

**SEVENTH SURVEY  
OF COMMUNITY GAMBLING PATTERNS  
AND PERCEPTIONS**

**Project Report**

**March 2000**

*- Prepared for -*

**Victorian Casino and Gaming Authority**  
Level 5/35 Spring Street  
Melbourne Victoria 3000

*- Prepared by -*

**Roy Morgan Research**  
411 Collins Street  
Melbourne Victoria 3000

***Seventh Survey of Community Gambling Patterns  
and Perceptions***

***Consultant - Roy Morgan Research***

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Address all enquiries to:***

***Victorian Casino and Gaming Authority  
Level 5/35 Spring Street  
Melbourne Victoria 3000***

***Telephone: 61 3 9651 3333  
Fax: 61 3 9651 3777***

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**CONTENTS**

**EXECUTIVE SUMMARY..... i**

**1. INTRODUCTION AND OBJECTIVES..... 1**

    1.1 Background..... 3

    1.2 Objectives ..... 7

**2. RESEARCH METHODOLOGY ..... 9**

    2.1 Methodology..... 11

    2.2 Review and Revision of Measurement Instrument ..... 17

    2.3 Issues Concerning Survey Estimation..... 23

    2.4 South Oaks Gambling Screen ..... 25

    2.5 Gambling Segments ..... 27

    2.6 This Report ..... 41

**3. TOTAL VICTORIAN GAMBLING PATTERNS..... 43**

    3.1 Number of Activities..... 47

    3.2 Participation Rates ..... 47

    3.3 Participation in Activities..... 49

    3.3B Profile of Victorian Gambling Activities ..... 53

    3.4 Regular Participation in Activities ..... 55

    3.5 Regular Participation in Gambling Activities Amongst Total Population..... 59

    3.6 Frequency of Participation..... 61

    3.7 Duration of Activities ..... 61

    3.8 Perceived Weekly Expenditure..... 63

    3.9 Actual Weekly Expenditure..... 65

    3.10 Overall Actual Weekly Expenditure ..... 67

    3.11 Expenditure Each Time Played..... 69

    3.12 Source of Gambling Expenditure..... 71

    3.13 Proportion of Outlay Reported as Won Back ..... 71

    3.14 Won or Lost on Gambling Activities – Last 7 Days ..... 73

    3.15 Amount Won or Lost Gambling – Last 7 Days ..... 73

    3.16 Appeal of Leisure Activities – Gamblers..... 75

    3.17 Appeal of Leisure Activities – Regular EGM/Casino Gamblers ..... 75

    3.18 Reasons – Gamblers..... 77

    3.19 Reasons – Regular EGM/Casino Gamblers ..... 77

    3.20 Behavioural Profile – Gambling Population ..... 79

    3.21 Behavioural Profile – Regular EGM/Casino Gamblers ..... 79

    3.22 Self-Perceptions – Total Population ..... 81

    3.23 Self-Perceptions – Regular EGM/Casino Gamblers ..... 81

    3.24 Attitudes to Gambling..... 83

    3.25 Awareness of Community Projects From Gambling Revenue ..... 89

    3.26 Personally Benefit From Community Projects..... 89

    3.27 Problem Gambling ..... 91

    3.28 Gambling Problems in the Family ..... 93

    3.29 Profile of “At Risk” Gamblers ..... 95

    3.30 Victorian Gambling Patterns – Summary ..... 97

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# Seventh Survey of Community Gambling Patterns and Perceptions

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<b>4.</b>	<b>CASINO GAMBLING PATTERNS .....</b>	<b>99</b>
4.1	Participation Rates .....	103
4.2	Favourite Gambling Activity .....	103
4.3	Frequency.....	107
4.4	Duration .....	107
4.5	Expenditure .....	109
4.6	Proportion of Outlay Reported as Won Back .....	109
4.7	Satisfaction.....	111
4.8	If Dissatisfied – Why Continue.....	111
4.9	Reasons .....	113
4.10	Appeal of Leisure Activities .....	113
4.11	Ever Visited Crown Casino .....	115
4.12	Entered Gaming Area at the Crown Entertainment Complex .....	115
4.13	When Last Visited Crown Entertainment Complex.....	117
4.14	Reasons For Not Visiting Crown Entertainment Complex.....	117
4.15	Activities Undertaken on Last Casino Visit.....	119
4.16	Main Activity Undertaken on Last Casino Visit.....	119
4.17	Games Played on Last Casino Visit .....	119
4.18	Casino Gambling Patterns – Summary .....	121
<b>5.</b>	<b>EGM GAMBLING PATTERNS .....</b>	<b>123</b>
5.1	Participation Rates .....	127
5.2	Favourite Gambling Activity .....	127
5.3	Frequency.....	131
5.4	Duration .....	131
5.5	Expenditure .....	133
5.6	Proportion of Outlay Reported as Won Back .....	133
5.7	Satisfaction.....	135
5.8	If Dissatisfied – Why Continue.....	135
5.9	Reasons .....	137
5.10	Appeal of Leisure Activities .....	137
5.11	EGM Venues Visited .....	139
5.12	EGM Venues Visited Most Often.....	139
5.13	Reasons For Attending EGM Venue .....	141
5.14	Activities Combined with EGMs on Last Visit .....	141
5.15	Won or Lost Last Time on EGMs (not at the Casino).....	143
5.16	Amount Won or Lost Last Time on EGMs (not at the Casino) .....	143
5.17	Visiting EGM Venues to Play Linked Jackpots.....	145
5.18	Distance Travelled to get to EGM Venue (not the Casino) .....	145
5.19	Where Travelled from to EGM Venue (not the Casino).....	145
5.20	EGM Gambling Patterns – Summary .....	147
<b>6.</b>	<b>LOTTO GAMBLING PATTERNS.....</b>	<b>149</b>
<b>7.</b>	<b>SCRATCH TICKET GAMBLING PATTERNS.....</b>	<b>159</b>
<b>8.</b>	<b>RAFFLES GAMBLING PATTERNS.....</b>	<b>169</b>
<b>9.</b>	<b>BINGO GAMBLING PATTERNS .....</b>	<b>179</b>
<b>10.</b>	<b>PRIVATE CARDS GAMBLING PATTERNS .....</b>	<b>189</b>
<b>11.</b>	<b>HORSE RACING GAMBLING PATTERNS.....</b>	<b>199</b>
<b>12.</b>	<b>TROTTING GAMBLING PATTERNS .....</b>	<b>209</b>
<b>13.</b>	<b>FOOTYBET GAMBLING PATTERNS.....</b>	<b>219</b>
<b>14.</b>	<b>CLUB KENO GAMBLING PATTERNS .....</b>	<b>229</b>
<b>15.</b>	<b>OTHER GAMBLING PATTERNS .....</b>	<b>239</b>
15.1	Occasional/Annual Gambling Activities.....	243
15.2	Other Gambling Activities .....	245
<b>APPENDIX 1: THE QUESTIONNAIRE .....</b>		<b>249</b>
<b>APPENDIX 2: SAMPLING ERROR ALLOWANCES .....</b>		<b>283</b>

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## EXECUTIVE SUMMARY

This report presents the results from the Seventh Survey of Community Gambling Patterns And Perceptions commissioned by the Victorian Casino and Gaming Authority (the Authority). The survey aims to observe and document changes in Victorian gambling patterns following the establishment of the Crown Casino Complex in Melbourne and the increased numbers of licensed gaming venues throughout Victoria and to compare the 1999 situation with that reported in previous surveys. It also aims to identify positive and negative perceptions of, and attitudes towards, gambling amongst the Victorian adult community.

The survey was conducted by Roy Morgan Research during October–November 1999 and administered via in-house Computer-Assisted Telephone Interviewing (CATI) facilities. Multilingual interviewers were used to conduct interviews in languages other than English to ensure that no particular groups were excluded from the survey. The sample was randomly generated from the most recent edition of the electronic White Pages, and a total of 58 sampling quotas were applied to represent unique geo-demographic segments of the Victorian population. A total of 1,760 interviews were conducted, covering both metropolitan (1,256) and rural (504) areas.

### *Definition of Terms*

Throughout this report, the terms “outlay”, “return”, “expenditure” and “turnover” have been used in relation to financial aspects of gambling. These terms are defined as follows:

- **Expenditure:** Within the gambling industry, this is commonly defined as the net amount lost, or, in other words, the amount wagered less the amount won, by people who gamble. Conversely, by definition, it is the gross profit (or gross winnings) due to the operators of each particular form of gambling. Within this report, expenditure has accordingly been operationally defined as:

$$\text{Outlay} - \text{Return} = \text{Expenditure}$$

That is, if return is less than outlay for a specific gambling activity, in net terms it has cost an individual money to participate; if return equals outlay, in net terms an individual has “broken even”; if return exceeds outlay, in net terms an individual has made a profit from participating.

- **Outlay:** Money spent or outlaid (excluding reinvestment of return, if any) on specified gambling activities.
- **Return:** Money won back (returned) on specified gambling activities.
- **Turnover:** Within the gambling industry, this is commonly defined as an expression used to describe the amount wagered. This does not include any additional charges that may also be paid at the point of purchase, such as selling agents commission in the case of lotteries.

For gambling activities with low reinvestment of return, such as raffles or lotto, outlay and turnover may be so close as to be regarded as virtually synonymous. However, for gambling activities with high reinvestment of return, such as thoroughbred horse racing and electronic gaming machines (EGMs), outlay and turnover may be very different from each other.

### *South Oaks Gambling Screen*

The gambling population was analysed using the South Oaks Gambling Screen (SOGS) which identified an “At Risk” group. The characteristics of those individuals are as follows:

- **At Risk Group:** Those identified displayed a high level of gambling activity, particularly on Electronic Gaming Machines (EGMs) and casino gambling activities. They spend heavily on gambling, yet say they feel gambling is a serious social problem—perhaps from personal experience.

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### ***Gambling Segments***

The gambling community was segmented according to gambling behaviour and attitudes in 1995, with five segments identified and replicated in the 1996, 1997, 1998 and 1999 surveys. The characteristics of the individuals identified as belonging to each segment are described as follows:

- ***Disinterested Gamblers:*** Display a very low level of expenditure on gambling activities and tend to find activities such as betting at the TAB and the playing of sport unappealing. They show the lowest level of visitation to the Crown Casino, and display low levels of participation in Electronic Gaming Machine (EGM) gambling activities. Most say they don't like to bet or gamble. They see gambling as a serious social problem, escalated by the introduction of EGMs to Victoria and exacerbated by the development of the Crown Complex, with most feeling that the Crown Casino is not good for the community.
  - ***Occasional Gamblers:*** Display a low level of gambling activity, but have a preference for activities such as lotto, scratch tickets and raffles. They do not find the idea of going to the casino or playing EGMs particularly appealing. When they lose money gambling they are less inclined than other segments to have another bet in an attempt to regain their money, and most say they do not tell friends they have lost less money on a gambling activity than they actually have.
  - ***Social Gamblers:*** Differ from other segments in that their motivations for gambling are closely related to the social opportunities and the atmosphere and excitement afforded by it. They find most social activities very appealing, and particularly like going to the casino, going out to dinner or going to the movies. Social Gamblers participate in a number of gambling activities over the course of a year, including lotto, EGMs, casino gambling and scratch ticket gambling. This segment shows the highest level of participation in both EGM and casino gambling. Social Gamblers tend to think that gambling is an acceptable activity in our community and that the Crown Entertainment Complex is good for the community.
  - ***Acknowledged Heavy Gamblers:*** Gamble quite frequently, and are particularly fond of EGM and casino gambling, but also participate regularly in raffles, scratch tickets and Club Keno. They acknowledge that they have another bet when they have lost money in an attempt to win it back, tell others they have lost less money than they actually have and brag about winning more money than they actually have won. They will spend more money if they have a chance of winning more. Acknowledged Heavy Gamblers tend to gamble secretly, and to conceal the true amount of money they wager. Most say they feel the level of gambling in Victoria is sustainable, and that the Crown Entertainment Complex is good for the community.
  - ***Committed Heavy Gamblers:*** Display a high level of gambling activity, gambling around 1½ times each week, spending over an hour and a half each week doing so. Most say they gamble for social reasons, but only gamble an amount which can be afforded. They differ from other people reporting gambling activity in that betting at the TAB and going to the races or the trots is very appealing to them. They regularly gamble on horses and lotto, and many say that gambling is their favourite activity or hobby. This segment is most likely to view gambling as an acceptable activity and to think that the introduction of EGMs to Victoria has created more jobs. If they lose money betting, they place another bet to try to win it back, and will spend more if they have the chance of winning more money.
-



## **Key Findings**

### **Gambling Overall**

For Victorians as a whole, patterns of gambling behaviour appear to be showing signs of stabilising since the introduction of EGMs in 1992 and the opening of the temporary Crown Casino in June 1994, followed by the opening of the permanent Crown Entertainment Complex in May 1997. After a marked shift in a positive direction in 1998, people's opinions on the impacts and role of gambling became more negative in 1999—although still generally less negative than in the preceding two years. Overall, the level of participation in gambling activities has increased in the past year. There are fewer people participating in EGM and in casino gambling, but those that do participate tend to play more often and spend more money each time they play. Actual gambling expenditure (the amount lost) increased overall by 8.11%, with most of this attributable to increased expenditure on EGM gambling. The expenditure on more established forms of gambling, like racing and lotto-type games, has remained relatively constant.

