Longitudinal Examination of Perceptions and Their Relationship with Actual Findings
Benchmark Report 1999

Prepared for

The Victorian Casino and Gaming Authority
Level 5/35 Spring Street
Melbourne Victoria 3001

Prepared by

Anne Sharp & Jenni Romaniuk
Marketing Science Centre
University of South Australia
North Terrace
Adelaide 5000

ph 61 8 8302 0637
fax 61 8 8302 0123

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Executive Summary

Introduction

The Victorian Casino and Gaming Authority engaged the Marketing Science Centre to undertake the research project "Longitudinal Examination of Perceptions and their Relationship with Actual Findings". The overall aim of the research project is to provide a greater understanding of individual perceptions and attitudes towards the gaming industry and the participation of people in casino gambling and the playing of electronic gaming machines in clubs and hotels. Of key interest, is how these perceptions and attitudes relate to actual gaming behaviour. Through this, it is hoped to reconcile the apparent inconsistency between individuals' perceptions and their actual behaviour in relation to gaming, and their views of the participation of the community at large.

The research project is also designed to track individuals' perceptions and behaviours over time, giving insight into patterns of change and possible triggers.

As the first study in this sequence, this study sets the benchmark for subsequent longitudinal studies. It establishes the methodology and the panel of respondents.

This report simply documents the benchmarks obtained in this phase of the research project, rather than exploring causal relationships or drawing conclusive findings. Conclusions about the research objectives are not made in this report as, at minimum, Phase 2 data is required to answer the research questions.

Methodology

The methodology consisted of a review of potentially relevant written and taped work conducted for the Victorian Casino and Gaming Authority to date. This was then followed by four focus groups, stratified by frequency of gambling and attitude to gambling and the gambling industry. From these groups, a quantitative instrument in the form of a 23 minute questionnaire was designed. This was pilot tested and then administered, via telephone, to 1022 randomly recruited respondents in Victoria. Testing for non-response bias showed it was not a significant problem in this research project.

Key Results

Knowledge of the industry

While respondents had a spread of knowledge about the industry, overall the level of accurate knowledge is quite low. This was shown when respondents were asked a series of 11 questions to test their knowledge of the gambling industry. They were then classified into two groups, based on how many responses they got correct. 66% of those surveyed were classified as having a lower level of industry knowledge (5 or fewer correct) and 34% as having a higher level (6 or more correct).

There is a widely held belief (51% of respondents) that the amount of exposure gambling activity has had in the Victorian media has increased.

Motivations for gambling

Five possible motivations for gambling were examined. Respondents were asked to rate them as a reason why they gamble and as a reason why others gamble. The ranking by mean score for each motivations was the same in both cases, but respondents were more willing to attribute "to avoid boredom or loneliness" and "more skill or luck" to others than to themselves.

Attitudes to the industry

There was an overall high level of disagreement (61%) with the statement "increased gambling activity is good for the Victorian economy". Also, 64% disagreed with the statement "there are sufficient controls and restrictions on the gambling industry".

There was strong agreement (78%) with the statement "the social problems of gambling far outweigh the benefits". There was 52% agreement and 42% disagreement with the statement "gambling provides a safe and pleasant environment for people to go to".

Respondents were polarised (56% disagreement and 39% agreement) with the statement "there is no such thing as a problem gambler, but there are people with problems who gamble".

Obtaining information on the industry

Television had the greatest reach of all the media, but it was also most commonly cited as the least credible source. Family and friends appear to be the source that potentially could have the most negative effect on perceptions of gambling and the gambling industry. This is because family and friends has (a) great reach, (b) was frequently cited as most credible and (c) was most commonly perceived to have a negative bias. Radio is potentially the least effective on this point as it has (a) a low reach, (b) was not commonly cited as most credible ad (c) has the highest proportion of people not knowing how it generally portrays the industry.

Respondent beliefs and behaviour

Polarisation was also seen for "I derive entertainment and pleasure from the money I spend on gambling", indicating a good attitudinal cross section of respondents was captured in the research.

Claimed awareness of gambling support services was high (64%).

The majority of respondents (70%) perceived that they had received less in winnings than they had outlaid in the last 12 months.

The future of the industry

The majority of respondents perceive gambling activity to be increasing (64%) in the next 12 months, while 27% think it will be stable and 6% predict a decrease.

Regardless of the number of people, most respondents perceived that expenditure would stay the same or increase in the next 12 months (90%). 75% of respondents also felt the number of problem gamblers was going to increase in the next 12 months.

Chapter 1: Research Background, Objectives and Methodology

Part 1:Introduction

Background & Purpose of this Project

This research project is one of two contained in the 1998-1999 Research Program of the Victorian Casino and Gaming Authority (the Authority), that aim to address the issue raised by Arthur Andersen in their report "Summary of Findings, 1996-97 Research Program", and repeated by the Auditor General in his report "Victoria's Gaming Industry – An insight into the role of the regulator, Special Report No. 54".

...With the introduction of EGMs in 1992, only a relative short time span has elapsed for meaningful data collection purposes. This has resulted in a lack of longitudinal research data, combined with a lack of social data available for gambling research.

This project was, as a result, commissioned by the Authority to track, over time, the perceptions of individual Victorians about the operation of the gaming industry, the participation of people in casino gambling, and the playing of electronic gaming machines at clubs and hotels. The project is designed to provide a greater understanding of individuals' perceptions and how these perceptions relate to actual findings of player participation and operation of the industry.

Another aim of this project is to seek to reconcile the apparent inconsistency between individuals' views of their own participation in gaming activities and their views of the participation of the community at large.

This research project differs from other Authority projects, such as the Patterns Surveys, in that it is longitudinal in nature. Unlike repeated cross-sectional studies, where different individuals are interviewed in each study, this project is designed to reinterview the same individuals over time. This methodology allows for the detection of individual as well as aggregate (overall) change. It also allows for causal relationships to be explored, such as the relationship between changes in knowledge of the gambling industry and changes in own behaviour, which is one of the foci of this research project.

It is important to note that the longitudinal nature of this research project strongly determines the report structure and analyses. As this is the first study in a series using the same individuals as the primary source of data, the questionnaire responses from this study provide the benchmark for subsequent studies. Many of the research questions will not be able to be fully answered until more than one phase of data collection has occurred. The purpose of this report, therefore, is to present a detailed description of those responses, so that changes and the possible causes of such changes can be explored in future studies with the same panel of respondents. Subsequent phases will allow not only for the examination of the relationship between variables but also causality or direction of the relationship, when responses are compared over time.

Part 2: Research Objectives

Broad Research Aim

The key objective of this phase of the research project was to set up a suitable framework to track individual perceptions about gaming in Victoria, and the relationship these perceptions have with actual participation levels and statistics about the industry. The information to be tracked includes both perceptual and behavioural information on:

- Operation of the gaming industry;
- Participation of people in casino gambling;
- Playing of electronic gaming machines at clubs and hotels;
- The impact of the industry.

Through this information, the level of understanding in the community about these issues can be gauged.

This research project also attempts to reconcile the apparent inconsistency between individuals' views of their own participation in gaming activities with their views of the participation of the community at large. The key means through which the project will address this issue, is through the examination of causal links. As this project collects data longitudinally, in subsequent phases it will be possible to associate change in one variable of interest, such as attitude to gaming, with changes in other variables, such as participation level in gaming. This is important for two reasons:

- it enables testing for the impact of information and awareness raising programs aimed to align public views with actual behaviour; and
- testing to see if perceptions influence behaviour or behaviour influences perceptions (ie the direction of causality). The perception to behaviour link is often assumed, when in fact there may be a strong causal link in the other direction that is not captured.

From this, a better understanding of how people form perceptions and attitudes about gaming and the gaming industry can be developed.

Terms of Reference for the Project

The following deliverables were specified by the Authority in the research brief.

Deliverables

In preparation of a comprehensive report for publication detailing the findings of the project, the following terms of reference were adopted by the Marketing Science Centre.

1. Determine the areas where individuals' perceptions vary significantly from what is actually occurring. This may involve but not be limited to:
    - Review and evaluation of existing research of the Authority and third parties;

- Interrogation of existing data bases where available;
- Collection of primary qualitative information.

Examples of possible areas may be:

Participation	Operational	Impact
Gambling as a leisure activity	Gaming concepts	Incidence of problem gambling
Frequency and nature of participation	Advertising of gambling products	Social cost of problem gambling
Reason for participation	Percentage return to players	Economic effects

2. Determine the best segmentation of people to be used in this evaluation. This segmentation may reflect the categories identified in the "Community Gambling Patterns Survey" series of the Authority or an alternative grouping which recommended by the project "Evaluation and Further Use of Existing Data Sets";

3. Set up a framework suitable for the tracking of individual perceptions over time and actual behavioural patterns. Construct a sample frame and conduct a survey in the areas identified. The project will monitor the perceptions of set groups of people, in each of the defined categories identified from point 2 above. This project is to cover the first year only. However, the consultant should be aware that the Authority proposes to conduct this project for the three years 1999, 2000 and 2001;

4. Establish a database and information gathering mechanism to record individuals' perceptions of:

- Gaming participation;
- The operation of the gaming industry; and
- The impact of the industry;

And allow comparisons with the actual situation;

5. Analyse the findings of the data collected to evaluate these comparisons in 1999 in a framework which allows their subsequent tracking over time in future years; and

6. Produce a comprehensive report for publication detailing the findings of the project.

Part 3: Methodology

Overall Research Project Outcomes

This longitudinal research project seeks to understand the variables associated with differing perceptions and behaviours of gaming and the gaming industry amongst respondents. Also, insight is sought as to what respondent attributes are associated with changes in these behaviours and perceptions over time. This is illustrated diagramatically in the 'Future Research Phases' chapter of this report.

Broad Nature of the Research Project

To date, research that has been conducted for the Authority has been cross sectional in nature, even when the project is conducted over several years. Such repeated cross sectional analyses, as is seen in the Community Gambling Patterns Surveys, involve multiple research phases with a separate group of respondents each time. This is an appropriate approach only if the issues in question are prevalent, allowing change over time to be detected even with the sampling error taken into account. In relation to this research project, many of the perceptual and behavioural changes of interest may be quite subtle in nature, making this approach problematic.

Repeated cross sectional studies are also appropriate if there is some concern about learning effects influencing the results. This is particularly important if the time between the initial study and the follow up is relatively short (for example less than 1 month). Neither of these is of major concern in this project, as the planned time between research project phases is one year and, based on MSC experience with similar projects, learning effects are likely to be minimal. Respondents are not told 'correct' answers to industry knowledge questions and the range of issues covered is sufficient to make it unlikely that learning effects will bias subsequent research.

Longitudinal analysis involves re-interviewing the participants from the first phase in subsequent research phases. This approach is recommended, where possible, because it allows for the detection of individual as well as aggregate (overall) change. This is particularly useful when detecting change that is not particularly prevalent or large. It also allows for causal relationships to be explored, which is one of the foci of this research project.

This first benchmark phase for this longitudinal research project comprised both qualitative and quantitative components:

- Four focus groups were conducted with Victorians from a selection of metro locations that varied from light to heavy gamblers, across a variety of ages, holding differing general attitudes to gambling. The purpose of the focus groups was to assist in the development of the quantitative instrument.
- telephone interviews were conducted with 1024 Victorians aged 18 years or over from both metropolitan and rural Victoria. These respondents were then recruited to a panel to be recontacted in subsequent research project phases.

Review of Existing Research

Before commencing any primary research, a review of the Authority's existing research was conducted. This involved a review of all published reports, viewing of recorded focus groups and interrogation of existing datasets. This was conducted so that our research project could build on previous work without unnecessary duplication. It also assisted in bringing the research team up to date on industry issues relevant to this project.

Focus Groups

Two focus groups were conducted on the evening of August 4, 1999 at the Marketing Science Centre office, Queens Rd, Melbourne. Two more were held the following evening. The groups were conducted at 6.00pm and 8.00pm. Respondents were recruited randomly from a list drawn from the Electronic White Pages that covered a selection of metropolitan suburbs. The suburbs were chosen such that respondents could access the focus group location with relative ease. The suburbs selected were St Kilda, Elwood, Balaclava, Windsor, Middle Park, South Melbourne, and Prahran.

Focus group tapes of previously conducted VCGA research were viewed prior to the commencement of this research project. In these, it was noted that some issues that emerged would potentially remain hidden if all the groups were mixed in terms of age and gambling participation level. For example, in the focus groups, it emerged that some younger respondents held strong perceptions as to who plays poker machines in the older age groups and their motivations for doing so. These perceptions differed markedly from the perceptions of own behaviour actually held by these older respondents. Also, those who were light gamblers held perceptions of heavier gamblers that they could be reluctant to openly express in front of such people. So, in order to explore these potential between group differences, the groups were structured according to attitude towards gambling (positive/neutral or negative), gambling participation levels (light or heavier), and age of respondent (under 40 or 40 and over). Respondents who were employed in the gambling industry were screened from this phase of the research project as it was felt their higher knowledge levels may interfere with the focus group dynamics.

The four groups were:

- Light gamblers with a negative attitude
- Light gamblers with a positive attitude
- Under 40 years and heavier gambler
- 40 year and over and heavier gambler

The criterion to be classified as a heavier gambler was participation in gambling 4 times or more per week. The forms of gambling considered were Raffles, playing electronic gaming machines, Bingo, gambling at the Crown Casino, Lotto, Scratchies, trotting, greyhound or thoroughbred racing, as well as betting on the footy at the TAB.

In order to classify respondents as having a positive or negative attitude, respondents were asked whether their overall attitude toward gambling in general was positive or negative. Those who were neutral were combined with positive respondents as it was known that lighter gamblers are more likely to hold negative attitudes and so the positive group would be more difficult to find respondents for.

Respondents were paid an honorarium of $40 for participation. There were five respondents in the heavier gamblers group and eight or nine participants in each of the remaining three groups. Each group included both males and females. Each session was video taped and audio taped.

A moderator prompt sheet was developed in consultation with the Authority, to assist in the control and flow of the discussion and ensure all necessary issues were addressed by each group. A copy of the prompt sheet is contained in Appendix 2.

Overview of issues covered in the focus groups

The group discussions addressed issues such as:

- Knowledge and general perceptions of the gambling industry. Issues such as the size of the industry and its potential positive and negative contributions to the economy and society were explored.
- Perceptions of industry trends. For example, has gaming activity increased or decreased? Are more/fewer people gaming? Are people spending more, less, or the same amount of money?
- Information on how perceptions are formed. Where do people hear about the gaming industry? Here we were seeking sources that they use to form their perceptions such as the media, personal experience, friends and family, or contacts within the industry. For each, we were interested in the credibility attached to that source.
- Information on the respondent's own gambling behaviour. This included motivations for gambling as well as actual behaviour and associated enjoyment levels.
- How respondents perceive the behaviour and motives of others. We explored their perceptions of why people gamble. We also circulated recent newspaper articles on the gambling industry obtained from the authority and asked respondents to discuss them.
- The future of the gambling industry. We sought respondents' perceptions of where the industry is heading. We asked them to identify trends they think are emerging and timeframes for changes.

Insights gained

The split of the focus groups by frequency of behaviour resulted in significant differences between the groups. For example, the heavy gambler, over 40 years group tended to recall all positive media stories about gambling. In contrast the light gambler group recalled primarily negative stories – even though the media accessed by both groups appeared to be similar. This highlighted the potential 'selective' nature of the processing of information – with people paying greater attention to messages which reinforced their own attitudes and behaviour.

The split by attitude to gambling was less clear-cut in distinguishing between respondents. This may have been because the neutral respondents tended to be actually quite negative when probed further. Putting them together with the positive attitude respondents therefore blurred the expected polarity between the two groups. It did, however, allow for a lot of interaction between respondents in the light gambler, positive attitude group where there were a number of respondents who were, when probed further, quite negative in their attitude towards gambling.

Telephone Survey

The focus groups were used primarily to develop the quantitative instrument. A list of topics was developed that identified areas where respondents had differed in their perceptions and reported behaviour. The results of the focus group were also used to determine the depth that respondents would be able to articulate to in a telephone interview and also to construct the response sets required to capture respondents' answers to questions.

The questionnaire was administered by telephone, using a Computer Assisted Telephone Interview (MSCati) methodology. A copy of the questionnaire is contained in Appendix 3.

Sample

The sample was randomly drawn from the Victorian population. We chose the respondent in a household based on their birthday to avoid any biases towards those more likely to answer the telephone. The survey was limited to those persons of 18 years or over.

The final sample size and questionnaire length were determined after balancing the requirements of:

- having a sufficient number of respondents recruited to the panel to maintain a longitudinal panel over three years,
- maintaining statistical reliability when conducting subgroup analysis, and
- covering the issues required in sufficient depth to answer the research project objectives.

A final sample of 1024 respondents was administered a 23 minutes telephone questionnaire.

Unlike the focus group phase, for the main survey, direct employees of the gambling industry were not excluded from participation. It was thought that direct involvement in the industry may be a factor associated with better knowledge of the industry and higher participation in gambling. This hypothesis would not have been able to be tested if such respondents were screened out. The only respondents excluded were those directly employed by the Authority. These people may have been aware of the research project and its objectives, which would introduce bias in their responses.

Questionnaire structure and recruitment to the panel

We did not wish to systematically exclude any group from the survey through putting them off by attempts to recruit them to the panel for continuing research. Therefore, the identification of the research sponsor and the desire to recruit for a panel was not fully disclosed in the introduction. The non-identification of the sponsor also minimised the likelihood of respondents giving answers that they thought might be expected by the Authority.

The MSC's previous longitudinal work has shown that, after the interview, the level of trust and rapport with respondents makes recruitment to a panel easier. Therefore, this was left to the closing stages of the interview.

The Authority was identified as the research sponsor at the conclusion of the interview and respondents were asked if they were willing to join the panel that would be involved in subsequent research project phases. To increase retention of panel members, an email address (where available) was collected from the respondent, so that if they move they may still be able to be tracked via this means. The contact details of another person who is aware of the respondent's contact details, but who does not live with the respondent, were also collected. Such means of tracing have proven very useful in previous MSC longitudinal work.

Panel recruitment was very successful. 85% of respondents interviewed agreed to take part in subsequent research project phases and provided contact details so that they can be traced over time. This translates into 875 panel members.

Tests of non-response between panel members and those respondents not agreeing to recontact are conducted in a later section of this report.

The questionnaire contains sections where the respondent is asked a series of knowledge or attitudinal questions. In such section, the questionnaire was randomised to avoid order effects.

Pilot

A pilot of the questionnaire was undertaken on Saturday, 2 October 1999 from 9.30 am to 3.30pm. Briefing was undertaken by one of the senior researchers on the project. 41 interviews were completed and this was deemed sufficient to undertake finalisation of the questionnaire. These interviews were not used in the final analyses.

Main Survey

The fieldwork was conducted by telephone using the MSCati system. Interviewing commenced on 5 October and ended on 13 October. The timing of the fieldwork was designed to avoid the peak of Spring Carnival, as it was anticipated that a significant number of people would participate in Spring Carnival events, thereby distorting figures of reported involvement in gambling activities.

