital status of the resident population of Dandenong resembled the profile for Victoria and Melbourne. Relative to Melbourne, Dandenong had a marginally higher proportion of married residents and a marginally lower proportion of residents who had never been married. The trends in the marital status of the population of Dandenong closely resembled the state-wide trend of declining married couples, increasing proportions of people who have never been married and increasing incidents of separations and divorces. The marital status of the resident population of Dandenong, Melbourne and Victoria as at the 1991 Census and 1996 Census is presented in Table 3.3.

Table 3.3: Marital status of Dandenong residents, 1991 and 1996

Status	Greater Dandenong		Melbourne		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
Married	56.1	53.3	55.2	52.5	56.4	53.6
Never Married	30.5	30.8	31.2	32.3	29.9	30.9
Separated	2.9	3.4	2.6	3.1	2.6	3.2
Divorced	4.8	6.1	4.9	5.9	4.7	5.8
Widowed	5.7	6.4	6.1	6.2	6.3	6.6
Total persons	100.0	100.0	100.0	100.0	100.0	100.0

Source: ABS Census data 1996

3.4 Birthplace

The City of Greater Dandenong has a comparatively high level of ethnic diversity with a significant proportion of non-Australian born residents (53.1%) from more than 140 different countries compared with Melbourne (32.7%) and Victoria (27.2%). The majority of overseas born residents are from Vietnam, United Kingdom, Sri Lanka, Cambodia and Italy. From 1991 to 1996, there was a significant increase in the proportion of non-Australian born residents in Dandenong. The proportion of Dandenong residents born in Vietnam increased from 5.7% to 8.2%. The ethnic diversity in Dandenong is partly a consequence of the impact of the Enterprise Migrant Centre in Springvale. The country of birth of the resident population of Dandenong, Melbourne and Victoria as a whole is presented in Table 3.4 for 1991 and 1996.

Table 3.4: Country of birth of Dandenong residents, 1991 and 1996

	Greater Dandenong		Melbourne		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
English-speaking countries	59.6	53.4	76.4	74.8	81.3	79.6
Non-English speaking countries	40.4	46.6	23.6	25.2	18.7	20.4
Six top ranking in Greater Dandenong						
Australia	51.4	46.9	68.2	67.3	73.9	72.8
Vietnam	5.7	8.2	1.5	1.7	1.0	1.3
United Kingdom	5.7	4.4	6.0	5.3	5.5	4.9
Sri Lanka	2.6	3.3	0.6	0.7	0.5	0.5
Cambodia	2.0	3.0	0.2	0.3	0.2	0.2
Italy	2.7	2.4	3.1	2.8	2.5	2.3
All other countries	27.3	28.9	18.0	18.4	14.3	14.7
Not stated	2.5	3.0	2.4	3.4	2.1	3.3
Total persons	100.0	100.0	100.0	100.0	100.0	100.0

Source: ABS Census data 1996

3.5 Religion

The profile of professed religion of Dandenong residents reflects the City's diverse cultural profile. At 1996, only 61.8% of the population were of the Christian faith, compared with 66.0% for Melbourne and 67.6% for Victoria. There was a high incidence of Buddhism, mainly as a result of the high proportion of Vietnamese residents in the City. Over the five years 1991 to 1996, there was a significant increase in the proportion of people following Buddhism in Dandenong, corresponding with a marked reduction in Christians. Table 3.5 presents the top five religions of the resident population of Dandenong residents compared to Victoria.

Table 3.5: Professed religion of Dandenong, 1991 and 1996

Five top ranking in Greater Dandenong	Greater Dandenong		Melbourne		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
Catholic	33.6	31.9	30.5	30.2	29.2	29.0
Anglican	12.7	9.8	16.8	15.0	18.2	16.5
Orthodox	6.5	7.1	6.2	6.2	4.7	4.7
Buddhism	5.0	8.5	1.3	1.9	1.0	1.4
Islam	3.0	4.8	1.6	2.0	1.2	1.5
Total Christian	67.1	61.8	68.9	66.0	70.7	67.6
Total Non-Christian	8.9	14.7	4.6	6.0	3.4	4.5
No Religion	12.9	15.3	15.0	19.0	14.4	18.7
Inadequately Described and Not-Stated	11.1	8.2	11.6	9.0	11.4	9.1
Total persons	100.0	100.0	100.0	100.0	100.0	100.0

Source: ABS Census data 1996

3.6 Mobility

Over the five-year period 1991 to 1996, the resident population of Dandenong exhibited a similar level of mobility as the resident population of Melbourne and the State as a whole. Table 3.6 compares the mobility of the population of Dandenong, Melbourne and Victoria as a whole.

Table 3.6: Mobility of the population (% of population, aged 15 and over), 1996

Usual residence	Greater Dandenong	Melbourne	Victoria
	%	%	%
Same address 5 years prior	54.5	53.7	53.7
Different address 5 years prior	34.0	35.8	35.8
Note stated	11.5	10.5	10.5
Total persons	125,722	3,122,243	4,354,126

Source: ABS Census data 1996

3.7 Household structure

At the time of the 1996 Census, Dandenong had a similar household structure to that of Melbourne and Victoria, with the exception of a marginally higher proportion of households represented by couples and single parents with children, probably reflecting the availability of rental housing (private and public). Over the five year period 1991 to 1996, the household structure of Dandenong residents has changed with a significant decrease in the proportion of households represented by a couple with children (63.8% to 58.9%), offset by a corresponding increase in one parent families (9.8% to 11.3%) and lone person households (5.9% to 7.0%). These trends are generally also reflected in the household structures in Melbourne and Victoria. Table 3.7 provides a comparative summary of the demographic profile by household type and composition for Dandenong, Melbourne and Victoria as at 1991 and 1996.

Table 3.7: Household type and composition, number of persons, 1991 and 1996

	Greater Dandenong		Melbourne		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
One family:						
Couple with children	63.8	58.9	60.9	56.9	60.9	56.6
Couple without children	13.0	13.4	15.5	16.7	16.2	17.6
One parent family	9.8	11.3	9.0	9.7	8.9	9.8
Other one family households	1.2	1.2	1.2	1.3	1.1	1.1
One family households	87.7	84.9	86.6	84.5	87.2	85.1
Two or more families	3.9	5.9	1.8	2.7	1.5	2.3
Lone person households	5.9	7.0	7.6	8.8	7.7	9.0
Group households	2.4	2.3	4.1	3.9	3.6	3.6
Total persons	100.0	100.0	100.0	100.0	100.0	100.0

Source: ABS Census data 1996

3.8 Tenure

There has been a significant increase in the level of home ownership in Dandenong over the period 1991 to 1996, offset by a similar level of reduction in people purchasing their homes. Despite this marked increase in home ownership, Dandenong still has a lower level of home ownership in comparison to Melbourne or Victoria. Conversely, Dandenong has a higher level of rental tenures than either Melbourne or Victoria. The dwelling tenure profile of Dandenong, Melbourne and Victoria is presented in Table 3.8 below.

Table 3.8: Dwelling tenure by type of landlord, 1991 and 1996

Tenure type	Number of persons for each type of dwelling					
	Greater Dandenong		Melbourne		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
Fully owned	33.5	39.4	38.0	41.0	39.0	41.5
Being purchased	35.3	28.2	35.6	32.8	34.8	32.5
Rented (government)	3.9	3.3	3.4	2.8	3.9	3.1
Rented (other)	21.5	23.7	17.4	18.5	16.8	17.9
Other	5.9	5.4	5.6	4.9	5.6	5.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: ABS Census data 1996. In 1996, persons living in manufactured home estates and accommodation for the retired have been excluded for comparability with 1991. The 'Other' category includes 'being occupied free', 'being occupied under a life tenure scheme' and 'other/not-stated'.

3.9 Education

Dandenong residents have lower levels of formal education compared to the Melbourne and Victorian averages. While there were marginal improvements in the general level of education for the resident population from 1991 to 1996, the trends were generally below the increasing levels of education experienced in Melbourne and Victoria. Table 3.9 provides a summary of the level of education attained for Dandenong, Melbourne and Victorian residents in 1991 and 1996.

Table 3.9: Levels of education attainment, 1991 and 1996

Highest qualification obtained	Persons aged 15 years and over					
	Greater Dandenong		Melbourne		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
Higher degree	0.3	0.5	1.2	1.6	1.0	1.3
Postgraduate diploma	0.4	0.6	1.3	1.8	1.2	1.7
Bachelor degree	2.7	4.3	7.1	9.7	6.2	8.4
Undergraduate diploma	2.0	2.0	3.9	3.5	3.9	3.5
Associate diploma	0.8	2.1	1.3	2.8	1.3	2.6
Vocational qualification	11.8	11.2	12.2	12.0	12.5	12.4
No qualification	67.3	65.5	60.7	56.9	61.9	58.3
Not stated	14.7	13.8	12.5	11.8	12.1	11.7
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: ABS Census data 1996

3.10 Household income

Dandenong is predominantly comprised of households earning low to middle levels of income. At the 1996 Census, approximately 37.7% of the City's households earned gross annual incomes of less than \$26,000, compared with 31.6% for Melbourne and 34.9% for Victoria. Correspondingly, the proportion of households in Dandenong earning more than \$52,000 per annum in gross income is significantly less than that for Melbourne and the State average. Table 3.10 provides a comparative summary of gross annual income per household for Dandenong, Melbourne and Victoria as at the 1996 Census.

Table 3.10: Gross annual income per household (\$), 1996

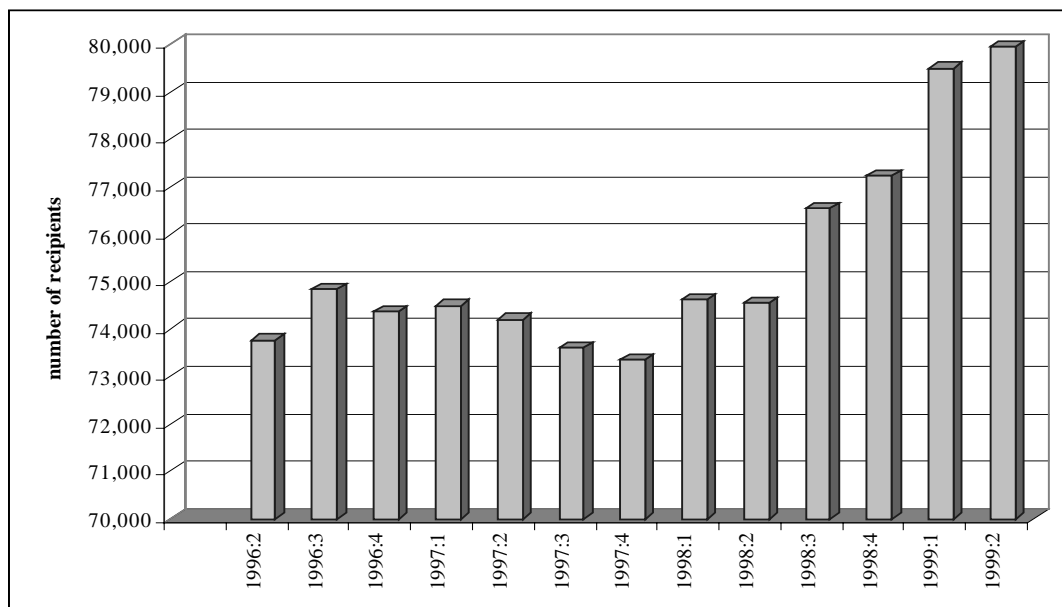
Number of households	Greater Dandenong % of total	Melbourne % of total	Victoria % of total
Negative/nil income	0.7	0.7	0.7
\$52-\$6,239	0.7	0.7	0.8
\$6,240-\$15,599	18.5	15.7	17.5
\$15,600-\$25,999	17.8	14.5	15.9
\$26,000-\$36,399	14.9	13.1	13.5
\$36,400-\$51,999	16.5	16.5	16.1
\$52,000-\$77,999	13.2	15.9	14.5
\$78,000-\$103,999	4.1	6.0	5.2
\$104,000 plus	1.9	5.9	4.8
Partial/incomplete records	11.8	10.9	11.0
Total	100.0	100.0	100.0

Source: ABS Census data 1996

3.11 Social security recipients

Figure 3.1 indicates that the number of social security recipients has risen steadily since the December quarter 1997. This is largely due to increases in the number of claimants for labour market payments and, more recently, parenting allowances.

Figure 3.1: Number of claimants of social security benefits, 1996 to 1999



Source: Centrelink. Some individuals receive multiple payments so a degree of double-counting occurs.

3.12 Vehicle ownership

Vehicle ownership in Dandenong is relatively low with a higher proportion of households with only one vehicle or with no vehicles in 1996. The car ownership profile for Dandenong, Melbourne and Victoria as at 1996 is presented in Table 3.11 below.

Table 3.11: Vehicle ownership, 1996

Vehicles	Households		
	Dandenong %	Melbourne %	Victoria %
No vehicle	12.8	11.2	10.5
One vehicle	39.6	35.6	36.7
Two vehicles	29.6	34.6	35.0
Three or more vehicles	11.9	12.1	12.5
Not stated	6.1	5.5	5.2
Total	100.0	100.0	100.0

Source: ABS Census data96

3.13 Travel to work

The most common method of travelling to work for Dandenong residents as at the 1996 Census was by car as driver, followed by car as passenger. While public transport along the corridor to the City of Melbourne is accessible for residents of Dandenong, it is less accessible across and into nearby regions (crucial since only 44% of Dandenong residents work in their region or in the City of Melbourne). There was a lower proportion of Dandenong residents that worked from home in comparison to Melbourne and the State

average. The following table presents a summary of the method of travel to work for Dandenong, Melbourne and Victoria as at the 1996 Census.

Table 3.12: Mode of travel to work, 1996

Includes multi-mode journeys	Employed persons		
	Dandenong %	Melbourne %	Victoria %
Train	6.4	7.2	5.5
Bus	1.6	1.5	1.3
Tram	0.0	1.6	1.2
Car, as driver	65.3	62.6	61.4
Car, as passenger	8.9	6.0	6.1
Other modes	4.7	5.6	6.8
Worked at home	3.2	4.0	5.7
Did not go to work	7.6	9.8	10.2
Not stated	2.2	1.7	1.8
Total	100.0	100.0	100.0

3.14 Journey to work destination and origin

As at the 1996 Census, the City of Greater Dandenong provided employment for 61,893 people, however, only 16,046 jobs were filled by local residents of Dandenong. The majority of the jobs in Dandenong were filled by residents from the surrounding areas of Casey, Monash, Frankston, Kingston and Knox. Residents of Dandenong work in their own LGA (36%), Monash (15%), Kingston (15%), Melbourne (8%) and a wide range of other municipalities. The following table presents a summary of the origin and destination matrix of the working resident population and working population of Dandenong as at the 1996 Census.

Table 3.13: Journey-to-Work data: Dandenong and rest of Melbourne, 1996

Origin-Destination Matrix Number of workers			
Work in LGA:	Live in Dandenong	Live in LGA:	Work in Dandenong
Greater Dandenong	16,046	Greater Dandenong	16,046
Monash	6,830	Casey	14,005
Kingston	6,641	Monash	4,428
Melbourne	3,661	Frankston	4,383
Knox	1,715	Kingston	4,048
Casey	1,428	Knox	3,451
Glen Eira	1,247	Cardinia	2,167
Stonnington	975	Mornington Peninsula	2,067
Whitehorse	842	Yarra Ranges	1,536
Port Phillip	838	Whitehorse	1,364
Bayside	723	Glen Eira	1,298
Yarra	646	Bayside	976
Frankston	580	Maroondah	906
Boroondara	578	Boroondara	804
Maroondah	313	Stonnington	681
Other	1,664	Other	3,733
Total	44,727	Total	61,893

Source: ABS Census data 1996, Working population profile, Journey-to-Work study areas

3.15 Crime

Table 3.14 gives summary statistics of criminal activity in the Greater Dandenong local government area. The incidence of crime in the region is substantially higher than in Victoria as a whole, when measured as the number of offences reported per thousand residents. From 1995 to 1998, the increase in the number of offences also exceeded the State average growth rate.