The main points of interest for Victorian gambling patterns have been outlined below:

- ✓ For the third year in succession, the mean number of gambling activities undertaken by people reporting gambling activity decreased, returning to levels last recorded prior to 1994;
  - ✓ Following a decrease in 1998, the gambling participation rate increased 5 points in 1999, with 81% of adult Victorians having participated in at least one of the gambling activities measured in the survey within the last 12 months. However, despite this increase, the participation rate remains lower than those recorded in 1996 and 1997 (87% and 86%, respectively);
  - ✓ Participation in EGM gambling decreased slightly to 30% in 1999—down 1% from the 1998 figure of 31%—but retained the third highest participation rate after lotto and raffles;
  - ✓ The reported level of participation in casino gambling continues to fall. In 1999, 16% of adult Victorians said they had gambled at the Casino in the last 12 months, compared with 18% in 1998, after a peak of 25% in 1997;
  - ✓ Actual expenditure on regulated forms of gambling in Victoria for the financial year ending June 1999 was \$3,456 million—an 8.11% increase from 1998. This expenditure amounts to an average loss per week of \$18.90 for each adult Victorian;
  - ✓ The overall trend since 1992 appears to have been towards a gradual decrease in frequency of participation in gambling activities. On average, people reporting gambling activity participated in some form of gambling activity a little less than once a week (0.8 times per week);
  - ✓ There was a very slight decrease in the average amount of time those reporting gambling activity spent on gambling activities in 1999—at 29 minutes per week, down 1 minute from the 1998 figure of 30 minutes (please note that there was a change in format of duration questions in 1999);
  - ✓ The average weekly expenditure on gambling activities by people reporting gambling activity in 1999 was \$31 (please note that a change in question format in 1999 means that expenditure data from this year's survey may not be directly comparable with those from previous years);
  - ✓ People reporting EGM gambling activity spent \$33 on average each day they played EGMs in 1999 (please note that a change in question format in 1999 means that expenditure data from this year's survey may not be directly comparable with those from previous years);
  - ✓ Those reporting casino gambling activity spent an average of \$63 each day they played at the casino in 1999 (please note that a change in question format in 1999 means that expenditure data from this year's survey may not be directly comparable with those from previous years);
  - ✓ For 43% of those reporting gambling activity, the main source of their expenditure on gambling was “pocket money”, and for another 19% it came from a “specific budget for entertainment or recreation”. For another 19% their expenditure on gambling came mainly from “money for basic living expenses”, and for 6% it came from “savings”, with only 3% funding their gambling from a “specific gambling budget”;
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- ✓ People reporting gambling activity believed that they won back 35% of their outlay on all gambling activities, overall (please note that a change in question format in 1999 means that data concerning return from this year's survey may not be directly comparable with those from previous years);
  - ✓ One third (33%) of Victorians reported having gambled in the last 7 days. The majority of these (61%) claimed to have lost money (\$23 on average), 20% reported having won money (\$126 on average), and 5% claimed to have broken even on their gambling activities;
  - ✓ People reporting gambling activity found activities such as going to the Casino, playing EGMs and betting at the TAB a little more appealing than did the Victorian population in general—but they found non-gambling activities slightly more appealing also;
  - ✓ The reasons for gambling most frequently agreed with by those reporting gambling activity were “may get lucky” (66%), “the thrill or dream of winning” (64%) and to “make a quick buck” (39%). Another reason frequently agreed with was “for social reasons/to be with friends” (26%). In 1999, 43% of those reporting regular EGM/casino activity agreed that one of their reasons for gambling was that they were “attracted to the venue” (please note that a change in question format in 1999 means that data concerning reasons for participation from this year's survey may not be directly comparable with those from previous years);
  - ✓ As in 1998, the single most common self-perception concerning gambling behaviour among adult Victorians in 1999 was that they “don't like to gamble or bet” (39%), followed by “gamble, but only an amount which can be afforded” (22%) and “enjoy a bet or flutter” (22%). The self-perception as being someone who “gambles for social interaction or leisure” decreased appreciably to 15%, and appears to be declining rapidly. Less than 1% of those reporting regular EGM/Casino activity said they were “addicted to or hooked on gambling”;
  - ✓ Generally, there were high levels of agreement among adult Victorians that “gambling-related problems have become worse in the last four years” (84%—same level as in 1996), “gambling is a serious social problem” (83%—down 1 point from 1996), “gambling is too widely accessible in Victoria” (78%—up 3 points from 1996) and “the number of poker machines (“pokies”) operating within Victoria should be reduced” (73%—up 16 points from 1996);
  - ✓ Although less frequently agreed with, the majority of adult Victorians also agreed that “the onus is on the individual to control themselves when gambling by knowing what he or she can afford” (77%), “on the whole, gambling is an acceptable activity in our community” (64%), “the introduction of poker machines (“pokies”) in Victoria resulted in more jobs” (61%), “Victoria's Casino provides a big boost to our state economy” (59%) and “revenue from poker machines (“pokies”) and the Casino has helped the State Government balance the books” (58%);
  - ✓ There were high levels of disagreement that “Victoria should have more casinos” (94%), “there are not enough hotels and clubs with poker machines (“pokies”)” (93%) and “gambling does more good for the community than harm” (79%);
  - ✓ Overall, there was a moderate swing in negative attitudes towards gambling and its effects, following a positive swing in 1998. However, attitudes remain more positive than in 1996 or 1997;
  - ✓ As in previous years, the level of awareness of community projects funded by gambling revenue was very low amongst the Victorian population (13%), and the proportion believing that they had personally benefited from such projects was lower still (6%);
  - ✓ Use of the South Oaks Gambling Screen for problem gamblers showed that only 0.8% of Victorian adults scored in the “At Risk” category—down from 1.5% in 1998;
  - ✓ Three per cent (3%) of the Victorian adult population considered that there had been gambling difficulties in their family during the preceding 6 months, with a further 6% considering that there had been gambling difficulties in their family prior to the last 6 months;
  - ✓ The demographic profile of gamblers closely reflected that of the general population overall; and
  - ✓ The demographic profile of the “At Risk” group showed a younger age profile and higher than average proportions of males, full-time workers, plant/machine operators/drivers and Acknowledged Heavy Gamblers.
-

### **Casino Gambling**

The establishment of the temporary casino in 1994 and the opening of the permanent Crown Casino in May 1997 made available a new gambling activity in Victoria. Changes in patterns of gambling behaviour since then have been monitored over time. Survey results in 1998 saw the first decrease in casino gambling activities since the Crown Casino opened in Melbourne, and results in 1999 saw a further decrease to 16%—down 2 points from 1998. Although regular visitation (once a month or more) of the Casino decreased, overall visitation achieved the highest level yet seen in this survey; however, 1999 saw the proportion of Crown visitors playing no games at all increase from little more than half (52%) in 1998 to almost two thirds (66%), and actual gambling expenditure (the amount lost) at the Casino by Victorians and visitors decreased by 2.75%. With almost two thirds (63%) of Victorians reporting casino gambling activity having played EGMs but not played other (card/table) games, and 16% having played both EGMs and other games, EGMs remain the most popular activity undertaken at the Casino.

The main points of interest for casino gambling patterns have been outlined below:

- ✓ The reported level of participation in casino gambling continues to fall. In 1999, 16% of adult Victorians said they had gambled at the Casino in the last 12 months, compared with 18% in 1998, after a peak of 25% in 1997;
- ✓ The proportion of gamblers for whom going to the Casino is their favourite gambling activity remained steady at 8%;
- ✓ The proportion of casino gamblers who play at least once per month decreased slightly to 15%—down 3 points from 18% in 1998;
- ✓ Among casino gamblers, 63% said they played only EGMs there, 21% played only other (card/table) games, and 16% played both EGMs and other games;
- ✓ In 1999, the average duration of playing at the Casino was almost 1½ hours (86 minutes) per day on which played. When considered on a weekly basis, the average amount of time spent playing at the Casino by those who did so was 26 minutes per week (please note that there was a change in format of duration questions in 1999);
- ✓ Among those reporting casino gambling activity, average expenditure per day on which played was \$63. When considered on a weekly basis, the average expenditure on playing at the Casino among those who did so was \$56 per week. As in previous years, expenditure was substantially higher on card/table games (\$106) than on EGMs (\$57) (please note that a change in question format in 1999 means that expenditure data from this year's survey may not be directly comparable with those from previous years);
- ✓ People reporting casino gambling activity believed that they had won back 62% of their outlay on this activity (please note that a change in question format in 1999 means that data concerning return from this year's survey may not be directly comparable with those from previous years);
- ✓ The proportion of outlay perceived as won back on card/table games (78%) was substantially higher than the reported proportion of outlay won back on EGMs at the Casino;
- ✓ Casino gamblers once more reported moderate satisfaction with casino gambling activities (Customer Satisfaction Index (CSI) = 61), but unlike 1998, satisfaction with card/table games (CSI = 64) was not much higher than satisfaction with EGMs (CSI = 61);
- ✓ The most frequent reason given for continuing to gamble at the Casino despite dissatisfaction with casino gambling was that it is “a social thing/to gamble with family or friends” (29%);
- ✓ Main reasons for gambling at the Casino among all who reported having done so were “may get lucky” (72%), “for social reasons/to be with friends” (70%) and “the thrill or dream of winning” (65%) (please note that a change in question format in 1999 means that data concerning reasons for participation from this year's survey may not be directly comparable with those from previous years);
- ✓ Leisure activities with greatest appeal for casino gamblers were “going out for dinner” and “relaxing at home (e.g. watching TV)”, with “betting at the TAB” the least appealing leisure activity;

- ✓ By October 1999, more than two thirds (70%) of Victorians had visited the Crown Entertainment Complex, compared with less than two thirds (63%) in September 1998; however, the proportion of visitors entering the gaming area decreased a little—at 81%, down 2 points from both 1998 and 1997;
- ✓ More than half (59%) of the Victorians who had visited the Crown Entertainment Complex by October 1999 last did so within that year (i.e. January–October 1999);
- ✓ Eighteen per cent (18%) of Victorians have never visited the Crown Entertainment Complex and are not interested in doing so, while 3% said they intend to visit but haven't got around to it yet. However, these figures continue to decline as the proportion of Victorians who have visited the Crown Entertainment Complex continues to rise;
- ✓ Although EGMs remained the most popular gambling activity for visitors to the Casino (undertaken by 26% of Crown visitors), all games experienced a decline in participation by visitors. The proportion of Crown visitors playing no games at all increased to almost two thirds (66%) in 1999 from little more than half (52%) in 1998.

### ***EGM Gambling***

With their introduction to Victoria in 1992, Electronic Gaming Machines (EGMs) increased the number and range of gambling opportunities available in this State, and have remained a popular gambling activity amongst Victorians. However, following a decrease in reported playing of EGMs among the Victorian population in 1998, playing of EGMs decreased slightly again in 1999 to 30%—down 1 point. Pubs and hotels remained the venues mentioned most often by EGM players as places where they played EGMs (53%). However, 1999 saw a resurgence in the Casino as a venue for EGM players (41%—up 8 points from 1998), and for the first time in this survey the Casino was reported as the venue visited the most to play EGMs (mentioned by 41% in this regard). As in previous years, the majority of those who reported playing EGMs at clubs and hotels said that they go to these venues “as part of a social outing” (75%) rather than “specifically to play the machines” (11%). Actual gambling expenditure (the amount lost) on EGMs not at the Casino increased by 14.2%. In 1999, the proportion of outlay that EGM players believed they won back, on average, was 57% of their outlay—representing a 43% perceived loss.