Analysis Approach

It is important to note that the longitudinal nature of this research project strongly determines the report structure and analyses. As this is the first study in a series using the same individuals as the primary source of data, the questionnaire responses from this study provide the benchmark for subsequent studies. Many of the research questions will not be able to be fully answered until more than one phase of data collection has occurred. The purpose of this report, therefore, is to present a detailed description of those responses, so that changes and the possible causes of such changes can be explored in future studies with the same panel of respondents. Subsequent phases will allow not only for the examination of the relationship between variables but also causality or direction of the relationship, when responses are compared over time. Subsequent phases of the research project will adopt the same broad report structure. However, as data will be available for more than one time period, the depth of analysis will be greater.

Non Response Bias

There are two ways in which non-response bias may be present in the research project. It is important to identify such bias at this stage of the research as it has implications for the quality and representativeness of the data. The first potential source of bias would be if those who refused to be interviewed differ from those who agreed to participate. The second potential source would be if those who agreed to take part in the survey but opted out from being recontacted in subsequent research project phases, differ from those who participated in the research and also agreed to join the longitudinal panel. Exploring each of these, we found the following:

Those who agreed to be interviewed versus those who did not take part in the survey

This was tested using two key statistics – knowledge of the industry and gambling participation rates.

Knowledge - The composite knowledge measure obtained from questions 4 to 18 of the research instrument shows a good spread of industry knowledge. This indicates that systematic non-response bias has been avoided, in the form of only those interested in the industry have agreeing to participate in the survey.

Usage - 80.6% of respondents claimed to participate in either lotto type games, racing (gallops, trots or dogs), poker machines, or any other game at the Crown Casino. This quite closely reflects industry participation rates (80%), indicating a representative sample of respondents in terms of gambling behaviour.

Therefore, we are confident that non-response bias of this kind is not a major weakness of the study.

Panel members versus non-members

This analysis was undertaken by comparing those who participated in this study and who agreed to join the longitudinal panel with those who participated in this survey but declined to be involved in future surveys. The comparisons were made on key demographic and behavioural variables. Of those who were interviewed in this benchmark study, 875 or 85% agreed to become panel members for future surveys.

The main characteristics on which the non-panel members differed from the panel members were that non-panel members were more likely to be non-gamblers and to be less informed about the gambling industry than were panel members. There were also some other minor socio-demographic differences.

These differences need to be taken into account when examining aggregate change over time, as the change in the characteristics of the sample may bias overall results. For example, when comparing respondents at Time Two with those at Time One, they may seem more knowledgeable but this could be because a higher proportion of the less knowledgeable respondents did not agree to be re-interviewed.

This is a methodological issue to be examined in subsequent research project phases.

Significance Testing

Significance testing (Chi-square with a confidence level of 95%) is used to assist with the analysis and interpretation of results. As a general rule, therefore, when figures are referred to in the discussion as being "significantly different" from other figures, it indicates that there is a 1 in 20 chance (or less) that the result was simply due to sampling variance.

Part 4: Definitions and Notations Used

Definitions

In the interviews, we do not make a distinction between gambling and gaming. Based on the focus group findings and the variation in definitions that exist in the industry currently, it was felt that it would be unlikely that the difference could be meaningfully conveyed to respondents, given time restrictions. We use the term gambling to refer to the general industry and when asking questions about activities and venues we name them specifically.

Electronic Gaming Machines are referred to as "poker machines" or "pokies" in the questionnaire. This practice is consistent with the 1999 Community Gambling Patterns Survey wording.

Notations

*	less than 0.5%
-	No responses
N/A	not available

The questions respondents were asked are shown in italics before discussion of results. Interviewer instructions, not read to respondents, are also shown in italics and brackets. The response categories are shown in the tables and figures displaying results

Chapter 2: Qualitative Findings

Before any qualitative work was commenced, previous research conducted by the Authority was reviewed. We were conscious of the need to avoid unnecessary duplication in our project work. A number of focus groups tapes, as well as published reports and data sets, were reviewed. From this process, a list of issues for our research was developed along with an understanding of where previous Authority projects could give us background on these issues. The list we developed detailed key measures that were needed in our project in order for us to answer our research questions. For example, a measure of industry knowledge, the respondent's own gambling behaviour, and their attitudinal beliefs. We were seeking to explore areas where a respondent's perceptions may differ from the actual operation of the gambling industry and to better understand how such perceptions may be formed and may change over time. In order to explore these issues, we needed measures of each respondent's:

- knowledge of the industry;
- own gambling behaviour;
- perceptions of others' behaviour;
- sources of exposure to gambling stories;
- credibility they personally attached to such sources;
- other sources (such as family and friends or work in the industry) through which their perceptions may have been formed; and
- any attitudes that the respondent held that may " colour" their beliefs about the industry operation.

Prior research assisted in operationalising these issues through examples of questionnaire wording and content. This left us with a clearer picture of how to utilise past research as our base. It also highlighted the need for information in areas that had not been explored in past research. Such issues included the role of the media in forming customer perceptions, respondent's beliefs about their own and others gambling behaviour, and capturing a detailed measure of the actual level of industry knowledge held by a respondent. The qualitative component of this research was used to provide the needed background and content in these previously unexplored areas.

In summary, the qualitative phase sought to:

- identify respondents' ability to articulate their views on the industry;
- gain a background in research topics that were being explored for the first time by the Authority;
- establish the range of behaviours, industry knowledge and perceptions that were likely to be encountered in the quantitative phase;
- pinpoint issues on which there was potential consensus and non-consensus;
- identify the verbal framework used by respondents to discuss the gambling

industry;

- develop questions in these new research areas that respondents would be able to comprehend and that would capture the phenomena of interest;
- further identify and develop hypotheses relating to perceptual and behavioural differences amongst respondents.

Some particular areas that were usefully explored for the first time on behalf of the Authority, are detailed next.

Differing attitudes to the gambling industry

All of the groups were readily able to articulate the positive economic outcomes of the growth of the gambling industry. However, there were differences apparent between groups when the topic of discussion turned to the negative economic outcomes. The negative economic outcomes (such as loss of revenue from non-gambling businesses) seemed to be much more apparent to those with a negative attitude to gambling and/or were light or non-gamblers.

There were also marked differences in the perceived social impact of gambling. This was most starkly apparent in the perception of the hospitality of gambling venues. Heavier gamblers perceived these venues to be warm, friendly, pleasant places while light gamblers (who's perceptions were established from 'looking in' or 'passing through' rather than actual participation) perceived the venues to be cold, sad and lonely.

These findings provided the justification for splitting the perceived impact of the gambling industry into positive and negative aspects for both social and economic impacts, when developing the quantitative instrument. Additionally, we also included a direct question on the perception of the environment provided by gambling venues, to further test the finding that attitudes to gambling venues are driven by the respondent's own level of and attitude to gambling.

Media

The section on media influences on gambling perceptions had not been covered by any other research conducted by the Authority. Therefore, this was an area that was explored in some depth in the focus groups. We were able to explore the level of recall and the perceptions of different media which enabled the development of a relatively concise, but comprehensive media section in the questionnaire. We found recall of specific stories was difficult for respondents, but people could provide some overall assessment of their perceptions of the bias in each media. Within media there was some difference depending on the source. For example, news programs were considered more credible than current affair programs. It was decided that the time limit on the questionnaire did not allow for specific program content to be explored. Rather, respondents would only be able to provide an overall assessment of the various media.

It was noticeable that, of the stories recalled, heavier gamblers tended to mention those that showed people winning a substantial amount. In contrast, the lighter gamblers focussed on the stories that illustrated people in financial difficulties due to their gambling activities. This highlighted the selective nature of attention and recall. It led to the inclusion of a question for each media source, of whether respondent felt the stories were generally portraying gambling in a positive or negative light.

In the focus groups, the moderator also showed clippings from particular newspaper stories related to gambling to check prior recognition, and then generate group discussion. This proved to be a useful exercise as it uncovered some of the (previously unexpressed) perceptions of the younger people who were light gamblers that older women gambled because they were lonely (which was the sentiment expressed in one of the stories). This provided the motivation for further exploring the motives of others gambling versus self and the rationale for including ‘to alleviate boredom or loneliness’ as one of the potential motives. This issue was operationalised in the questionnaire through having two separate questions on motivations for gambling. The first explored the respondent’s own reasons for gambling and the second explored the respondent’s perceptions of why others gamble. It was hoped that such a structure would capture any perceptual differences that exist.

There were also varying levels of perceived credibility of media, with respondents placing more weight on certain opinions and, despite being aware of the information from other sources, were quick to disregard them. Therefore questions on perceived credibility of sources were also included in the final questionnaire.

Role of advertising for gambling activities

We also explored the awareness and perceptions of gambling advertising and promotion. Group participants appeared to be more readily able to recall specific offers (free meals, discounts, competitions) than mass media advertising. The level of involvement in these incentives varied, as expected, in line with frequency of gambling. They were also quite comfortable discussing the behaviour they felt had been prompted by these promotions.

Influence of advertising for gambling support services

Respondents seemed to acknowledge a rise in the profile of problem gamblers. That is, they frequently claimed to know someone they considered to have a gambling problem and to have seen an increase in advertising for help for problem gamblers. It was hypothesised that, as this exposure increases, the perceptions of the prevalence of problem gamblers would increase (regardless of the actual reported number). Therefore this was also included in the questionnaire.

Influence of the perceptions and behaviour of family and friends

Another area that was extremely interesting to explore was the perceptions held by a group participants about the gambling activities and motives of their family and friends. In this section of the discussion we focussed on how the gambling activities of specific people had changed over time and what they felt contributed to this change (which was usually an increase in gambling to what was perceived as a ‘problem’ level). Most participants who knew of someone who had reached a level of concern were able to cite a variety of factors (some of which were not related to gambling itself) that contributed to the increase. This lead to the inclusion of the statement *There is no such thing as a problem gambler, but there are people with problems who gamble* in the quantitative questionnaire.

Summary

The outcome of the qualitative phase was the development of the quantitative instrument. The qualitative work assisted in both establishing wording that was easily comprehensible to respondents and also structuring issues so that there was an easy flow for them to follow. It also highlighted where we may expect to find differences. For example – perceptions of why other people gambled differed markedly, depending on the attitude and frequency gambling of the person giving the response.

Chapter 3: Demographic Profile

This section details the demographic profile of the respondents. The questions were worded to match those of the 1999 Community Gambling Patterns Survey.

Gender was established by observation. If the interviewer was in any doubt then they asked the respondent directly.

Table 1: Gender

Value Label	Frequency	Percent
Male	456	44.5
Female	568	55.5
Total	1024	100%

Question 81: Into which of the following age groups do you belong?

Table 2: Age group

	Frequency	Percent
18 years	12	1.2
19 years	12	1.2
20 to 24 years	63	6.2
25 to 29 years	85	8.3
30 to 34 years	109	10.6
35 to 39 years	112	10.9
40 to 44 years	144	14.1
45 to 49 years	100	9.8
50 to 54 years	110	10.7
55 to 59 years	86	8.4
60 to 64 years	61	6.0
65 to 69 years	50	4.9
70 years and over	77	7.5
Refused (do not read)	3	0.3
Total	1024	100%

Question 82: Which of the following best describes your household?

Table 3: Household structure

Value Label	Frequency	Percent
Single person	194	18.9
Group household (no relation)	45	4.4
Couple with no children	100	9.8
One parent family with dependent kids	52	5.1
One parent family with kids not at home	14	1.4
Two parent family with dependent kids	388	37.9
Two parent family with kids not at home	187	18.3
Other related individuals	33	3.2
Refused (do not read)	3	0.3
Other	8	0.8
Total	1024	100%

Question 83: Which of these describes you best?

Table 4: Employment status

Value Label	Frequency	Percent
Work full time	481	47.0
Work part time	209	20.4
Household duties only	87	8.5
Student	39	3.8
Retired (self supporting)	92	9.0
Pensioner	96	9.4
Unemployed	15	1.5
Don't know/can't say	5	0.5
Total	1024	100%

Question 84: What is your country of birth?

Table 5: Country of birth

Value Label	Frequency	Percent
Australia	839	81.9
UK/Scotland/Ireland/Wales	67	6.5
New Zealand	8	0.8
North America (USA/Canada)	5	0.5
Greece	5	0.5
Italy	13	1.3
Other West European	23	2.2
East Europe (Russia/Georgia/Bulgaria)	14	1.4
Middle East (Israel/Iraq/Egypt)	3	0.3
Vietnam	4	0.4
Malaysia	6	0.6
Philippines	2	0.2
Hong Kong	1	0.1
Other Asia/Pacific	23	2.2
Africa	6	0.6
Refused/don't know	2	0.2
Other	3	0.3
Total	1024	100%

Question 85: Were your parents born in Australia?

Table 6: Parents born in Australia

	Frequency	Percent
Yes - father	48	4.7
Yes - mother	50	4.9
Yes - both	665	64.9
No - neither	260	25.4
Can't say/refused	1	0.1
Total	1024	100%

Question 86: What is the main language spoken at home when growing up?

Table 7: Language spoken at home while growing up

Value Label	Frequency	Percent
English	924	90.2
Mandarin	4	0.4
Cantonese	2	0.2
Vietnamese	3	0.3
Spanish	2	0.2
Italian	22	2.1
Greek	8	0.8
Refused (do not read)	2	0.2
Other (please specify)	57	5.6
Total	1024	100%

Question 88: Can you tell me your highest level of education?

Table 8: Education level

Value Label	Frequency	Percent
No school or primary	29	2.8
Attended high school	84	8.2
Completed year 10 or 11	275	26.9
Completed year 12 (VCE/HSC/ Matriculation)	193	18.8
Trade certificate or	52	5.1
Other certificate or	110	10.7
Bachelors degree	175	17.1
Post graduate degree	100	9.8
Refused	6	0.6
Total	1024	100%

Question 87: Into which of these ranges is your gross (before tax) income? If you live with a partner it will be your joint income, otherwise it will be your income alone.

Table 9: Household gross income

Value Label	Frequency	Percent
$0 to $10 000	69	6.7
$10 001 to $15 000	69	6.7
$15 001 to $20 000	64	6.3
$20 001 to $25 000	64	6.3
$25 001 to $30 000	70	6.8
$30 001 to $35 000	73	7.1
$35 001 to $40 000	68	6.6
$40 001 to $50 000	118	11.5
$50 001 to $60 000	97	9.5
$60 001 to $75 000	85	8.3
$75 001 to $100 000	74	7.2
$100 001 to $125 000	31	3.0
$125 001 to $150 000	12	1.2
Over $150 000	22	2.1
Don't know/unsure	50	4.9
Refused	58	5.7
Total	1024	100%

Question 89: What is your religion? (Do not read out)

Table 10: Religion

Value Label	Frequency	Percent
Anglican/Church of England	201	19.6
Catholic	256	25.0
Baptist/Church of Christ	21	2.1
Presbyterian /Methodist	145	14.2
Salvation Army	2	.2
Lutheran	6	.6
Other Christian	56	5.5
Jewish/Judaism	9	.9
Buddhism	9	.9
Other non-Christian	8	.8
Other	1	.1
No religion	288	28.1
Don't know/can't say	9	.9
Islam	2	.2
Greek Orthodox	11	1.1
Total	1024	100%

Chapter 4: Quantitative findings

In this section, findings are presented and discussed for all those interviewed in the main telephone survey. Prior to each table or figure, the question asked of respondents is stated.

This section sets the structure for subsequent research phases. It does not seek to establish any relationships between variables, as this is the purpose of the longitudinal research design.

Respondents Working in the Industry

Question 2: Do you or anyone else in your household work in....? (Read out list, multiple responses possible)

Table 11: Proportion of respondents working in gambling industry

Industry area	Percentage (n=1024)
A venue where poker machines are present	1.8
TAB agency or Tabcorp	1.0
Tattersalls agency or corporation	0.6
The Racing Industry	0.5
The Crown Casino	0.4
None of these	96.9

Table 1 shows the proportion of respondents who claimed to be directly employed in the gambling industry. The question was multiple response to allow for situations where respondents worked in the industry themselves and also had family members working in other areas of the industry.

Respondents who either worked themselves or had family members working in the industry were ‘tagged’ for later analysis, but were still included in the research. This was so we could test issues such as whether gambling industry workers have a better understanding of the gambling industry than respondents not employed in the industry. The exception to this was those who worked for the Authority; they were screened out. In the past, the Authority has typically screened out respondents who work or have family who work in the industry. However, it could be that these respondents hold differing perceptions and behaviour patterns from those respondents who have no such industry involvement. So, in this research project and also in the 1999 Community Gambling Patterns Survey, such respondents were retained in the sample.

Knowledge of the Industry

Section overview

A series of questions was administered to assess the level of understanding respondents have as to the size and operation of the gambling industry and the workings of the industry. These results are compared to actual industry figures to determine who were able to correctly answer these questions. This is then used to classify people according to their level of accurate knowledge of the industry.

The questions in this section also provide benchmarks for examining change over time and then determining what 'causes' people to improve/reduce their level of accurate knowledge of the industry, and the relative influence of these 'causes'. For example, we can investigate if there is an increase in advertising for gambling support services associated with overestimation of the proportion of problem gamblers.

The order in which the questions were asked was randomised to avoid any order effects. Each of the knowledge questions is examined separately before a discussion of respondents' knowledge across the questions.

To aid interpretation, correct answers to the industry knowledge questions are shown by light shading in the tables.

The section examines perceptions of the size of the industry, restrictions, returns, skill requirements, expenditure, incidence of problem gamblers and then looks at the spread of knowledge across all these issues.

Size of the industry

Question 4: What proportion of state revenue that the Victorian government raises, excluding federal grants, come from gambling taxes.

Table 12: Proportion of state revenue that come from gambling taxes

	Frequency	Percent
None	2	0.2
Less than 5 percent	33	3.2
Between 5 and 10 percent	123	12.0
Between 11 and15 percent	**115**	**11.2**
Between 16 and 20 percent	66	6.4
Between 20 and 25 percent	119	11.6
Between 26 and 35 percent	81	7.9
Between 36 and 50 percent	105	10.3
Can't say	380	37.1
Total	1024	100%

To test perceptions of the size of the industry, respondents were asked what proportion of state revenue that the Victorian Government raises, excluding federal grants, comes from gambling taxes. The correct proportion is closest to 15% (source: page 5, "Community Facilities Resulting From the Providers of Gaming in Victoria", 1997). 11.2% of respondents chose the category that contained the correct answer. A further 18.4% were in the two categories on either side of the correct answer. Overall, 36.2% overestimated while 15.4% underestimated. 37.1% of respondents were unsure of the answer. These results are shown in Table 12.

Question 5: If there are 14,000 Victorians employed in Electricity, gas and water supplies and 45,000 Victorians employed in Education, how many Victorians do you think are directly employed in the gambling industry?