Table 3.14: Crime trends: Number of offences reported in Greater Dandenong and Victoria, 1995 to 1998

Year	Greater Dandenong	% growth	Incidents per thousand persons	Victoria	% growth	Incidents per thousand persons
1995	13,652	-	104.4	374,241	-	84.8
1996	15,632	14.5	118.6	399,237	6.7	89.5
1997	16,645	6.5	126.0	404,817	1.4	89.9
1998	17,440	4.8	132.0	413,836	2.2	90.7

Source: Victoria Police

3.16 Summary

In summary, the City of Greater Dandenong has similar demographic characteristics to the rest of metropolitan Melbourne, except for its greater ethnic diversity. Compared to Melbourne, the region does, however, have a higher proportion of couple and single parent families with children, lower educational and income levels, higher receipt of social security benefits, lower levels of home ownership and car ownership and higher rates of crime.

4 The regional economic profile

Dandenong was essentially a country town until World War II, after which time, Australia's post-war boom brought extraordinary growth and development to the Region. The availability of large areas of flat land with water and power infrastructure, plus a regular transport service to Melbourne, attracted large firms moving out from Melbourne's inner urban areas. Post-War European migrants flocked to the Region, which provided employment opportunities. During the 1950s and 1960s Dandenong flourished, as factories, shops, houses and schools rapidly covered the vacant land. During the 1970s and 1980s, the Region continued to grow strongly, while its ethnic diversity continued to flourish. The opening of the Commonwealth Government Enterprise Migrant Centre in Springvale in 1970 had a substantial impact on the region's population, attracting large numbers of migrants from a range of countries. More recently, population growth has slowed.

The City is the major focus for economic development in the south-east region of Victoria and it is a busy regional centre serving Melbourne's largest growth corridor. Greater Dandenong has the largest retail and commercial centre outside of Greater Melbourne. International businesses in the region include companies such as SmithKline Beecham, Nissan, BASF, GMH, Cussons and Yakult.

4.1 Employment and labour force participation

As at December 1999, the labour force participation rate in the City of Greater Dandenong was 64.7%, lower than the State average of 68%. The unemployment rate in Dandenong in December 1999 was 8.2%, higher than the State average of 6.7%. More detailed but dated information on labour force participation and employment is provided in the 1996 Census, and reproduced below in Table 4.1 and Table 4.2. As at June 1996, the City of Greater Dandenong had a higher unemployment rate (14.5%) in comparison to the state level of 9.4%.

Table 4.1: Labour force participation by sex, 1996

Age group Persons 15 years and over	Percentage employed or seeking work			
	Males		Females	
	Dandenong %	Vic %	Dandenong %	Vic %
15-19 years	39.0	43.8	40.5	45.1
20-24 years	79.6	80.8	69.3	74.7
25-34 years	87.0	89.7	60.6	68.0
35-44 years	85.9	89.9	64.3	69.8
45-54 years	82.5	86.0	61.2	67.0
55-64 years	56.4	60.3	23.8	29.9
65 and more years	5.9	10.0	1.8	3.3
All age groups	67.4	70.0	47.6	51.9
Not in the labour force	29.5	27.4	49.5	45.8
Not stated/overseas visitors	3.2	2.9	3.2	2.6
Adult population	100.0	100.0	100.0	100.0

Source: ABS Census data 1996

Table 4.2: Labour force status, 1996

	Males		Females		Persons	
	Dandenong %	Vic %	Dandenong %	Vic %	Dandenong %	Vic %
Full-time employed	69.7	72.6	49.5	47.9	61.2	61.7
Part-time employed	14.2	15.4	32.7	41.2	21.9	26.7
Employed (not-stated)	2.3	2.0	2.4	2.2	2.4	2.1
Unemployed	13.7	9.9	15.5	8.8	14.5	9.4

Source: ABS Census data1996

4.2 Industry of employment

Comparing the 1991 and 1996 Census results, there was a decrease in the number of employed persons residing in the City of Greater Dandenong from 52,386 in 1991 to 49,092 in 1996. At the 1996 Census, manufacturing remained the principal sector for employment for the Dandenong population (32.0%). There was a significant increase in the proportion of residents employed in this sector from 1991 to 1996. Other significant employment sectors for the City include retail trade (13.4%) and wholesale trade (7.4%). The proportion of residents employed in retail trade increased marginally from 1991 to 1996, in line with trends across Victoria. Employment increased significantly in the property and business services sector from 1991 to 1996, in line with the general increase experienced across Victoria. Employment decreased in the following sectors:

- Electricity, gas and water supply;
- Wholesale trade;
- Transport and storage;
- Finance and insurance; and
- Government administration and defence.

The following table provides a summary of the industry of employment profile for Dandenong and Victoria as at 1991 and 1996.

Table 4.3: Industry of employment of Dandenong residents, 1991 and 1996

Industry	Greater Dandenong		Victoria	
	1991 %	1996 %	1991 %	1996 %
Agriculture, Forestry and Fishing	0.8	1.1	3.9	3.9
Mining	0.1	0.1	0.3	0.3
Manufacturing	28.7	32.0	16.0	16.3
Electricity, Gas and Water Supply	1.0	0.4	1.4	0.7
Construction	4.6	5.3	5.4	5.9
Wholesale Trade	7.6	7.4	6.2	6.1
Retail Trade	13.1	13.4	13.4	13.8
Accommodation, Cafes and Restaurants	2.1	2.6	3.3	3.8
Transport and Storage	3.9	3.7	4.1	3.9
Communication Services	2.4	2.7	1.9	2.3
Finance and Insurance	4.5	3.3	4.7	4.1
Property and Business Services	4.7	6.7	7.0	9.9
Government Administration and Defence	3.4	2.8	5.2	3.8
Education	3.5	3.7	6.8	7.0
Health and Community Services	5.2	6.0	8.5	9.3
Cultural and Recreational Services	1.0	1.4	1.7	2.4
Personal and Other Services	2.7	2.9	3.1	3.5
Non-classifiable economic units	0.6	2.2	0.4	1.6
Not stated	10.1	2.2	6.8	1.6
Total	100.0	100.0	100.0	100.0
Source: ABS Census data 1996				

4.3 Employment by occupation

Table 4.4 provides a summary of employment by occupation for Dandenong, Melbourne and Victoria as a whole for 1991 and 1996.

Table 4.4: Employment by occupation - 1991 and 1996

Occupation	Greater Dandenong		Melbourne		Victoria	
	1991 %	1996 %	1991 %	1996 %	1991 %	1996 %
Managers and Administrators	4.4	4.0	8.2	7.8	10.0	9.5
Professionals	7.6	8.5	16.6	19.1	15.6	17.8
Associate Professionals	5.3	7.7	7.5	11.4	7.5	11.4
Tradespersons and Related Workers	16.6	16.0	13.4	12.6	13.7	12.9
Advanced Clerical and Service Workers	5.8	3.3	7.2	4.7	6.5	4.3
Intermediate Clerical, Sales and Service Workers	11.7	15.1	12.4	16.2	11.6	15.4
Intermediate Production and Transport Workers	14.7	18.1	8.6	8.8	8.7	8.9
Elementary Clerical, Sales and Service Workers	10.9	9.2	11.1	9.0	10.8	8.9
Labourers and Related Workers	14.2	14.8	8.4	7.6	8.8	8.3
Not stated/inadequately described	8.8	3.5	6.9	2.6	6.8	2.7
Total employment	100.0	100.0	100.0	100.0	100.0	100.0
Source: ABS Census data 1996						

At 1996, the City of Greater Dandenong was comprised of a comparatively higher proportion of residents employed in trades, intermediate production and transport, and labouring, compared with Melbourne and Victoria. Correspondingly, there were lower proportions of residents employed in managerial and professional roles. While the proportion of professional and associate professionals increased from 1991 to 1996, the trends were generally in line with or below the trends recorded across Victoria. The significant increase in the proportions of residents employed in labour-related and production roles over the period were not recorded in Victoria and Melbourne.

4.4 Business by industry and size

According to the September 1998 ABS Business Register, the City of Greater Dandenong had a total of 7,165 businesses located within the local government area. Approximately 91% of these of businesses were classified as being small with the majority of businesses operating within the manufacturing, retail trade, and property and business services industries. Table 4.5 provides an overall summary of the nature of businesses that are located within the City of Greater Dandenong as at September 1998.

Table 4.5: The structure of business in Dandenong: Distribution of businesses by industry and firm size, 1998

Industry to which business is assigned <i>ANZSIC Division</i>	Number of business locations by firm size			
	Small	Medium	Large	Total
Agriculture forestry and fishing	76	2	0	78
Mining	4	0	0	4
Food beverage & tobacco manufacturing	66	5	1	72
Textile clothing footwear manufacturing	299	4	0	303
Wood & paper product manufacturing	86	4	0	90
Printing publishing & recorded media	68	2	0	70
Petroleum coal & chemical manufacturing	149	10	0	159
Non-metallic mineral product manufacturing	36	4	0	40
Metal product manufacturing	271	5	0	276
Machinery & equipment manufacturing	250	15	0	265
Other manufacturing	172	1	0	173
Manufacturing	1,397	50	1	1,448
Electricity gas and water supply	5	1	1	7
Construction	731	28	2	761
Wholesale trade	696	67	8	771
Food retailing	310	24	6	340
Personal & household good retailing	546	22	3	571
Motor vehicle retailing & services	468	15	2	485
Retail trade	1,324	61	11	1,396
Accommodation cafes and restaurants	118	26	0	144
Transport and storage	298	14	5	317
Communication services	36	2	2	40
Finance and insurance	193	13	0	206
Property and business services	848	27	10	885
Government administration and defence	17	8	5	30
Education	85	43	5	133
Health and community services	471	25	6	502
Cultural and recreational services	86	18	2	106
Personal and other services	318	14	5	337
All total all industries	6,494	558	113	7,165

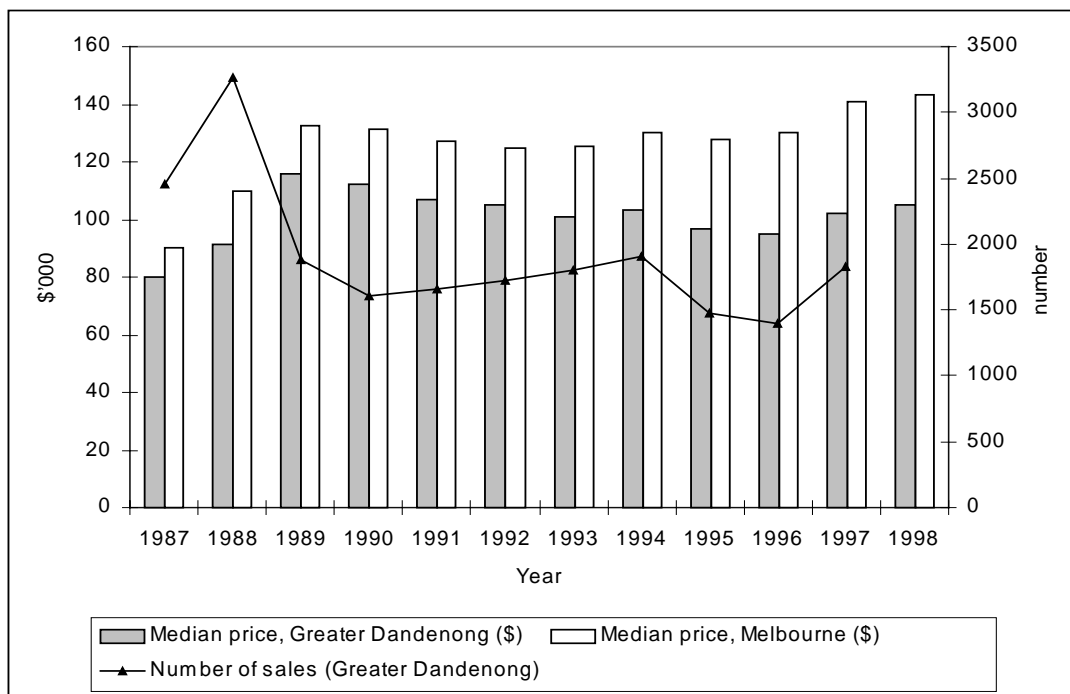
Source: ABS Business register. The ANZSIC industry classification is used. Most industries are shown at the divisional level (one-digit). However manufacturing and retailing industries are presented also at the sub-divisional (two-digit) level. The definition of business size is as follows: Small business, <20 employees; Medium-sized business, 20-99 employees; Large business, 100+ employees.. However, for manufacturing industry: Small business = <100 employees; Medium-sized business = 100-499 employees; Large business = 500+ employees.

4.5 House sales and prices

Figure 4.1 shows that the number of house sales in Greater Dandenong peaked in the late 1980s and then fell sharply in the early 1990s, before recovering modestly in the latter part of the decade. The high volume of transactions in 1988, in part reflected the relocation of businesses, and therefore employees and their families, to Greater Dandenong. Insurance companies were part of the decentralisation phenomenon – moving away from the City of Melbourne. The property market fell during the 1990s recession, but has since rebounded to some degree. There are major housing developments in suburbs such as Hallam, Cranbourne, Berwick and Pakenham, with younger buyers seeming to favour the newer dwelling stock over the old. One obvious reason for this is that the new houses (and especially project homes) are highly competitively priced and come with attractive financing options. The availability of affordable housing in nearby localities explains why average

house prices in the region are still somewhat below 1980s levels. Dandenong prices also lag those of metropolitan Melbourne, and the gap has widened in recent years.

Figure 4.1: Median house prices, Greater Dandenong and Melbourne, 1987 to 1998



Source: Land Victoria, 1997-98

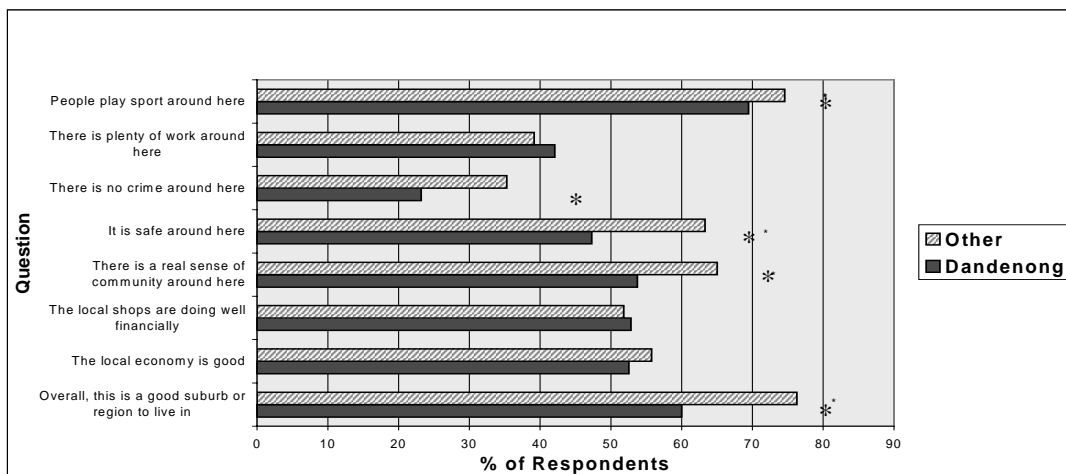
4.6 Community perceptions of the region

In our survey of 167 adults living in the City of Greater Dandenong, conducted in October 1999, we asked questions about residents' opinions of their region. While the sample size is sufficiently large to enable us to draw conclusions about Dandenong, it does not allow us to draw statistically significant conclusions about the differences between Dandenong and the other regions surveyed for many of the survey questions¹. As a result, comparisons between the City of Dandenong and other regions can only be made where differences are statistically significant, and have been denoted by an asterisk (*) on the relevant graph.