The main points of interest for EGM gambling patterns have been outlined below:

- ✓ Reported EGM activity decreased slightly in 1999 to 30%—down 1 point from 1998;
  - ✓ The proportion of people naming playing EGMs as their favourite gambling activity decreased slightly in 1999 to 15%—down 2 points from 1998;
  - ✓ EGM gamblers closely resemble the Victorian population, although including higher proportions of Social Gamblers, Acknowledged Heavy Gamblers, Committed Heavy Gamblers and those identified as being “At Risk” on the SOGS;
  - ✓ The proportion of all EGM gamblers who participated regularly (at least once a month) decreased in 1999 to 34%—down 5 points from 39% in 1998;
  - ✓ The amount of time spent by those playing EGMs each time (day) they played decreased to 62 minutes in 1999—down 6 minutes from the 1998 figure of 68 minutes. When considered on a weekly basis, the average amount of time spent playing EGMs by those who did so was 27 minutes per week (please note that there was a change in format of duration questions in 1999);
  - ✓ In 1999, the average expenditure on EGMs each time (day) played increased to \$33. When considered on a weekly basis, the average expenditure on EGMs among those who reported playing them was \$26 per week (please note that a change in question format in 1999 means that expenditure data from this year's survey may not be directly comparable with those from previous years);
  - ✓ In 1999, people reporting EGM gambling activity reported on average that they won back 57% of their outlay on EGM gambling activities (please note that a change in question format in 1999 means that return data from this year's survey may not be directly comparable with those from previous years);
  - ✓ EGM players reported moderate satisfaction with EGM gambling activities. The difference in level of satisfaction between playing EGMs at the Casino and playing EGMs at clubs and hotels was larger than in previous years, but still less than 3 points (CSI = 61.2 and 58.6, respectively);
-

- ✓ The most frequent reason given for continuing to play EGMs despite dissatisfaction with playing EGMs was that it is “a social thing/to gamble with family or friends” (35% of those playing at the Casino; 34% of those playing at clubs and hotels);
- ✓ The main reasons for playing EGMs were “may get lucky” (73%), “for social reasons/to be with friends” (68%), and “the thrill or dream of winning” (66%) (please note that a change in question format in 1999 means that data concerning reasons for participation from this year’s survey may not be directly comparable with those from previous years);
- ✓ People reporting EGM gambling activity found “relaxing at home”, “going out for dinner”, “going to the movies” and “playing sport” relatively appealing leisure activities. The level of appeal for playing EGMs amongst those who reported having done so within the last 12 months decreased slightly from 1998;
- ✓ Pubs/hotels were the venues mentioned most often by EGM players as places at which they play EGMs (53%)—up 5 points from 1998. The most appreciable change, however, was an increase in visitation of the Casino for the playing of EGMs—at 41%, up 8 points from 1998. Further, the Casino was the venue mentioned most often as the venue visited the most to play EGMs—at 41%, up 21 points from 1998, and the first time the Casino has been mentioned more often than pubs/hotels in this regard;
- ✓ When people reporting EGM gambling activity at EGM venues other than the Casino were asked whether they visited these venues specifically to play the machines or as part of a social outing, three quarters (75%) said they visited as part of a social outing, 10% said both reasons were a factor, and only 11% said that they visited EGM venues specifically to play the machines;
- ✓ The main activity combined with EGM gambling in 1999 was dining out, and the proportion of EGM players who did nothing but play the machines on their last visit to a venue decreased to 12%—down 10 points from 1998, and the lowest level seen yet in this survey;
- ✓ Similar to previous years, almost two thirds (64%) of those having played EGMs at clubs and hotels reported a loss (average of \$26) the last time they played. Eleven per cent (11%) reported that they broke even the last time they played EGMs at a club or hotel, and 24% claimed they won money (average of \$120);
- ✓ As in previous years, the majority of those reporting EGM gambling activity (83%) never visited EGM venues specifically to play linked jackpots. Only 1% of EGM players said they play linked jackpots all the time—down 2 points from both 1998 and 1997—and 6% did not know what linked jackpots are;
- ✓ The majority (54%) of those playing EGMs at clubs and hotels still travelled less than 5 kilometres to get to the venue, but there was an increase in the proportion who travelled more than 20 kilometres to do so—at 17%, up 5 points from both 1998 and 1997; and
- ✓ As in previous years, the majority (76%) of those playing EGMs at clubs and hotels still travelled to the venue direct from their home.

### ***Other Gambling Activities***

Lotto-type games are the single most popular gambling activity amongst adult Victorians, and a number of other gambling activities of varying popularity are also available. Gambling patterns on activities such as lotto, scratch tickets, bingo, raffles, horse racing, trotting, greyhound racing and Footybet were also monitored in the survey.

The main points of interest for these other gambling activities have been outlined below:

- ✓ Participation in lotto gambling fluctuated between 60% and 66% for the 1992–1997 period, but following a decrease to 52% in 1998, a further 1 point decrease in 1999 sees the barest of majorities (51%) continuing to participate in lotto gambling. Among lotto players, there was a 4 point decrease in the proportion playing regularly (i.e. once a month or more often) to 72%;
  - ✓ As in 1998, one in five adult Victorians (20%) participated in scratch ticket gambling in 1999. However, the proportion of regular scratch ticket players decreased to 42%—down 5 points from 1998;
-

- ✓ Raffles was the gambling activity with the second highest gambling activity participated in by Victorians in the last 12 months (39%). This represents a slight increase of 6% since 1998, when 33% of adult Victorians participated in raffles;
- ✓ A steady downward trend in bingo participation continues, with only 3% of adult Victorians playing bingo in 1999—down 2 points from 1998. However, an increase in the frequency of regular participation amongst bingo players to 63%—up 13 points from 1998—suggests that there is still a core of keen players;
- ✓ The participation rate for private cards remained stable in 1999, with 2% of respondents participating in this form of gambling. People who play cards for money privately spend around three hours on this activity each time they participate in it;
- ✓ In 1999, the proportion of adult Victorians who gambled on horse racing remained steady at 14%. Of those who gambled on horse racing activities, 41% did so at least once a month—down 8 points from 1998;
- ✓ Participation in trotting gambling remained steady but low, with only 3% of Victorians participating in this activity in the last 12 months. People who reported gambling on trotting spent approximately \$8 each day they participated in this activity;
- ✓ After a decrease to 1% in 1998, participation in Footybet gambling remained steady at this level in 1999. The proportion of regular participation among those entering Footybet decreased to 40%—down 16% from 1998—but the average expenditure increased to \$23 each time (week) they participated—an \$8 increase from 1998, and the highest level yet seen in this survey;
- ✓ Participation in Club Keno gambling continued a downward trend, with only 3% of adult Victorians participating in this activity in 1999—down from 4% in 1998 and 10% in 1997;
- ✓ Thirty-seven per cent (37%) of adult Victorians participated in Melbourne Cup sweeps in 1999—down 1 point from 1998;
- ✓ More than one in five Victorian adults (21%) participated in footy tipping competitions in 1999—a 2 point increase from 1998; and
- ✓ Fourteen per cent (14%) of adult Victorians participated in telephone dial-in competitions in 1999—up 1 point from 1998.

### ***Official Gambling Expenditure Figures***

The official Expenditure figures for regulated forms of gambling in Victoria for the financial year ending June 30 1999 are released in this report (Table 3.9). They will consequently be incorporated in the detailed tables of Australian Gambling Statistics compiled by the Tasmanian Gaming Commission.

Key points are:

- Total expenditure was 3,456.487 million dollars, which represented an overall increase of 8.11% over the previous financial year;
  - Expenditure on EGMs (outside the Casino) was 1,954.192 million dollars, which represented an increase of 14.19% over the previous financial year;
  - Expenditure at Crown Casino was 721.852 million dollars, which represented a decrease of 2.75% from the previous financial year; and
  - Expenditure on racing was up 5.44% to 454.783 million dollars, although the bookmaker component of that expenditure declined by 9.49% to 15.693 million dollars.
-

**SECTION 1**

**INTRODUCTION  
AND OBJECTIVES**





## 1. INTRODUCTION AND OBJECTIVES

### 1.1 Background

The increase in the number and range of gambling opportunities that has occurred in Victoria since the introduction of gaming machines in 1992, the establishment of the Casino in 1994, and the opening of the permanent Crown Casino in 1997 have certainly changed the gambling environment in Victoria.

The Victorian Casino and Gaming Authority (the Authority) has a statutory responsibility to carry out research on the impacts of gambling on the Victorian community. The Authority also advises the Minister on policy issues with respect to gambling and sets out the general framework for regulation of gaming, casino and wagering activities in the State.

The Authority is committed to conducting research into the social impact of gaming and gambling in Victoria. The research conducted by the Authority provides a store of information as to the changes in community gambling patterns and perceptions over time, and insight into the impact of gaming and gambling in Victoria. The information is also used to provide advice to the Minister on policy issues with respect to gaming and gambling.

To date, the Authority has commissioned seven surveys in the series *Survey of Community Gambling Patterns and Perceptions*. The current survey should be viewed in the context of a series of surveys on community gambling and perceptions of gambling conducted since 1992 on behalf of the Authority. Initially conducted as two separate series, the Community Gambling Patterns and the Positive and Negative Perceptions surveys were combined in 1997 into one survey. The 1998 and 1999 surveys combine the two series as in 1997.

The survey series has undergone continual improvement and refinement since its inception, and has taken the following forms over the years:

- ✓ In May 1992, the first Community Gambling Patterns survey was conducted, prior to the introduction of gaming machines in Victoria;
  - ✓ In May 1994, a second survey was conducted after the introduction of gaming machines and prior to the opening of the temporary Melbourne Casino;
  - ✓ In May/June 1995, the third survey was conducted following the opening of the temporary Melbourne Casino;
  - ✓ In August/September 1996, the fourth survey was conducted to continue monitoring the gambling patterns of Victorians;
  - ✓ In September 1997, the fifth survey was conducted, following the opening of the permanent Melbourne Casino. This survey also included the essential elements of the survey project "Positive and Negative Perceptions of Gambling" first conducted in July 1996. The fifth survey also included the South Oaks Gambling Screen (SOGS) to measure the prevalence of problem gambling. This was included as the result of a recommendation arising from the project "Definition and Incidence of Problem Gambling including the Socio-Economic Distribution of Gamblers", commissioned by the Authority and completed in August 1997. In addition, the Authority has commissioned another project ("Problem Gambler Measurement Instrument"), the aim of which is to design a replacement instrument for SOGS which will be better suited as a general population screen. It is intended to use the newly developed screen once it has been developed and validated; and
  - ✓ In September 1998, the sixth survey was conducted to continue monitoring the gambling patterns of Victorians.
-



The research project “Community Gambling Patterns and Perceptions Survey Series” is part of the 1998–1999 Research Program of the Authority, and was awarded to Roy Morgan Research after a tender process. The project has three components:

- The conduct and reporting of the 1998 survey (Sixth Survey of Community Gambling Patterns and Perceptions, released in April 1999);
- A process of review and evaluation of the survey questionnaire to identify, evaluate and implement improved data collection and interpretation techniques in areas where the current interpretation of data was unclear; and
- The conduct and reporting of the 1999 survey (the Seventh Survey of Community Gambling Patterns and Perceptions, which you are now reading).

As a consequence of the review process, the questionnaire used for the 1999 survey has been revised in some key areas. The review process and the consequent changes to the questionnaire are described in Section 2.2 of this report.

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## 1.2 Objectives

The purpose of the research is to continue to collect data for the Community Gambling and Perceptions Survey series and to report on the findings of the 1999 survey, incorporating into the report comparative data from previous years. Thus, this component of the Authority's research project has the task of monitoring Victorian gambling patterns and perceptions of gambling over time.

The 7th wave of the Community Gambling Patterns and Perceptions Survey was conducted to provide insight into the following:

- ✓ The gambling patterns of adult Victorians, and in particular the frequency and duration of visits to licensed gaming venues and to the Melbourne Crown Casino;
- ✓ The clientele using the various available forms of gambling (socio-demographics);
- ✓ The level of expenditure per gambling activity based on household and individual income;
- ✓ The proportion of people who are gamblers versus non-gamblers;
- ✓ The incidence of problem gamblers, based on the "South Oaks Gambling Screen" criteria;
- ✓ An investigation of both the positive and negative perceptions and attitudes of the community towards gambling, and the variations which exist in these perceptions and patterns between individuals, communities and representative groups; and
- ✓ The reasons for visits to gambling outlets, specifically gaming venues and the casino, and which other activities (if any) the visit is combined with.

A copy of the questionnaire "*Seventh Survey of Community Gambling Patterns & Perceptions*" (1999) is included in Appendix 1.

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**SECTION 2**

**RESEARCH  
METHODOLOGY**





## 2. RESEARCH METHODOLOGY

### 2.1 Methodology

The Seventh Survey of Community Gambling Patterns & Perceptions was a random sample telephone survey conducted using Roy Morgan Research's in-house Computer-Assisted Telephone Interviewing (CATI) facilities.