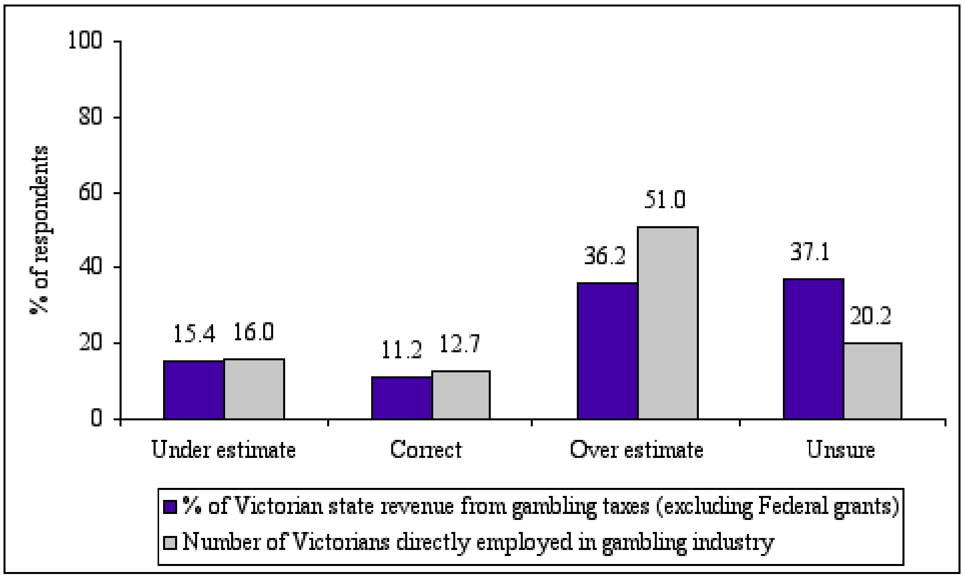
The correct answer is closest to option 3 (source: Figure E1 page ii, "The Effect of Gambling on Employment in Victoria", 1997). 12.7% of respondents were correct. 16.0% underestimated, 51.0% overestimated while 20.2% were unsure.

Table 13: Number of Victorians directly employed in the gambling industry

Value Label	Frequency	Percent
Fewer than 5 thousand	26	2.5
Between 5 and 10 thousand	138	13.5
Between 10 and 15 thousand	**130**	**12.7**
Over 15 thousand	522	51.0
Don't know	207	20.2
Refused (not read out)	1	0.1
Total	1024	100%

Figure 1 compares the accuracy of responses from the previous two questions. It illustrates how respondents generally overestimated the number of people directly employed in the gambling industry and the proportion of state revenue from gambling taxes. This suggests that respondents generally perceive a greater positive economic contribution than is actually occurring.

Figure 1: Comparisons of accuracy of responses from Table 2 and 3



Restrictions

In order to assess the level of understanding of the industry's operations, respondents were asked questions about restrictions, payouts and skill requirements.

Question 6: Is there a limit on the number of poker machines (or Pokies) in Victoria? (If no click "there is not limit" If yes then ask)
Is that current limit approximately…

Table 14: Limit on number of poker machines in Victoria

	Frequency	Percent
There is no limit	169	16.5
One thousand	10	1.0
Ten thousand	83	8.1
Thirty thousand	**146**	**14.3**
Fifty thousand	82	8.0
One hundred thousand	64	6.3
Don't know (not read out)	470	45.9
Total	1024	100%

This was the first question that examined restrictions issues. 16.5% of respondents thought there was no limit. The current limit is thirty thousand (27 500 in clubs and hotels throughout the State, as determined by Ministerial Direction, and 2 500 at the Melbourne Casino, as specified in the casino license). 14.3% of respondents got this correct. 45.9% were unsure of the answer. 25.6% underestimated the cap and 14.3% overestimated. These results are shown in Table 14.

Returns

Question 7: Must poker machines (or pokies) return a minimum percentage to the players?
(If 'no' indicate below, if yes then)
Is that..?.
(Read out other options. Single response only. we are interested in return to players rather than to the Casino or Government.)

Table 15: Returns from poker machines

	Frequency	Percent
No minimum return	178	17.4
To each individual player	26	2.5
Over a period of a day	162	15.8
Over a period of a year	**323**	**31.5**
Don't know (not read out)	333	32.5
Refused (not read out)	2	0.2
Total	1024	100%

Respondents were asked if poker machines must return a minimum percentage to players. 17.4% (incorrectly) said there was no such requirement. 32.5% of respondents were unsure of this question. Those who said "yes" were read out a list of options for payment returns. 31.5% gave the correct answer of "over a period of a year".

Question 8: In fact the law requires that for every hundred dollars put into a pokie machines a minimum must, on average, be returned to players in payouts. Is this amount... (read out options)?

Respondents were asked what the minimum return to players is for every $100 put into a machine. Few respondents thought machines paid out equal or more money than is put into them (just over 1% of respondents). 21.2% were unsure. The majority of respondents underestimated the return. The correct answer was identified by 13% of respondents. These results are shown in Table 16.

Table 16: Return in payouts for every $100 put into a poker machine

	Frequency	Percent
33 dollars	550	53.7
50 dollars	52	5.1
67 dollars	57	5.6
87 dollars	**133**	**13.0**
100 dollars	9	0.9
107 dollars	4	0.4
Don't know (not read out)	217	21.2
Refused (not read out)	2	0.2
Total	1024	100%

Question 9: What is the minimum percentage of the money that is bet on a roulette table that theoretically is returned to players in payouts. Is it?

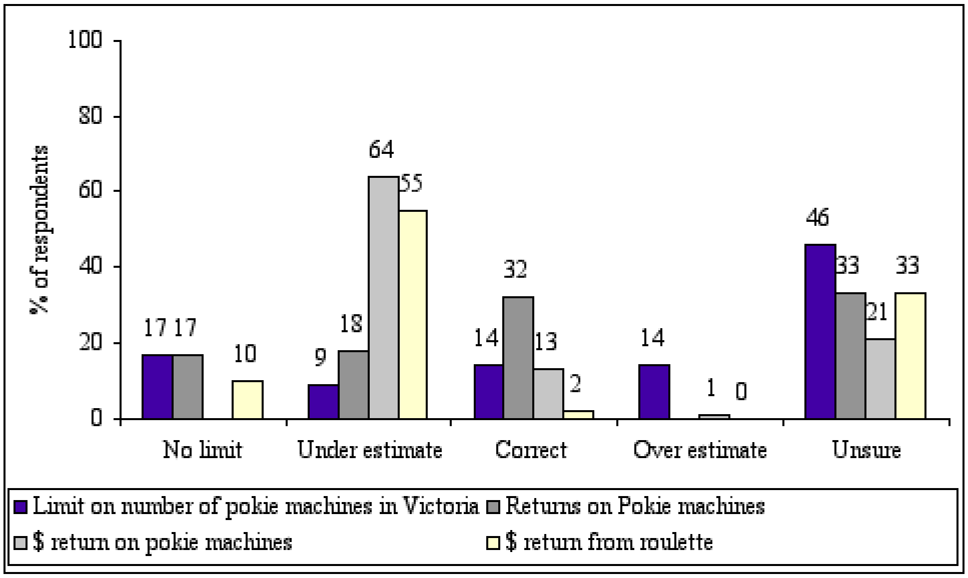
Table 17: Percentage that is theoretically returned to players from Roulette

Value Label	Frequency	Percent
25%	431	42.1
50%	88	8.6
75%	41	4.0
97%	**25**	**2.4**
100%	4	0.4
It could be anything	101	9.9
Don't know (not read out)	334	32.6
Total	1024	100%

2.4% of respondents correctly stated 97% was the percentage theoretically returned from Roulette. The majority underestimated the return (54.7%). 9.9% thought the return was not set, while 32.6% were unsure.

Figure 2 compares the accuracy level of the answers from Tables 4 to 7. It shows how there was a general underestimate of the returns from both poker machines and Roulette.

Figure 2: Accuracy of answers in Tables 4-7



Question 10: A poker machine (or pokie) is more likely to pay out soon if someone has been playing it for an hour and lost their money.

Table 18: "A poker machine is more likely to pay out soon if someone has been playing it for an hour and lost their money"

Value	Frequency	Percent
True	282	27.5
False	**663**	**64.7**
Don't know	79	7.7
Total	1024	100%

Table 18 reveals that a significant proportion of respondents (27.5%) hold the perception that a poker machine is more likely to pay out soon if someone has been playing it for an hour and lost their money. While a poker machine is required to return a minimum percentage over a year, in a timeframe as short as an hour, an estimate of payout probability is not possible. Each play is independent of any other. 64.7% of respondents correctly answered "yes" to this question. Only 7.7% of respondents were unsure which is lower response rate than for many of the other questions in this section.

Skill requirements

Respondents were asked about skill levels required for different forms of gambling. For Pokies, as each play is independent, no skill is required. However, the answers to the questions relating to horses, Roulette and Blackjack have an element of subjectivity. This is especially true when trying to distinguish between whether " a lot" and " a little" skill is needed for such gambling forms. For this reason, no shading is given for correct answers in these cases.

Question 11: Do you think skill is involved at winning on the pokies? (If yes then say) Is that a lot or a little?

Table 19: Level of skill involved at winning on the Pokies

Value Label	Frequency	Percent
None (do not read)	**969**	**94.6**
A little	30	2.9
A lot	12	1.2
Can't say (do not read)	13	1.3
Total	1024	100%

Table 19 shows that there is a widely held perception that winning at poker machines does not require skill. This is the industry accepted answer, as each play is independent of the last. Few respondents were unsure.

Question 12: Do you think skill is involved at winning on the horses? (If yes then say) Is that a lot or a little?

Table 20: Level of skill involved at winning on the horses

Value Label	Frequency	Percent
None (do not read)	351	34.3
A little	399	39.0
A lot	254	24.8
Can't say (do not read)	20	2.0
Total	1024	100%

Table 20 shows that there is a more widely held perception that winning on the horses requires skill, than in the case of poker machines. While only 4.1 of respondent felt poker machines required skill, 63.8% felt winning on the horses did involve skill to some extent. Again there was little uncertainty amongst respondents, with only 2.0% saying they were unsure. Whether winning on horses requires skill and especially whether this is " a lot" or " a little", is subjective. For this reason no shading is given for correct answer.

Question 13: Do you think skill is involved at winning on roulette? (If yes then say) Is that a lot or a little?

Table 21: Level of skill involved at winning on roulette

Value Label	Frequency	Percent
None (do not read)	**718**	**70.1**
A little	128	12.5
A lot	52	5.1
Can't say (do not read)	126	12.3
Total	1024	100%

There is the widely held perception (70.1%) that Roulette does not require skill to win. This concurs with industry perceptions. A high proportion of respondents was unsure of the correct answer (12.3%). 17.6% felt it took some degree of skill.

Question 14: Do you think skill is involved at winning on blackjack? (If yes then say) Is that a lot or a little?

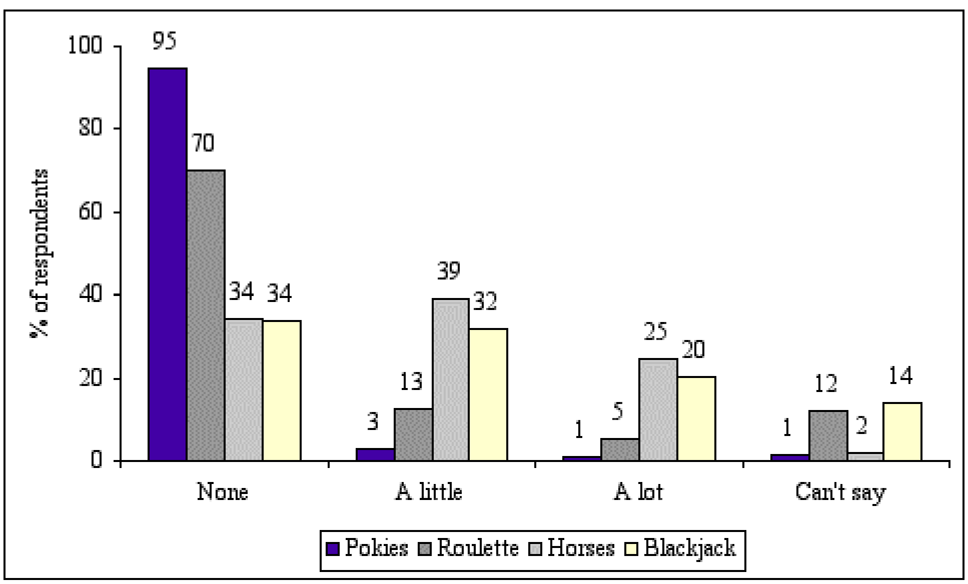
Table 22: Level of skill involved at winning at Blackjack

Value Label	Frequency	Percent
None (do not read)	344	33.6
A little	**327**	**31.9**
A lot	**209**	**20.4**
Can't say (do not read)	144	14.1
Total	1024	100%

52.3% felt that Blackjack is a game requiring skill. 33.6 % stated no skill was involved. Again, a higher proportion was unsure about skill requirements compared to poker machines and horseracing. The industry view is that Blackjack does involve skill. But it is subjective as to whether this is " a lot" or " a little" Given this, 52.3% gave the 'correct' answer, while 33.6% felt no skill was involved.

An overview of the distribution of responses to these skill questions is shown in Figure 3. Poker machines are most strongly perceived as not requiring skill. Blackjack and horses have a similar profile and are seen as requiring a higher level of skill than Roulette or poker machines. Roulette lies between poker machines and Blackjack/Horses in terms of perceptions of skill requirements.

Figure 3: Comparison of perceived required skill levels



Expenditure

Question 15: What percentage of household disposable income do Victorians spend (by this we mean lose) on gambling. Is it….(read out options)

Table 23: Percentage of household disposable income that Victorians spend on gambling

Value Label	Frequency	Percent
Less than 1 percent	9	0.9
1 to 2 percent	78	7.6
3 to 4 percent	**227**	**22.2**
5 to 8 percent	573	56.0
Can't say (do not read)	135	13.2
Refused (do not read)	2	0.2
Total	1024	100%

Respondents were asked what percentage of household disposable income Victorians spend on gambling. The answer is between 3 and 4% (source: page i, "The Impact of the Expansion in Gaming on the Victorian Retail Sector", 1997). 22.2% correctly stated this. 8.5% underestimated the proportion spent, 56.0% overestimated, while 13.2% could not state a percentage.

Question 16: Approximately how many pokie machines are there in Australia currently?

Table 24: Number of poker machines currently in Australia

	Frequency	Percent
Less than 10 thousand	12	1.2
10 to under 30 thousand	48	4.7
30 to under 50 thousand	54	5.3
50 to under 100 thousand	122	11.9
100 to under 125 thousand	123	12.0
125 to under 150 thousand	51	5.0
150 to under 175 thousand	46	4.5
175 to under 200 thousand	**29**	**2.8**
200 or more thousand	179	17.5
Unsure (do not read)	360	35.2
Total	1024	100%

This question probed respondents' about gambling issues at a national level, rather than just focusing on Victoria. The question was included as a result of the high level of media attention given to the reported number of poker machines in Australia in the 1999 Productivity Commission Report. The perceptions respondents held about the incidence of poker machines at a national level, and how these perceptions might change with diminished media attention was of interest. Currently there are approximately 180 000 machines in Australia (source: page 12.5 Productivity Commission Draft Report, 1999). This was correctly identified by only 2.8% of respondents. 35.2% were unsure. 44.6% underestimated and 17.5% overestimated. 24.8% of respondents were either correct or within one category of being correct.

Overall participation levels in gambling were sought. 16.7% correctly identified participation levels (source: page 40 " Sixth Survey of Community Gambling patterns and Perceptions, 1999). 52.9% underestimated the participation level and 20.3% overestimated. 10.1% were unsure. This is shown in Table 25.

Question 17: What percentage of Victorian adults participate in gambling in a year?

Table 25: Percentage of Victorians that participate in gambling each year

	Frequency	Percent
Less than 20 percent	28	2.7
21 to 30 percent	95	9.3
31 to 50 percent	170	16.6
51 to 70 percent	249	24.3
71 to 80 percent	**171**	**16.7**
81 to 90 percent	118	11.5
Over 90 percent	90	8.8
Unsure	103	10.1
Total	1024	100%

Problem gamblers

Question 18: What is the percentage of all Victorian adults who are considered to be 'problem gamblers', whereby their gambling results in harm to them, their family and/or society?

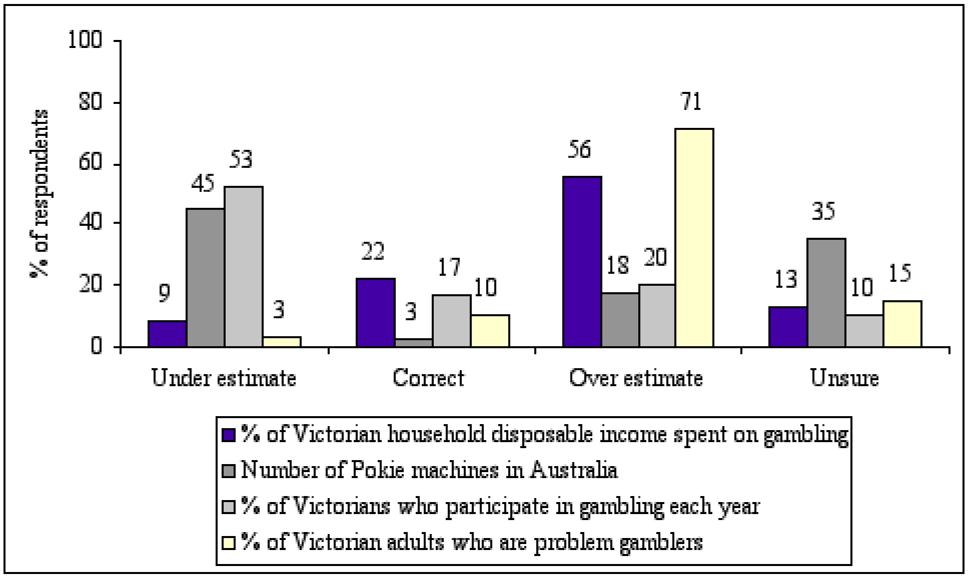
Finally in the knowledge measures, the issue of incidence of problem gambling was sought. The incidence is dependent on the definition of 'problem gambler' adopted. The Authority's "Sixth Survey of Community Gambling Patterns and Perceptions" found that 1.5% of Victorian adults scored in the "At Risk" category of the South Oaks Gambling Screen for problem gamblers. The Productivity Commission Report estimates that around 2.3% of the adult population have significant gambling problems. Certainly, in this research project, respondents' perceptions of the incidence were higher than actual incidence. 10.2% identified the correct proportion. 3.3% underestimated, 71.4% overestimated, while 15% were unsure.

Table 26: Proportion of Victorian adults who are problem gamblers

Value Label	Frequency	Percent
1 percent or less	34	3.3
More than 1 percent up to 3	**104**	**10.2**
More than 3 percent up to 5	152	14.8
More than 5 percent up to 10	208	20.3
More than 10 percent up to 20	158	15.4
More than 20 percent	214	20.9
Don't know	154	15.0
Total	1024	100%

Figure 4 compares the accuracy level of the responses for Tables 13 to 16. It shows a considerable proportion of respondents over estimate the proportion of disposable income spent on gambling and the proportion of problem gamblers. There is also a tendency to underestimate the number of poker machines in Australia and the proportion of Victorians who participate in gambling each year.