While 60% of Dandenong residents have generally a favourable view of their City, this is considerably less than the 75% average in other regions. Figure 4.2 indicates that the major negative differences between Dandenong and other regions relate to safety, crime and the sense of community. The list of these factors is somewhat balanced by the fact that the majority of Dandenong respondents perceive that local shops and the local economy are doing well.

¹ The regions surveyed were the local government areas of Mildura, Geelong, Wellington, Maribymong, Moreland and Dandenong. KPMG surveyed about 167 adults in each of these regions.

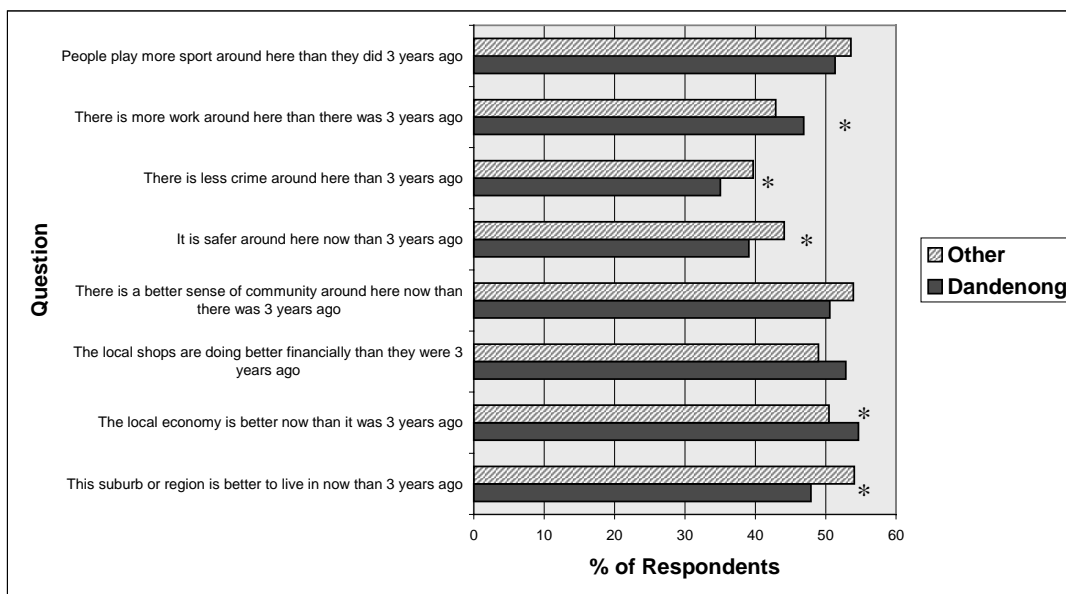
Figure 4.2: Opinion of Dandenong



(*) Statistically significant difference between Dandenong and the average of the other regions.

There is a general consensus amongst Dandenong residents that the suburb has not improved over the last three years. Fewer Dandenong respondents believe that there has been improvements in safety and crime over the last three years when compared to the perceptions of respondents in other regions. However, Dandenong residents consider that the local economy has improved. The results compared to other regions are set out in Figure 4.3.

Figure 4.3: Opinion of Dandenong compared to three years ago



(*) Statistically significant difference between Dandenong and the average of the other regions.

In summary, about half the people of Dandenong believe their economy is doing well and 60% believe the suburb is good to live in. However, more than half of Dandenong residents have concerns about safety and crime. Only half or less believe that it is a better place to live than three years ago. In general, Dandenong respondents are less positive and less satisfied about their region, than the respondents in the other study regions.

5 Participation in gaming in Dandenong

5.1 Gambling defined

The Productivity Commission² suggests that the following characteristics distinguish gambling from other, apparently similar activities:

- as a group, gamblers necessarily lose money as a result of the activity, because the total “prize” is equal to the accumulated stakes of punters, less taxes to government and profits and costs for operators; and
- gambling is typically presented as a form of entertainment.

Gambling is the (lawful) placement of a wager or bet on the outcome of a future uncertain event. It is treated as an activity than can be clearly divided into two distinct areas – **racing** related and **gaming** related. Where the word *gambling* is referred to in this publication, it is intended to imply the total of racing and gaming activities.³

5.2 EGMs and venues

The supply of EGMs and venues with EGMs in Dandenong and Victoria is presented in Table 5.1.

Table 5.1: EGMs and gaming venues in Dandenong and Victoria, 1992 to 1999

Dandenong	Sep-92	Jun-93	Jun-94	Jun-95	Jun-96	Jun-97	Jun-98	Jun-99	Dec-99	AAG %
EGMs	140	697	742	922	998	1,129	1,156	1,154	1,194	
EGM Growth %	n/a	397.9	6.5	24.3	8.2	13.1	2.4	-0.2	3.5	11%
Venues	2	12	13	14	14	15	15	15	16	
Venue Growth %	n/a	500.0	8.3	7.7	0.0	7.1	0.0	0.0	6.7	5.1%
Average No. of EGMs per venue	70.0	58.1	57.1	65.9	71.3	75.3	77.1	76.9	74.6	
Victoria	Sep-92	Jun-93	Jun-94	Jun-95	Jun-96	Jun-97	Jun-98	Jun-99		
EGMs	3,929	13,661	17,537	21,268	23,478	25,962	26,965	27,811	27,208	
EGM Growth %	n/a	247.7	28.4	21.3	10.4	10.6	3.9	3.1	-2.2	15.2%
Venues	59	251	365	468	521	554	559	573	556	
Venue Growth %	n/a	325.4	45.4	28.2	11.3	6.3	0.9	2.5	3.0	18.7%
Average No. EGMs per venue	66.6	54.4	47.6	45.4	45.1	46.9	48.2	48.5	48.9	

Source: VCGA AAG = average annual growth (using June 1993 base)

The number of EGMs and venues with EGMs in Dandenong has demonstrated average annual growth rates of 11% and 5.1% respectively since 1993. Growth for Victoria across the same time period was 15.2% and 18.7% respectively.

The average number of EGMs per venue in Dandenong has consistently been above the Victorian average since September 1992. The average number of EGMs per venue has

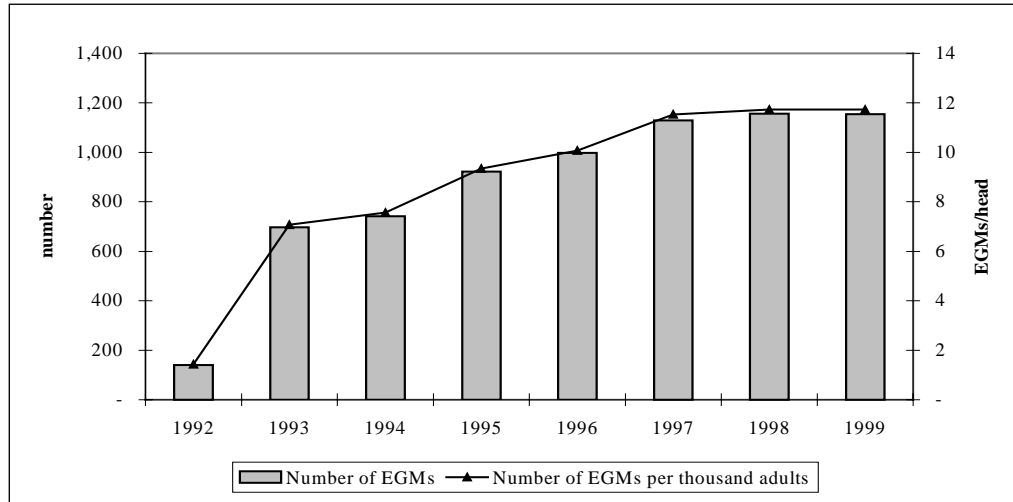
² Productivity Commission (1999), *Final Report*, Productivity Commission, Melbourne.

³ Tasmanian Gaming Commission, *Australian Gaming Statistics 1972-73 to 1997-98*, page 4

increased from a low of 57.1 machines in 1994 to 74.6 machines in December 1999, compared to 48.9 machines per venue for Victoria as a whole.

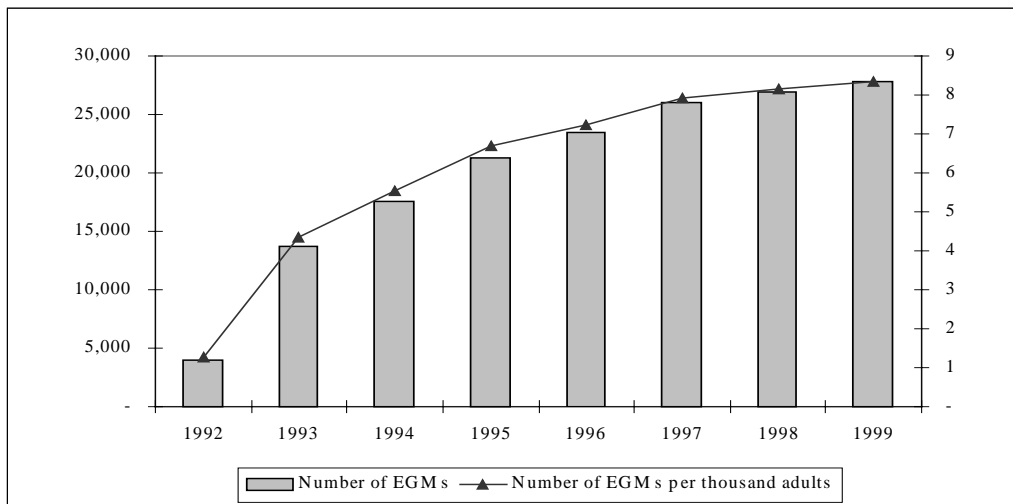
The number of EGMs per 1,000 adults in Dandenong increased from 1.43 in 1992 to 11.73 in June 1999. Figure 5.1 illustrates the growth in EGMs and the number of EGMs per thousand adults in Dandenong. EGM Density in Dandenong is well above the density for Victoria as a whole (1.26 in 1992 and 8.6 in 1999), as shown in Figure 5.2.

Figure 5.1: EGM density in Dandenong (EGMs/'000 adults), 1992 to 1999



Source: VCGA

Figure 5.2: EGM density in Victoria (EGMs/'000 adults), 1992 to 1999



Source: VCGA

As at 31 December 1999, Dandenong had 16 gaming venues licensed to offer 1,194 EGMs of which 6 venues were hotels and 10 were clubs. The following map illustrates the location of each of these venues within the City of Greater Dandenong.

Figure 5.3: Venues in Dandenong, December 1999

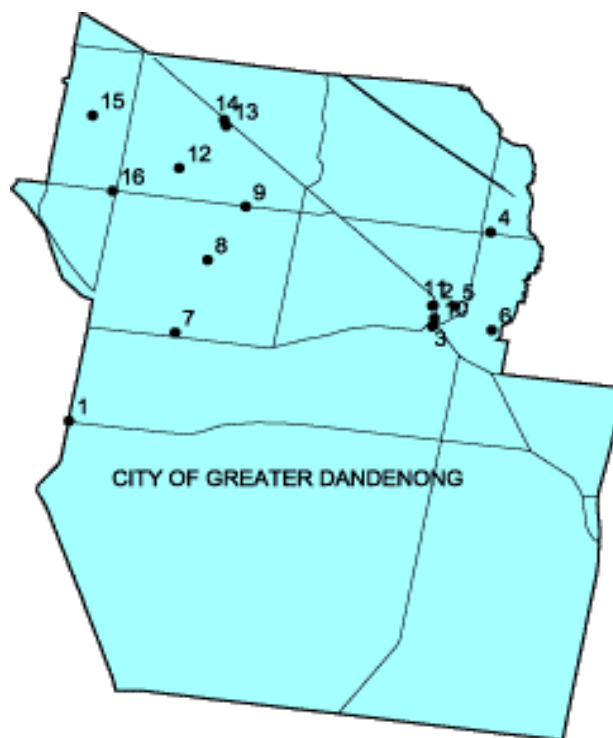


Table 5.2: Venue Type, December 1999

Venue	Venue Type	Address	Operator
1 Aces Town And Country Club	Club	Keysborough	Tabcorp
2 Albion Hotel	Hotel	Dandenong	Tattersalls
3 Club Grand	Club	Dandenong	Tattersalls
4 Dandenong Club	Club	Dandenong	Tattersalls
5 Dandenong RSL Club	Club	Dandenong	Tattersalls
6 Dandenong Workers Social Club	Club	Dandenong	Tattersalls
7 Keysborough Hotel	Hotel	Keysborough	Tabcorp
8 Noble Park Football Social Club Ltd	Club	Noble Park	Tattersalls
9 Noble Park RSL	Club	Noble Park	Tattersalls
10 Old Dandy Inn	Hotel	Dandenong	Tabcorp
11 Players Hotel	Hotel	Dandenong	Tabcorp
12 Sandown Greyhound Racing Club	Club	Lightwood Road	Tabcorp
13 Sandown Park Hotel	Hotel	Noble Park	Tattersalls
14 Sandown Racecourse	Club	Springvale	Tabcorp
15 Springvale RSL Club	Club	Springvale	Tattersalls
16 Waltzing Matilda Hotel	Hotel	Springvale	Tabcorp

Source: VCGA

The supply of Hotel EGMs represents 40% of the total number of EGMs in Dandenong with Club EGMs accounting for 60%. The average size of an EGM installation for Hotels and Clubs was 72 and 80 respectively as at June 1999.

The following table illustrates the supply of EGMs by venue in Dandenong and their respective share of either hotel or club EGM supply and the total supply of EGMs as at 30 December 1999.

Table 5.3: Gaming venue details in December, 1999

Venue	EGMs	% Hotel EGMs	% Total EGMs
Sandown Park Hotel	100	21%	8%
Waltzing Matilda Hotel	100	21%	8%
Keysborough Hotel	103	22%	9%
Albion Hotel	50	11%	4%
Club Grand	50	11%	4%
Old Dandy Inn	35	7%	3%
Players Hotel	35	7%	3%
TOTAL Hotels	473	100%	40%
Venue	EGMs	% Club EGMs	% Total EGMs
Aces Town And Country Club	105	15%	9%
Sandown Greyhound Racing Club	105	15%	9%
Sandown Racecourse	105	15%	9%
Dandenong Club	100	14%	8%
Dandenong Workers Social Club	100	14%	8%
Dandenong RSL Club	70	10%	6%
Noble Park Football Social Club Ltd	51	7%	4%
Springvale RSL Club	50	7%	4%
Noble Park RSL	35	5%	3%
TOTAL Clubs	721	100%	60%
GRAND TOTAL	1,194		100%
Source: VCGA			

In summary, the City of Greater Dandenong has a comparatively high level of EGMs per head, with a high concentration of EGMs per gaming venue, being more concentrated in clubs than in hotels. Over recent years, the numbers of machines and venues has been static.

5.3 Gaming expenditure

Based on VCGA figures, expenditure on gaming in Dandenong has consistently increased from \$13.63M in 1992/1993 to \$85.59M in 1998/1999. During 1998/1999, Dandenong's expenditure on gaming was 72% higher than the average for metropolitan Local Government Areas (LGA), with this trend being observed across all seven years of data collection. In 1998/1999, Dandenong's expenditure on gaming per adult (\$868.38) was 54% higher than the State average (\$562.56). This trend was also observed across all seven years of data collection. Expenditure on gaming in Dandenong is summarised in the table below.