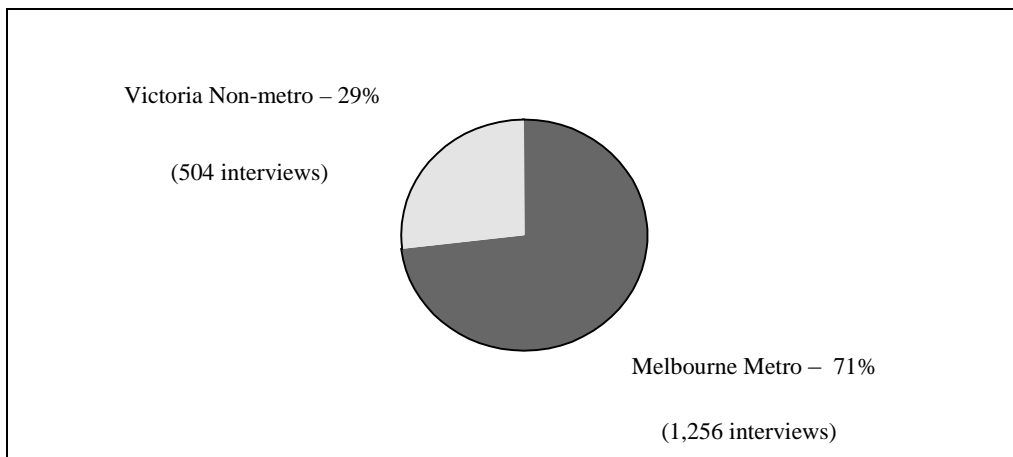
Interviews were conducted between October 7th and November 14th, 1999, the great majority being conducted in October.

A total of 1,760 interviews were conducted amongst Victorians aged 18 and over, with the following area distribution:

- ✓ Melbourne metropolitan..... 1,256
- ✓ Victoria non-metropolitan..... 504

Refer to Figure 2.1, which indicates this sample distribution across metropolitan and rural Victoria.

**FIGURE 2.1**



As in recent previous waves of the Community Gambling Patterns and Perceptions survey series, Geospend (a division of Australia Post) provided the population sample. Geospend generated a random sample from an electronic version of the White Pages. A total of 58 quotas were assigned to the sampling frame, representing geo-demographic segments of the Victorian population previously identified by Geospend. The data from these surveys will be evaluated further with a view to being able to project gambling behaviour on a geodemographic basis.

In order to project the result to the Victorian population, the results have been weighted by age, sex and country/metropolitan areas, according to the latest available ABS Census data.

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### ***EXPENDITURE CALCULATIONS***

Several gambling expenditure calculations have been reported within this document, and these expenditure figures have been calculated by different methods. The following definitions were applied to expenditure calculations in this report, and are consistent with previous surveys except where indicated.

### ***CALCULATED GAMBLING OUTLAY***

These figures are the result of a calculation based on a survey estimate of perceptions of expenditure (not actual expenditure) and frequency of gambling, as follows:

- For each gambling activity, the frequency of participation is multiplied by the perceived expenditure (net outlay) each time the activity is undertaken. This is then added together to form the calculated gambling outlay. (The wording of this question was amended in 1999)

### ***PERCEIVED GAMBLING OUTLAY***

These figures are the result of a single question contained on the survey questionnaire covering perceptions of overall spending (not actual expenditure) on gambling as follows:

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

(Wording of question amended in 1999)

### ***AMOUNT STATED AS WON OR LOST***

Respondents were also asked two questions relating to the amount they won or lost in total on gambling activities over the last week:

- Thinking of all the gambling activities you participated in during this past week. Overall, did you win or lose in total on gambling activities this week?
- How much more money did you have at the end of the week, due to gambling, than you had at the start?

(Wording of second question amended in 1999)

### ***ACTUAL EXPENDITURE FIGURES***

On page 58, the actual expenditure (i.e. the amount lost) on regulated forms of gambling in Victoria for the financial year ending June 1999 is given. These figures are provided by the Authority and are released in this report. They will subsequently be incorporated in the tables of Australian Gambling Statistics compiled by the Tasmanian Gaming Commission.

### ***CALCULATION OF AVERAGE DURATION, OUTLAY***

Most figures quoted for average outlay per time (day for some activities, week for others) or average duration per time (day or week) are calculated as a simple mean (i.e. the sum of the amounts per time reported by respondents, divided by the number of respondents). In relation to the two combined measures (Total EGMs and Total Casino), an amount per respondent per time (day or week) was first derived by weighting the amounts per time (day or week) reported for each activity proportional to the number of times they engaged in that activity. A simple mean across all relevant respondents was then calculated using this derived amount per respondent per time (day or week). (Wording of questions amended in 1999)

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### ***CUSTOMER SATISFACTION INDEX***

The figures in this report relating to satisfaction with a gambling activity have been presented as a Customer Satisfaction Index. The index is calculated by applying a score to each of the answer categories as follows:

- Very Satisfied (100)
- Mildly Satisfied (75)
- Neither Satisfied nor Dissatisfied (50)
- Mildly Dissatisfied (25)
- Very Dissatisfied (0)

The Customer Satisfaction Index (CSI) for a group of respondents is the average (mean) of their scores. The CSI will be a number anywhere between 0 and 100, where a higher index means that on average the group is more satisfied (or less dissatisfied). For example, a CSI of 0 can be interpreted as meaning that everyone is Very Dissatisfied, a CSI of 50 means that on average the group is neither Satisfied nor Dissatisfied, and a CSI of 100 would be obtained only if everyone in the group was Very Satisfied.

### ***REASONS FOR DISSATISFACTION WITH GAMBLING ACTIVITIES.***

Respondents who reported being dissatisfied with each gambling activity were asked:

- Why do you continue to participate in...(gambling activity)...if you are dissatisfied?

This was an open-ended question with no predetermined categories. Verbatim responses were recorded and upon completion of interviewing they were coded into categories of similar responses to allow for quantitative treatment of the results.

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**2.2 Review and Revision of Measurement Instrument**

Subsequent to completion of the 1998 survey, a process of review and evaluation was undertaken in order to determine how satisfactorily the questionnaire was functioning in terms of quality and consistency of data collected.

This process included a quantitative phase involving correlational analyses between weekly outlay figures for individual gambling activities combined and overall estimates of weekly outlay on gambling activities. Correlations were only moderate, at best, and the results suggested the existence of an appreciable error component in measurement of expenditure on gambling activities within the survey.

The review process also included a qualitative research phase involving in-depth face-to-face interviews with 64 respondents from the 1998 survey. Respondents were distributed among eight “gambling activity × level of activity” categories to ensure breadth of coverage of both gambling activities and level of gambling, as follows:

<b>Gambling activity</b>	<b>No. of Respondents with “Typical” Participation Level</b>	<b>No. of Respondents with “Higher Than Typical” Participation Level</b>
Racing (thoroughbred horse racing, harness racing and/or greyhound racing)	9	7
Electronic gaming machines not at the Casino	8	7
Casino (electronic gaming machines and/or any other game)	6	6
Lotto, Tattslotto, Oz Lotto, Tatts Keno or Powerball	12	9

Interviewees were run through a limited series of crucial questions they had answered during their prior telephone interview, followed by in-depth probing into the way they arrived at their answers, as well as their interpretation of the questions. Where time permitted, interviewees’ understanding of the phrases used to describe different gambling activities was checked to see how closely this resembled intended meaning.

A brief description of the major changes is provided below:

- Replacement of the phrase “informal cards for money not at the casino” with “playing cards for money privately (at home or any other place)”, due to confusion among respondents about the meaning of the original phrase.
- Replacement of the phrase “electronic gaming machines” with the phrase “poker machines (‘pokies’)”, due to confusion among respondents about the meaning of the original phrase.
- Replacement of the phrase “the Casino” with “the Melbourne Crown Casino or casinos outside Victoria”, due to confusion among respondents about the meaning of the original phrase.
- Replacement of the phrase “fixed odds sports betting” with “betting on sports with Sportsbet or other bookmakers”, due to confusion among respondents about the meaning of the original phrase.
- Replacement of the phrase “Internet gambling” with “casino games for money on the Internet”, due to confusion among respondents about the meaning of the original phrase.
- Revision of scales for frequency of participation in gambling activities so that lotto, Footybet and Soccer Pools were based on a week and all other activities were based on a day, due to confusion among respondents about what a “time” was on the original scale.
- Revision of wording of questions concerning individual gambling activities to ensure appropriate reference to a weekly basis for lotto, Footybet and Soccer Pools and a daily basis for all other activities, for consistency with above-mentioned changes in scales.





- Deletion of questions specifically concerning gambling at a casino or on electronic gaming machines, where this information could be obtained from another existing question.
  - Deletion of question concerning duration of gambling for raffles, lotto, scratch tickets and Soccer Pools, as the issue of time involved in participating is of little relevance to these activities.
  - Revision of question concerning duration of gambling to include peripheral activity for relevant gambling activities (e.g. inclusion of studying the form and listening to and/or watching the races for thoroughbred horse racing, trotting/harness racing and greyhound racing).
  - Revision of question concerning expenditure on thoroughbred horse racing to exclude Melbourne Cup sweeps, due to confusion among respondents about whether or not this constituted “betting on thoroughbred horse racing”.
  - Revision of question concerning expenditure on thoroughbred horse racing, trotting/harness racing, greyhound racing and private cards so respondents are asked how much money they set aside to bet with and how much they have left at the end of a day’s betting, with expenditure derived by subtracting latter from former, due to confusion among respondents about whether the question was concerned with outlay or expenditure (outlay less return).
  - Revision of question concerning expenditure for all other activities so respondents are asked how much they “spend or outlay” rather than how much they are “prepared to or would outlay”, due to confusion among respondents about whether the figure sought was amount prepared to spend or amount actually spent (for these activities, respondents generally regarded “spend” and “outlay” as synonymous terms).
  - Inclusion of question concerning ways in which bets are mainly placed on thoroughbred horse racing or greyhound racing, at specific request of VCGA, to collect additional information.
  - Revision of question concerning percentage of outlay won back on individual gambling activities so that the basis for responses is specified as being “breaking even means winning 100% of your outlay back”, due to significant variability among respondents in their usage of percentage figures.
  - Revision of question concerning reasons for participating in individual gambling activities from open-ended format to closed agreement scale format, as response categories appear to have been consistent and well-defined for some time.
  - For question concerning reasons for participating in individual gambling activities, restriction of:
    - . “because I am attracted to the venue” to bingo, thoroughbred horse racing, trotting/harness racing, greyhound racing, EGMs at a club/hotel, EGMs at a casino, and card/table games at a casino;
    - . “because it adds interest to the game” to Footybet or sports betting;because these reasons were of such little relevance to other activities that it would be misleading to ask them, given a closed question format.
  - Revision of a few questions to replace the term “gambling” with the term “playing”, “entering” or “betting on”, as appropriate, for consistency with other questions (e.g. “entering raffles” rather than “gambling on raffles”).
  - Revision of question concerning average weekly outlay on all gambling activities to eliminate the term “average week” and provide a time frame of “the last 12 months”, due to confusion among respondents.
-



- Revision of question concerning source of money outlaid on gambling to probe beyond simple reference to respondents' sources of income (e.g. pension, wage or job) by asking what the money might otherwise have been used for, in order to investigate displacement more fully.
  - Revision of question concerning how much money was won or lost on particular occasions or within particular periods (e.g. last week) to provide basis for estimate of how much more/less money the respondent had at the end than at the start, due to confusion among respondents about whether outlay won back should be included or excluded from this figure.
  - Removal of filter from question concerning appeal of various leisure activities so it would be answered by all respondents, not just gamblers, at specific request of VCGA.
  - Revision of question concerning participation in telephone dial-in competitions to specifically include "millionaire"-type quiz games, due to confusion among respondents.
  - Deletion of attitudinal question "Welfare groups are coping with the social impact of gambling in Victoria" due to ambiguous wording.
  - Removal of filter from question concerning occupation so it would be answered by people who are not currently employed but have been in past, not just those currently in full-time employment, and ASCO major occupational group codes applied, at specific request of VCGA.
  - Inclusion of questions concerning industry respondent or main income earner working/worked in, at specific request of VCGA.
  - Revision of question concerning religion to include Greek Orthodox as a separate category.
  - Inclusion of question concerning highest level of education, at specific request of VCGA.
  - Inclusion of question concerning ownership of current residence, at specific request of VCGA.
-



### **2.3 Issues Concerning Survey Estimation**

In the 1998 survey, “outliers” were removed in some cases prior to the analysis. Outliers are cases where a particular value appears higher than the general pattern by an appreciable amount. The issue of whether or not to remove outliers can be complex, and particularly so in research such as gambling research. For example, it is probable that a small proportion of the population bet in amounts very much higher than the rest of the population and therefore account for a substantial proportion of gambling expenditure. If such cases are treated as outliers and omitted from the analysis, then the figures produced (e.g. mean expenditure; total expenditure) are likely to appreciably under-estimate the true situation. However, if outliers are not removed, then measures such as mean expenditure may appear to fluctuate inexplicably from year to year. This is because within the Victorian population the proportion of heavy gamblers on any particular activity is sufficiently small that the number who may be included in a sample of approximately 1,700 respondents is very small. Because this very small sub-sample is subject to random fluctuations (e.g. 2 cases in one year; 4 cases in the next year—a 100% increase), movements in the mean may be both large and random.