Figure 4: Comparisons of accuracy levels of Tables 13-16



Differing Levels of Knowledge

Using the knowledge questions from Questions 4 to 18, a composite measure of knowledge was constructed for each respondent. For each question they correctly answered they were given a score of 1. For incorrect answers or an "unsure", they were given a score of zero. For the questions on skill, the degree of skill was not discriminated. So, for example, in the Blackjack question "a lot" and "a little" skill were both considered correct answers. The distribution of knowledge is shown in Figure 5 and appears to follow a normal distribution. This is a pleasing finding as it means we have a spread of knowledge across the sample for our further analyses. It also indicates an absence of non-response in our data. This is discussed further in a later section.

Questions 11 to 14 of the knowledge questions are arguably more subjective than the other knowledge questions. This is because they relate to estimates of skill required for different forms of gambling and this is open to a degree of personal opinion. As a check for the effect of including these questions, the above composite knowledge variable was recalculated excluding these four questions. The results show that the distribution skews towards lower levels of knowledge. This is because these four skill questions have a higher proportion of correct responses than is seen for the other industry knowledge questions.

Figure 5: Level of Knowledge

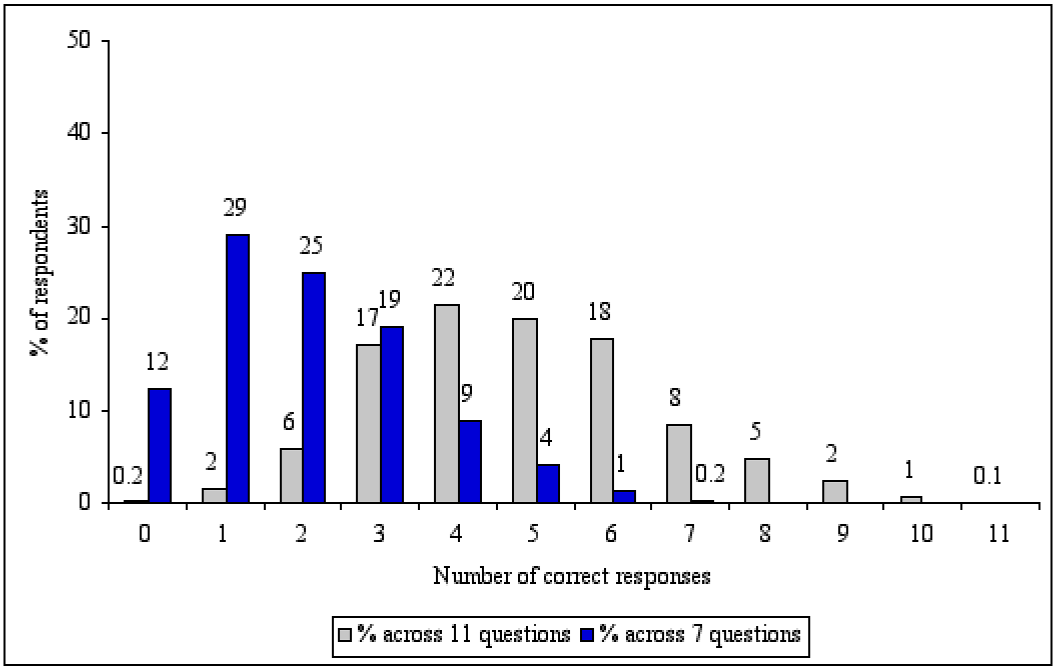


Figure 5 did not give findings that indicated these questions should be excluded for the knowledge variable. Therefore, all the industry knowledge questions are included in the analysis.

A two-category variable was created from the knowledge questions. Respondents who gained a score of 6 or more correct were categorised as being higher in knowledge than those getting five or fewer correct. The split was decided upon after looking at the distribution of responses. There are 66% in the lower knowledge group and 34% in the higher knowledge.

There was no statistically significant difference in respondents' knowledge of the gambling industry between those respondents who worked in the gambling industry (or who had family members working in the industry) and those respondents who did not work in the gambling industry or have family members working in the industry. Those respondents who held pokies or Casino Club membership also did not have a higher level of knowledge than those respondents who did not hold such memberships.

There was, however, a tendency for males to be more likely to be in the higher knowledge group (44.5%) than females (25.7%), and for those who were unemployed, pensioners or engaged in household duties to have lower industry knowledge than those respondents in other professions.

There also appeared to be a relationship between income and knowledge of the gambling industry, with higher knowledge associated with higher income levels. This same pattern was also seen for education level, again to a statistically significant degree. More educated respondents had a higher level of knowledge of the gambling industry. There did not appear to be a relationship between gambling industry knowledge level and any of the other demographic variables collected in the study.

General Perceptions of Industry and Change

Question 19: In the last year, do you think the amount of exposure gambling activity has had in the Victorian media has....

Respondents were asked what they thought about the amount of exposure gambling has had in the Victorian media over the last year. The term " media" was not explicitly defined in the questionnaire. It was important to gain the respondent's own overall perception about the amount of exposure gambling has had and so we wanted to work within respondent's own definition. The question came early on in the interview, before any references to specific media forms such as radio, had been made, which could have influenced their self defined understanding of the term.

This question will be used as a perception of change benchmark for subsequent research project phases. By asking about media exposure, we are able to test if perceptions of exposure are associated with the strength of attitude held. For example, those who feel it is an increasing media issue may feel more strongly negative about the industry.

Table 27: The level of exposure gambling has received in the media

Value Label	Frequency	Percent
Increased	520	50.8
Decreased	211	20.6
Stayed the same	262	25.6
Don't know (do not read)	31	3.0
Total	1024	100%

Table 27 shows a widely held perception that media exposure has increased of late. Few respondents were unsure. 20.6% felt there had been a decrease while 25.6% felt it was unchanged.

Motivations for Gambling

Question 20: I am now going to read out a list of 5 possible reasons why other people gamble. For each, I would like you to give it a rating for how common you think it is as a reason others gamble. You should give a 10 to the statement if you believe it is the most common reason why others gamble or a 0 to the statement if you believe it is not a common reason at all. You can also give scores anywhere between 0 and 10.

This section examines the perceptions held by respondents as to why they themselves gamble and why they perceive others gamble. It was thought that such a comparison would give insights into the apparent inconsistencies that exist between people's perceptions of the industry and other people's gambling behaviour and their own behaviour.

To capture perceptions, respondents were given a series of five possible motivations and asked to rate each for how common a reason they thought it was in motivating others to gamble. The perceptions that were tested were chosen to align closely with the 1999 Community Gambling Patterns Survey to allow for comparisons between the two studies.

However, some variation between the perceptions tested in the two studies is based on the qualitative work for this project. Our qualitative work suggested that loneliness is widely perceived as a motivation for others gambling, an influence not explored in the Patterns Survey.

Later in the survey, respondents were asked to again rate five possible reasons for gambling but this time in terms of how common each was as a reason for their own gambling behaviour. The questions of self and other motivations were separated in the questionnaire to minimise the likelihood of the responses to one question influencing responses to the other.

The five possible motivations were:

1. To avoid boredom or loneliness;

2. Enjoyment or social reasons;

3. For the thrill or dream of winning;

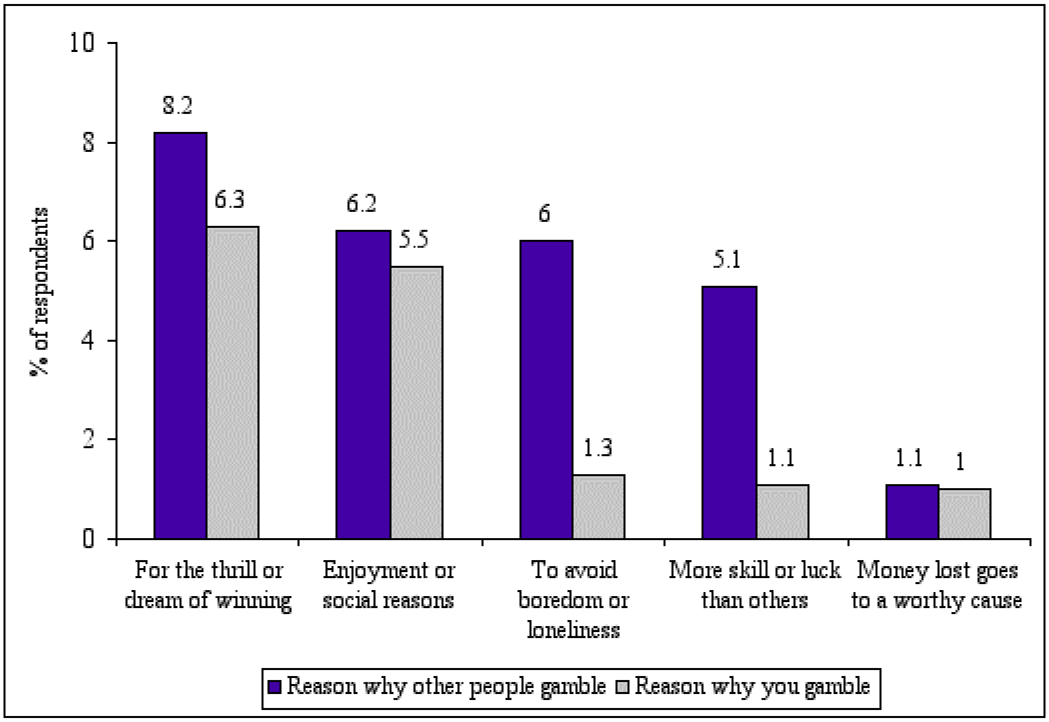
4. Because money lost goes to a worthy cause;

5. Because I /(they think they) have more skill or luck than others.

The mean was then calculated for each of the motivations. These calculations were done after the removal of the ‘unsures’. Figure 6 shows that the greatest difference between self perceptions and perceptions of others occurs for motivations relating to boredom or loneliness, followed by having more skill or luck than others.

The perception of 'money lost goes to a worthy cause' received low ratings as both a perception of why others gamble and why the respondent themselves gamble. Altruistic motivations were not perceived to be a key reason for gambling behaviour. Few respondents stated they were primarily motivated to gamble because they perceive themselves to have more skill or luck than others.

Figure 6: Comparison of means for motivations for gambling



From Figure 6 it is evident that, while there is the same ranking of people's perceived motivations for themselves versus others' gambling, there is a wide disparity found in two motivations. Respondents were more willing to attribute 'avoid boredom or loneliness' and 'more skill or luck' to others than to themselves.

Analysis was conducted to see if those respondents aged 55 years and over were more likely to give higher ratings to "enjoyment or social reasons" and "to avoid boredom or loneliness" as reasons why they, themselves gamble, compared to respondents aged under 55 years. No statistically significant differences were seen. That is, it does not appear to be a stronger motivation for one particular group, or at least they do not state that it is.

The same analysis was conducted for the perceptions of why other gamble and, again, no differences were found. That is, the finding from the focus groups that younger respondents perceive older people to gamble to avoid 'boredom or loneliness' to a greater degree than respondent in younger age groups was not supported in this data. These results could also be an artefact of the wording, which was not age specific in terms of motivation.

Perceived Impact of Gambling

A series of statements were read to respondents and they were asked to indicate their agreement or disagreement with the statement. The statements describe various different impacts of gambling, covering positive to the economy, positive to society and negative to society. The statements were chosen as a result of our qualitative findings. We wanted to capture perceptions where there were likely to be significant differences between respondents. The issues tested here had such perceptual differences in the focus groups. In subsequent analysis, we will explore variables associated with holding the differing perceptions and also at variables associated with a change in perception between research project phases.

Question 27: Increased gambling activity is good for the Victorian economy

Table 28: Level of agreement with "increased gambling is good for the economy"

Value Label	Frequency	Percent
Agree strongly	125	12.2
Agree slightly	220	21.5
Neutral	43	4.2
Disagree slightly	167	16.3
Disagree strongly	455	44.4
Refused/don't know	14	1.4
Total	1024	100%

Table 28 examines a 'positive to the economy' statement. There is an overall high level of disagreement with this statement. Few respondents were neutral.

Question 28: Gambling venues provide a safe and pleasant environment for people to go to

Table 29: Level of agreement "Gambling venues provide a safe and pleasant environment for people to go to"

Value Label	Frequency	Percent
Agree strongly	195	19.0
Agree slightly	334	32.6
Neutral	53	5.2
Disagree slightly	186	18.2
Disagree strongly	240	23.4
Refused/don't know	16	1.6
Total	1024	100%

A positive social impact of gambling statement had 51.6% agreement and 41.6% disagreement. Again, a low proportion of respondents was neutral.

Question 29: The social problems of gambling far outweigh the benefits

Table 30: Level of agreement with "The social problems created by gambling far outweighs the benefits"

Value Label	Frequency	Percent
Agree strongly	612	59.8
Agree slightly	183	17.9
Neutral	30	2.9
Disagree slightly	111	10.8
Disagree strongly	84	8.2
Refused/don't know	4	0.4
Total	1024	100%

Table 30 examines perceptions of the negative social impact of gambling. Strong levels of agreement are seen, with 77.7% of respondents agreeing either slightly or strongly. This is in line with findings from other Authority studies.

Question 30: There is no such thing as a problem gambler, but there are people with problems who gamble

Table 31: Level of agreement with "There is no such thing as a problem gambler, but there are people with problems who gamble"

Value Label	Frequency	Percent
Agree strongly	286	27.9
Agree slightly	115	11.2
Neutral	40	3.9
Disagree slightly	123	12.0
Disagree strongly	453	44.2
Refused/don't know	7	0.7
Total	1024	100%

This question on problem gambling polarised respondents. There is a significant proportion of respondents at each scale extreme. Overall, there are more respondents who disagree with this statement (56.2%) than agree (39.1%).

Further analysis was conducted on those respondents who either "agreed strongly" or "disagreed strongly" to see what the distinguishing characteristics were between the two groups. Respondents more likely to "agree strongly" were on house hold duties or retired, those more likely to disagree were working full time or students. Also, the higher income bracket respondents tended to disagree more with the statement. So too, did those with higher education levels. Those with a higher degree of industry knowledge were more likely to "strongly disagree" with the statement, as were those aged under 55 years.

Question 31: There are sufficient controls and restrictions on the gambling industry

Table 32: Level of agreement with "There are sufficient controls and restrictions on the gambling industry"

Value Label	Frequency	Percent
Agree strongly	92	9.0
Agree slightly	202	19.7
Neutral	23	2.2
Disagree slightly	207	20.2
Disagree strongly	451	44.0
Refused/don't know	49	4.8
Total	1024	100%

Table 32 examines respondents' perceptions of the current level of regulation of the industry. Overall, there is a lower proportion that agrees (28.7%) than disagrees (64.2%) that there are sufficient controls and restrictions currently.

Question 32: I derive entertainment and pleasure from the money I spend on gambling

Table 33 examines perceptions of respondents' enjoyment of gambling. A polarisation of responses is evident, with a slight skew towards disagreeing with the statement.

Table 33: Level of agreement with "I derive entertainment and pleasure from the money I spend on gambling"

Value Label	Frequency	Percent
Agree strongly	110	10.7
Agree slightly	252	24.6
Neutral	52	5.1
Disagree slightly	178	17.4
Disagree strongly	402	39.3
Refused/don't know	30	2.9
Total	1024	100%

Gambling Support Services

This section examines whether respondents are aware of gambling support services and if they know anyone who has used such a service. The research is testing whether increased exposure to gambling support services and/or knowing someone with a gambling problem, influences perceptions and knowledge of the industry.

Question 34: Have you seen any advertising targeted at problem gamblers in the last 3 months?

Table 34: Seen any advertising for gambling support services in the last 3 months

Value Label	Frequency	Percent
Yes	656	64.1
No	356	34.8
Can't say	12	1.2
Total	1024	100%

Table 34 shows that claimed awareness of gambling support services is high, with 64.1% claiming to have seen advertising for such a service in the last 3 months. Those with higher industry knowledge were slightly more likely to state that they had seen recent advertising (69.6%), than those with lower levels of industry knowledge (61.2%).

Question 35: Has the amount of advertising you see for gambling support services increased, decreased or stayed the same over the last year?

Table 35: Has the level of advertising for gambling support services...

Value Label	Frequency	Percent
Increased	330	32.2
Decreased	210	20.5
Stayed the same	369	36.0
Haven't seen any	40	3.9
Don't know (do not read)	75	7.3
Total	1024	100%

Perceptions of whether the advertising has increased or decreased or stayed the same in the last year showed a lot of diversity across respondents. This is shown in Table 35. There was no statistically significant difference between those who work in the industry, or have family working in the industry, and those who do not, in their perceptions of how the level of advertising of gambling support services has changed in the last year. There was no relationship between perceptions of increases in advertising for gambling support services and beliefs about how many problem gamblers there are currently. There was also no relationship with perceptions of how the incidence of problem gamblers will change in the next 12 months. As this question was a subjective assessment of the respondent's own exposure to advertising, there are no right or wrong answers for this question.

Question 36: Do you know anyone who has used a gambling support service such a breakeven or G Line?

Overall, 91.2% of respondents stated they did not know anyone who had used such services. 8.4% said they did know someone and the remaining 0.4% either refused or were unsure.

Interestingly, those with better industry knowledge were no more likely to know someone who has used a gambling support service, than those with a lower level of industry knowledge. Those who work in the industry or have family in the gambling industry were more likely to state that they knew someone who had used a gambling support service (14.3%) than those who did not (8.2%).

Media Habits

The following section covers the media habits of respondents and their exposure to gambling related information. It explores the different media of newspapers, television and radio, as well as word of mouth sources such as friends and family, and people who work in the industry.

Newspapers

Question 37: On average, how many days a week do you read a newspaper?

Table 36: Frequency of reading newspapers

Value Label	Frequency	Percent
Don't read newspapers	67	6.5
One day a week	107	10.4
Two days a week	136	13.3
Three days a week	125	12.2
Four days a week	71	6.9
Five days a week	78	7.6
Six days a week	72	7.0
Every day	368	35.9
Total	1024	100%

Only 6.5% of respondents did not read newspapers, with over one third (35.9%) claiming to read a newspaper every day.

Question 38: Thinking about newspapers, can you recall reading any gambling related stories?

Nearly two thirds of respondents (63.3%) who read a newspaper at least once a week, recalled seeing gambling related stories in the newspaper. 36.1% could not recall seeing any stories, while the remaining 0.6% were either unsure or refused the question.

There is an obvious interaction with between frequency of reading a newspaper and likelihood of seeing gambling related stories. Respondents who read a newspaper less than 2 days a week were less likely to have seen a gambling related story than those who read a newspaper more frequently.

Question 39: Which of the following best describes how newspaper articles generally show gambling and the gambling industry?

Table 37: Best description of how newspapers generally show gambling and the gambling industry

Value Label	Frequency	Percent
Totally positive	35	3.7
More positive than negative	198	20.7
Equally positive and negative	215	22.5
More negative than positive	336	35.1
Totally negative	73	7.6
Can't say (do not read)	100	10.4
Total	957	100%

42.7% of respondents thought that newspapers generally portrayed gambling and the gambling industry either totally negatively, or more negatively than positively. 22.5% thought there was a balance between positive and negative stories, while 24.4% thought the portrayal by newspapers was more positive than negative, or totally positive.