Table 5.4: Expenditure on gaming in Dandenong 1992 to 1999

	92-93	93-94	94-95	95-96	96-97	97-98	98-99
Total expenditure - Dandenong	\$13,631,707	\$35,900,348	\$48,128,036	\$61,128,571	\$65,662,018	\$76,404,074	\$85,590,514
Total Expenditure – Metropolitan *	\$211,319,751	\$551,431,696	\$745,524,325	\$963,832,773	\$1,131,288,009	\$1,306,707,971	\$1,542,948,218
Average Expenditure per Metropolitan LGA	\$6,816,766	\$17,788,119	\$24,049,171	\$31,091,379	\$36,493,161	\$42,151,870	\$49,772,523
Total Expenditure - Non Metropolitan **	\$43,309,135	\$131,167,765	\$207,627,542	\$281,533,049	\$325,195,095	\$362,925,551	\$411,322,997
Average Expenditure per Non Metropolitan LGA	\$921,470	\$2,790,803	\$4,417,607	\$5,990,064	\$6,919,044	\$7,721,820	\$8,751,553
Total – Victoria	\$254,628,886	\$682,599,461	\$953,151,867	\$1,245,365,822	\$1,456,483,104	\$1,669,633,522	\$1,954,271,215
Average Expenditure per Victorian LGA	\$3,264,472	\$8,751,275	\$12,219,895	\$15,966,228	\$18,672,860	\$21,405,557	\$25,054,759
Adult Population – Dandenong #	98,234	98,551	98,192	98,766	99,142	97,917	98,564
Expenditure per adult - Dandenong	\$139	\$364	\$490	\$619	\$662	\$780	\$868
% increase/decrease - Dandenong##	n/a	163%	35%	26%	7%	18%	11%
Adult Population –Victoria #	3,293,135	3,318,245	3,343,108	3,373,447	3,408,503	3,446,886	3,473,879
Expenditure per adult – Victoria	\$77	\$205	\$285	\$369	\$427	\$484	\$562
% increase/decrease -State##	n/a	166%	39%	29%	16%	13%	16%
\$ difference per adult +	\$61	\$158	\$205	\$249	\$234	\$295	\$305
% difference per adult ++	79%	77%	72%	68%	55%	61%	54%

Source: VCGA

* 31 Metropolitan LGAs (defined as all LGAs in the Melbourne Statistical Division)

** 47 Non-metropolitan LGAs (defined as all LGAs not part of the Melbourne Statistical Division)

Population defined as the number of adults over the age of 18. (Source VCGA figures as at June of each year except for 1992/1993 which represents population as at September.)

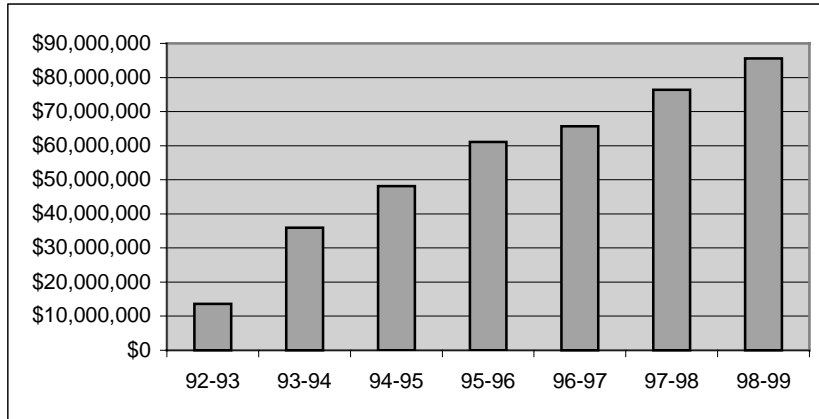
Increase/decrease relative to previous year's gaming expenditure

+ Difference between Dandenong LGA and State per adult expenditure levels. A positive figure indicates that gaming expenditure per adult in Dandenong is above the State average.

++ Percentage difference between Dandenong and State per adult expenditure levels

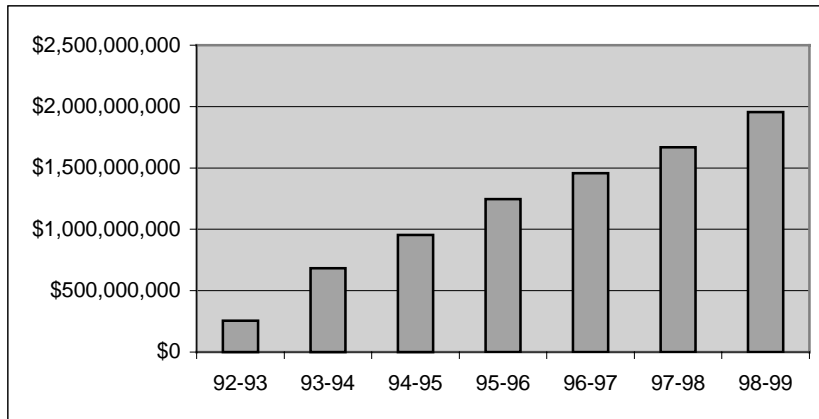
During the period 1992-1999, expenditure on gaming increased for both Dandenong and the State as a whole. These findings are presented graphically below.

Figure 5.4: Expenditure on gaming for Dandenong, 1992-1999



Source: VCGA

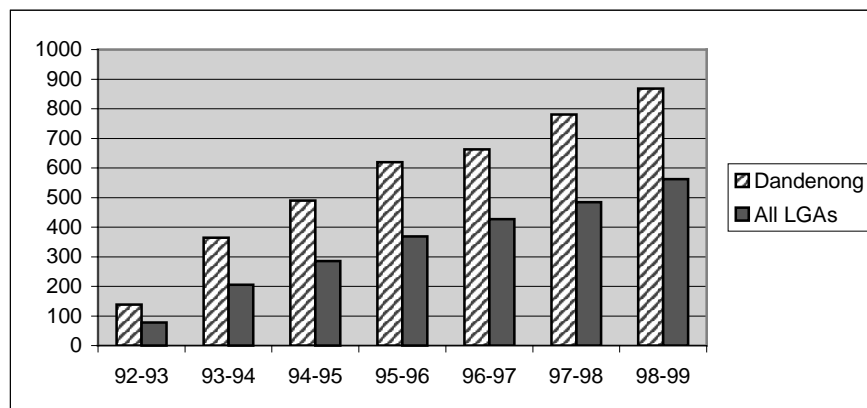
Figure 5.5: Expenditure on gaming for Victoria, 1992-1999



Source: VCGA

In comparing average expenditure by adults over the age of 18 years in Dandenong against that of adults across the State (all LGAs), we found that the average amount spent on gaming was consistently higher in Dandenong than the State average across the entire period of data collection. This comparison is presented in Figure 5.6.

Figure 5.6: Gaming expenditure per adult (\$) – Dandenong and Victoria, 1992-1999



Source: VCGA

Over the seven years of data collection, the number of EGMs in Dandenong increased from 697 in 1992/1993 to 1,154 in 1998/1999. During the same period average expenditure per EGM increased from \$19,557 in 1992/1993 to \$74,168 in 1998/1999. These figures are summarised in Table 5.5.

Table 5.5: Expenditure, number of EGMs and average expenditure per EGM, 1992-1999

	92-93	93-94	94-95	95-96	96-97	97-98	98-99
Expenditure	\$13,631,707	\$35,900,348	\$48,128,036	\$61,128,571	\$65,662,018	\$76,404,074	\$85,590,514
EGMs	697	742	922	998	1,129	1,156	1,154
Av. Exp/EGM	\$19,557	\$48,383	\$52,199	\$61,251	\$58,159	\$66,093	\$74,168

Source: VCGA

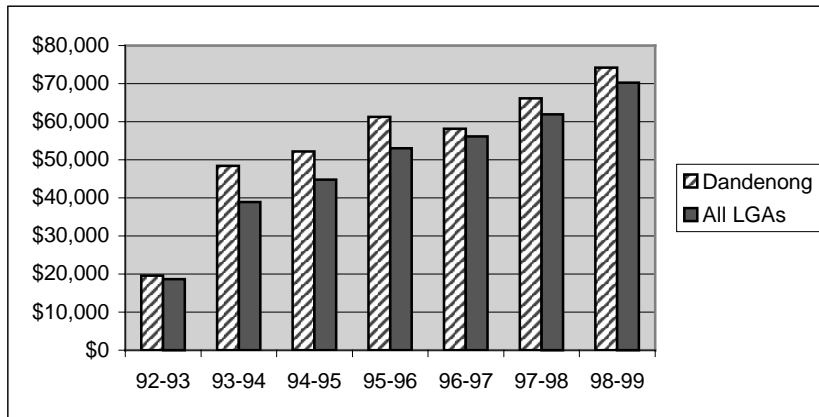
Comparing expenditure per EGM in Dandenong against expenditure per EGM across the State, expenditure in Dandenong has consistently been higher (See Table 5.6).

Table 5.6: Average expenditure per EGM, 1992-1999

	92-93	93-94	94-95	95-96	96-97	97-98	98-99
Dandenong - Av. Exp/EGM	\$19,558	\$48,383	\$52,200	\$61,251	\$58,159	\$66,093	\$74,169
Victoria - Av. Exp/EGM	\$18,639	\$38,923	\$44,816	\$53,044	\$56,101	\$61,919	\$70,270
Dandenong - % change	n/a	147%	8%	17%	-5%	14%	12%
Victoria - % change	n/a	109%	15%	18%	6%	10%	13%

Source: VCGA

Figure 5.7: Average expenditure per EGM, 1992-1999

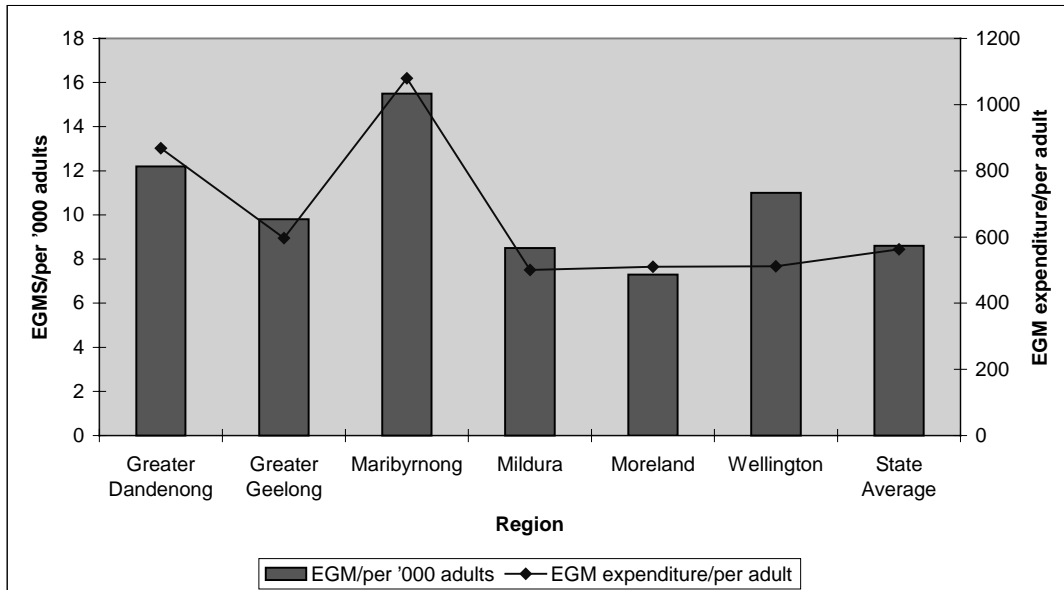


Source VCGA

5.4 Gaming: comparison between Dandenong and other regions

Figure 5.8 compares the number of EGMs and EGM expenditure, per thousand adults between Dandenong, the other study regions, and the State average. These measures indicate that the level of gaming in Dandenong is above the State average and second highest (after Maribyrnong) of the six regions in our study.

Figure 5.8: Number of EGMs per thousand adults and EGM expenditure per adult, 1999



5.5 Who gambles and frequency of gambling?

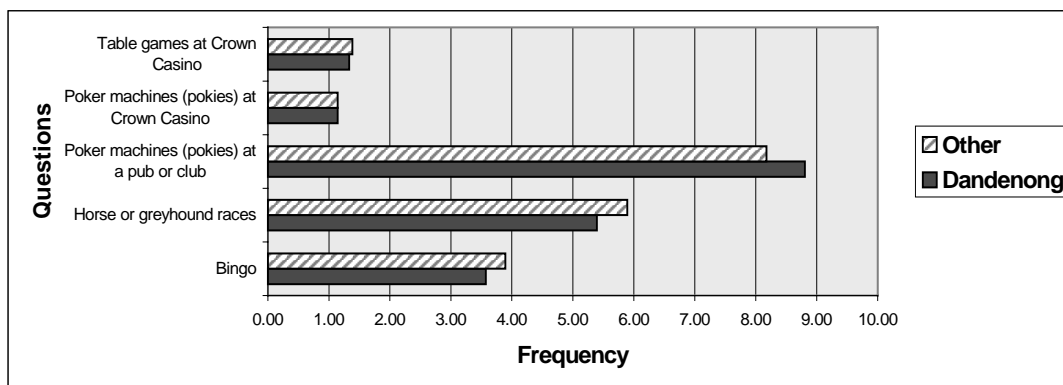
Our understanding of the profile of residents of the City of Greater Dandenong who use EGMs is drawn from:

- our survey of 167 adults living in the City of Greater Dandenong, conducted in October 1999; and
- opinions expressed during our consultations by venues, community groups and in public forums.

Of the 167 people surveyed in the Dandenong region, almost 53% participated in gambling activities in the last six months, compared to the 'Patterns' Survey finding that 75% of Victorians have gambled in the last 12 months.⁴

Figure 5.9 details the frequency of gambling among the Dandenong respondents. The most popular gambling activity is playing the poker machines at a pub or club. Dandenong respondents participate in this almost 8.8 times a year. Greyhound or horse races is the next most common activity, and the least is playing the poker machines at the Crown Casino.

Figure 5.9: Frequency of gambling, Dandenong



(There is no statistically significant difference between Dandenong and other regions for these questions.)

In our consultations, many gaming venue operators indicated that they had an older clientele, with the majority being women over 45 years of age. A medium sized gaming venue commented that its clientele generally comprised older members of the local area, predominantly women aged 50 years and older, while younger patrons tended to frequent the facility during weekends. One venue operator indicated that more people are gaming locally and are spending more time on this form of activity, frequenting several competing venues, while at the same time fewer people are going to the casino. Several venues also indicated that they had a small percentage of regulars and these seldom visited the casino, and those who do so are more likely to be younger. Some venue operators reported a decline in participation rates outside school hours and school holidays, suggesting that a proportion of venue patrons have school aged children.

⁴ The full title of the 'Patterns' Survey is the "Sixth Survey of Community Gambling Patterns and Perceptions", April 1999, conducted by Roy Morgan Research for the Victorian Casino and Gaming Authority.

Community agencies and participants at the public meeting suggested that gamblers come from different socio-economic backgrounds. However, the perception was that the people from a higher socio-economic class tend to go to the casino, while lower socio-economic groups predominantly gamble at local venues. It was noted that the Vietnamese community are attracted to gambling, with a majority of males participating, and, whilst female participation is lower, it is increasing.