Outliers were removed in 1998 in order to maintain comparability with the previous survey report, which also removed outliers. For the 1999 survey report, however, it was decided in general not to remove outliers, as the comparability of the series had already been affected by improvements to the question wording. As a result of the decision not to remove these heavy gamblers from the analysis, a few figures appear to have increased appreciably between the two years.

The only figures substantially affected by this issue are means, where the exclusion or inclusion of a single individual with an extreme value can alter the result. With any highly skewed distribution (as most gambling expenditure patterns are), the use of the mean as a measure of central tendency is problematic. It is, therefore, arguable that the reliance upon means in the reporting of issues such as gambling expenditure creates the dilemma of whether to include or exclude outliers. Future waves of this research may wish to consider other approaches to reporting, such as frequency distributions, inter-quartile means, etc.

The issue of sample size is also crucial. The fluctuations caused by the small number of high-value gamblers included in the sample from year to year suggest that a much larger sample of gamblers may be called for. This does not necessarily require the entire sample size to increase proportionally, but could be achieved by use of a sample design involving a screening process followed by disproportionate sampling of gamblers and regular gamblers. An approach of this nature was adopted by the Productivity Commission for its national survey as part of the 1999 Report into Australia’s Gambling Industries.

Over the years of this series of surveys, a number of changes in the results have almost certainly been influenced by factors other than actual changes in the behaviour of the Victorian population. While changes in the questionnaire and changes in the treatment of “outliers” are two critical issues, other factors may include:

- Changes in the coding procedures between different consultants;
- Changes in time of year/time of week when interviewing has taken place;
- Changes in the sample design (this has been provided by Geospend in recent years);
- Random changes in the sample; and
- Changes in the briefing of interviewers between different consultants.

**SOUTH OAKS GAMBLING SCREEN**

**BACKGROUND**

- ✓ Developed in the United States to identify pathological gamblers.
- ✓ Scoring adapted in Australia and detailed in report entitled “The Definition And Incidence of Problem Gambling” (August, 1997).
- ✓ Australian version refers to the respondent’s gambling experiences over the last 6 months.
- ✓ South Oaks Gambling Screen (SOGS) describes the proportion of the population who are “At Risk” of experiencing gambling-related problems.

**SCORING**

- ✓ Scores interpreted in terms of the likelihood that the respondent is experiencing significant problems arising from their gambling, as follows:

**FIGURE 2.4**

<b>SCORE</b>	<b>RISK LEVEL</b>
Scores 0 to 4 .....	Not at risk
Scores 5 to 6 .....	One in five risk
Scores 7 to 9 .....	One in two risk
Scores 10 and over.....	One in one risk

**At Risk**

## **2.4 South Oaks Gambling Screen**

The South Oaks Gambling Screen (SOGS) is a set of questions about a person's experience of gambling and some of the harmful impacts that may arise from their gambling.

The screen was designed in the United States to identify those people who reported a level of harmful impacts that was similar to client problem gamblers who were attending a treatment facility for pathological gamblers (i.e. a person who satisfied the diagnostic criteria for this mental disorder as specified in the Diagnostic and Statistical Manual of the American Psychiatric Association, DSM IV 1994).

When the SOGS has been used in Australia, the scoring criteria have been adapted to ensure that screening is more accurate. These changes were evaluated and detailed in the Authority's research report "Definition and Incidence of Problem Gambling, Including Socio-Economic Distribution of Gamblers" (August, 1997).

This report also recommended the development of a gambling screen which would more accurately fit the Australian context and would be suitable for use as a general population screen rather than in a clinical setting. The development of such a screen is the purpose of an ongoing research project of the Authority entitled "Problem Gambler Measurement Instrument". When a suitable instrument has been developed and validated, it is intended that this will be used in place of SOGS in future waves of this gambling patterns survey.

In the Australian research, all of the questions refer to experiences that have occurred in the last six months. This current information is clearly of greater relevance in the provision and planning of services and in the development of an overall picture of the level of harmful impacts that may be occurring in the community.

Finally, the SOGS has been used to describe the proportion of the population who are "at risk" of experiencing gambling-related difficulties. Thus the method used is indicative, rather than a reliable means of identifying individual cases.

Figure 2.4 opposite shows an interpretation of the scores for the SOGS. As in the 1997 and 1998 surveys, SOGS results have been reported throughout this document as a "No Risk" group (score of 0-4) and an "At Risk" group (score of 5 or more).





## 2.5 Gambling Segments

The gambling population was segmented according to gambling behaviour and attitudes in 1995, and five segments were identified and replicated in 1996, 1997, 1998 and 1999 as follows:

✓ <b>Disinterested Gamblers</b>	<b>22%</b>
✓ <b>Occasional Gamblers</b>	<b>38%</b>
✓ <b>Social Gamblers</b>	<b>9%</b>
✓ <b>Committed Heavy Gamblers</b>	<b>8%</b>
✓ <b>Acknowledged Heavy Gamblers</b>	<b>5%</b>
✓ <b>Non-Gamblers<sup>1</sup></b>	<b>19%</b>

Detailed descriptions of each of these segments and of Non-Gamblers are provided on the following pages. They are referred to throughout the report as they provide valuable insight into understanding the nature of gambling activities undertaken by Victorians.

Respondents were identified as belonging to a particular segment depending upon their answers to the following questions: Q23(a) to Q23(h), Q30(a) to Q30(i), Q31(e), Q32(a) and Q32(l). Those identified as being in each segment exhibit the characteristics described in the following pages.

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<sup>1</sup> The profile figures given above represent the distribution into the five segments in the 1999 survey. The remaining 19% of the adult population (aged 18 and over) are non-gamblers.

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**Disinterested Gambler (22%)**

**Level of Gambling Activity: Low**

Disinterested Gamblers tend to be older people, with more than half of those falling into this category aged over 50 years. These people are more likely to be older singles or older couples. The majority is female, and most are pensioners. They have a below-average annual income (probably due at least in part to the fact that most are retired). Disinterested Gamblers show a very low level of expenditure on gambling activities and tend to find activities such as betting at the TAB and the playing of sport unappealing. Watching television at home is the only activity in which this segment shows above-average interest in participating. Disinterested Gamblers show the lowest level of visitation to the Crown Casino, and display low levels of participation in Electronic Gaming Machine (EGM) gambling activities. Most Disinterested Gamblers say they don't like to bet or gamble. When they do, though, the main attraction for them is the thrill or dream of winning and the hope they may get lucky. They see gambling as a serious social problem, escalated by the introduction of EGMs to Victoria and exacerbated by the development of the Crown Complex, with most feeling that the Crown Casino is not good for the community. On average, Disinterested Gamblers participate in fewer types of gambling activities than other segments do, but still gamble about once per week on average, mainly on lotto-type gambling activities. Other gambling activities, such as raffles and bingo, are participated in occasionally. On average, Disinterested Gamblers spend approximately 22 minutes per week participating in gambling activities.

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**DEMOGRAPHICS**

- ✓ Female bias;
- ✓ Oldest of the gambling segments, with average age of 51 years (compared with the Victorian average age of 44 years);
- ✓ Close to half not in paid employment, most being pensioners;
- ✓ More likely to be older singles or older couples; and
- ✓ Lower than average income.

**ATTITUDES**

- ✓ Most leisure activities have lower than average appeal, except watching television at home. Show a particularly low level of interest in playing sport, betting at the TAB or going to the casino;
- ✓ Higher than average perception that they don't like to bet or gamble;
- ✓ Main attraction of gambling is the thrill/dream of winning and the hope of winning;
- ✓ Agree that gambling is a serious social problem and that problems associated with gambling are escalating; and
- ✓ Less inclined than average to agree that Victoria should have more casinos.

**BEHAVIOUR**

- ✓ Below-average participation in gambling activities over the course of a year (involved in 1.9 different types of gambling per year, compared with the Victorian average of 2.3);
  - ✓ Gamble approximately once per week (0.7 times per week);
  - ✓ Spend approximately 22 minutes per week on gambling activities;
  - ✓ Have below-average expectations of returns on gambling outlay (expect around 31% return);
  - ✓ Low levels of casino and EGM gamblers;
  - ✓ Lowest level of visitation to Crown Complex;
  - ✓ Regularly undertake lotto gambling activities;
  - ✓ Other gambling activities are undertaken infrequently; and
  - ✓ Less inclined than other gamblers to say they have another bet if they lose, and less inclined to not admit their losses.
-



**Occasional Gambler (38%)**

**Level of Gambling Activity: Low**

Occasional Gamblers are generally aged between 30 and 49 years, and living in households predominantly classified as families. Significantly more Occasional Gamblers are white-collar workers, with above-average incomes. They are very interested in participating in activities such as playing sport. Their attraction to gambling when they do so is the thrill or dream of winning and the social opportunities gambling provides. Most say they don't like to gamble. On average, they participate in 2.0 different gambling activities over the course of a year, and have a preference for activities such as lotto, scratch tickets and raffles. They do not find the idea of going to the Casino or playing EGMs particularly appealing. When they lose money gambling they are less inclined than other segments to have another bet in an attempt to regain their money, and most say they do not tell friends they have lost less money on a gambling activity than they actually have.

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**DEMOGRAPHICS**

- ✓ No gender bias;
- ✓ Predominantly aged 30–49 years (average age 43 years);
- ✓ High proportion of white-collar workers;
- ✓ Tend to be classified as families; and
- ✓ Higher than average income.

**ATTITUDES**

- ✓ Find participating in sports a very appealing activity. Going to the casino and playing EGMs is not a particularly appealing activity;
- ✓ Most say they don't like to bet or gamble;
- ✓ Main attraction of gambling is the thrill/dream of winning and socialising; and
- ✓ Agree that the number of EGMs operating within Victoria should be reduced, and are less inclined than average to agree that the current level of gambling activity in Victoria is sustainable or that Victoria's casino provides a big boost to the state economy.

**BEHAVIOUR**

- ✓ Below average participation in gambling activities over the course of a year (involved in 2.0 different types of gambling, compared with the Victorian average of 2.3 activities per year);
  - ✓ Gamble approximately once per week (0.6 times per week);
  - ✓ Spend approximately 10 minutes per week on gambling activities;
  - ✓ Have average expectations of returns on gambling outlay (expect 31% return);
  - ✓ Average level of participation in EGM gambling activities, but lower levels of participation in other casino gambling activities;
  - ✓ Fairly low level of visitation to Crown Complex;
  - ✓ Regularly undertake lotto and raffles gambling activities;
  - ✓ Other gambling activities are only undertaken occasionally; and
  - ✓ Less inclined than other gamblers to say they have another bet if they lose or to tell others they have lost less than they actually have.
-



**Social Gambler (9%)**

**Level of Gambling Activity: Moderate**

Social Gamblers tend to be females, and most are relatively young, with a predominance of people aged 20–39 years. Most are in full-time employment, and have average annual incomes. Most work as white-collar workers. This segment differs from other segments in that their motivations for gambling are closely related to the social opportunities and the atmosphere and excitement afforded by it. They find most social activities very appealing, and particularly like going to the Casino, going out to dinner and going to the movies. Social Gamblers participate in a number of gambling activities over the course of a year, including lotto, EGMs, casino gambling and scratch ticket gambling. This segment shows the highest level of participation in both EGM and casino gambling. Social Gamblers tend to think that gambling is an acceptable activity in our community and that the Crown Entertainment Complex is good for the community.

---

**DEMOGRAPHICS**

- ✓ Female bias;
- ✓ Youngest of the gambling segments, with average age of 37 years (compared with the Victorian average age of 44 years);
- ✓ Most are in full-time employment;
- ✓ Mostly white-collar workers;
- ✓ Mostly families; and
- ✓ Average income.

**ATTITUDES**

- ✓ Greatly enjoy social activities, such as going to the movies, going out for dinner or going to the Casino;
- ✓ Most gambling undertaken is motivated by social or leisure factors;
- ✓ Main attraction of gambling is the thrill/dream of winning and socialising. They also enjoy the atmosphere, the excitement and buzz of gambling, and many say it is their favourite activity or hobby;
- ✓ Feel that the Crown Complex is good for the community and that gambling is an acceptable activity in our community; and
- ✓ Are less inclined to agree that gambling is too widely accessible in Victoria or that gambling facilities should not be advertised.