There was no statistically significant relationship between frequency of reading the newspaper and perceptions of the portrayal of gambling and the gambling industry.

Question 40: Can you recall seeing any advertising for gambling venues, activities or events in newspapers?

Three quarters (75.9%) claimed to have seen advertising for gambling venues, activities or events in newspapers.

Question 41: Can you recall receiving any special offers, incentives, or pamphlets in the mail to go to a pokies venue such as a hotel, club or casino?

Over half the respondents (57.8%) claimed to have received special offers, incentives or pamphlets in the mail to go to a pokies venue.

Question 42: Have you taken up any of those offers in the last month?

Of those who recalled receiving offers, only 5.4% said they took up the offers that they received.

Television

Question 43: On average, how many hours a day do you watch television?

Table 38: Frequency of watching television

Value Label	Frequency	Percent
Don't watch television	18	1.8
Less than an hour a	101	9.9
1-2 hours	444	43.4
3-5 hours	409	39.9
More than 5 hours a	52	5.1
Total	1024	100%

Only 1.8% of respondents stated they did not watch television. Of those that claimed to watch television, the majority were split between 1 to 2 hours per day (43.4%) and 3 to 5 hours per day (39.9%).

Question 44: Have you ever seen any gambling related stories on television?

Of those watching television, 71.1% stated they recalled seeing gambling related stories. There was no specific relationship between frequency of watching television and likelihood of seeing gambling related stories.

Question 45: Which of the following best describes how television generally shows gambling and the gambling industry?

Table 39: How television generally portrays gambling and the gambling industry

Value Label	Frequency	Percent
Totally positive	54	5.4
More positive than negative	223	22.2
Equally positive and negative	226	22.5
More negative than positive	320	31.8
Totally negative	75	7.5
Can't say (do not read)	107	10.6
Refused (do not read)	1	0.1
Total	1006	100%

39.3% of respondents perceived that television portrayed gambling and the gambling industry as more negative than positive, or totally negative. In contrast, 27.6% thought the portrayal was more positive than negative, or totally negative, while 22.5% thought the overall portrayal was equally positive and negative.

Question 46: Have you seen any advertising on TV for gambling activities, events or venues?

Over three quarters of respondents who claimed to watch television (78.7%) recalled seeing advertising on television for gambling activities, venues or events.

Radio

Question 47: On average, how many hours a day do you listen to the radio?

Table 40: Frequency of listening to the radio

Value Label	Frequency	Percent
Don't listen to radio	88	8.6
Less than an hour a day	243	23.7
1-2 hours	303	29.6
3-5 hours	197	19.2
More than 5 hours a	193	18.8
Total	1024	100%

A total of 8.6% stated they did not listen to the radio at all. The rest of the respondents were relatively evenly split in terms of frequency of listening, across the four options presented. This is shown in Table 40.

Question 48: Have you heard any gambling related stories on the radio?

Of those who claimed to listen to the radio, 47.6% recalled hearing stories about gambling or the gambling industry. There was a clear relationship with frequency, whereby the more frequently someone listened to the radio, the more likely they were to report hearing stories on gambling and the gambling industry.

Question 49: Which of the following best describes how the radio generally discusses gambling and the gambling industry?

37.5% of respondents perceived that the gambling industry was portrayed more negatively than positively, or totally negatively. 14.2% thought the portrayal was either more positive than negative, or totally positive, while 21.6 perceived the portrayed to be equally positive and negative. 26.4% could not comment.

Table 41: How radio generally portrays gambling and the gambling industry

Value Label	Frequency	Percent
Totally positive	31	3.3
More positive than negative	102	10.9
Equally positive and negative	202	21.6
More negative than positive	288	30.8
Totally negative	63	6.7
Can't say (do not read)	247	26.4
Refused (do not read)	3	0.3
Total	936	100%

Word of mouth

Question 50: Do you know anyone who works in the gambling industry?

36.5% claimed to know someone who worked in the gambling industry.

Question 51: Overall would you say that the views on gambling that you hear from people who work in the industry are…

Table 42: Views from people who work in the gambling industry

Value Label	Frequency	Percent
Totally positive	32	8.6
More positive than negative	70	18.7
Equally positive and negative	96	25.7
More negative than positive	90	24.1
Totally negative	37	9.9
Can't say (do not read)	49	13.1
Total	374	100%

The views of those who worked in the industry were reported to be totally positive, or more positive than negative for 27.3%, while 35.0% thought the opposite. There were 25.7% who reported an overall neutral view, while 13.1% could not say. This is shown in Table 42.

Question 52: Have you heard any stories about gambling from your family and friends (other than those who work in the industry)?

Nearly two thirds (62.9%) of respondents had heard stories from family and friends about gambling.

Question 53: Overall would you say the views of your family and friends about the gambling industry are….

Table 43: Overall views of family and friends

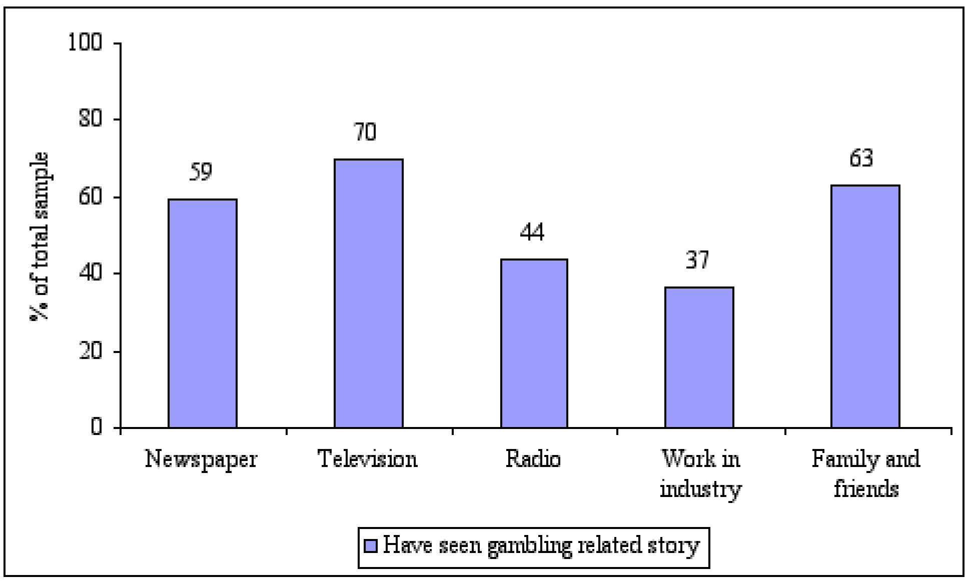
Value Label	Frequency	Percent
Totally positive	40	3.9
More positive than negative	137	13.4
Equally positive and negative	264	25.8
More negative than positive	335	32.7
Totally negative	174	17.0
Can't say (do not read)	74	7.2
Total	1024	100%

Nearly half of all respondents (49.7%) reported that the views of their family and friends about gambling were more negative than positive, or totally negative. 25.8% were neutral, while 17.3% were more positive than negative, or totally negative. This is shown in Table 43

Source reach

To examine the reach of all the different sources, the proportion of people seeing a gambling related story by each different source were recalculated using the entire sample (n=1024) as the base. This was needed as, in the questionnaire, only those who claimed to have been exposed to a source were asked if they had see any gambling related stories from that source. This recalculation allows comparison of story exposure for all the media sources on more even terms, as reach is controlled for. From the recalculations, we can see that the source with the highest exposure of gambling related stories across the whole sample was television (70% of the whole sample had seen gambling related stories from this source), followed by family and friends (63%) and newspaper (59%).

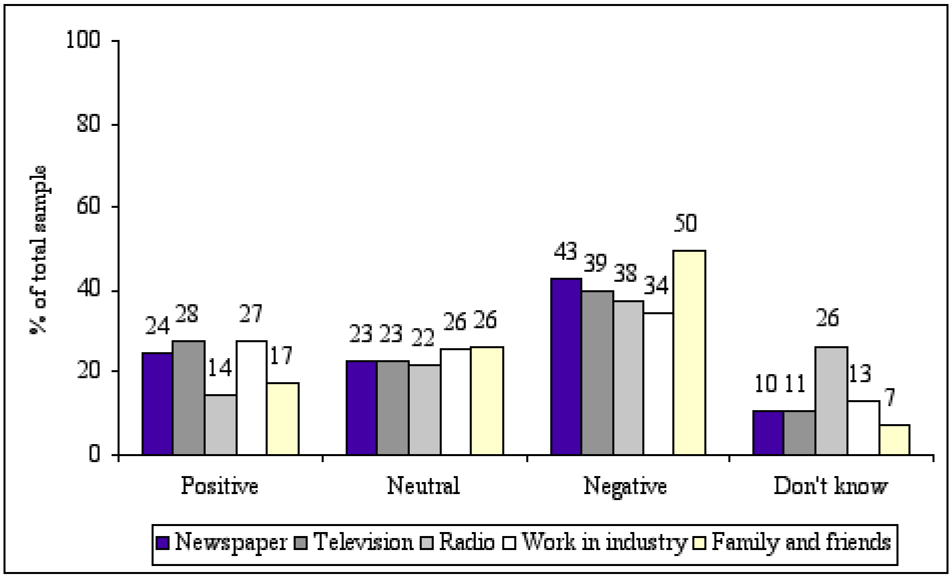
Figure 7: Story reach by source



Source bias

The following figure shows the perceived portrayal of gambling and the gambling industry across all sources. The only deviations are for radio which was more frequently cited as 'don't know', and family and friends which was more frequently cited as negative than other sources.

Figure 9: Participation levels in gambling activities (multiple responses possible)



Perceived credibility of information sources

Question 54: Which of the following sources of information on the gambling industry do you believe the most out of....

Table 44: Most credible source

Value Label	Frequency	Percent
Family and friends	298	29.1
Newspaper	202	19.7
People who work in the industry	171	16.7
TV	120	11.7
Radio	91	8.9
None (do not read)	86	8.4
All equally (do not read)	43	4.2
Refused	13	1.3
Total	1024	100%

The most commonly cited most credible information source was family and friends (29.1%), followed by newspapers (19.7%), and people who worked in the industry (16.7%). This shows the relative power of word of mouth over other media sources. This is shown in a Table 44.

Question 55: Which of the following sources of information on the gambling industry do you believe the least out of....

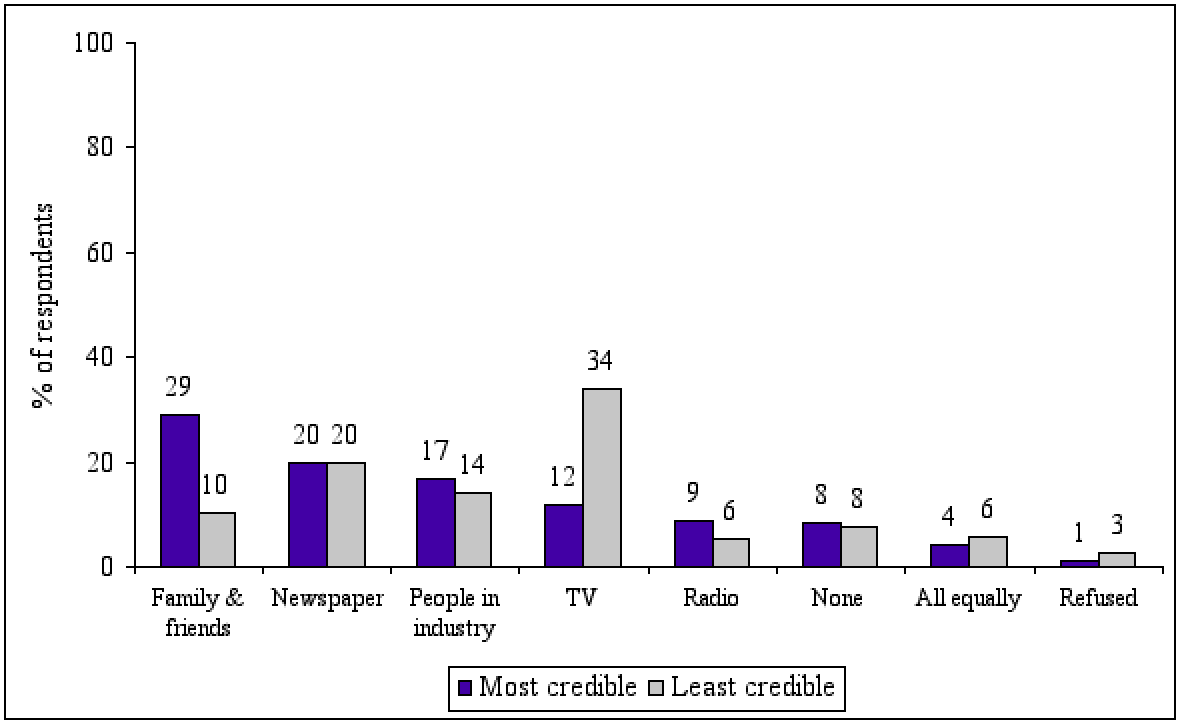
Table 45: Least credible source

Value Label	Frequency	Percent
TV	348	34.0
Newspaper	204	19.9
People who work in the industry	145	14.2
Family and friends	104	10.2
None (do not read)	80	7.8
All equally (do not read)	59	5.8
Radio	56	5.5
Refused	28	2.7
Total	1024	100%

The most common *least credible source* cited was television (34%). This was followed by newspapers (19.9%), followed by the two word of mouth sources.

Figure 10 compares the credibility results for each of the media sources. The main points of interest in the figure are that family and friends were much more commonly cited as the most credible source than they were for least credible, while the reverse was evident for television.

Figure 10: Comparison of credibility of media sources



Therefore, while television had the greatest reach, it was also most commonly cited as the least credible. Family and friends appears to be the source that potentially could have the most negative effect on perceptions of gambling and the gambling industry. This is because it has (a) the greatest reach, (b) was frequently cited as most credible and (c) was most commonly perceived to have a negative bias. Radio is potentially the least effective on this point as it has (a) a low reach, (b) was not commonly cited as most credible ad (c) has the highest proportion of people not knowing how it generally portrays the industry.

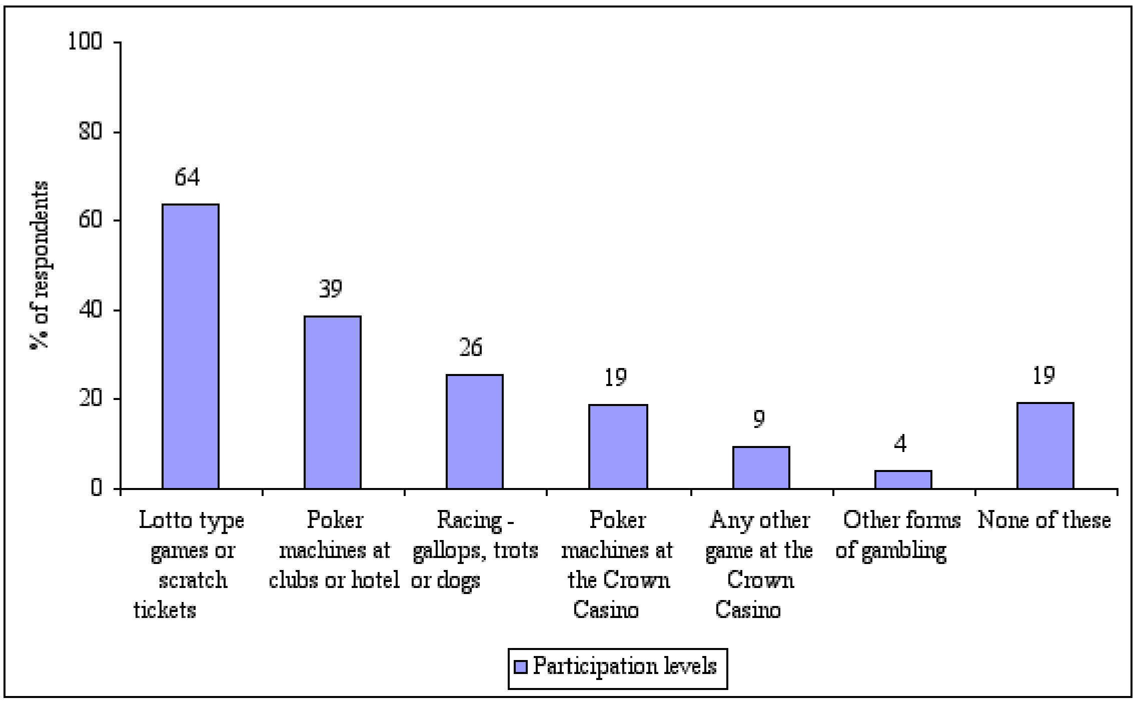
Claimed Gambling Behaviour

This section examines the claimed gambling behaviour of respondents.

Question 57: Which of the following activities or games have you played or gambled in the last 12 months?

Firstly, respondents were read a list of gambling activities and asked if they had participated in that form of gambling in the last 12 months. Lotto type games were the most common form of gambling respondents had participated in, followed by poker machines. Overall, 43.2% of respondents claimed to play poker machines (regardless of venue).

Figure 11: Participation levels in gambling activities (multiple responses possible)



Claimed Frequency of Behaviour

Question 58: How often do you play Lotto type games or scratch cards?

Table 46: Frequency of playing lotto games

Value Label	Frequency	Percent
Not specified	5	0.8
Every week or nearly every week	296	45.4
About twice a month	40	6.1
About once a month	83	12.7
About once every 2 to 3 months	113	17.3
About once every 6 months	72	11.0
About once a year	34	5.2
Less often than once	8	1.2
Total	651	100%

Lotto games had a high frequency of participation, relative to the other forms of gambling, with 45.4% claiming to participate every, or nearly every, week.

Question 59: How often do you bet on racing?