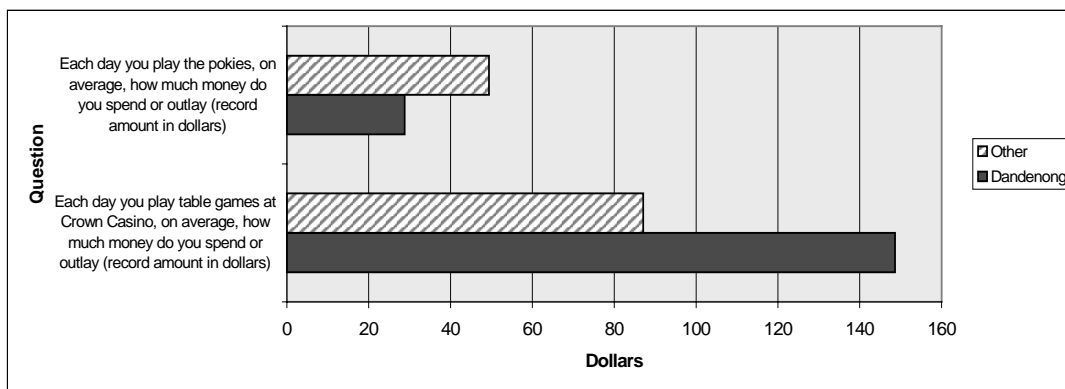
5.6 Gamblers in our survey

In our survey, gamblers are defined as those people who had participated in gambling in the last six months. They make up 53% of Dandenong residents. We asked this sub-sample more detailed questions about their gaming behaviour (see sections 5.7 to 5.11), and also asked about their gambling behaviour to check for the prevalence of problem gambling (see section 5.12).

5.7 Time and money spent on gaming

Dandenong gamers spend on average \$30 per daily visit at the pokies. While Dandenong gamers patronise Crown Casino less frequently than local venues, on average they spend almost five times the amount of money on gaming activities at the Casino than elsewhere. (Note that respondents who are patrons at Crown Casino were answering with respect to table games and not pokies).

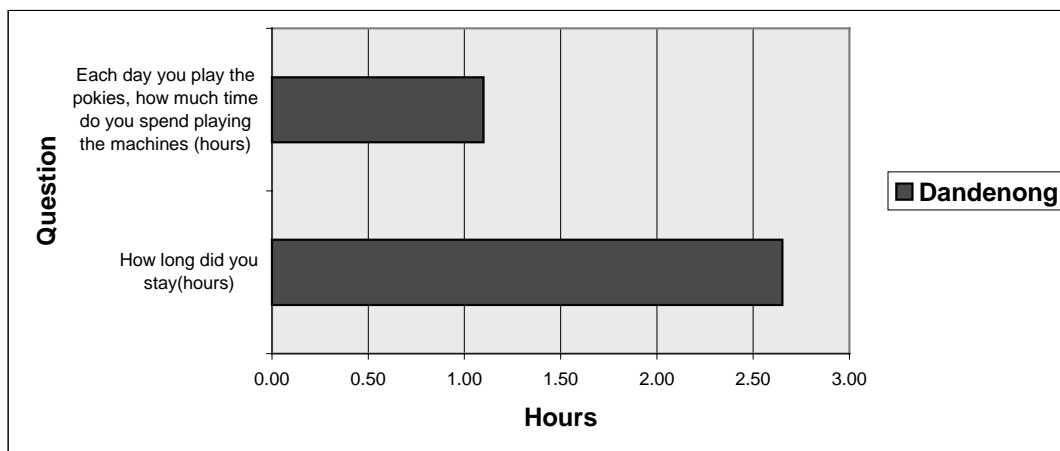
Figure 5.10: Money spent on gaming, Dandenong



(There is no statistically significant difference between Dandenong and other regions for these questions.)

Our survey indicates that Dandenong gamers spend less than half the time in gaming venues playing pokies. This suggests that gamers go to gaming venues for social reasons and a broad entertainment experience, of which gaming is one component.

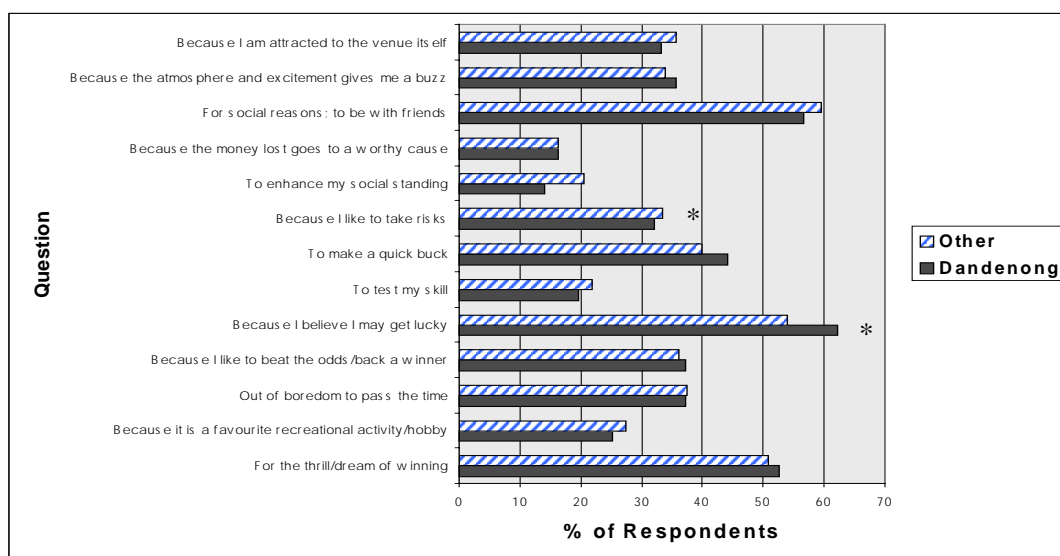
Figure 5.11: Time spent at Venue, Dandenong



5.8 Reasons for gaming

Our survey indicates that in Dandenong the main reason respondents play poker machines is the prospect of having a lucky win. This factor is more pronounced than in the other regions. The second most popular reason was described as being ‘for social reasons; to be with friends’. Fewer gamblers in the Dandenong region play pokies for reasons of social standing than in other regions, although this element is still a major factor. Figure 5.12 indicates that in Dandenong the thrill/dream of winning, making a “quick buck” and the attraction of the venue itself are major influences in gamblers choosing to play poker machines. In addition, the excitement and atmosphere as well as the element of risk associated with playing attracts a significant number of respondents to poker machines.

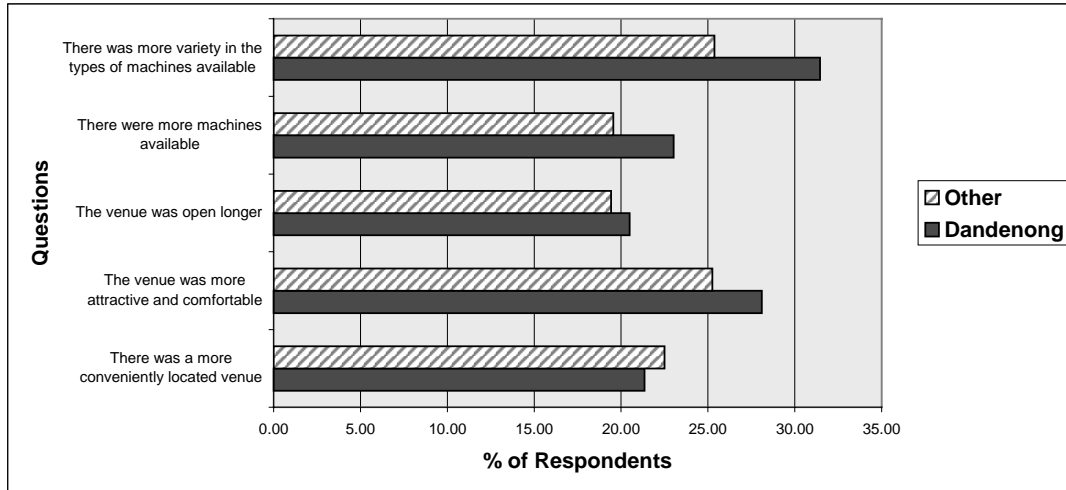
Figure 5.12: Reasons for gaming, Dandenong



(*) Statistically significant difference between Dandenong and the average of the other regions.

Gamers were asked what would make them game more. Overall most gamers indicated that the factors we suggested would not make them game more. While the variety of machines available is a minor reason for the choice of gaming venue, it featured as the main factor, relative to the others suggested, contributing to people gaming more. Venue attractiveness and ambience, the quantity of machines available, extended operating hours of venues and the convenient location of venues were considered as minor factors for gaming more.

Figure 5.13: Factors contributing to gaming more, Dandenong

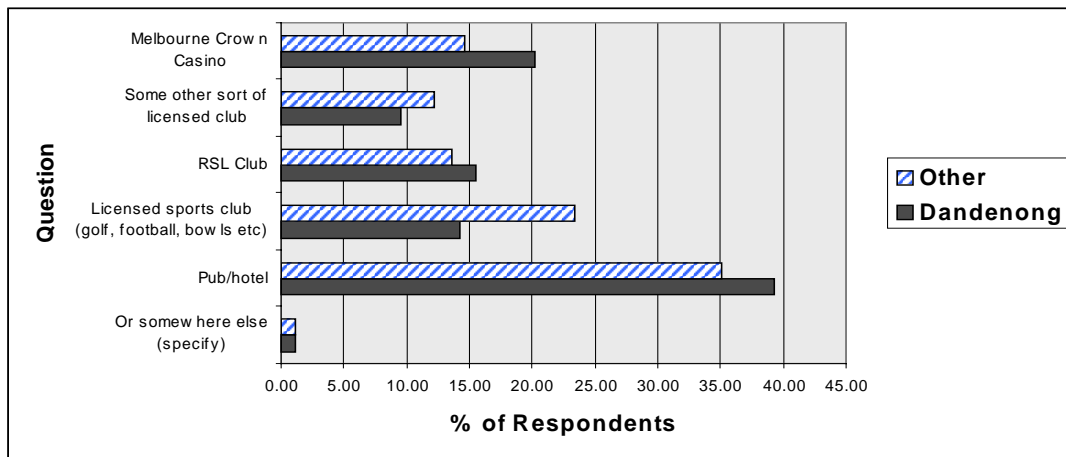


(There is no statistically significant difference between Dandenong and other regions for these questions.)

5.9 Venues at which EGMs are played

The most popular venue among poker machine players is a pub or hotel. Over 45% of Dandenong respondents chose this option, with the next most popular being Melbourne Crown Casino.

Figure 5.14: Venue at which EGMs are played, Dandenong

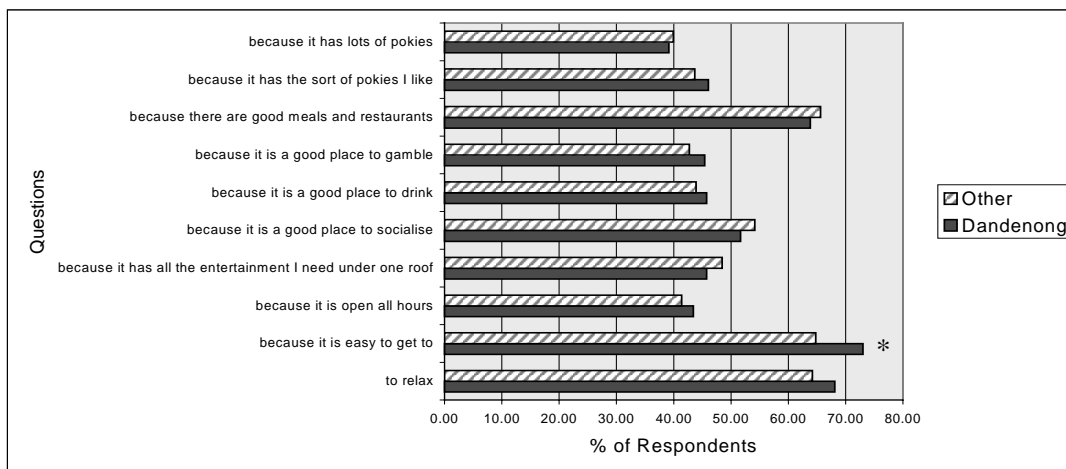


(There is no statistically significant difference between Dandenong and other regions for these questions.)

Our survey found that most gamers game locally. Gamblers from the Dandenong region travel on average 2km to gaming venues, which is slightly less than the 2.6km travelled by those gamers residing in our five other study regions. The majority of gamers in Dandenong depart from home to get to the gaming venue.

In our survey, between 65% and 74% of gamblers in Dandenong choose gaming venues on the basis of proximity, to relax and because there are good meals. Our findings indicate that Dandenong gamers are more inclined to patronise a venue because it is easy to get to than in the other regions. The social ambience, good meals and restaurants and the existence of various forms of entertainment under one roof are also major determinants of venue choice in the Dandenong region. While gamers also choose venues because they are open all hours and for the number and variety of poker machines, these reasons are less significant factors.

Figure 5.15: Reasons for Venue Choice, Dandenong

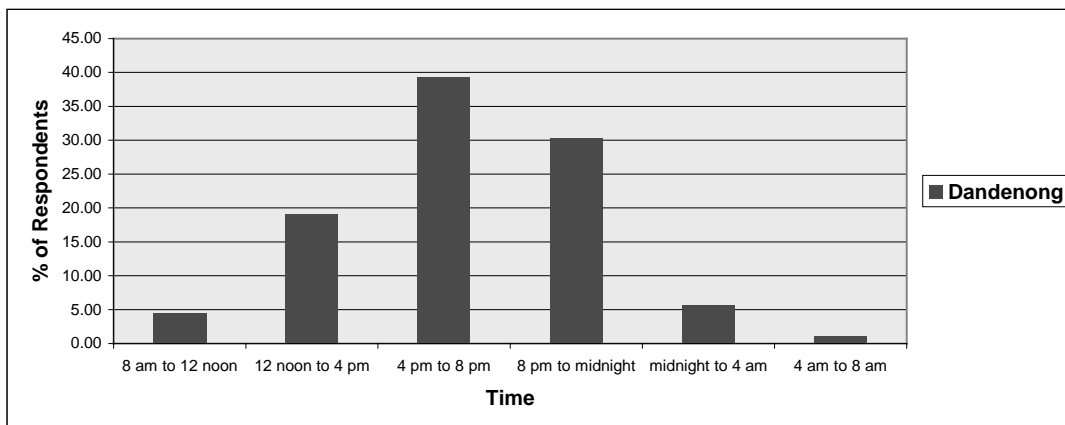


(*) Statistically significant difference between Dandenong and the average of the other regions

5.10 Utilisation of poker machines

Figure 5.16 indicates that the use of venues varies over the day. The peak arrival time at venues is between 4pm and 8pm with 40% of Dandenong gamers arriving at venues during this time. Patron numbers begin declining after 10pm with less than 5% of respondents arriving between the hours of 4am and 8am, although this finding may also reflect the fact that many venues are closed at this time.

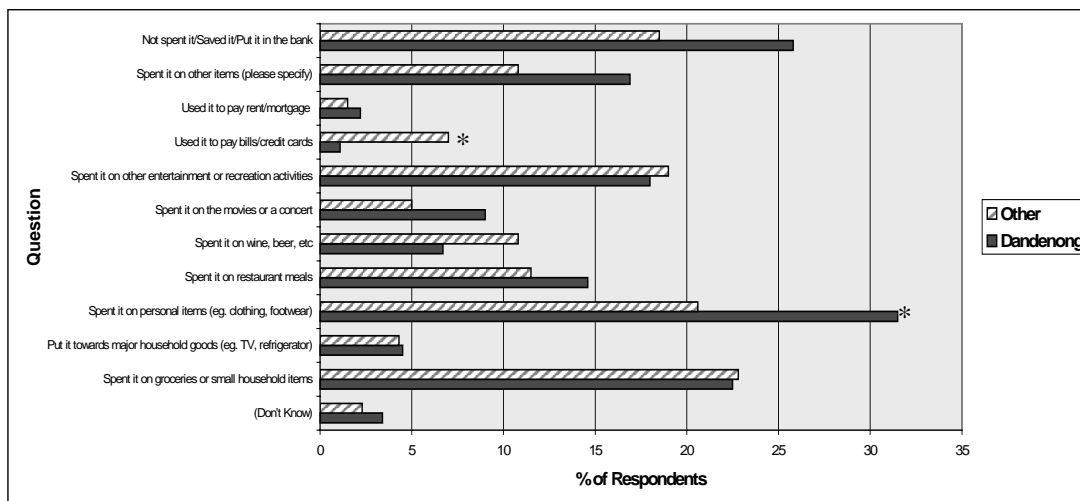
Figure 5.16: Time of arrival at venue, Dandenong



5.11 Alternative use of EGM funds

Figure 5.17 details what gaming respondents indicated they would spend their money on had they not spent it on gaming. In our survey about 32% of gamers in the Dandenong region said they would use money not spent on gaming on personal items, which is substantially more than the average for the other regions (21%). Around 26% of Dandenong gamers would have saved the money, approximately 23% would have spent it on groceries and household items and approximately 18% would have spent it on entertainment and recreation. Less than 5% of Dandenong gamers said they would spend their money on essentials such as rent, mortgage, credit cards or paying bills, if they had not spent it on gaming.