**BEHAVIOUR**

- ✓ Moderate participation in gambling activities over the course of a year (involved in 3.0 different types of gambling, compared with the Victorian average of 2.3 activities per year);
  - ✓ Gamble once per week;
  - ✓ Spend approximately 57 minutes per week on gambling activities;
  - ✓ Have higher than average expectations of returns on gambling outlay (expect 45% return);
  - ✓ Higher than average level of participation in EGM and casino gambling activities;
  - ✓ Highest level of visitation to Crown Complex;
  - ✓ Regularly undertake lotto, scratch ticket, EGM and casino gambling activities;
  - ✓ Most say they brag about winning when they have actually lost money gambling; and
  - ✓ Most are prepared to bet more if there is a chance of winning more.
-





**Committed Heavy Gambler (8%)**

**Level of Gambling Activity: High**

Committed Heavy Gamblers tend to be male and some are relatively young. Most are in paid employment, are significantly more likely to be skilled workers, and have average annual incomes. Most people in this segment are classified as living in families. Committed Heavy Gamblers differ from other gamblers in that betting at the TAB and going to the races or the trots is very appealing to them. They regularly gamble on horses and lotto, and are more likely than other segments to regularly participate in raffles. While EGM and casino gambling are also highly appealing to this segment, they undertake these activities less regularly. On average, they gamble around twice each week, spending over an hour and a half each week doing so. Most Committed Heavy Gamblers say they gamble for social reasons, but only gamble an amount which can be afforded. Additionally, the thrill of winning and the buzz and excitement of gambling are also strong motivators for this segment. Many say that gambling is their favourite activity or hobby. This segment is most likely to view gambling as an acceptable activity and to think that the introduction of EGMs to Victoria has created more jobs. If they lose money betting, they place another bet to try to win it back, and will outlay more if they have the chance of winning more money.

---

**DEMOGRAPHICS**

- ✓ Strong male bias;
- ✓ Have a younger than average age profile (average age 40 years);
- ✓ Most are in full-time employment;
- ✓ High proportion of skilled workers;
- ✓ Mostly families; and
- ✓ Average income.

**ATTITUDES**

- ✓ Find betting at the TAB and going to the races or the trots very appealing. They also rate playing EGMs or going to the Casino as being very appealing activities;
- ✓ Most agree that they gamble for social reasons;
- ✓ Main attraction of gambling is socialising and the thrill/dream of winning. They also enjoy the atmosphere, the excitement and buzz of gambling, and many say it is their favourite activity or hobby. Many say they gamble out of boredom; and
- ✓ Feel that gambling is an acceptable activity, and that the introduction of EGMs in Victoria has resulted in more jobs.

**BEHAVIOUR**

- ✓ Highest participation in different types of gambling over the course of a year (involved in 3.3 different activities compared with the Victorian average of 2.3);
  - ✓ Gamble often—about 1.5 times per week;
  - ✓ Spend around an hour and a half per week on gambling activities (96 minutes);
  - ✓ Have highest expectations of returns on gambling outlay (expect 51% return);
  - ✓ High level of participation in EGM and casino gambling activities;
  - ✓ High level of visitation to Crown Complex;
  - ✓ Regularly undertake lotto, horse racing, raffles, trotting and scratch ticket gambling activities;
  - ✓ More likely to admit that after losing when having a bet or gambling they have bragged about winning; and
  - ✓ Most say they have another bet if they lose to try to win back their money, and most are prepared to bet more if there is a chance of winning more.
-



**Acknowledged Heavy Gambler (5%)**

**Level of Gambling Activity: High**

Acknowledged Heavy Gamblers show no gender bias, but most are relatively young. They are represented across all occupation and income categories. Most leisure activities appeal to this segment, with the exception of playing sport. EGMs are particularly appealing to Acknowledged Heavy Gamblers. This segment acknowledges that they have another bet when they have lost money in an attempt to win it back, they tell others they have lost less money than they actually have, and brag about winning more money than they actually have won. They will outlay more money if they have a chance of winning more. Acknowledged Heavy Gamblers tend to gamble secretly, and to conceal the true amount of money they wager. On average, they gamble 1.1 times a week, and are particularly fond of EGM and casino gambling, but also participate regularly in raffles, scratch tickets and Club Keno. Most Acknowledged Heavy Gamblers say they feel the level of gambling in Victoria is sustainable, and that the Crown Entertainment Complex is good for the community. Most are motivated to gamble by the thrill of winning, the buzz and excitement of gambling, social reasons and boredom.

---

**DEMOGRAPHICS**

- ✓ No gender bias;
- ✓ Younger than average age profile (average age 41 years); and
- ✓ Represented across all occupation and income categories.

**ATTITUDES**

- ✓ Most leisure activities are of average appeal, with particularly high level of appeal for playing EGMs or going to the casino, and particularly low appeal for playing sport;
- ✓ Self-perception as people who only gamble an amount which can be forwarded or gamble for social interaction/leisure;
- ✓ Main attraction of gambling is the thrill/dream of winning and socialising. They also say gambling is their favourite activity or hobby; and
- ✓ Feel that the level of gambling in Victoria is sustainable and that the Crown Entertainment complex is good for the community.

**BEHAVIOUR**

- ✓ Participation in different types of gambling over the course of a year slightly higher than average (involved in 2.6 different activities, compared with the Victorian average of 2.3);
  - ✓ Gamble about 1.1 times per week;
  - ✓ Spend around 52 minutes each week on gambling activities;
  - ✓ Have above average expectations of returns on gambling outlay (expect 45% return);
  - ✓ High level of participation in EGM and casino gambling activities;
  - ✓ High level of visitation to Crown Complex;
  - ✓ Regularly undertake horse racing, EGM and casino gambling activities; and
  - ✓ Most agree with the following statements:
    - After a loss I have another bet to try to win back my money;
    - I tell others I have lost less than I actually have;
    - I brag about winning when in actual fact I have lost; and
    - I will bet more if I have a chance of winning more money.
-



**Non-Gambler (19%)**

**Level of Gambling Activity: Nil**

Non-Gamblers are represented across all age, gender and income categories and they tend not to be in the paid workforce, being either students or self-supporting retirees. Their attitudes towards gambling differ from the general population in that they are more negative about gambling activities, the Casino, EGMs, problem gambling and all other attitudes measured in the survey.

---

**DEMOGRAPHICS**

- ✓ No gender bias;
- ✓ Average age of 47 years (population average: 44 years);
- ✓ Includes all occupational categories, but are more likely to be self-supporting retirees and professionals;
- ✓ Mostly singles and families; and
- ✓ No income spent on gambling.

**ATTITUDES**

- ✓ Believe that
  - gambling is a serious social problem;
  - gambling is too widely accessible; and
  - the number of EGMs in Victoria should be reduced.
- ✓ Generally disagree with the following statements:
  - gambling is an acceptable activity;
  - the introduction of EGMs has resulted in more jobs; and
  - revenue from gambling has helped the State Government balance the books and provide better opportunities for recreational enjoyment.
- ✓ Disagree with the following statements:
  - the Crown Complex is good for the community;
  - Victoria needs gambling to attract tourists; and
  - gambling does more good for the community than harm.

**BEHAVIOUR**

- ✓ Involved in no gambling activities.
-



## **2.6 This Report**

This report outlines the findings of the Community Gambling Patterns & Perceptions – Wave 7 survey. Several notations have been used throughout this report, and specific calculations have also been designed for this survey.

### **NOTATION**

In the tables, the following notations have been used:

- – means there was no response;
- \* means less than 0.5%;
- NA means not applicable; and
- the number that is given in the brackets above the percentage sign in each column is the sample base for that column.

Questions have been identified as “prompted” where respondents were read a list of possible answers. Respondents were not read out a list of possible answers in the case of “unprompted” questions.

Differences between sub-groups that are discussed in the report are statistically significant at the 95% confidence level. Appendix 2 identifies the percentage allowances for sampling variation at the 95% confidence limit. Sub-groups examined include the following:

- Gender;
- Age;
- Income;
- Occupation;
- Marital status;
- Gambling segmentation; and
- South Oaks Gambling Screen (SOGS) score.

For legibility reasons, some time-series data from the earliest surveys have not been included in selected charts. Readers particularly interested in these earlier figures are referred to the report for “The Sixth Survey of Community Gambling Patterns and Perceptions (April 1999)”, which may be accessed on the Authority’s Web-site ([www.gambling.vcga.vic.gov.au](http://www.gambling.vcga.vic.gov.au)). All the available historical data to that time is presented in that report.

The report you are now reading can also be accessed on the Authority’s Web-site.

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**SECTION 3**

**TOTAL VICTORIAN  
GAMBLING PATTERNS**

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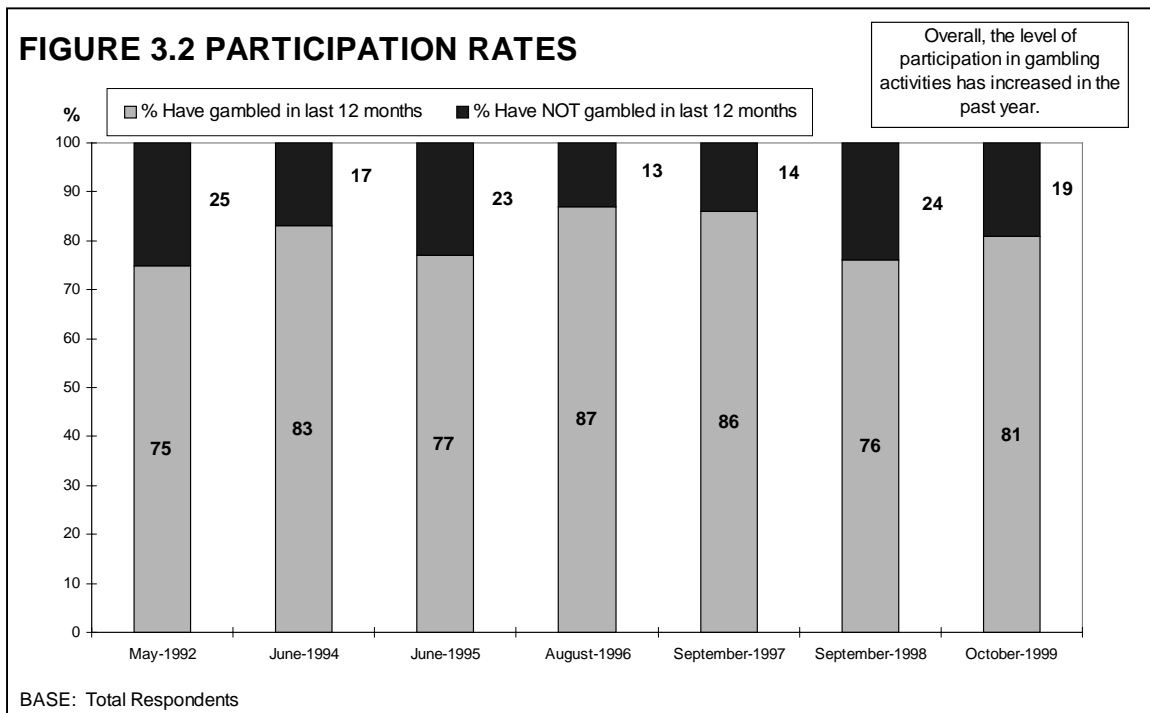
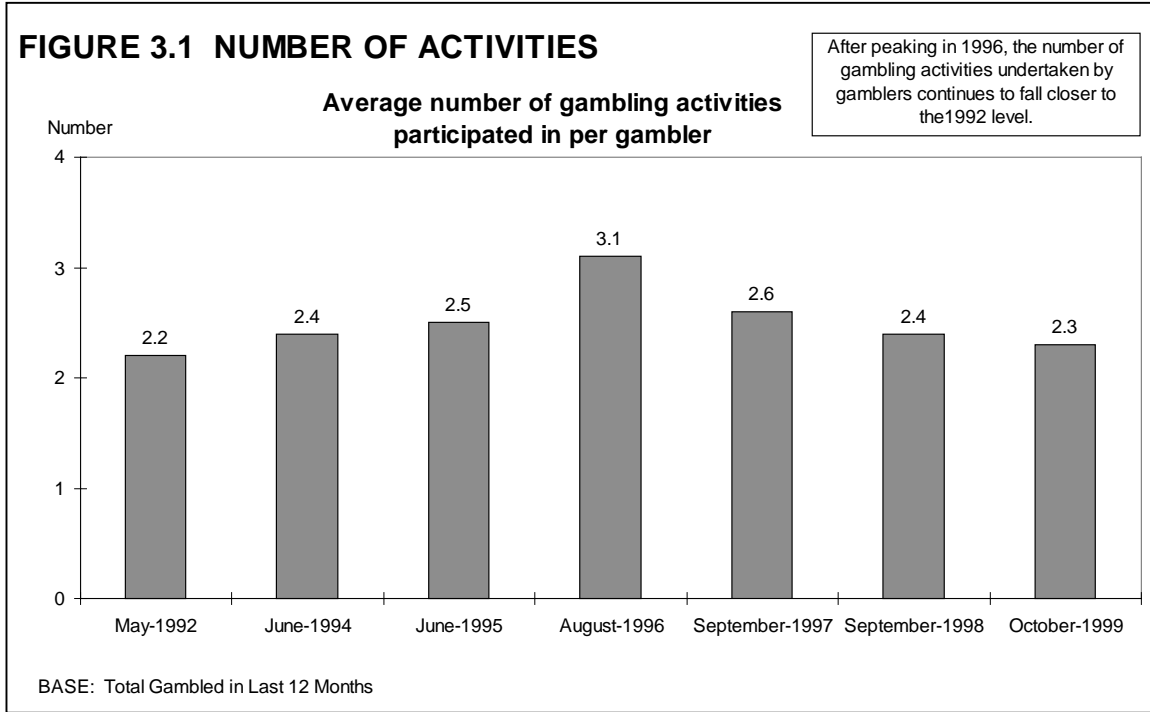
### **3. TOTAL VICTORIAN GAMBLING PATTERNS**

The following section provides an analysis of Total Victorian Gambling Patterns, including:

- ✓ Participation;
  - ✓ Frequency;
  - ✓ Duration;
  - ✓ Expenditure;
  - ✓ Proportion of outlay won back;
  - ✓ Reasons;
  - ✓ Gambling behaviour;
  - ✓ Self-perceptions;
  - ✓ Attitudes;
  - ✓ Awareness of community projects from gambling revenue;
  - ✓ Problem gambling; and
  - ✓ Gambler profiles.
-

## TOTAL VICTORIAN GAMBLING PATTERNS

Note: Number of activities included in the survey increased in 1995, 1996 and 1997.