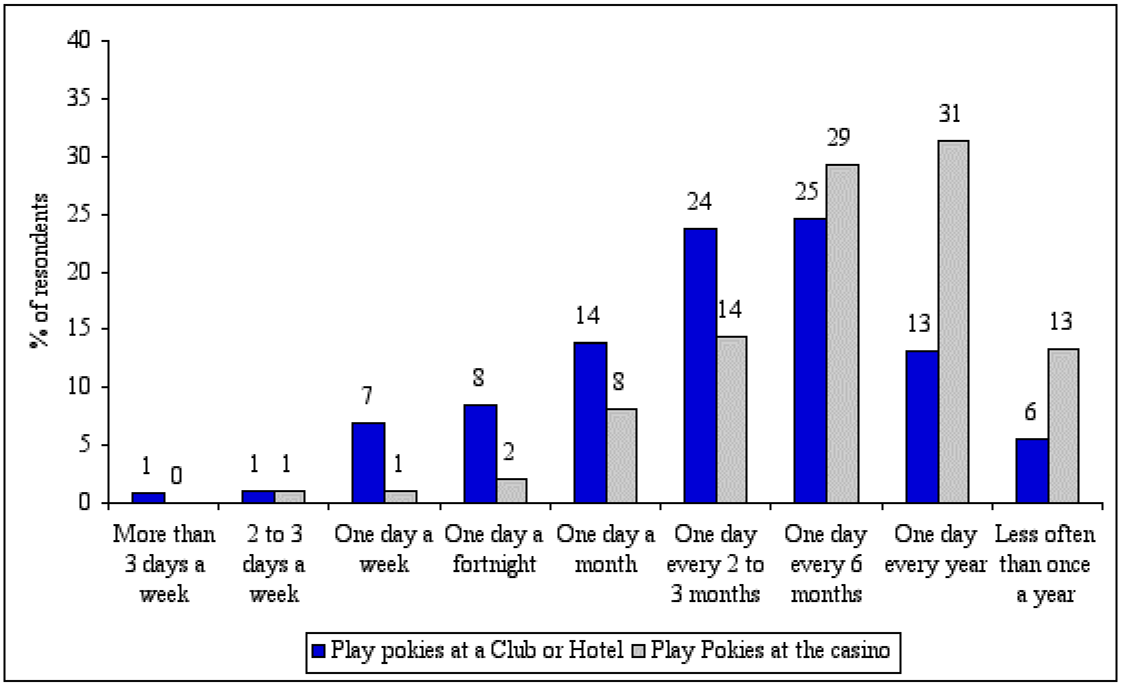
Table 47: Frequency of betting on the races

Value Label	Frequency	Percent
Not specified	1	0.4
More than 3 days a week	12	4.6
2 to 3 days a week	7	2.7
One day a week	24	9.2
One day a fortnight	11	4.2
One day a month	15	5.7
One day every 2 to 3 months	51	19.5
One day every 6 months	36	13.8
One day every year	91	34.9
Less often than once a year	13	5.0
Total	261	100%

Of the respondents who stated they participate in betting on horses, 73.2% claimed this was one day every two months or less.

Frequency of playing poker machines at clubs or hotels was higher than playing at the Casino. 31.7% of respondents playing at clubs or hotels play one day a month or more, compared to 11.3% playing with the same frequency at the casino. This is illustrated in Figure 12.

Figure 12: Comparison of frequency playing pokies at a Club or Hotel versus a Casino



Question 62: How often do you play any other game at the Crown Casino or casinos outside Victoria?

Table 48: Frequency of playing other games at the casino

Value Label	Frequency	Percent
One day a fortnight	2	2.1
One day a month	6	6.3
One day every 2 to 3 months	18	18.9
One day every 6 months	27	28.4
One day every year	29	30.5
Less often than once a year	12	12.6
Refused	1	1.1
Total	95	100%

Comparing the frequencies of playing poker machines at the casino versus other games, it appears that heavy users of casinos (ie more than once a fortnight) are going there to play pokies.

In any behavioural data that relies on measures of self-reporting from respondents, there is variation from 'actual' behaviour. People, in general, find it very difficult to recall their own behaviour accurately and, depending on the behaviour under consideration, either under claim or over claim their activities. However, people are generally better able to assess change in their own behaviour over time. For example, recalling if they have undertaken an activity more or less often in the past. In this research project, we are tracking the same individuals over time and so we will gain a measure of relative change, rather than having to rely on cross sectional measures of claimed behaviour at just one point in time. This is useful in establishing how individual level behaviours may increase, decrease or remain stable over time.

We are also interested in assessing how individual's beliefs about the industry, for example the size of the gambling industry, vary from reality. In subsequent phases of this research project, we will be examining changes to this degree of variation and identifying what variables or behaviours are associated with such perceptual shifts. We are interested in what factors contribute to better industry knowledge and which to the holding of misconceptions.

Question 56: In the last year, would you say that the gambling activities of your family and friends have….

Table 49: Gambling activities of friends and family in the last year

Value Label	Frequency	Percent
Increased	107	10.4
Decreased	163	15.9
Stayed the same	726	70.9
Don't know (do not read)	27	2.6
Refused (do not read)	1	0.1
Total	1024	100%

Respondents were asked about perceived changes to the gambling activities of their friends and family. The majority stated that it had remained stable, but there were also sizeable groups who felt it had both increased and decreased. Few were unable to make a judgement about the behaviour of their friends and family.

Expenditure

Question 63: On each day you play poker machines (pokies) at a club or hotel, how much do you spend or outlay on this activity?

Question 64: On each day you play poker machines (pokies) at a casino, how much do you spend or outlay on this activity?

Question 65: On each day you play games other than poker machines (pokies) at a casino, how much do you spend or outlay on these activity?

Question 66: Thinking about all of your gambling activities over the last 12 months, on average how much did you spend or outlay each week?

Table 50: Expenditure of gambling activities

Activity	n	Mean	Std dev	Minimum	Maximum
Pokies at club or hotel	388	$32 $25[1]	+/-$117 +/- $33	0	$2,000
Pokies at the Casino	192	$32	+/-$39	0	$250
Games other than pokies at the Casino	93	$107	+/-$245	0	$2,000
Gambling in total	777	$64	+/-$1086	0	$30,000

Table 40 examines daily claimed expenditure for playing poker machines, and the total for all forms of gambling. There was no difference between the mean expenditure on poker machines by venue. However, there was a greater standard deviation for expenditure in clubs and hotels than for expenditure at the Casino. This variation, in part, is driven by two outliers, or extreme values, that are both over $1,000. Games other than poker machines at the Casino had a significantly higher expenditure at $107.

[1] Outliers removed.

Question 67: Thinking about all of your gambling activities in the last 12 months, do you think you have won back more than you outlaid, less than you outlaid, or about the same as you outlaid?

Table 51: Assessment of overall winning or losing

Value Label	Frequency	Percent
Not specified	6	0.7
More than outlaid	90	10.9
Less than outlaid	577	69.9
About same as outlaid	143	17.3
Can't say (do not read)	8	1.0
Refused (do not read)	1	0.1
Total	825	100%

The majority (69.9%) of respondents perceived that they had received less than they had outlaid.

Question 74: Are you a member of any pokies or casino clubs?

Table 52: Member of pokies club or casino

Value Label	Frequency	Percent
Not specified	6	0.7
Yes	158	19.1
No	662	80.1
Total	825	100%

A sizeable proportion (19.1%) of respondents claimed to be members of a pokies club or the Casino. There was no statistically significant difference in membership level between the higher and lower knowledge groups. However, those who work in the industry, or had family and friends who do, had a higher proportion of club members (33.3%) than those who do not (18.6%).

Perceptions of the Future

As this study is longitudinal, in subsequent phases it will be possible to examine how individual's perceptions have changed over time. In this section, we ask respondents to forecast the future of the gambling industry over the next 12 months, which is the time period until the next phase of this research project. We want to establish some measure of how they feel the industry is currently evolving, as this may be a determinant of their views on such issues as regulation. Through these questions, we can set benchmarks for perceived future change. We can then compare these with actual industry changes in 12 months time. For example, in a subsequent interview, we can ask a respondent how they have perceived the industry over the last 12 months. We can then compare this to what they said here in the benchmark study. Inconsistencies can be identified and explored.

Question 76: Over the next 12 months, is the number of people participating in gambling activities in Victoria likely to..?

Table 53: Proportion of people participating in gambling activities in Victoria in the next 12 months

Value Label	Frequency	Percent
Increase	657	64.2
Decrease	63	6.2
Stay the same	274	26.8
Don't know (do not read)	28	2.7
Refused (do not read)	2	0.2
Total	1024	100%

Table 53 indicates that the majority of respondents perceive gambling activity to be increasing. Very few see activity levels dropping in the next year.

Question 77: In the next 12 months, is the total amount people spend on gambling activities in Victoria likely to…?

Table 54: Total amount people spend on gambling activities in Victoria in the next 12 months

Value Label	Frequency	Percent
Increase	696	68.0
Decrease	68	6.6
Stay the same	228	22.3
Don't know (do not read)	30	2.9
Refused (do not read)	2	0.2
Total	1024	100%

As activity levels are perceived to be increasing by the majority of respondents, so too is the amount spent on gambling.

- 90.1% of respondents who felt that the level of gambling activity would increase, also stated that expenditure would increase. 2% thought it would decrease and 7% thought it would stay the same. Of those who thought gambling activity would decrease, 49.2% felt expenditure would decrease, 19.0% increase and 28.6% stay the same. The remainder were unsure.
- Of those who felt the activity level would stay the same over the next 12 months, 57.7% felt expenditure would also remain stable, 8.0% felt it would decrease and 34.1% increase. 2.9% were unsure.

From this, we can say that many respondents, regardless of what they think if the activity level of gambling over the next 12 months, do not feel that there will be a drop in expenditure on gambling.

Question 78: In the next 12 months, is the number of problem gamblers in Victoria likely to…?.

Finally respondents were asked what they felt about the proportion of problem gamblers in the next 12 months. 74.5% felt the proportion was going to increase.

Table 55: In the next 12 months the proportion of problem gamblers is likely to

Value Label	Frequency	Percent
Increase	763	74.5
Decrease	42	4.1
Stay the same	188	18.4
Don't know (do not read)	30	2.9
Refused (do not read)	1	0.1
Total	1024	100%

Chapter 5: Future Research Project Phases

Future Analyses

As this phase is the benchmark phase, the focus of this report is to report the baseline figures in the knowledge, attitudes and behaviours of interest. The subsequent phases will administer the same questions to the same respondents to determine change over time. The changes we are interested in include aggregate and individual level changes.

Aggregate change versus individual level

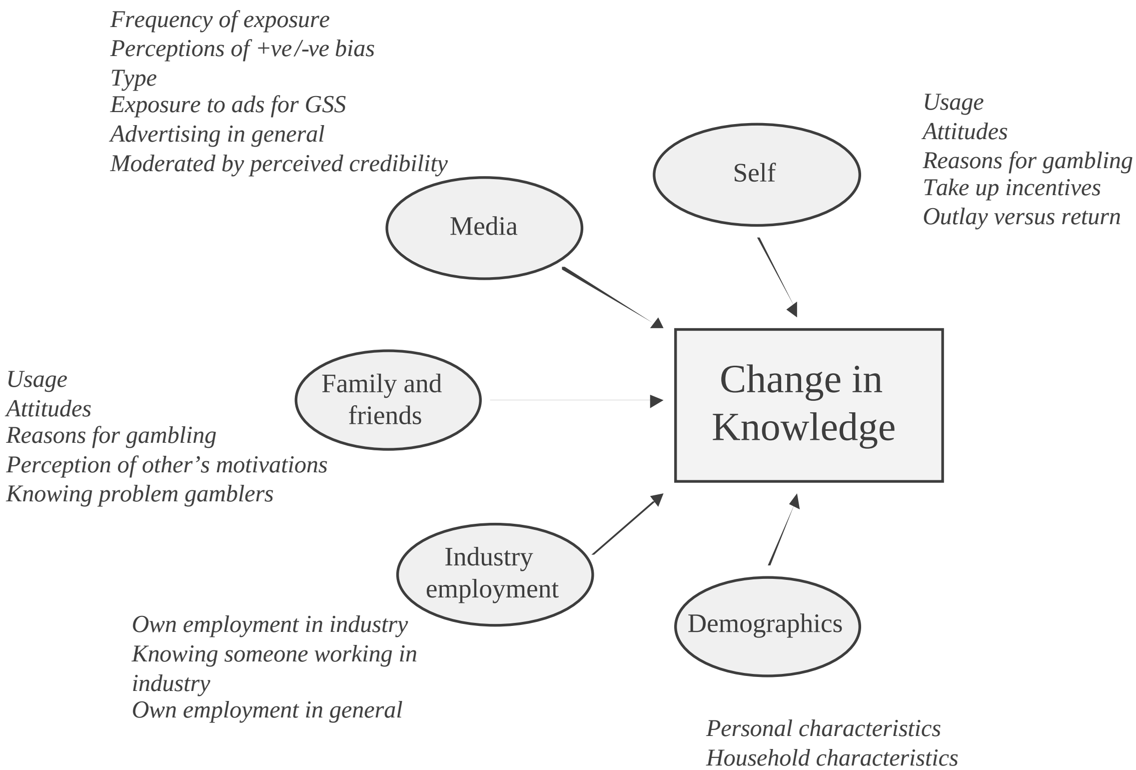
Most research conducted by the Authority, to date, has tended to focus on reporting aggregate level change. For example, reporting what percentage of respondents have participated in the various forms of gambling at Time 1 and at Time 2, or reporting what percentage agreed with a statement such as "on the whole, gambling is an acceptable activity in our community" on a yearly basis. While this research will examine these aggregate measures, the longitudinal dimension of this research project allows for an added level of insight. Because we are tracking the same individuals over time, we are able to explore change at an individual respondent level. Issues that we can examine include:

- Do individuals change their gambling behaviour, attitudes and/or level of industry knowledge over time?
- What are the variables associated with such change/s? For example, is a change in the respondent's gambling participation level associated with an increased level of positive perceptions of the industry? Is an improvement in a respondent's level of accurate knowledge of the gambling industry associated with their exposure to media, or other such factors?
- When individuals experience a change in their level of gambling industry knowledge over time, is this typically towards becoming a more accurate reflection of the industry or is it towards holding more misconceptions? What factors are associated with such changes in perceptions? Are certain variables, such as having family working in the industry, associated with developing more accurate knowledge?
- How do individual's perceptions of others change when their own behaviour alters? If they become heavier gamblers are they more or less critical of the motivations others have to gamble?

As suggested above, once individual level changes have been identified, further exploration and analysis can be conducted to determine potential reasons why this has occurred. At this first stage of the research project, the firm direction of future analyses are unknown, as it is impossible to predict where, what and how great changes will be.

Therefore, we have developed the following diagram that illustrates the potential relationships that may be explored and quantified in subsequent research project phases.

Diagram 1: Future research project directions



Additional Information for Subsequent Research Project Phases

At this stage, we envisage that the subsequent phases of this research project will follow the same structure as laid out in this report. However, the depth of analysis will be greater as causal relationships and change between phases are explored.

Panel Retention

This report details the findings from Phase 1 of this longitudinal research project. At the conclusion of the telephone interview, respondents were asked whether or not they were willing to be recontacted in subsequent research phases. The script used for recruitment was:

Thank you for taking the time to answer our questions. Through this you have taken part in a very important, large scale research project that the Marketing Science Centre is undertaking on behalf of the Victorian Casino and Gaming Authority. An important part of this study is gaining data from the same panel of people on a yearly basis for the next two years to identify any changes in perceptions. We would really like you to become part of this panel, as you fit the special selection criteria and are therefore important to this research.

The way in which this would work is that we would phone you in a years time with a set of questions very similar to the ones you have just answered. Again, they will only take a few minutes to complete. Are you able to become part of our panel?

85.4% of respondent agreed to become part of the panel.

Respondent details were collected to help with recontact in subsequent phases. Data collected on the respondent was: first name, last name, physical address, home and work phone numbers and email address. Having such multiple contact details has lowered attrition rates significantly in previous research we have undertaken. To further assist in panel retention, we asked respondents for another person's contact details.

To help us keep in contact with you, I'd like to get contact details for someone who will know where you are living if you move before the next research phase. Please tell me a person, perhaps a relative or friend, most likely to know where you'll be living over the next year or two and who does not currently live with you.

Chapter 6: Summary

This research project has established the benchmarks by which individual Victorians' perceptions and behaviour in relation to the gambling industry can be better understood. The research project has successfully recruited a cross section of Victorians whose behaviour and perceptions will be tracked over time, to provide a greater understanding of the perceptions and attitudes towards the gaming industry and the participation of people in casino gaming and the playing of electronic gaming machines.

Key results from this phase of the research project are detailed below.

Knowledge of the industry

While respondents had a spread of knowledge about the industry, overall the level of accurate knowledge is quite low. This was shown when respondents were asked a series of 11 questions to test their knowledge of the gambling industry. They were then classified into two groups, based on how many responses they got correct. 66% of those surveyed were classified as having a lower level of industry knowledge (5 or fewer correct) and 34% as having a higher level (6 or more correct).

There is a widely held belief (51% of respondents) that the amount of exposure gambling activity has had in the Victorian media has increased.

Motivations for gambling

Five possible motivations for gambling were examined. Respondents were asked to rate them as a reason why they gamble and as a reason why others gamble. The ranking by mean score for each motivations was the same in both cases, but respondents were more willing to attribute "to avoid boredom or loneliness" and "more skill or luck" to others than to themselves.

Attitudes to the industry

There was an overall high level of disagreement (61%) with the statement "increased gambling activity is good for the Victorian economy". Also, 64% disagreed with the statement "there are sufficient controls and restrictions on the gambling industry".

There was strong agreement (78%) with the statement "the social problems of gambling far outweigh the benefits". There was 52% agreement and 42% disagreement with the statement "gambling provides a safe and pleasant environment for people to go to".

Respondents were polarised (56% disagreement and 39% agreement) with the statement "there is no such thing as a problem gambler, but there are people with problems who gamble".

Obtaining information on the industry

Television had the greatest reach of all the media, but it was also most commonly cited as the least credible source. Family and friends appear to be the source that potentially could have the most negative effect on perceptions of gambling and the gambling industry. This is because family and friends has (a) great reach, (b) was frequently cited as most credible and (c) was most commonly perceived to have a negative bias. Radio is potentially the least effective on this point as it has (a) a low reach, (b) was not commonly cited as most credible ad (c) has the highest proportion of people not knowing how it generally portrays the industry.

Respondent beliefs and behaviour

Polarisation was also seen for "I derive entertainment and pleasure from the money I spend on gambling", indicating a good attitudinal cross section of respondents was captured in the research.

Claimed awareness of gambling support services was high (64%).

The majority of respondents (70%) perceived that they had received less in winnings than they had outlaid in the last 12 months.

The future of the industry

The majority of respondents perceive gambling activity to be increasing (64%) in the next 12 months, while 27% think it will be stable and 6% predict a decrease. Regardless of the number of people, most respondents perceived that expenditure would stay the same or increase in the next 12 months (90%). 75% of respondents also felt the number of problem gamblers was going to increase in the next 12 months.

Appendix 1: Focus Group Recruitment Questionnaire

Good afternoon/evening, my name is .... from the Marketing Science Centre, which is based at the University of South Australia.

Today we are speaking to Melbourne residents on behalf of a state government department. We wish to talk to Victorian's about gambling and will be holding some group discussions on the topic next week in Melbourne.

Firstly, can you tell me

SQ1 Do you or anyone in your household work for any of the following organisations:

A TAB agency or TABCORP 1
TATTERSLLS AGENCY OR CORPORATION 2
A VENUE WHERE THERE ARE ELECTRONIC GAMING MACHINES 3
A MARKET RESEARCH COMPANY 4
THE CROWN CASINO...5
VICTORIAN CASINO AND GAMING AUTHORITY................................6

If yes to any of the above, terminate

Q1 Can you tell me, on average, how many times a week do you participate in the following activities?