Figure 5.17: Alternative uses for EGM Funds, Dandenong



(*) Statistically significant difference between Dandenong and the average of the other regions

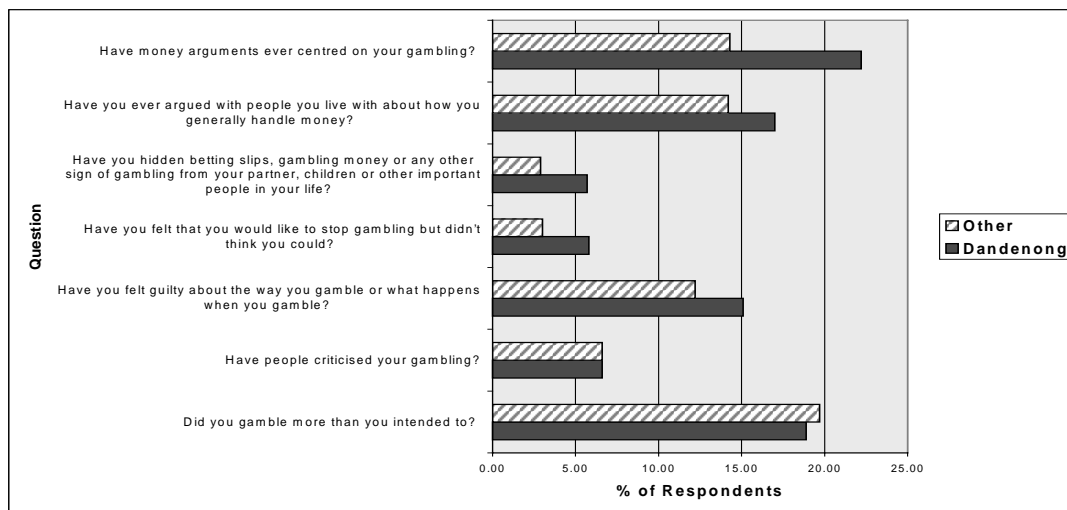
5.12 Problem gambling

The respondents who had gambled in the last six months were asked the battery of questions from the South Oaks Gambling Screen (SOGS), which is a tool used to identify gambling risks in the total population. We derived a score to identify the percentage of people ‘at risk’ of gambling problems in our survey regions using the approach adopted in the state-wide survey, ‘Sixth survey of community gambling patterns and perceptions’.⁵

Our survey found that only 2.4% of Dandenong residents fall into the ‘at risk’ category, having SOGS scores of 5 or more, compared to the State-wide average of 1.5%, and the average for our other regions of 1.9%⁶. Only 1% of Dandenong gamblers feel they have had a problem with gambling or that their gambling was out of control. However, 11% of all Dandenong residents said that they, or a member of their family, had experienced difficulties with excessive gambling at some time, with 53% of this group having experienced difficulties in the last six months.

In our survey, more than one in five Dandenong gamblers indicated that they have had money arguments centred over gambling in the last six months. Similarly, approximately 19% had gambled more than they intended to and around 15% felt guilty about the way they gambled or the consequences of their gambling. While Dandenong respondents responded that they had a lower gambling spend, this is a region with low-income levels. So it is not surprising that gambling leads to money arguments. (See Figure 5.18)

Figure 5.18: Negative gambling experiences in the last six months, Dandenong



(There is no statistically significant difference between Dandenong and other regions for these questions.)

⁵ Ref: ‘Definition and Incidence of Problem Gambling including the Socio-Economic Distribution of Gamblers’ Australian Institute for Gambling Research (1997) commissioned by the VCGA. In this report, the Institute recommended that the SOGS was the best currently available instrument to measure the prevalence of problem gambling and that it should be used in the short term for the VCGA ongoing survey series of community gambling patterns and perceptions.

The VCGA has included the SOGS in the last three of its ongoing Community Gambling Patterns surveys.

⁶ There is no statistically significant difference between the incidence of problem gambling in Dandenong and the incidence in our other five study regions.

In order to probe the issue of problem gambling further, a series of questions was asked in relation to whether gambling activities were financed through credit and borrowing. In Dandenong very little gambling activity is financed by credit. Less than 2% of Dandenong gamblers admitted to having borrowed money to finance gambling, including borrowing money from relatives, credit cards or selling personal property to finance gambling.

Our consultations provided some insights into community perceptions about problem gambling. Venue operators indicated awareness of the problems associated with gambling in the community. One large venue indicated that *Breakeven* brochures are made available to patrons and the self-exclusion program had been adopted. A medium sized venue reported that it knew about half a dozen problem gamblers who have spent all of their money on gambling, including several older people who have spent their retirement packages. This venue had 8 self-excluded patrons from gaming activities. A smaller venue in Dandenong had one self-exclusion, which was the only problem gambling case they had had to deal with in two years. The venue dealt with the problem by contacting G-Line and by providing information on the services available from the Salvation Army. However, the venues stated that there is not much more they can do to deal with problem gambling at gaming venues than the measures and policies that are already in place. In contrast, one venue manager stated that in general people know their limitations and that they budget for expenditure on gambling. However, some big gamblers at the venue were thought to be spending between \$4,000 and \$5,000 per day.

Overall community agencies saw problem gambling coming from gaming rather than horse-racing or other forms of gambling. However, increasing problems relate to casino gambling (including table games) and EGM gambling at local hotels and clubs. Agencies reported that the majority of problem gamblers did not participate in other gambling activities prior to the introduction of EGMs, and that problems with gaming were less prevalent prior to the introduction of EGMs in Victoria. Before this time, the only Victorians exposed to EGMs were those who took part in bus trips to New South Wales venues, which were typically once-off and accordingly less likely to lead to any cases of problem gambling.

The BreakEven agency, which covers the Dandenong region (East Bentleigh Community Health Centre), reported 546 cases and 3,212 gambling-related client contacts in 1997-98. These figures are an increase over the previous year (80% and 21%, respectively). (Note that these figures relate to a much wider area than Dandenong.) The agency commented that over the past four years more people are admitting that they have some social problems that have resulted from their own or their partner's gambling related problem. There is a level of difficulty in identifying problem gamblers. For some there is a general stigma towards gambling in the community, and this stigma is perceived to be more of an issue for non-Australian born residents, as gaming is often illegal in their countries of origin and they take advantage of the greater freedom in Australia. However, there is an increase in the number of people seeking assistance who admit and disclose that they have a gambling problem.

Some community support agencies consider that problem gambling is becoming an increasing issue amongst the Asian community with some reported incidences of people borrowing money for a particular purpose and spending it on gambling. Members of the Dandenong Chamber of Commerce have reported cases of employees experiencing trouble due to gambling related problems with both staff and their spouses spending time in gaming venues.

One agency counselling people with gambling related problems reported that their advice is not generally accepted or understood. However, more recently they were experiencing greater success with cases of problem gambling. It was considered by this agency that the casino was the main problem for its clients with family members of problem gamblers self-referring to the agency. Most cases involved problems associated with table games and not EGMs.

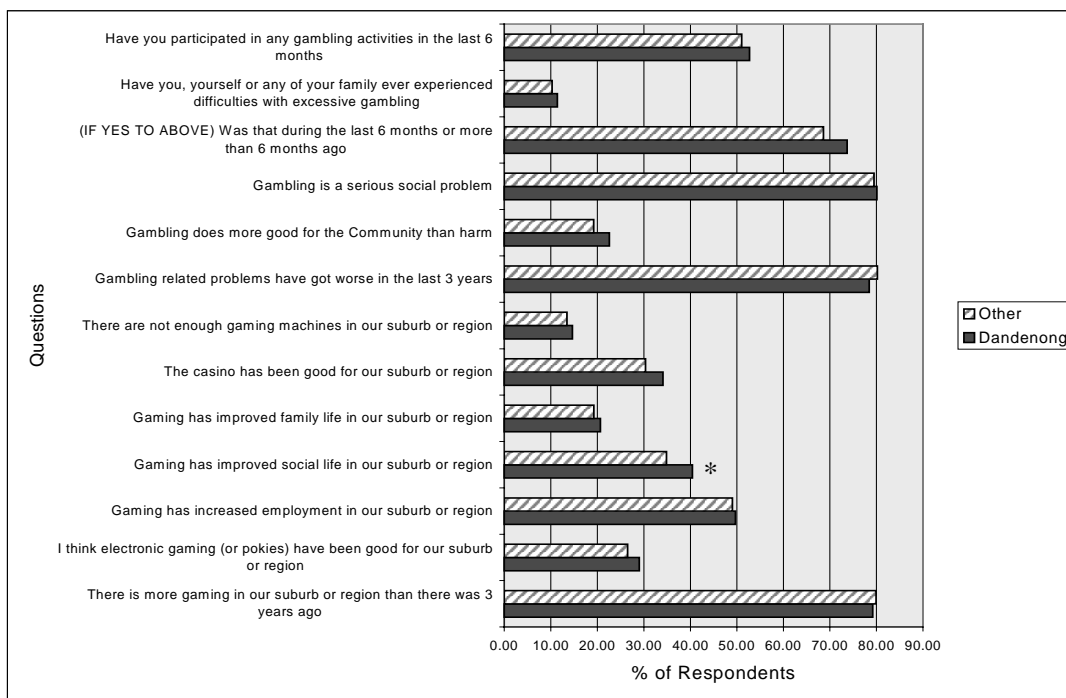
A number of agencies expressed their concern regarding the need for greater action in the area of problem gambling. One community support agency noted the need for improved assistance measures towards the treatment of problem gambling incorporating better prevention and harm minimisation strategies. Another agency commented that problems are the result of the availability of EGMs and Automatic Teller Machines (ATMs) close to gaming lounges and venues.

6 Social and economic impact of gaming

6.1 Impacts on the community

From our survey, 80% of Dandenong respondents agree that gaming is a serious social problem and 78% believe that gambling related problems have become worse in the last three years. About 40% of Dandenong respondents think that gaming and the pokies have improved social life in their suburb, and 50% of Dandenong residents believe gaming has increased employment in the region. In the survey, 52% of respondents in the Dandenong area participated in gambling activities over the last six months. Twelve per cent of respondents claimed that they or member of their family had experienced difficulties with excessive gambling, and of this group over 70% had experienced difficulties during the past six months.

Figure 6.1: Opinion on the impact of gambling, Dandenong



(*) Statistically significant difference between Dandenong and the average of the other regions.

Venue operators noted a number of positive aspects of the introduction of EGMs, including increased provision of entertainment alternatives for the people of Dandenong such that people are happy about EGMs. One venue noted that community recreation interests have changed and with that has been the creation of new social opportunities - no longer are activities at these venues limited to just drinking. One medium sized venue commented that people are using EGMs to suppress other personal issues and social problems such as loneliness. Another venue commented that venues provide a safe, family orientated environment that encourages social interaction amongst family members and friends, adding to people's social life.

Gaming venues reported that the ability to provide schools, clubs, charities and other community groups and organisations with sponsorship dollars and meal vouchers has only been possible through the introduction of EGMs. One venue operator indicated that there had been an increase in drug problems and crime in the district, although it was suggested that there is no link between gaming and drugs or crime.

The Mayor of Dandenong stated that there were more gambling venues than there is space for recreation. He is pushing for tighter regulations for gaming venues. According to a concerned mother of a student whose school has a gaming venue located nearby, young people are becoming attracted to these types of facilities.

Individuals at the public forum noted that EGMs and gambling are becoming more socially acceptable. However they noted concern that there has been a shift away from spending time at the club to spending time at the machines. These people believed that gaming is not a very sociable activity. However, it was recognised that gaming provides the elderly with a place to meet and to enjoy a cheap meal.

Emerging impacts on the community that are perceived to result from the introduction of EGMs include:

- changing leisure patterns, with money going into venues rather than a diversity of entertainment centres;
- less community based activities, with non-gaming clubs losing resources;
- individual financial losses, including loss of businesses, housing, properties and other assets;
- increase in the number of problems relating to interpersonal issues, including relationship and family problems and increased depression and suicide;
- impacts on family members, including children. For example, General Practitioners reported seeing children with reduced school performance;
- increase in the number of family members seeking assistance for problem gamblers;
- increased demand for material aid, counselling and financial assistance; and
- increased incidences of fraud and law infringements.

One community support agency reported that media and advertising are making gambling more acceptable. It is generally seen that the government supports and encourages gambling which has had an impact on some cultural groups who cannot understand that something might not be good if the government endorses it. Additionally, it is believed that if community leaders say that something is good, it will receive acceptance.

6.2 Economic effects

Overall, the perceptions of the economic impacts of EGMs on the local community are mixed.

Gaming has been undeniably popular in the marketplace and gaming venues have been able to increase their patronage and improve their profitability:

- one large club venue commented that if it were not for EGMs, the club would have collapsed resulting from financial difficulties. EGMs at this venue enabled the facility to complete a \$2 million redevelopment and expansion project. It was also stated that other recreational clubs in the area are struggling, whilst theirs is booming;
- one medium sized club reported that one of the benefits of the introduction of EGMs has been the formation of sub-clubs for people with common interests such as darts, bowls, golf and fishing, with some of these sub-clubs generating trading surpluses which are donated to welfare groups;
- one venue noted that the introduction of EGMs has enabled the facility to develop meeting facilities to cater for the local corporate market.

Gaming venues argue that they have been able to offer increased employment opportunities and training for local residents, particularly young adults and women who may otherwise have had little opportunity for employment elsewhere. All gaming venues reported increased employment after the introduction of EGMs:

- a large club venue employs a total of 60 staff, 25 full-time, 4 part-time and 31 casuals;
- a medium sized venue provides employment for 40 staff, 6 on a full-time basis and the balance casual;
- a total of 32 people are employed, 6 full-time, at a smaller venue with EGMs.

Concern was expressed by a smaller venue that, whilst EGMs have been good for everyone, the limited access to additional machines has resulted in strong competition between venues and an incapacity by venues to meet their patrons' demands. Also, a non-gaming venue indicated that the introduction of EGMs at a neighbouring venue caused a massive reduction in attendance at their venue and that shops had closed in the main street. Another venue noted that, since the introduction of EGMs, the community has witnessed bank closures, a changing retail profile and an increase in the level of commercial vacancies, suggesting that other factors may also have influenced the regional economy besides EGMs. Similar concerns regarding perceived retail downturn and business failure resulting from funds being diverted to gambling pursuits were expressed by community agencies.

Some community support agencies recognised the positive contribution that EGMs have made to the viability of sporting clubs, however other venues that rely on traditional forms of generating revenue are believed to be suffering.