### 3.1 Number of Activities

The mean number of gambling activities undertaken in the prior 12-month period was calculated for all those reporting gambling activity. For the third year in succession, the number of gambling activities participated in by gamblers decreased, falling to an average of 2.3 in 1999 from a peak of 3.1 in 1996. During the period from May 1992 to August 1996, a clear pattern of steadily increasing variety of gambling activities undertaken emerged. However, this trend has been reversing since 1996, and the number of gambling activities engaged in by people reporting gambling activity in 1999 declined almost to the relatively low level of 1992.

Figure 3.1<sup>2</sup> provides a time-series analysis of the average number of activities undertaken by people reporting gambling activity in the prior 12-month period. When evaluating emerging trends, it is important to note that the number of activities measured in the survey increased in 1995, 1996, and again in 1997, but has remained constant since then.

There were *higher* than average numbers of activities undertaken by:

- ✓ Committed Heavy Gamblers (3.3);
- ✓ Plant/Machinery Operators/Drivers (3.0); and
- ✓ Social Gamblers (3.0).

There were *lower* than average numbers of activities undertaken by:

- ✓ Students (1.8);
- ✓ Professionals (1.9);
- ✓ Disinterested Gamblers (1.9); and
- ✓ Occasional Gamblers (2.0).

### 3.2 Participation Rates

As shown in Figure 3.2, participation in gambling activities increased in 1999, with 81% of Victorians having participated in at least one of the gambling activities surveyed in the last 12 months—up 5 points from 1998. Respondents were classified as having gambled if they had partaken in any of the activities referred to in question 1 of the survey in the preceding 12 months.

There were *higher* than average participation rates in gambling activities amongst:

- ✓ Salespersons/personal service workers (89%);
- ✓ Those living in the country (86%);
- ✓ Those with pre-tax annual incomes of \$20,000–\$40,000 per annum (84%);
- ✓ Those employed full-time (84%); and
- ✓ Those born in Australia (84%).

There were *lower* than average participation rates in gambling activities amongst:

- ✓ Those born in the Asia/Pacific region (61%), western Europe (other than UK, Greece or Italy—66%) or the Middle East/Africa (69%);
- ✓ Those aged over 70 years and over (71%);
- ✓ Self-supporting retirees (74%), pensioners (76%) and the unemployed (77%).

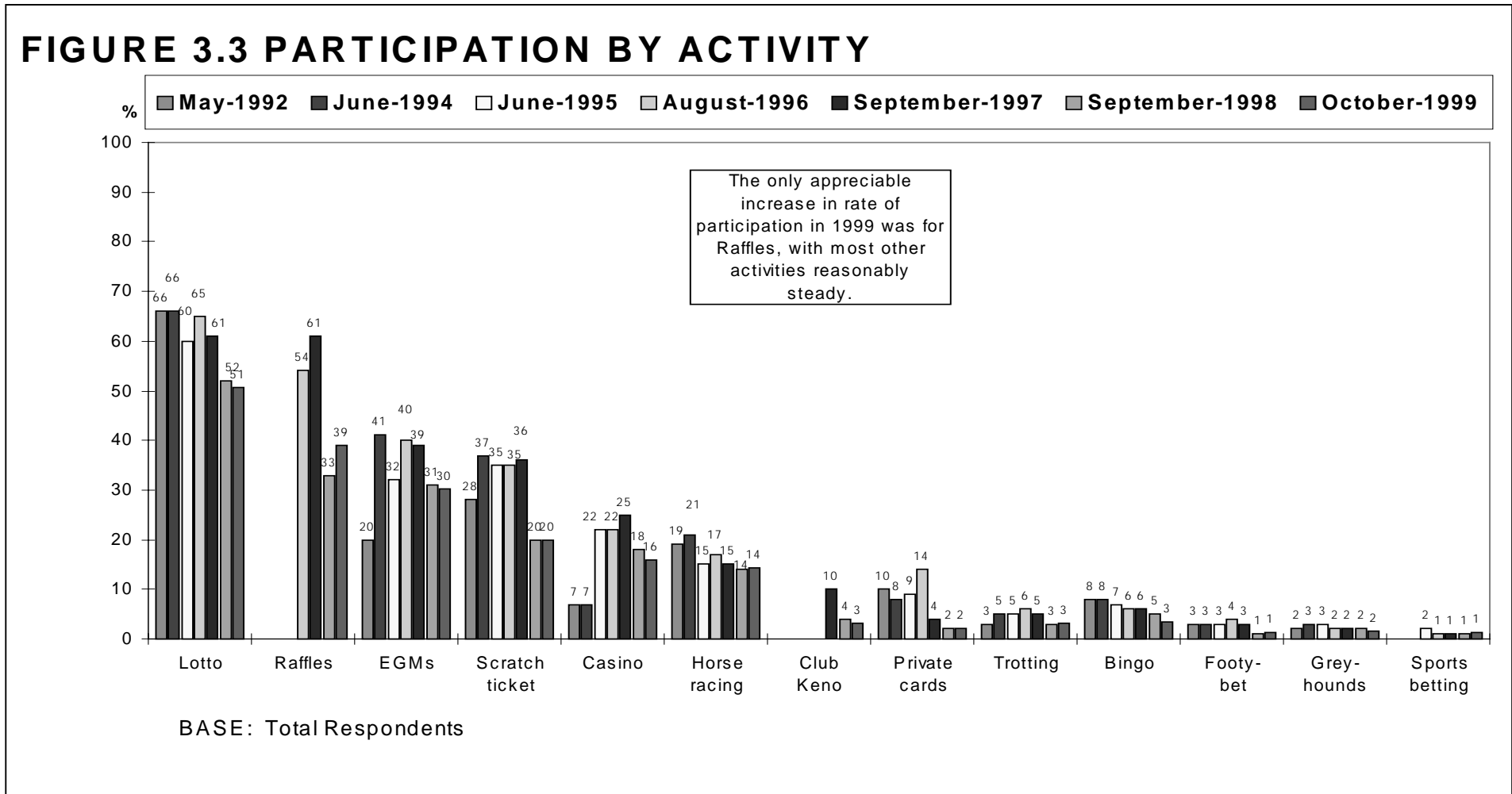
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<sup>2</sup> Question 1: Which of the following activities or games have you played, entered or bet on in the past 12 months?

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## TOTAL VICTORIAN GAMBLING PATTERNS

Note: Number of activities included in the survey increased in 1995, 1996 and 1997.



Note: Soccer Pools and Casino games for money on the Internet have not been included in the chart above because of very low participation rates.

### 3.3 Participation in Activities

Despite the increase in the proportion of the Victorian adult population participating in gambling, Figure 3.3<sup>3</sup>, opposite, shows that participation rates for most gambling activities remained relatively steady. The main points of interest included:

- ✓ The most apparent change in participation rates for individual gambling activities in 1999 was an increase in raffles participation—at 39%, up 6 points from 1998;
- ✓ Despite a 1 point decrease from 1998, lotto remains the gambling activity participated in by more Victorians than any other (51%);
- ✓ EGM gambling retains the third highest participation rate of any gambling activity after lotto and raffles, despite a slight decrease in 1999 to 30%—down 1 point from 1998;
- ✓ Participation in scratch ticket gambling remained steady at 20% in 1999—the same level as in 1998, but substantially lower than participation rates in prior years of the survey;
- ✓ Having increased substantially in 1995, after the introduction of Melbourne’s temporary Crown Casino in June 1994 (from 7% to 22%), casino gambling participation decreased to 16% in 1999, having peaked at 25% in 1997;
- ✓ Participation in thoroughbred horse racing remained gambling steady at 14%—the same level as in 1998;
- ✓ After a substantial decrease in 1998 (from 10% to 4%), participation in Club Keno decreased another point to 3% in 1999;
- ✓ Participation in private cards remained steady at 2% in 1999—the same level as in 1998, but substantially lower than participation rates in prior years of the survey. However, it should be noted that the definition changed in 1997, and was changed again in 1999 from “informal cards for money not at the casino” to “playing cards for money privately (at home or any other place)”;
- ✓ As in previous years, low levels of participation were recorded for all other measured forms of gambling, including trotting/harness racing, bingo, Footybet, greyhounds, sports betting, Soccer Pools and Casino games for money on the Internet. At no point in this survey have participation rates for any of these activities risen as high as 10%, and in general they appear to be remaining steady (e.g. greyhounds) or declining (e.g. bingo);
- ✓ With participation rates for Soccer Pools and casino games for money on the Internet below 1% for the last two years, these activities have not been displayed in Figure 3.3.


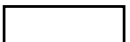
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<sup>3</sup> Question 1: “Which of the following activities or games have you played, entered or bet on in the past 12 months?”

**PROFILE OF GAMBLERS**

**TABLE 3.3A**

	<b>Total Population</b>	<b>Gamblers (Last 12 months)</b>	<b>Reg. Gamblers (Once a mth+)</b>
<b>GENDER</b>			
Male	48.8%	48.0%	52.0%
Female	51.2%	52.0%	48.0%
<b>AGE</b>			
Average Age	44.4	43.9	46.0
<b>RESPONDENT'S OCCUPATION</b>			
Managers/(Senior) Administrators	11%	12%	12%
Professionals	19%	18%	16%
Para-professionals	7%	7%	6%
Tradespersons	12%	12%	14%
Clerks	10%	11%	10%
Sales/Personal Service Workers	12%	13%	13%
Plant/Machine Operators/Drivers	4%	4%	5%
Labourers/Related workers	9%	9%	10%
Can't Say	3%	3%	3%
<b>TOTAL NOW EMPLOYED</b>	<b>59%</b>	<b>61%</b>	<b>62%</b>
Employed full-time	44%	46%	49%
Employed part-time	15%	16%	13%
<b>TOTAL NOT EMPLOYED</b>	<b>41%</b>	<b>39%</b>	<b>38%</b>
Household duties	8%	8%	6%
Students	8%	8%	5%
Self-supporting Retirees	8%	8%	8%
Pensioners	14%	14%	17%
Unemployed	2%	2%	2%
<b>LOCATION</b>			
Melbourne Metropolitan	73.3%	71.6%	69.8%
Other Victoria non-metropolitan	26.7%	28.4%	30.2%
<b>SOGS SCORE</b>			
(0-4)	99.2%	99.1%	98.8%
(5-20)	0.8%	0.9%	1.2%
<b>SEGMENT</b>			
Disinterested Gambler	21.6%	26.6%	26.3%
Occasional Gambler	37.5%	46.3%	43.7%
Social Gambler	9.3%	11.5%	11.8%
Acknowledged Heavy Gambler	4.6%	5.7%	7.0%
Committed Heavy Gambler	8.1%	9.9%	11.3%

 Higher than average compared with the total population  
 Lower than average compared with the total population



---

Table 3.3A opposite provides a profile of gamblers in general and regular gamblers, compared with the total Victorian population<sup>4</sup>.