RAFFLES ....
PLAYING ELECTRONIC GAMING MACHINES ....
BINGO ....
GAMBLING AT THE CASINO ....
LOTTO ....
BUY SCRATCHIES ....
BETTING ON TROTTING, GREYHOUND OR THOROUGHBRED RACING ....
BETTING ON THE FOOTY AT THE TAB ....
Total ....
Heavy skip to Q3
Light continue to Q2

Interviewer note: ***If total times per week is 4 or more these are considered heavy respondents and if 3 or less, they are light respondents.***

Q2 **I would like to know your overall attitude toward gambling in general. Would you say it is positive or negative?**

Positive ....1 – recruit for Group 1 – ***skip to Q4***
Negative...2 – recruit for Group 4 – ***skip to Q4***
Neutral (do not read but treat as light) ....3 – recruit for Group 1 – ***skip to Q4***

Q3 **And finally are you aged under or over 40 years of age?**

Under 40...1 – recruit for Group 2 – ***skip to Q4***
Over 40...2 – recruit for Group 3 - ***skip to Q4***

Interviewer note: anyone who is exactly 40 put in over 40 group

Q4 **Have you been involved in a focus group in the past six months?**

Yes...1
No...2

If yes to any of the above screening questions, thank and terminate.

We would really value your participation in a focus group we are running. These groups will involve around eight people sitting around a table with some light refreshments talking about their experiences and attitudes across a range of topics and issues relevant to Victorian's today.

The groups will be run very informally with a trained moderator generating the discussion. There are no wrong or right answers. Your honest opinion is what we want and these opinions are not attributed to you personally.

We conduct all research in accordance with the Market Research Society code of ethics and we protect the anonymity of our respondents. We will reimburse you $40.00 for coming along.

The group will last approximately one hour and a half and will be held at The Marketing Science Centre, Apartment 3, Bendigonia at 25 Queens Road Melbourne 3004.

The time and date for the discussion is (*choose correct group according Q 2 and 3 recruitment indication)*

Group 1	Light gambler and positive attitude	Tues August3rd 6pm
Group 2	Under 40 and heavier gambler	Tues August3rd 8pm
Group 3	40 or over and heavier gambler	Wed August4th 6pm
Group 4	Light gambler and negative attitude	Wed August4th 8pm

SQ6 Are you interested in being involved in <u>one</u> of these focus groups?

Yes ....1 go to SQ8
No 2

SQ7 Do you know anyone else who would be interested in attending <u>one</u> of these focus groups?

Yes ....1 Get contact details
No ....2 terminate

We will be sending you a letter shortly confirming this focus group. Do you have a fax number that we could use? Thankyou for agreeing to participate in this research. Lastly, may I get some details so we can address the confirmation letter to you.

First Name : ______________________________________

Surname : _______________________________________

Address: _______________________________________

Suburb:____

Postcode:_______________________________________

Telephone number:_______________________________

Interviewer ID:_________ Date: ________________

Thank you for your time. In case you missed it my name is ……………from the Marketing Science Centre. If you have any queries you can contact our Adelaide office on 1800 801 857 or Melbourne 9866-3418

I, ... (interviewers name) confirm that the information contained in this questionnaire was obtained by me at the time and date specified and is, to the best of my knowledge, an accurate and honest report of the answers provided by the respondent. This interview was conducted according to the guidelines set out by ICC/Esomar International Code of Marketing and Social Research Practice. Signed: .... Date: ....

Appendix 2: Focus Group Prompt Sheet

Welcome

When was the last time you gamed? Broad description of circumstances.

(we are just trying to break the ice and the discussion will be kept general)

General perceptions

What can you tell me about gaming in Victoria?

How big is the industry?

What are its positive and negative contributions to the economy, society etc?

Extent to which they understand regulations, odds, etc

Identification of the key bodies and other interested parties in the industry (eg Government, industry). How does the industry impact on them? How do they in turn impact on the industry?

Perceptual sources (unprompted)

What are the general trends in gaming in Victoria? Has gaming activity increased decreased? Are more/fewer people gaming? Are people spending more/less money? Are people losing more? Probe for how it has changed over time.

(For each, probe for the sources of information)

Where do you see/hear about the gaming industry? Probe for sources that they use to form their perceptions eg media, personal experience, friends/family, contacts within the industry.

The media as a source

What is currently being covered in the media about gaming? Split the media discussion into

(1) advertising for gaming activities and

(2) media publicity about gaming/effect of gambling (positive and negative)

(3) information about regulation/industry bodies or use of funds from gaming.

We would like to explore their exposure and perceptions to the three different sources of message.

Probe for specific stories they can recall and their reactions to them. Did they agree with the stories? Did it match their personal perceptions? Why/why not? Probe for an estimate of which sources are seen as more/less credible and why.

Is gaming getting more or less exposure in the media? What do you think of this (good, bad, don't care)?

Have some stories that will be passed around as prompts for discussion if recall fails.

Own behaviour

Crown Casino

What are your thoughts on the Crown Casino?

How many times have you been to the Crown Casino since it opened? Motives for going? What do you play? Typical outlay? Outlay on last visit? Other non-gaming activities associated with visit? Did you enjoy the last visit? Why/why not?

Have you increased/decreased how often you go to the casino and gamble? Why/why not?

EGMs

What are your thoughts on EGM's?

How many times have you used EGM's? Motives for going? Where do you play? Typical outlay? Outlay on last visit? Other non-gaming activities associated with visit? Did you enjoy the last visit? Why/why not?

Have you increased/decreased how often you gamble on EGMs? Why/why not?

Other people as a source

In a newspaper report apparently "fewer Victorians are gaming but those who are, are spending more" – do you know of anyone that fits into this category? Do you know people who are spending more?

Who else do you know that gambles? Probe for relationship to that person.

Describe their behaviour. Has it changed over time? If so, how and why?

How do you feel about their gaming activities?

Are there any particular groups in society that you think are effected more by gambling? Why? Where did you get this information?

The future of the industry

Perceptions of where the industry is heading. Trends they think are emerging. Changes they expect to see and timeframes.

Appendix 3 Questionnaire

Following is a copy of the MSCati questionnaire used in the computer assisted interview process. The question, response sets, skips and interviewer instructions are all detailed in this questionnaire.

Question # 1 Page # 1

Hi, I'm (name) from the Marketing Science Centre, at the University of South Australia. We are conducting an important research study on behalf of a regulatory authority about gambling in Victoria. Could I please speak to the adult (18 years of age or over) whose birthday is closest to today's date?

Repeat introduction of necessary
This is not a sales call. It is a research study that will take about 12 minutes, at the most, to complete. Anything you say will be held strictly confidential. Your personal identity will not be disclosed to anyone. You have been randomly selected from a list of White Pages telephone entries.

If foreign language: note to supervisor and schedule call back

-Check List- (Number of items: 1 Min: 1 Max: 1)
1 continue

Question # 2 Page # 2

Do you or anyone else in your household work in...?
Read out list. Multiple responses possible.

-Check List- (Number of items: 7 Min: 1 Max: 5)
1 A TAB agency or TABCORP (continue)
2 Tattersalls agency or corporation (continue)
3 A venue where there are pokies machines (continue)
4 The Crown Casino (continue)
5 The Victorian Casino & Gaming Authority (terminate)
6 The racing industry (continue)
7 None of these (continue)

Question # 3 Page # 3

I am going to ask you a few questions about the gambling industry in general.

-Check List- (Number of items: 1 Min: 1 Max: 1)
1 continue

Question # 4 Page # 4

What proportion of state revenue that the Victorian Government raises, excluding federal grants, comes from gambling taxes?
Probe first. If required prompt. Single response.

-Check List- (Number of items: 10 Min: 1 Max: 1)
1 None
2 Less than 5 percent
3 Between 5 and 10 percent
4 Between 11 and15 percent
5 Between 16 and 20 percent
6 Between 20 and 25 percent
7 Between 26 and 35 percent
8 Between 36 and 50 percent
9 Can't say
10 Refused (do not read)

Question # 5 Page # 5

If there are 14,000 Victorians employed in Electricity, gas and water supplies and 45,000 Victorians employed in Education, how many Victorians do you think are directly employed in the gambling industry?
Probe first. If required prompt. Single response.

-Check List- (Number of items: 6 Min: 1 Max: 1)
1 Fewer than 5 thousand
2 Between 5 and 10 thousand
3 Between 10 and 15 thousand
4 Over 15 thousand
5 Don't know
6 Refused (do not read)

Question # 6 Page # 6

Is there a limit on the number of poker machines (or Pokies) in Victoria?
If no click on "there is no limit"
If yes then ask...
Is that current limit approximately ...
Read out list. Single response.

-Check List- (Number of items: 8 Min: 1 Max: 1)
1 There is no limit (do not read)
2 One thousand
3 Ten thousand
4 Thirty thousand
5 Fifty thousand
6 One hundred thousand
7 Don't know (do not read out)
8 Refused (do not read out)

Question # 7 Page # 7

Must poker machines (or pokies) return a minimum percentage to the players?
If 'no' indicate below, if yes then:
Is that...
Read out other options. Single response only. we are interested in return to players rather than to the Casino or Government.

-Check List- (Number of items: 6 Min: 1 Max: 1)

1 No minimum return (do not read)
2 to each individual player
3 over a period of a day
4 over a period of a year
5 don't know (do not read out)
6 refused (do not read out)

Question # 8 Page # 8

In fact, the law requires that for every hundred dollars put into a pokies machine a minimum must, on average, be returned to players in payouts. Is this amount... (read out options) ?

-Check List- (Number of items: 8 Min: 1 Max: 1)

1 33 dollars
2 50 dollars
3 67 dollars
4 87 dollars
5 100 dollars
6 107 dollars
7 Don't know (do not read)
8 refused (do not read)

Question # 9 Page # 9

What is the minimum percentage of the money that is bet on a roulette table that theoretically is returned to the players in payouts. Is it ?

-Check List- (Number of items: 9 Min: 1 Max: 1)

1 25%
2 50%
3 75%
4 97%
5 100%
6 107%
7 It could be anything - it is impossible to work out
8 Don't know (do not read)
9 refused (do not read)

Question # 10 Page # 10

Is this statement true or false?
A poker machine (or pokie) is more likely to pay out soon if someone has been playing it for an hour and lost their money.

-Check List- (Number of items: 4 Min: 1 Max: 1)

1 True
2 False
3 Don't know
4 Refused

Question # 11 Page # 11

Do you think skill is involved at winning on the pokies?
If yes then say:
Is that a lot or a little?

-Check List- (Number of items: 5 Min: 1 Max: 1)
1 None (do not read)
2 A lot
3 A little
4 Can't say (do not read)
5 Refused (do not read)

Question # 12 Page # 12

Do you think skill is involved at winning on the horses?
If yes then say:
Is that a lot or a little?

-Check List- (Number of items: 5 Min: 1 Max: 1)
1 None (do not read)
2 A lot
3 A little
4 Can't say (do not read)
5 Refused (do not read)

Question # 13 Page # 13

Do you think skill is involved at winning on roulette?
If yes then say:
Is that a lot or a little?

-Check List- (Number of items: 5 Min: 1 Max: 1)
1 None (do not read)
2 A lot
3 A little
4 Can't say (do not read)
5 Refused (do not read)

Question # 14 Page # 14

Do you think skill is involved at winning on Blackjack?
If yes then say:
Is that a lot or a little?

-Check List- (Number of items: 5 Min: 1 Max: 1)
1 None (do not read)
2 A lot
3 A little
4 Can't say (do not read)
5 Refused (do not read)

Question # 15 Page # 15

What percentage of household disposable income do Victorians spend (by this we mean lose) on gambling. Is it ... (Read out options)
Single response only. We are talking about amount lost here.

-Check List- (Number of items: 6 Min: 1 Max: 1)

1 less than 1percent
2 1 to 2 percent
3 3 to 4 percent
4 5 to 8 percent
5 Can't say (do not read out)
6 Refused (do not read out)

Question # 16 Page # 16

Approximately how many pokie machines are there in Australia currently?
Probe first. If required prompt. Single response.

-Check List- (Number of items: 11 Min: 1 Max: 1)

1 Less than 10 thousand
2 10 to under 30 thousand
3 30 to under 50 thousand
4 50 to under 100 thousand
5 100 to under 125 thousand
6 125 to under 150 thousand
7 150 to under 175 thousand
8 175 to under 200 thousand
9 200 or more thousand
10 Unsure (do not read)
11 Refused (do not read)

Question # 17 Page # 17

What percentage of Victorian adults participate in gambling in a year?
Probe first. If required prompt. Single response. Gambling is defined however the respondent wants to.

-Check List- (Number of items: 9 Min: 1 Max: 1)

1 Less than 20 percent
2 21 to 30 percent
3 31 to 50 percent
4 51 to 70 percent
5 71 to 80 percent
6 81 to 90 percent
7 Over 90 percent
8 Unsure
9 Refused

Question # 18 Page # 18

What is the percentage of all Victorian adults who are considered to be 'problem' gamblers, whereby their gambling results in harm to them, their family and/or society?
Probe only. Single response.

-Check List- (Number of items: 9 Min: 1 Max: 1)
1 There are no problem gamblers (zero)
2 1 percent or less
3 More than 1 percent up to 3
4 More than 3 percent up to 5
5 More than 5 percent up to 10
6 More than 10 percent up to 20
7 More than 20 percent
8 don't know
9 refused

Question # 19 Page # 19

In the last year, do you think the amount of exposure gambling has had in the Victorian media has...
Read out options, response set will be randomised - do not read option with 'do not read out' next to them. Single response only

-Check List- (Random)(Number of items: 5 Min: 1 Max: 1)
1 increased
2 decreased
3 stayed the same
4 don't know (do not read out)
5 refused (do not read out)

Question # 20 Page # 20

I am now going to read out a list of 5 possible reasons why other people gamble. For each, I would like you to give it a rating for how common you think it is as a reason others gamble. You should give a 10 to the statement if you believe is the most common reason why others gamble or a 0 to the statement if you believe is not a common reason at all, why others gamble. You can also give scores anywhere between 0 and 10.
-Check List- (Number of items: 1 Min: 1 Max: 1)
1 continue

Question # 21 Page # 21

To avoid boredom or loneliness
Single response

-Check List- (Number of items: 13 Min: 1 Max: 1)
0 0
1 1
2 2
3 3
4 4
5 5
6 6
7 7
8 8
9 9
10 10
11 Unsure
12 Refused

Question # 22 Page # 22

Enjoyment or social reasons
Single response

-Check List- (Number of items: 13 Min: 1 Max: 1)

0	0
1	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10	10
11	Unsure
12	Refused

Question # 23 Page # 23

For the thrill or dream of winning
Single response

-Check List- (Number of items: 13 Min: 1 Max: 1)

0	0
1	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10	10
11	Unsure
12	Refused

Question # 24 Page # 24

They think they have more skill or luck than others
Single response
-Check List- (Number of items: 13 Min: 1 Max: 1)

0	0
1	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10	10
11	Unsure
12	Refused

Question # 25 Page # 25

Because money lost goes to a worthy cause
Single response

-Check List-   (Number of items: 13   Min: 1   Max: 1)

0	0
1	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10	10
11	Unsure
12	Refused

Question # 26 Page # 26

I would now like to ask you a few questions about gambling's impact on the economy and society. Please tell me if you agree or disagree with the following statements...

-Check List-   (Number of items: 1   Min: 1   Max: 1)

1	continue

Question # 27 Page # 27

Increased gambling activity is good for the Victorian economy.
If they agree or disagree probe for
Is that slightly or strongly?

-Check List-   (Number of items: 6   Min: 1   Max: 1)

1	agree strongly
2	agree slightly
3	neutral
4	disagree slightly
5	disagree strongly
6	refused/don't know (do not read out)

Question # 28 Page # 28

Gambling venues provide a safe and pleasant environment for people to go to.
If they agree or disagree probe for
Is that slightly or strongly?

-Check List-   (Number of items: 6   Min: 1   Max: 1)

1	agree strongly
2	agree slightly
3	neutral
4	disagree slightly
5	disagree strongly
6	refused/don't know (do not read out)

Question # 29 Page # 29

The social problems created by gambling far outweigh the benefits
If they agree or disagree probe for
Is that slightly or strongly?

-Check List- (Number of items: 6 Min: 1 Max: 1)
1 agree strongly
2 agree slightly
3 neutral
4 disagree slightly
5 disagree strongly
6 refused/don't know (do not read out)

Question # 30 Page # 30

There is no such thing as a problem gambler, but there are people with problems who gamble
If they agree or disagree probe for
Is that slightly or strongly?

-Check List- (Number of items: 6 Min: 1 Max: 1)
1 agree strongly
2 agree slightly
3 neutral
4 disagree slightly
5 disagree strongly
6 refused/don't know (do not read out)

Question # 31 Page # 31

There are sufficient controls and restrictions on the gambling industry.
If they agree or disagree probe for
Is that slightly or strongly?

-Check List- (Number of items: 6 Min: 1 Max: 1)
1 agree strongly
2 agree slightly
3 neutral
4 disagree slightly
5 disagree strongly
6 refused/don't know (do not read out)

Question # 32 Page # 32

I derive entertainment and pleasure from the money I spend on gambling
If they agree or disagree probe for
Is that slightly or strongly?

-Check List- (Number of items: 6 Min: 1 Max: 1)
1 agree strongly
2 agree slightly
3 neutral
4 disagree slightly
5 disagree strongly
6 refused/don't know (do not read out)

Question # 33 Page # 33

I would now like to ask a few questions about gambling support services

-Check List- (Number of items: 1 Min: 1 Max: 1)

1 continue

Question # 34 Page # 34

Have you seen any advertising targeted at problem gamblers in the last 3 months ?

-Check List- (Number of items: 3 Min: 1 Max: 1)

1 Yes
2 No
3 Can't say/refused (do not read out)

Question # 35 Page # 35

Has the amount of advertising you see for gambling support services increased, decreased or stayed the same over the last year?
Read out options, response set will be randomised - do not read option with 'do not read' next to them. Single response only

-Check List- (Random)(Number of items: 6 Min: 1 Max: 1)

1 increased
2 decreased
3 stayed the same
4 haven't seen any
5 don't know (do not read)
6 refused (do not read)

Question # 36 Page # 36

Do you know anyone who has used a gambling support service such as Breakeven or G Line?

-Check List- (Number of items: 3 Min: 1 Max: 1)

1 Yes
2 No
3 Can't say/refused (do not read out)

Question # 37 Page # 37

On average, how many days a week do you read a newspaper?

-Check List- (Number of items: 9 Min: 1 Max: 1)

1 Don't read newspapers
2 One day a week
3 Two days
4 Three days
5 Four days
6 Five days
7 Six days
8 Every day
9 Refused (do not read)

SKIPS from Q37
IF q37=1 SKIP TO: 41

Question # 38 Page # 38

Thinking about newspapers can you recall reading any gambling related stories?

-Check List- (Number of items: 3 Min: 1 Max: 1)

1 Yes
2 No
3 Can't say/refused

Question # 39 Page # 39

Which of the following best describes how newspaper articles generally show gambling and the gambling industry...
Single response. Read out list

-Check List- (Number of items: 7 Min: 1 Max: 1)

1 Totally positive
2 More positive than negative
3 Equally positive and negative
4 More negative than positive
5 Totally negative
6 Can't say (do not read out)
7 Refused (do not read out)

Question # 40 Page # 40

Can you recall seeing any advertising for gambling venues, activities or events in newspapers?