The Dandenong Chamber of Commerce was less positive about the effect of gaming on local businesses with retailers claiming that it has reduced the level of expenditure on discretionary items by local consumers. Other negative impacts were considered to be the reduction in the level of household savings as a result of people's gambling activities. However, the Chamber of Commerce recognised the positive impact that the introduction of EGMs has had on increased employment opportunities, particularly for women entering the workforce and receiving on the job training. Additionally, the improvement in quality of facilities for older people to facilitate social interaction in a comfortable atmosphere was acknowledged as being a result of the introduction of gaming machines.

Some community support organisations reported that the positive impacts resulting from the introduction of EGMs are difficult to identify and assess in isolation, as other factors contribute to the economic condition of a local economy. It was recognised that the introduction of EGMs has contributed to an increase in the level of employment of people from the local community and an overall improvement in the appearance and quality of venues. In our survey, half of the respondents agreed that gaming had increased employment, but only 34% felt that the casino and EGMs had been good for the region.

6.3 Perceived benefits and costs

To summarise, during our consultations, the following costs and benefits of gaming were identified.

6.3.1 Benefits

- The economic benefits for individual venues are widely acknowledged. Venues with gaming machines are more profitable and have been able to finance expansion and upgrading of facilities. For clubs there has also been the potential to cross-subsidise other activities for club members, whilst generating trading surpluses that can be donated to welfare groups.
- Successful venues provide employment, training and new career paths for young people.
- In some areas, the introduction of EGMs has brought with it significant improvements in the appearance of an area and has injected life back into the streets. However, in other areas, there has been a decline in retail environment and street amenity, reflecting a shift in the location of economic activity.
- For many, gaming has become a form of entertainment and a means to get away from the demands of family life and to relax. For others it is an avenue to escape from other social problems, such as loneliness. The resulting change in the overall mix of social and recreational alternatives available for residents is seen by some to be of benefit.
- Community support agencies have recognised some benefits associated with the introduction of EGMs, including the ability for venues to provide donations and sponsorship to community groups, clubs and charities and an increase in the number of community support agencies and other health and welfare services funded through gaming taxes.

6.3.2 Costs

- There are substantial costs to some businesses as a result of the introduction of EGMs. Non-EGM venues and sporting clubs become less viable and the control over EGM placements by the two EGM operators can impact on the viability of gaming venues.
- There is a concern that money generated from machine gaming is going to places elsewhere, rather than staying in the local community.
- Four in five of Dandenong residents believe that gaming is a serious social problem that does more harm than good for the community and that gaming problems have got worse in the past three years.
- Community support agencies consider that family breakdowns and relationship problems are major costs of problem gambling. Additionally, problem gamblers tend to be diverting funds away from items such as food, rent and school expenses.

Appendix 1

VCGA Gaming Survey		Dandenong	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
PART B - PERSONAL VALUES										
Life in general										
1	I am really happy w ith life	72.90	74.25	-1.35		0.479	X5B(1)	71.2	24.0	4.8
2	The Australian economy is doing w ell	56.15	52.60	3.55		0.082	X5B(2)	43.7	35.3	21.0
3	The Australian economy is getting better	55.40	52.38	3.03		0.15	X5B(3)	43.1	33.5	23.4
4	My life w ill be better in the next year than it w as last year	67.08	67.10	-0.03		0.984	X5B(4)	60.5	29.3	10.2
5	My family's financial situation is good	66.33	64.83	1.50		0.475	X5B(5)	64.7	23.4	12.0
6	I feel that w here I end up in life w ill be more a matter of luck than planning	46.55	43.45	3.10		0.263	X5B(6)	39.5	13.2	47.3
7	I believe rules should never be broken	54.65	52.00	2.65		0.304	X5B(7)	42.5	25.7	31.8
8	I seek out the latest things	50.30	48.55	1.75		0.443	X5B(8)	37.1	29.9	33.0
9	I am healthy	71.10	72.73	-1.63		0.429	X5B(9)	74.9	14.4	10.8
10	I rarely feel stressed	49.55	45.35	4.20		0.088	X5B(10)	38.3	23.4	38.3
Belonging and friendship										
11	I have a good family life	79.50	79.25	0.25		0.906	X5B(11)	85.0	8.4	6.6
12	Security is of concern to me	73.35	71.90	1.45		0.522	X5B(12)	77.2	8.4	14.4
13	I am hardly ever lonely	67.98	69.03	-1.05		0.658	X5B(13)	67.6	13.2	19.2
Levels of activity										
14	I am always busy	75.60	79.15	-3.55		0.115	X5B(14)	74.8	13.2	12.0
Fun and going out										
15	I have a full social life	63.33	61.73	1.60		0.477	X5B(15)	58.7	24.6	16.8
16	I like crow ds	49.25	46.70	2.55		0.303	X5B(16)	35.9	26.9	37.1
17	I am hardly ever bored	63.93	69.55	-5.63	p	0.017	X5B(17)	62.3	16.8	21.0
Risk										
18	Taking risks gives me a thrill	46.85	45.70	1.15		0.662	X5B(18)	33.6	21.6	44.9
Trust										
19	I believe most people can be trusted	44.30	46.60	-2.30		0.317	X5B(19)	29.3	29.3	41.3
Income										
20	I alw ays have enough money to go around	48.35	53.30	-4.95	p	0.041	X5B(20)	37.7	25.1	37.1
21	I buy luxuries	42.98	42.20	0.78		0.739	X5B(21)	29.3	23.4	47.3
Shopping										
22	I am a spender, not a saver	48.35	48.90	-0.55		0.822	X5B(22)	30.0	31.7	38.3
Thinking about your suburb or region										
23	Overall, this is a good suburb or region to live	60.03	76.30	-16.28	** p	0	X5B(23)	55.7	22.8	21.6
24	The local economy is good	52.55	55.75	-3.20		0.112	X5B(24)	39.5	34.1	26.4
25	The local shops are doing w ell financially	52.85	51.83	1.03		0.636	X5B(25)	37.1	35.9	27.0
26	There is a real sense of community around	53.75	65.00	-11.25	* p	0	X5B(26)	45.5	27.5	27.0
27	It is safe around here	47.30	63.33	-16.03	** p	0	X5B(27)	34.1	26.9	38.9
28	There is no crime around here	23.20	35.30	-12.10	* p	0	X5B(28)	6.6	15.0	78.4
29	There is plenty of w ork around here	42.08	39.18	2.90		0.197	X5B(29)	23.4	33.5	43.1
30	People play sport around here	69.45	74.55	-5.10	p	0.004	X5B(30)	72.5	19.2	8.4

VCGA Gaming Survey		Dandenong	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
Thinking about your life 3 years ago										
31	I was living in this suburb or region 3 years ago	76.35	78.73	-2.38		0.327	X5B(31)	85.0	3.0	12.0
Life in general										
32	I am happier than I was 3 years ago	63.33	68.23	-4.90	p	0.022	X5B(32)	55.1	29.3	15.6
33	The Australian economy is better now than it was 3 years ago	63.48	60.23	3.25		0.123	X5B(33)	59.3	25.1	15.6
34	My family's financial situation is better than it was 3 years ago	62.13	61.10	1.03		0.662	X5B(34)	55.7	26.3	18.0
35	I am healthier now than I was 3 years ago	51.50	55.38	-3.88		0.08	X5B(35)	33.0	37.7	29.4
36	I feel less stressed now than I did 3 years ago	51.20	52.08	-0.88		0.736	X5B(36)	37.8	25.1	37.1
Belonging and friendship										
37	I have a better family life now than I did 3 years ago	57.78	60.83	-3.05		0.144	X5B(37)	41.9	38.3	19.8
38	I am less concerned with security now than I was 3 years ago	43.73	46.13	-2.40		0.307	X5B(38)	22.8	34.1	43.1
39	I am less lonely now than I was 3 years ago	53.75	54.33	-0.58		0.79	X5B(39)	35.9	38.9	25.2
Levels of activity										
40	I am busier now than I was 3 years ago	66.18	65.98	0.20		0.933	X5B(40)	64.7	14.4	21.0
Fun and going out										
41	I have a better social life now than I did 3 years ago	55.40	52.68	2.73		0.231	X5B(41)	41.3	34.7	24.0
42	I am less bored now than I was 3 years ago	58.23	58.05	0.18		0.928	X5B(42)	44.3	34.7	21.0
Risk										
43	I take more risks now than I did 3 years ago	44.30	43.48	0.83		0.722	X5B(43)	28.2	25.1	46.7
Trust										
44	I trust people more now than I did 3 years ago	36.98	38.35	-1.38		0.469	X5B(44)	11.4	37.1	51.5
Income										
45	My money goes further now than it did 3 years ago	41.93	36.48	5.45	p	0.039	X5B(45)	32.4	13.2	54.5
46	I buy more luxuries now than I did 3 years ago	40.28	37.03	3.25		0.192	X5B(46)	29.4	14.4	56.3
Thinking about your suburb or region compared to how it was 3 years ago										
47	This suburb or region is better to live in now than 3 years ago	47.90	54.08	-6.18	p	0.003	X5B(47)	24.6	47.9	27.6
48	The local economy is better now than it was 3 years ago	54.65	50.48	4.18	p	0.025	X5B(48)	37.1	46.7	16.2
49	The local shops are doing better financially than they were 3 years ago	52.85	48.98	3.88		0.062	X5B(49)	35.3	39.5	25.2
50	There is a better sense of community around here now than there was 3 years ago	50.60	53.93	-3.33		0.07	X5B(50)	27.5	50.9	21.6
51	It is safer around here now than 3 years ago	39.08	44.10	-5.03	p	0.009	X5B(51)	13.8	40.7	45.5
52	There is less crime around here than 3 years ago	35.03	39.70	-4.68	p	0.031	X5B(52)	15.6	29.3	55.1
53	There is more work around here than there was 3 years ago	46.85	42.88	3.98	p	0.048	X5B(53)	25.8	42.5	31.8
54	People play more sport around here than they did 3 years ago	51.35	53.58	-2.23		0.177	X5B(54)	21.6	61.7	16.8

VCGA Gaming Survey		Dandenong	Other	diff	diff	prob	var	%Agree	%Neutral	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
Gaming- explain that gaming is electronic gaming machines or pokies and the games played at the casino										
55	There is more gaming in our suburb or region than there was 3 years ago	79.20	79.90	-0.70		0.727	X5B(55)	80.2	12.6	7.2
56	I think electronic gaming (or pokies) have been good for our suburb or region	29.05	26.48	2.58		0.237	X5B(56)	12.0	21.6	66.4
57	Gaming has increased employment in our	49.70	49.05	0.65		0.79	X5B(57)	39.5	26.3	34.2
58	Gaming has improved social life in our	40.43	34.85	5.58	p	0.014	X5B(58)	24.0	26.3	49.7
59	Gaming has improved family life in our	20.65	19.28	1.38		0.439	X5B(59)	3.0	18.0	79.0
60	The casino has been good for our suburb or	34.13	30.35	3.78		0.102	X5B(60)	13.2	32.9	53.8
61	There are not enough gaming machines in our suburb or region	14.68	13.50	1.18		0.491	X5B(61)	3.6	8.4	88.0
62	Gambling related problems have got worse in the last 3 years	78.45	80.20	-1.75		0.409	X5B(62)	78.4	14.4	7.2
63	Gambling does more good for the Community	22.60	19.20	3.40		0.092	X5B(63)	6.0	18.0	76.0
64	Gambling is a serious social problem	80.10	79.50	0.60		0.781	X5B(64)	81.4	10.2	8.4
65	Have you, yourself or any of your family ever experienced difficulties with excessive	11.40	10.30	1.10		0.702	X2B(65)	11.4	0.0	88.6
66	(IF YES TO ABOVE) Was that during the last 6 months or more than 6 months ago	73.70	68.60	5.10		0.663	X2B(66)	73.7	0.0	26.3
67	Have you participated in any gambling activities in the last 6 months	52.70	51.00	1.70		0.694	X2B(67)	52.7	0.0	47.3
PART C - FREQUENCY OF CONSUMPTION										
In the last month, how many times did you visit.....?										
1	Department stores	4.65	4.27	0.39		0.311	XFC(1)			
2	Shopping centres	7.60	6.37	1.23	p	0.004	XFC(2)			
In the last month, how many of the items in any of the following categories did you buy..?										
3	Clothing	3.03	3.53	-0.49		0.108	XFC(3)			
4	Fashion accessories	0.71	0.86	-0.14		0.257	XFC(4)			
5	Books	1.91	2.00	-0.10		0.707	XFC(5)			
6	Cds	1.57	1.10	0.48		0.061	XFC(6)			
7	Computer software, hardware and	0.79	0.49	0.30		0.093	XFC(7)			
8	Homewares	0.98	1.18	-0.20		0.243	XFC(8)			
In the last month, how many times did you.....?										
9	Go to a BYO or licensed restaurant	1.75	2.20	-0.45	p	0.033	XFC(9)			
10	Eat takeaways	4.05	3.96	0.09		0.811	XFC(10)			
11	See a movie at a cinema	0.83	0.75	0.07		0.528	XFC(11)			
12	Go to a pub or bar for drinks only	1.08	1.56	-0.48	p	0.041	XFC(12)			
13	Go to a night club or disco	0.65	0.59	0.06		0.667	XFC(13)			
In the last six months, have you										
14	Bought or built a house or flat	3.59	5.52	-1.93		0.243	XFC(14)			
15	Carried out renovations of more than \$5,000	5.39	8.04	-2.65		0.183	XFC(15)			
16	Bought a car (new or used)	12.58	14.29	-1.71		0.548	XFC(16)			
How often do you gamble on or play.....?										
17	Bingo	3.57	3.89	-0.32		0.814	XFC(17)			
18	Horse or greyhound races	5.40	5.89	-0.50		0.784	XFC(18)			
19	Poker machines (pokies) at a pub or club	8.81	8.18	0.63		0.743	XFC(19)			
20	Poker machines (pokies) at Crown Casino	1.15	1.14	0.00		0.994	XFC(20)			
21	Table games at Crown Casino	1.34	1.38	-0.05		0.923	XFC(21)			
	Average frequency of Pokies, Horses and	5.94	5.93	0.01		0.994	X_GFREQ3			
	Average frequency of Pokies, Horses, Bingo, Crown (pokies, tables)	4.06	3.93	0.13		0.858	X_GFREQ5			
22	I am gambling less now than I was 3 years	54.95	55.88	-0.93		0.731	X5C(22)	36.6	35.9	27.6