-Check List- (Number of items: 3 Min: 1 Max: 1)

1 Yes
2 No
3 Can't say/refused

Question # 41 Page # 41

Can you recall receiving any special offers, incentives, or pamphlets in the mail to go to a pokies venue such as a hotel, club or casino?
Here we are talking about any offer, not just ones addressed to the respondent.

-Check List- (Number of items: 3 Min: 1 Max: 1)

1 Yes
2 No
3 Can't say/refused

SKIPS from Q41
IF q41>1 SKIP TO: 43

Question # 42 Page # 42

Have you taken up any of those incentives in the last month?
Single response

-Check List- (Number of items: 3 Min: 1 Max: 1)

1 Yes
2 No
3 Can't say/refused (do not read out)

Question # 43 Page # 43
On average, how many hours a day do you watch television?

-Check List- (Number of items: 6 Min: 1 Max: 1)
1 Don't watch television
2 Less than an hour a day
3 1-2 hours
4 3-5 hours
5 More than 5 hours a day
6 Refused

SKIPS from Q43
IF q43=1 SKIP TO: 47

Question # 44 Page # 44
Have you ever seen any gambling related stories on television?

-Check List- (Number of items: 3 Min: 1 Max: 1)
1 Yes
2 No
3 Can't say/refused

Question # 45 Page # 45
Which of the following best describes how television generally shows gambling and the gambling industry?
Single response. Read out list.

-Check List- (Number of items: 7 Min: 1 Max: 1)
1 Totally positive
2 More positive than negative
3 Equally positive and negative
4 More negative than positive
5 Totally negative
6 Can't say (do not read out)
7 Refused (do not read out)

Question # 46 Page # 46
Have you seen any advertising on TV for gambling activities, events or venues?

-Check List- (Number of items: 3 Min: 1 Max: 1)
1 Yes
2 No
3 Can't say/refused

Question # 47 Page # 47
On average, how many hours a day do you listen to the radio?

-Check List- (Number of items: 6 Min: 1 Max: 1)
1 Don't listen to radio
2 Less than an hour a day
3 1-2 hours
4 3-5 hours
5 More than 5 hours a day
6 Refused

SKIPS from Q47
IF q47=1 SKIP TO: 50

Question # 48 Page # 48
Have you ever heard any gambling related stories on the radio?

-Check List- (Number of items: 3 Min: 1 Max: 1)
1 Yes
2 No
3 Can't say/refused

Question # 49 Page # 49
Which of the following best describes how the radio generally discusses gambling and the gambling industry?
Single response. Read out list.

-Check List- (Number of items: 7 Min: 1 Max: 1)
1 Totally positive
2 More positive than negative
3 Equally positive and negative
4 More negative than positive
5 Totally negative
6 Can't say (do not read out)
7 Refused (do not read out)

Question # 50 Page # 50
Do you know anyone who works in the gambling industry? We are not talking about people working in problem gambling support services.

-Check List- (Number of items: 3 Min: 1 Max: 1)
1 Yes
2 No
3 Can't say/refused

SKIPS from Q50
IF q50>1 SKIP TO: 52

Question # 51 Page # 51
Overall, would you say that the views on gambling that you hear from people who work in the industry are...
Read out options. Single response

-Check List- (Number of items: 7 Min: 1 Max: 1)
1 Totally positive
2 More positive than negative
3 Equally positive and negative
4 More negative than positive
5 Totally negative
6 Can't say (do not read)
7 Refused (do not read)

Question # 52 Page # 52
Have you heard any stories about gambling from your family or friends (other than those who work in the industry)?

-Check List- (Number of items: 3 Min: 1 Max: 1)
1 Yes
2 No
3 Can't say/refused

Question # 53 Page # 53

Overall, would you say the views of your family and friends about the gambling industry are...
Read out options. Single response.

-Check List- (Number of items: 7 Min: 1 Max: 1)

1 Totally positive
2 More positive than negative
3 Equally positive and negative
4 More negative than positive
5 Totally negative
6 Can't say (do not read)
7 Refused (do not read)

Question # 54 Page # 54

Which of the following sources of information on the gambling industry do you believe the most out of....
Read from list. We want to know which source is the most credible.

-Check List- (Number of items: 8 Min: 1 Max: 1)

1 Newspaper
2 TV
3 Radio
4 Family and friends
5 People who work in the industry
6 None (do not read)
7 All equally (do not read)
8 Refused

Question # 55 Page # 55

And which of the following sources of information on the gambling industry do you believe the least out of...
Read from list. We want to know which source is the least credible.

-Check List- (Number of items: 8 Min: 1 Max: 1)

1 Newspaper
2 TV
3 Radio
4 Family and friends
5 People who work in the industry
6 None (do not read)
7 All equally (do not read)
8 Refused

Question # 56 Page # 56

In the last year, would you say that the gambling activities of your family and friends have...
Read out options, response set will be randomised - do not read option with 'do not read' next to them. Single response only

-Check List- (Random)(Number of items: 5 Min: 1 Max: 1)

1 increased
2 decreased
3 stayed the same
4 don't know (do not read out)
5 refused (do not read out)

Question # 57 Page # 57

Which of the following activities or games have you played or gambled in the last 12 months?
Read out list. Multiple responses possible.

-Check List Open- (Number of items: 8 Min: 1 Max: 7)
1 Lotto type games or scratch tickets
2 Racing -gallops, trots or dogs
3 Poker machines (pokies) at clubs or hotels
4 Poker machines (pokies) at the Crown casino or a casino outs
5 Any other game at the Crown Casino or a casino outside Vic.
6 None of these (do not read)
7 Refused (do not read)
8 Other forms of gambling (please specify) «»

SKIPS from Q57
IF (button7(q57)=1) | (button8(q57)=1) SKIP TO: 75

Question # 58 Page # 58

How often do you play Lotto type games or scratch cards ?
Read out scale

-Check List- (Number of items: 9 Min: 1 Max: 1)
1 Every week or nearly every week
2 About twice a month
3 About once a month
4 About once every 2 to 3 months
5 About once every 6 months
6 About once a year
7 Less often than once a year
8 Don't play
9 Refused

SKIPS from Q58
IF (button1(q57)=1) SKIP TO: 0

Question # 59 Page # 59

How often do you bet on racing ?
Read out scale

-Check List- (Number of items: 10 Min: 1 Max: 1)
1 More than 3 days a week
2 2 to 3 days a week
3 One day a week
4 One day a fortnight
5 One day a month
6 One day every 2 to 3 months
7 One day every 6 months
8 One day every year
9 Less often than one day a year
10 refused

SKIPS from Q59
IF (button2(q57)=1) SKIP TO: 0

Question # 60 Page # 60

How often do you play on poker machines (pokies) at a club or hotel ?
Read out scale

-Check List-   (Number of items: 10 Min: 1 Max: 1)
1 More than 3 days a week
2 2 to 3 days a week
3 One day a week
4 One day a fortnight
5 One day a month
6 One day every 2 to 3 months
7 One day every 6 months
8 One day every year
9 Less often than one day a year
10 refused

SKIPS from Q60
IF (button3(q57)=1)   SKIP TO: 0

Question # 61 Page # 61

How often do you play on poker machines (pokies) at the Crown Casino or casinos outside Victoria?
Read out scale

-Check List-   (Number of items: 10 Min: 1 Max: 1)
1 More than 3 days a week
2 2 to 3 days a week
3 One day a week
4 One day a fortnight
5 One day a month
6 One day every 2 to 3 months
7 One day every 6 months
8 One day every year
9 Less often than one day a year
10 refused

SKIPS from Q61
IF (button4(q57)=1)   SKIP TO: 0

Question # 62 Page # 62

How often do you play any other game at the Crown Casino or casinos outside Victoria?
Read out scale

-Check List-   (Number of items: 10 Min: 1 Max: 1)
1 More than 3 days a week
2 2 to 3 days a week
3 One day a week
4 One day a fortnight
5 One day a month
6 One day every 2 to 3 months
7 One day every 6 months
8 One day every year
9 Less often than one day a year
10 refused

SKIPS from Q62
IF (button5(q57)=1)   SKIP TO: 0

Question # 63 Page # 63

On each day you play poker machines (pokies) at a club or hotel, how much money do you spend or outlay on this activity?
Please type in amount, enter -1 if refused

-Dbase- (Number of items: 2)
Amount in $
«Integer: -1 = i = 100000 »

SKIPS from Q63
IF (button3(q57)=1) SKIP TO: 0

Question # 64 Page # 64

On each day you play poker machines (pokies) at a Casino, how much money do you spend or outlay on this activity?
Please type in amount, enter -1 if refused

-Dbase- (Number of items: 2)
Amount in $
«Integer: -1 = i = 100000 »

SKIPS from Q64
IF (button4(q57)=1) SKIP TO: 0

Question # 65 Page # 65

On each day you play games other than pokies at a Casino, how much money do you spend or outlay on these activities?
Please type in amount, enter -1 if refused

-Dbase- (Number of items: 2)
Amount in $
«Integer: -1 = i = 100000 »

SKIPS from Q65
IF (button5(q57)=1) SKIP TO: 0

Question # 66 Page # 66

Thinking about all your gambling activities over the last 12 months, on average, how much did you spend or outlay each week ?
Please type in amount, enter -1 if refused

-Dbase- (Number of items: 2)
Amount in $
«Integer: -1 = i = 100000 »

Question # 67 Page # 67

Thinking about all your gambling activities in the last 12 months, do you think that you have won back more than you outlaid, less than you outlaid, or about the same as you outlaid?

-Check List- (Number of items: 5 Min: 1 Max: 1)
1 More than outlaid
2 Less than outlaid
3 About same as outlaid
4 Can't say (do not read)
5 Refused (do not read)

Question # 68 Page # 68

I am now going to read out a list of 5 possible reasons why you gamble. For each, I would like you to give it a rating for how common it is as a reason you gamble. You should give a 10 to the statement if it is the most common reason why you gamble or a 1 to the statement if it is not a common reason at all. You can also give scores anywhere between 1 and 10.

-Check List- (Number of items: 1 Min: 1 Max: 1)

1 continue

Question # 69 Page # 69

Enjoyment or social reasons

-Check List- (Number of items: 13 Min: 1 Max: 1)

0	0
1	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10	10
11	Unsure
12	Refused

Question # 70 Page # 70

For the thrill or dream of winning

-Check List- (Number of items: 13 Min: 1 Max: 1)

0	0
1	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10	10
11	Unsure
12	Refused

Question # 71 Page # 71

Because money lost goes to a worthy cause

-Check List- (Number of items: 13 Min: 1 Max: 1)

0	0
1	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10	10
11	Unsure
12	Refused

Question # 72 Page # 72

To avoid boredom or loneliness

-Check List- (Number of items: 13 Min: 1 Max: 1)

0	0
1	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10	10
11	Unsure
12	Refused

Question # 73 Page # 73

Because I have more skill or luck than others

-Check List- (Number of items: 13 Min: 1 Max: 1)

0	0
1	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10	10
11	Unsure
12	Refused

Question # 74 Page # 74

Are you a member of any pokies or casino clubs?

-Check List- (Number of items: 3 Min: 1 Max: 1)

1 Yes
2 No
3 Can't say/refused (do not read out)

Question # 75 Page # 75

Now, before I finish I would like to know what you think about the future...

-Check List- (Number of items: 1 Min: 1 Max: 1)

1 continue

Question # 76 Page # 76

Over the next 12 months, is the number of people participating in gambling activities in Victoria likely to...?
Read out options, response set will be randomised - do not read option with 'do not read' next to them. Single response only

-Check List- (Random)(Number of items: 5 Min: 1 Max: 1)

1 increase
2 decrease
3 stay the same
4 don't know (do not read)
5 refused (do not read)

Question # 77 Page # 77

In the next 12 months, is the total amount people spend on gambling activities in Victoria likely to....?
Read out options, response set will be randomised - do not read option with 'do not read' next to them. Single response only

-Check List- (Random)(Number of items: 5 Min: 1 Max: 1)

1 increase
2 decrease
3 stay the same
4 don't know (do not read)
5 refused (do not read)

Question # 78 Page # 78

In the next 12 months, is the number of problem gamblers in Victoria likely to...?
Read out options, response set will be randomised - do not read option with 'do not read' next to them. Single response only

-Check List- (Random)(Number of items: 5 Min: 1 Max: 1)

1 increase
2 decrease
3 stay the same
4 don't know (do not read)
5 refused (do not read)

Question # 79 Page # 79

Finally, I'd like to ask a few questions about yourself to make sure that we have a good cross section of the community.

-Check List- (Number of items: 1 Min: 1 Max: 1)

1 continue

Question # 80 Page # 80

Gender (by observation)

-Check List- (Number of items: 2 Min: 1 Max: 1)

1 Male

2 Female

Question # 81 Page # 81

Into which of the following age groups do you belong?

Read out options

-Check List- (Number of items: 14 Min: 1 Max: 1)

1 18 years

2 19 years

3 20-24 years

4 25 to 29 years

5 30 to 34 years

6 35 to 39 years

7 40 to 44 years

8 45 to 49 years

9 50 to 54 years

10 55 to 59 years

11 60 to 64 years

12 65 to 69 years

13 70 years and over

14 Refused (do not read)

Question # 82 Page # 82

Which of the following best describes your household ?

Read out options

-Check List Open- (Number of items: 10 Min: 1 Max: 1)

1 Single person

2 Group household (not related)

3 Couple with no children

4 One parent family with dependent kids

5 One parent family with kids not at home

6 Two parent family with dependent kids

7 Two parent family with kids not at home

8 Other related individuals

9 Refused (do not read out)

10 Other (please specify) «»

Question # 83 Page # 83

Which of these describes you best ?

Read out options

-Check List- (Number of items: 8 Min: 1 Max: 1)

1 Work full time

2 Work part time

3 Household duties only

4 Student

5 Retired (self supporting)

6 Pensioner

7 Unemployed

8 Don't know/can't say (do not read out)

Question # 84 Page # 84

What is your country of birth?

-Check List Open- (Number of items: 17 Min: 1 Max: 1)

1 Australia
2 UK/Scotland/Ireland/Wales
3 New Zealand
4 North America (USA/Canada)
5 Greece
6 Italy
7 Other West European (Germany/France/Holland)
8 East Europe (Russia/Georgia/Bulgaria)
9 Middle East (Israel/Iraq/Egypt)
10 Vietnam
11 Malaysia
12 Philippines
13 Hong Kong
14 Other Asia/Pacific
15 Africa
16 Refused/don't know/unsure
17 Other (please specify) «»

Question # 85 Page # 85

Were your parents born in Australia?
Probe for either mother or father or both.

-Check List- (Number of items: 5 Min: 1 Max: 1)

1 Yes -father
2 Yes - mother
3 Yes - both
4 No -neither
5 Can't say/refused

Question # 86 Page # 86

What was the main language spoken at home when you were growing up?

-Check List Open- (Number of items: 9 Min: 1 Max: 1)

1 English
2 Mandarin
3 Cantonese
4 Vietnamese
5 Spanish
6 Italian
7 Greek
8 Refused (do not read)
9 Other (please specify) «»

Question # 87 Page # 87

Into which of these ranges is your gross (before tax) income? If you live with a partner it will be your joint income, otherwise it will be your income alone.
Read out options

-Check List- (Number of items: 16 Min: 1 Max: 1)

1 $0 to $10 000
2 $10 001 to $15 000
3 $15 001 to $20 000
4 $ 20 001 to $25 000
5 $ 25001 to $ 30 000
6 $30 001 to $35 000
7 $ 35 001 to $40 000
8 $ 40 001 to $ 50 000
9 $ 50 001 to $ 60 000
10 $ 60 001 to $75 000
11 $75 001 to $100 000
12 $100 001 to $ 125 000
13 $125 001 to $ 150 000
14 Over $150 000
15 Don't know/unsure (do not read)
16 Refused (do not read)

Question # 88 Page # 88

Could you tell me your highest level of education?

-Check List- (Number of items: 9 Min: 1 Max: 1)

1 No school or primary school only
2 Attended high school but no certificate
3 Completed year 10 or 11 (intermediate or leaving)
4 Completed year 12 (VCE/HSC or Matric)
5 Trade certificate or apprenticeship
6 Other certificate or diploma
7 Bachelors degree
8 Post graduate degree
9 Refused (do not read)

Question # 89 Page # 89

What is your religion?
Do NOT read out

-Check List Open- (Number of items: 15 Min: 1 Max: 1)
1 Anglican/Church of England
2 Catholic
3 Baptist/Church of Christ
4 Presbyterian/Methodist/Uniting Church
5 Salvation Army
6 Lutheran
15 Greek Orthodox
7 Other Christian
8 Jewish/Judaism
9 Buddhism
14 Islam
10 Other non-Christian
12 No religion
13 Don't know/can't say/refused (do not read)
11 Other (please specify) «»

Question # 90 Page # 90

Thank you for taking the time to answer our questions. Through this you have taken part in a very important, large scale research project that the Marketing Science Centre is undertaking on behalf of the Victorian Casino and Gaming Authority. An important part of this study is gaining data from the same panel of people on a yearly basis for the next two years to identify any changes in perceptions. We would really like you to become part of this panel, as you fit the special selection criteria and are therefore important to this research.
The way in which this would work is that we would phone you in a years time with a set of questions very similar to the ones you have just answered. Again, they will only take a few minutes to complete.

Are you able to become part of our panel?

-Check List- (Number of items: 2 Min: 1 Max: 1)
1 Yes
2 No - thank and close section

SKIPS from Q90
IF q90=1 SKIP TO: 92

Question # 91 Page # 91

If not joining panel
Thank you for your time in completing this research. In case you missed it, my name is ... from the Marketing Science Centre. As part of our quality control process, my supervisor will be contacting 10% of the people I have spoken to today. May I please have your name and verify your phone number and postcode for this purpose?
Fill in then thank and terminate.

-Dbase- (Number of items: 6)
NAME
«Text Variable»
PHONE
«Text Variable»
Postcode
«Text Variable»
SKIPS from Q91

IF q90=2 SKIP TO: 94

Question # 92 Page # 92

To become part of our panel, we require your phone contact details and name so that we can contact you again in a years time. These details are just for this study and will not be passed onto anyone else.

-Dbase-   (Number of items: 14)
Firstname
«Text Variable»
Last name
«Text Variable»
street address
«Text Variable»
postcode
«Text Variable»
Home hone number
«Text Variable»
Work phone number
«Text Variable»
Email address
«Text Variable»

Question # 93 Page # 93

To help us keep in contact with you, I'd like to get contact details for someone who will know where you are living if you move before the next research phase. Please tell me a person, perhaps a relative or friend, most likely to know where you'll be living over the next year or two and who does not currently live with you.
If they refuse enter "-1"

-Dbase-   (Number of items: 16)
Firstname
«Text Variable»
Last name
«Text Variable»
street address
«Text Variable»
postcode
«Text Variable»
Home phone (AREA CODE)
«Text Variable»
Home phone number
«Text Variable»
Work number
«Text Variable»
Relationship with respondent
«Text Variable»

Question # 94 Page # 94

Thank and close
-Dbase-   (Number of items: 4)
Interviewer number
«Integer: -1 = i = 1000 »
Date
«Text Variable»