VCGA Gaming Survey		Dandenong	Other	diff	diff	prob	var	%Agree	%Neutra	%Disagree	
ref: VCGA99-BDT09-Reports.xls					(word)						
PART D - GAMING											
	1	Would you say you are satisfied or dissatisfied with your experience of playing table games at Crown Casino (very	70.45	64.20	6.25		0.283	X5D(1)	63.7	27.3	9.1
	2	Each day you play table games at Crown Casino, how much time do you spend at the gaming tables (record time in minutes)	81.36	74.76	6.61		0.734	XND(2)			
	3	Each day you play table games at Crown Casino, on average, how much money do you spend or outlay (record amount in	148.64	87.10	61.54	***	0.066	XND(3)			
	4	Would you say you are satisfied or dissatisfied with your experience of playing	49.10	46.15	2.95		0.417	X5D(4)	40.4	25.0	34.6
	5	Each day you play the pokies, how much time do you spend playing the machines	66.56	51.98	14.58	*	0.095	XND(5)			
	6	Each day you play the pokies, on average, how much money do you spend or outlay	28.80	49.37	-20.57	**	0.442	XND(6)			
	7	What are the main motivations, attractions or reasons you play the pokies?									
	a	Thrill/dream rewards of winning	17.90	13.80	4.10		0.38	X2D7(1)	17.9	0.0	82.1
	b	Atmosphere/excitement/gives a buzz	9.50	9.30	0.20		0.952	X2D7(2)	9.5	0.0	90.5
	c	Beating the odds/back a winner	9.50	1.90	7.60	* p	0.022	X2D7(3)	9.5	0.0	90.5
	d	Exchange of money/handling money	1.20	0.00	1.20		is	X2D7(4)	1.2	0.0	98.8
	e	Upbringing/family background	0.00	0.50	-0.50		is	X2D7(5)	0.0	0.0	100.0
	f	Ego/self esteem	0.00	0.00	0.00		is	X2D7(6)	0.0	0.0	100.0
	g	Favourite recreational activity/hobby	17.90	7.40	10.50	* p	0.02	X2D7(7)	17.9	0.0	82.1
	h	Social reasons/see friends	36.90	47.30	-10.40	*	0.079	X2D7(8)	36.9	0.0	63.1
	i	Compulsions/addiction	0.00	1.10	-1.10		is	X2D7(9)	0.0	0.0	100.0
	j	Like taking risks/risk taker	0.00	0.50	-0.50		is	X2D7(10)	0.0	0.0	100.0
	k	Belief in luck/may get lucky	13.10	12.50	0.60		0.884	X2D7(11)	13.1	0.0	86.9
	l	Want to be successful	4.80	1.90	2.90		0.237	X2D7(12)	4.8	0.0	95.2
	m	Boredom/pass time	21.40	22.30	-0.90		0.855	X2D7(13)	21.4	0.0	78.6
	n	Other (specify)	2.40	8.20	-5.80	p	0.008	X2D7(14)	2.4	0.0	97.6
	o	(Don't know)	1.20	1.30	-0.10		0.917	X2D7(15)	1.2	0.0	98.8
I play the pokies:											
	8	For the thrill/dream of winning	52.68	50.80	1.88		0.657	X5D(8)	44.0	17.9	38.1
	9	Because it is a favourite recreational	25.30	27.53	-2.23		0.506	X5D(9)	17.9	3.6	78.6
	10	Out of boredom to pass the time	37.20	37.50	-0.30		0.936	X5D(10)	27.4	11.9	60.7
	11	Because I like to beat the odds/back a	37.20	36.10	1.10		0.756	X5D(11)	23.8	20.2	55.9
	12	Because I believe I may get lucky	62.20	54.00	8.20	* p	0.024	X5D(12)	60.7	20.2	19.0
	13	To test my skill	19.65	21.80	-2.15		0.426	X5D(13)	4.8	8.3	86.9
	14	To make a quick buck	44.05	39.95	4.10		0.328	X5D(14)	38.1	14.3	47.6
	15	Because I like to take risks	32.15	33.50	-1.35		0.682	X5D(15)	19.1	16.7	64.3
	16	To enhance my social standing	14.00	20.48	-6.48	p	0.002	X5D(16)	0.0	7.1	92.9
	17	Because the money lost goes to a worthy	16.38	16.35	0.03		0.996	X5D(17)	4.8	7.1	88.1
	18	For social reasons; to be with friends	56.55	59.45	-2.90		0.438	X5D(18)	51.2	22.6	26.2
	19	Because the atmosphere and excitement	35.73	33.90	1.83		0.566	X5D(19)	17.9	27.4	54.7
	20	Because I am attracted to the venue itself	33.33	35.65	-2.33		0.475	X5D(20)	20.2	11.9	67.8
Other gambling questions											
		Thinking of the last week in which you spent money on pokies or table games. If you hadn't spent the money on gambling, could you please tell me in what other ways you might have used it? (Don't read out, circle									
	21	Spent it on groceries or small household	22.50	22.80	-0.30		0.946	X2D(21)	22.5	0.0	77.5
	22	Put it towards major household goods (eg. TV, refrigerator)	4.50	4.30	0.20		0.924	X2D(22)	4.5	0.0	95.5
	23	Spent it on personal items (eg. clothing,	31.50	20.60	10.90	* p	0.044	X2D(23)	31.5	0.0	68.5
	24	Spent it on restaurant meals	14.60	11.50	3.10		0.453	X2D(24)	14.6	0.0	85.4
	25	Spent it on wine, beer, etc	6.70	10.80	-4.10		0.194	X2D(25)	6.7	0.0	93.3
	26	Spent it on the movies or a concert	9.00	5.00	4.00		0.222	X2D(26)	9.0	0.0	91.0
	27	Spent it on other entertainment or recreation	18.00	19.00	-1.00		0.814	X2D(27)	18.0	0.0	82.0
	28	Used it to pay bills/credit cards	1.10	7.00	-5.90	p	0.001	X2D(28)	1.1	0.0	98.9
	29	Used it to pay rent/mortgage	2.20	1.50	0.70		0.662	X2D(29)	2.2	0.0	97.8
	30	Spent it on other items (please specify)	16.90	10.80	6.10		0.159	X2D(30)	16.9	0.0	83.1
	31	Not spent it/Saved it/Put it in the bank	25.80	18.50	7.30		0.152	X2D(31)	25.8	0.0	74.2
	32	(Don't know)	3.40	2.30	1.10		0.59	X2D(32)	3.4	0.0	96.6

VCGA Gaming Survey		Dandenong	Other	diff	diff	prob	var	%Agree	%Neutra	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
	Which type of venue do you play pokies at (MULTIPLE RESPONSE):									
33	Pub/hotel	46.40	41.00	5.40		0.366	X2D(33)	46.4	0.0	53.6
34	Licensed sports club (golf, football, bow ls	21.40	28.20	-6.80		0.184	X2D(34)	21.4	0.0	78.6
35	RSL Club	22.60	17.00	5.60		0.264	X2D(35)	22.6	0.0	77.4
36	Some other sort of licensed club	15.50	16.00	-0.50		0.913	X2D(36)	15.5	0.0	84.5
37	Melbourne Crow n Casino	25.00	22.10	2.90		0.576	X2D(37)	25.0	0.0	75.0
38	Or somew here else (specify)	1.20	1.90	-0.70		0.627	X2D(38)	1.2	0.0	98.8
	Which type of venue do you go to the most to play pokies (single response):									
40	Pub/hotel	39.30	35.10	4.20		0.48	X2D(40)	39.3	0.0	60.7
41	Licensed sports club (golf, football, bow ls	14.30	23.40	-9.10	* p	0.041	X2D(41)	14.3	0.0	85.7
42	RSL Club	15.50	13.60	1.90		0.661	X2D(42)	15.5	0.0	84.5
43	Some other sort of licensed club	9.50	12.20	-2.70		0.458	X2D(43)	9.5	0.0	90.5
44	Melbourne Crow n Casino	20.20	14.60	5.60		0.242	X2D(44)	20.2	0.0	79.8
45	Or somew here else (specify)	1.20	1.10	0.10		0.923	X2D(45)	1.2	0.0	98.8
	Thinking of the last time you played the pokies at a club or pub (not including Crow n									
47	How far did you travel to get to this venue?	2.08	2.62	-0.54	p	0.002	XND(47)			
48	Did you go to this venue									
	* From home	33.50	31.90	1.60		0.69	2START(1)	33.5	0.0	66.5
	* On the way to or from work	4.20	1.70	2.50		0.122	2START(2)	4.2	0.0	95.8
	* From somew here else	7.80	9.20	-1.40		0.528	2START(3)	7.8	0.0	92.2
49	I visit that venue more than other venues	49.35	54.40	-5.05		0.255	X5D(49)	44.7	7.9	47.4
50	I really like visiting the venue	54.60	54.83	-0.23		0.948	X5D(50)	46.1	26.3	27.6
51	I have lots of good luck there	29.93	28.50	1.43		0.632	X5D(51)	6.5	27.6	65.8
52	It is enjoyable and thrilling	42.43	44.68	-2.25		0.502	X5D(52)	25.0	30.3	44.8
53	I had a meal	63.83	58.33	5.50		0.199	X5D(53)	68.4	5.3	26.3
	I went to the venue..									
54	to relax	68.10	64.23	3.88		0.264	X5D(54)	68.4	13.2	18.4
55	because it is easy to get to	73.03	64.78	8.25	* p	0.012	X5D(55)	76.4	10.5	13.1
56	because it is open all hours	43.43	41.38	2.05		0.585	X5D(56)	23.6	26.3	50.0
57	because it has all the entertainment I need	45.73	48.45	-2.73		0.495	X5D(57)	35.5	13.2	51.4
58	because it is a good place to socialise	51.65	54.13	-2.48		0.524	X5D(58)	46.0	17.1	36.9
59	because it is a good place to drink	45.73	43.90	1.83		0.658	X5D(59)	34.3	17.1	48.7
60	because it is a good place to gamble	45.40	42.73	2.68		0.444	X5D(60)	29.0	30.3	40.7
61	because there are good meals and	63.83	65.63	-1.80		0.598	X5D(61)	64.5	14.5	21.0
62	because it has the sort of pokies I like	46.05	43.70	2.35		0.511	X5D(62)	29.0	32.9	38.2
63	because it has lots of pokies	39.15	39.93	-0.78		0.808	X5D(63)	15.8	35.5	48.7
	On your last visit to a gaming venue									
64	What time did you arrive:									
	8 am to 12 noon	4.50	6.50	-2.00		0.426	X2TIME(1)	4.5	0.0	95.5
	12 noon to 4 pm	19.10	18.50	0.60		0.905	X2TIME(2)	19.1	0.0	80.9
	4 pm to 8 pm	39.30	43.60	-4.30		0.459	X2TIME(3)	39.3	0.0	60.7
	8 pm to midnight	30.30	28.60	1.70		0.744	X2TIME(4)	30.3	0.0	69.7
	midnight to 4 am	5.60	2.00	3.60		0.16	X2TIME(5)	5.6	0.0	94.4
	4 am to 8 am	1.10	0.80	0.30		0.758	X2TIME(6)	1.1	0.0	98.9
65	How long did you stay(hours)	2.65	2.41	0.25		0.083	XND(65)			
	Thinking about w hen you last played the									
66	How much did you w in? (a lot=100)	45.25	39.03	6.23		0.057	X5D(66)	29.7	19.0	51.2
67	I had really good luck	36.30	34.50	1.80		0.622	X5D(67)	20.2	19.0	60.7
68	I enjoyed myself	64.88	62.23	2.65		0.37	X5D(68)	67.8	20.2	12.0
	I w ould game more if:									
69	There w as a more conveniently located	21.35	22.50	-1.15		0.631	X5D(69)	3.4	13.5	83.1
70	The venue w as more attractive and	28.10	25.25	2.85		0.353	X5D(70)	14.6	11.2	74.1
71	The venue w as open longer	20.50	19.43	1.08		0.623	X5D(71)	3.4	10.1	86.5
72	There w ere more machines available	23.03	19.55	3.48		0.185	X5D(72)	7.8	10.1	82.0
73	There w as more variety in the types of	31.45	25.38	6.08		0.068	X5D(73)	20.3	11.2	68.5

VCGA Gaming Survey		Dandenong	Other	diff	diff	prob	var	%Agree	%Neutra	%Disagree
ref: VCGA99-BDT09-Reports.xls					(word)					
PART A - SAMPLE AND DEMOGRAPHICS										
1	Gender (male=0 female=100)	50.30	51.30	-1.00		0.821	X2A(1)	50.3	0.0	49.7
2	Region									
	Dandenong	100.00	0.00	100.00	*** **	is	X2LOC(1)	100.0	0.0	0.0
	Geelong	0.00	20.00	-20.00	**	is	X2LOC(2)	0.0	0.0	100.0
	Maribyrnong	0.00	20.00	-20.00	**	is	X2LOC(3)	0.0	0.0	100.0
	Midura	0.00	20.00	-20.00	**	is	X2LOC(4)	0.0	0.0	100.0
	Moreland	0.00	19.90	-19.90	**	is	X2LOC(5)	0.0	0.0	100.0
	Wellington/ South Gippsland	0.00	19.90	-19.90	**	is	X2LOC(6)	0.0	0.0	100.0
1	Do you live with a partner or spouse? (No=0	49.70	57.90	-8.20	*	0.056	X2F(1)	49.7	0.0	50.3
2	Do you have dependent children living at home? (No=0 Yes=100)	32.90	36.90	-4.00		0.33	X2F(2)	32.9	0.0	67.1
3	Do you receive a government pension or benefit? (No=0 Yes=100)	35.90	38.70	-2.80		0.505	X2F(3)	35.9	0.0	64.1
4	Are you the main income earner? (No=0	60.50	63.40	-2.90		0.484	X2F(4)	60.5	0.0	39.5
5	Highest education level? (1=primary 4=year 12 7=degree)	4.07	3.89	0.18		0.205	XNF(5)			
	Less than year 12	44.30	51.30	-7.00		0.102	X2ED(1)	44.3	0.0	55.7
	Year 12	26.90	22.70	4.20		0.256	X2ED(2)	26.9	0.0	73.1
	Trade or diploma	16.20	14.00	2.20		0.494	X2ED(3)	16.2	0.0	83.8
	Degree	12.60	12.00	0.60		0.839	X2ED(4)	12.6	0.0	87.4
6	Work status?									
	* Work full time (for money)	47.90	42.00	5.90		0.166	X2JOB(1)	47.9	0.0	52.1
	* Work part time(for money)	15.00	19.70	-4.70		0.128	X2JOB(2)	15.0	0.0	85.0
	* Household duties only	7.20	8.50	-1.30		0.548	X2JOB(3)	7.2	0.0	92.8
	* Full time student	6.60	4.80	1.80		0.388	X2JOB(4)	6.6	0.0	93.4
	* Retired (self supporting)	7.80	10.00	-2.20		0.349	X2JOB(5)	7.8	0.0	92.2
	* Other pensioner	12.00	11.50	0.50		0.87	X2JOB(6)	12.0	0.0	88.0
	* Unemployed	66.50	65.10	1.40		0.728	X2JOB(7)	66.5	0.0	33.5
		33.50	34.80	-1.30		0.75	X2JOB(8)	33.5	0.0	66.5
7	What is (was) your occupation?									
	Un-skilled Blue Collar									
	Semi-skilled Blue Collar	7.20	7.10	0.10		0.963	X2OCC(1)	7.2	0.0	92.8
	Skilled Blue Collar	13.20	9.80	3.40		0.239	X2OCC(2)	13.2	0.0	86.8
	Lower White Collar	13.20	13.10	0.10		0.975	X2OCC(3)	13.2	0.0	86.8
	Upper White Collar	26.30	27.60	-1.30		0.737	X2OCC(4)	26.3	0.0	73.7
	Senior Upper White Collar	8.40	11.50	-3.10		0.195	X2OCC(5)	8.4	0.0	91.6
8	What industry do (did) you work in?	1.80	1.10	0.70		0.513	X2OCC(6)	1.8	0.0	98.2
9	Were you or your parents born overseas?	48.20	26.30	21.90	** p	0	X3F(9)	38.3	19.8	41.9
10	What was the main language spoken at home when you were growing up?									
	English	41.90	64.30	-22.40	** p	0	X2LANG(1)	41.9	0.0	58.1
	Mandarin	19.80	18.70	1.10		0.76	X2LANG(2)	19.8	0.0	80.2
	Cantonese	38.30	16.90	21.40	** p	0	X2LANG(3)	38.3	0.0	61.7
	Vietnamese	0.00	0.00	0.00		is	X2LANG(4)	0.0	0.0	100.0
	Spanish	0.00	0.00	0.00		is	X2LANG(5)	0.0	0.0	100.0
	Italian	0.00	0.00	0.00		is	X2LANG(6)	0.0	0.0	100.0
	Greek	0.00	0.00	0.00		is	X2LANG(7)	0.0	0.0	100.0
	Other	0.00	0.00	0.00		is	X2LANG(8)	0.0	0.0	100.0
11	Age in years	43.18	43.70	-0.52		0.706	AGE			
12	What is the gross (before tax) family	30.67	32.56	-1.89		0.323	INCOME			
		16.700 %	83.300 %*			12.450 %*				
		167.00	833.00							