**GAMBLERS**

*(In this survey, gamblers were classified as gamblers if they had partaken in any of the activities referred to in Question 1 of the survey in the preceding 12 months)*

Analysing the demographic profile of gamblers, compared with that of the general population, we see very little difference from the general population in most of the parameters. Differences related to occupation, and to the inevitable over-representation of people in the gambling segments. In particular:

- ✓ There was an even distribution of males and females in the gambling population;
- ✓ Gamblers had an average age just under 44 years;
- ✓ Professionals were less likely to have gambled; and
- ✓ White-collar workers were more likely to have gambled.

**REGULAR GAMBLERS**

*(In this survey, regular gamblers were defined as anyone who gambles at least once a month)*

Comparison of regular gamblers (i.e. those who gamble once a month or more often) with the general population revealed:

- ✓ A tendency towards more males than the general population;
- ✓ The mean age of regular gamblers was 46 years;
- ✓ A significantly lower proportion of students amongst regular gamblers; and
- ✓ More likely to be employed full-time.

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<sup>4</sup> Question 1: "Which of the following activities or games have you played or gambled on in the past 12 months?"

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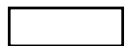
## PROFILE OF VICTORIAN GAMBLING ACTIVITIES

**TABLE 3.3B**

	<b>Total Pop (1760)</b>	<b>Total Gamblers (1433)</b>	<b>Casino (267)</b>	<b>EGMs (534)</b>	<b>Lotto (905)</b>	<b>Scratch Ticket (353)</b>	<b>Raffles (716)</b>	<b>Bingo (63)</b>	<b>Private Cards (32)</b>	<b>Horse Racing (244)</b>	<b>Trotting (52)</b>	<b>Footy Bet (20)</b>	<b>Club Keno (58)</b>
<b>GENDER</b>													
<b>Male</b>	48.8%	48.0%	54.6%	48.2%	49.6%	43.2%	42.5%	33.5%	78%	62%	69.4%	84.4%	49.6%
<b>Female</b>	51.2%	52.0%	45.4%	51.8%	50.4%	56.8%	57.5%	66.5%	22%	38%	30.6%	15.6%	50.4%
<b>AGE</b>													
<b>Av. Age (yrs)</b>	44.4	43.9	39.6	44.2	45.2	41.5	44.7	47.5	32	42	42	34.0	45.2
<b>SEGMENT</b>													
<b>Disint. Gambler</b>	21.6%	26.6%	14.8%	22.1%	27.3%	26.1%	27.3%	21.4%	15%	10.7%	13.7%	16.3%	19.8%
<b>Occ. Gambler</b>	37.5%	46.3%	29.1%	34.6%	46.1%	40.9%	49.7%	42.5%	41.9%	32.9%	22.9%	32.5%	32.3%
<b>Social Gambler</b>	9.3%	11.5%	28.3%	22.0%	10.9%	16.5%	10.0%	17.4%	18%	15.0%	11.3%	4.1%	21.8%
<b>Ack. Gambler</b>	4.6%	5.7%	10.0%	10.5%	6.0%	6.4%	3.9%	11.8%	7.2%	4.3%	1.2%	10.4%	9.6%
<b>Commit. Gambler</b>	8.1%	9.9%	17.8%	10.9%	9.8%	10.1%	9.1%	6.9%	18.3%	37.2%	51.0%	36.7%	16.5%



Higher than average compared with the total population



Lower than average compared with the total population

Note: Profile information not provided for greyhounds, sports betting, Soccer Pools and Internet gambling, as sample sizes for these activities are too small to provide reliable estimates.

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### 3.3B Profile of Victorian Gambling Activities

Table 3.3B<sup>5</sup> provides a profile, by age, gender and gambling segment, of gamblers' participation in various gambling activities in the past 12 months. The main points of consideration include:

- ✓ *Casino gamblers* – displayed a bias towards males and had a younger age profile than most other gamblers. There was a higher than average proportion of Social Gamblers, Acknowledged Heavy Gamblers and Committed Heavy Gamblers, and a lower than average proportion of Disinterested Gamblers and Occasional Gamblers;
- ✓ *EGM gamblers* – had a slight gender bias towards females, and an average age profile. EGM gamblers also contained a higher than average proportion of Committed Heavy Gamblers, Acknowledged Heavy Gamblers and Social Gamblers;
- ✓ *Lotto gamblers* – had equal proportions of males and females and were a little older than average. Lotto gamblers were more likely to be Disinterested Gamblers or Occasional Gamblers;
- ✓ *Scratch ticket gamblers* – had a female bias and a younger than average age profile. Within the Scratch ticket gamblers group, there was a higher than average proportion of Social Gamblers;
- ✓ *Raffles gamblers* – had a strong female bias and the same average age as the population. In terms of gambling segment profiles, Raffles gamblers were more likely to be Disinterested Gamblers or Occasional Gamblers;
- ✓ *Bingo gamblers* – had a strong female bias and tended to be in an older age bracket. Bingo gamblers were more likely to be Acknowledged Heavy Gamblers or Social Gamblers;
- ✓ *Private cards gamblers* – had a strong male bias and considerably younger than the average age of all gamblers. They were also more likely to be Committed Heavy Gamblers or Social Gamblers;
- ✓ *Thoroughbred horse racing and trotting gamblers* – had a strong male bias and tended to be younger than average. These groups contained a higher than average proportion of Committed Heavy Gamblers;
- ✓ *Footybet gamblers* – had a strong male bias and a considerably younger than average age profile. This group contained a higher than average proportion of Committed Heavy Gamblers; and
- ✓ *Club Keno gamblers* – tended to have a slightly older than average age profile, equal proportions of males and females and a higher proportion of Acknowledged Heavy Gamblers and Social Gamblers.

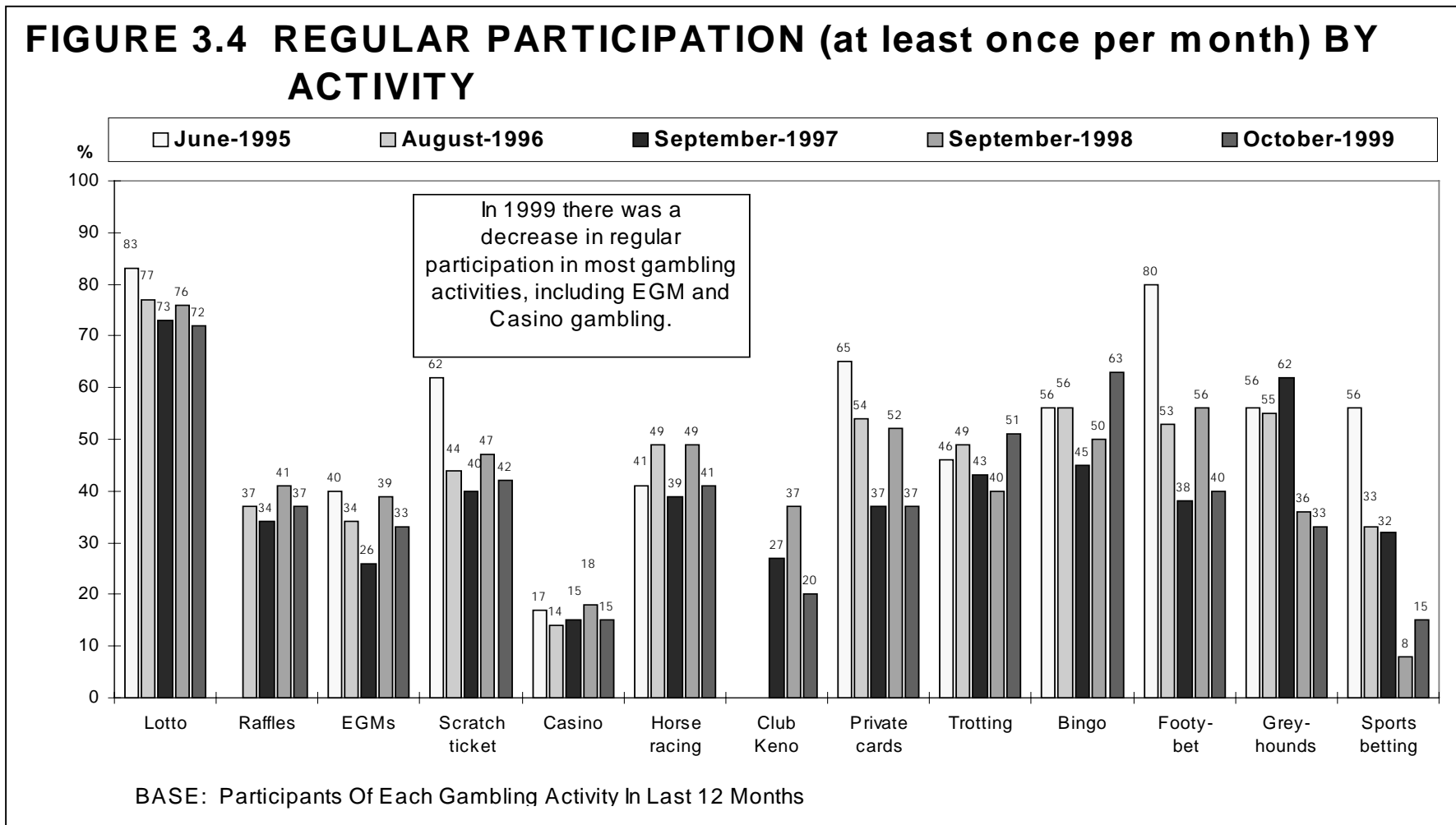
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<sup>5</sup> Question 1: Which of the following activities or games have you played, entered or bet on in the past 12 months?

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## TOTAL VICTORIAN GAMBLING PATTERNS

Note: Number of activities included in the survey increased in 1995, 1996 and 1997.



Note: Soccer Pools and Casino games for money on the Internet have not been included in the chart above because of very low participation rates.

### 3.4 Regular Participation in Activities

Figure 3.4<sup>6</sup> opposite shows the level of regular participation in gambling by types of gambling activity undertaken at least once per month. The percentages represent the proportion of participants in each gambling activity who participate in that activity at least once per month. It should be noted that the sample sizes for Soccer Pools and sports betting were very small, and results presented for these activities should be interpreted as indicative only. Due to small sample sizes, Soccer Pools and casino games for money on the Internet have not been included in Figure 3.4.

Regular participants of an activity are defined as anyone who has participated in that activity at least once per month. Apart from trotting and bingo, all other measured gambling activities recorded decreases in regular participation. The main findings regarding regular participation in activities were:

- ✓ As in previous years, Lotto had the highest level of regular participation in 1999, despite a slight decrease—at 72%, down 4 points from 1998;
- ✓ Regular trotting gambling activity increased to 51% in 1999 (up 11 points from 1998), as did regular bingo gambling (at 63%, up 13 points from 1998), showing that there are still cores of regular bingo players and trotting betters, despite declines in overall participation levels;
- ✓ Regular greyhound gambling activity decreased to 33% in 1999—down 3 points from 1998;
- ✓ Regular participation in private cards decreased to 37% in 1999—down 15 points from 1998. However, the definition of this activity was changed in 1997 and again in 1999, so data from different years for this activity may not be directly comparable across years;
- ✓ Regular participation in Footybet and horse racing also decreased in 1999 to 40% (down 16 points) and 41% (down 8 points), respectively;
- ✓ The level of regular participation in scratch ticket gambling decreased by 5 points to 42% in 1999;
- ✓ Despite a 4 point decrease in 1999, more than one third (37%) of Victorian raffles gamblers were still regular participants;
- ✓ Club Keno had a decrease in the level of regular participation in 1999—at 20%, 17 points down from 1998);
- ✓ Regular participation in EGM gambling decreased 6 points in 1999, but at 33%, remained higher than the 1997 level of 26%;
- ✓ Regular participation in casino gambling activities experienced a relatively modest decrease of 3 points, declining to 15%; and
- ✓ Sample sizes for regular participants in Soccer Pools and casino games for money on the Internet were too small to provide reliable results.

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<sup>6</sup> Question 3A–P: How often do you play/enter/bet on...(gambling activity)?

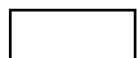
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**PROFILE OF REGULAR GAMBLERS (1999) BY GAMBLING ACTIVITY (at least once per month)**

**Table 3.4B**

	Total Pop (1760)	Total Casino/ EGM (190)	Casino (38)	EGMs (183)	Lotto (653)	Scratch Ticket (143)	Raffles (266)	Bingo (39)	Private Cards (11)	Horse Racing (95)	Trotting (26)	Footy Bet (8)	Club Keno (11)
<b>GENDER</b>													
Male	48.8%	50.5%	57.6%	48.6%	53.2%	48.9%	47.0%	41.6	77.7%	82.2%	75.6%	79.3%	73.0%
Female	51.2%	49.5%	42.4%	51.4%	46.8%	51.1%	53.0%	58.4	22.3%	17.8%	24.4%	20.7%	27.0%
<b>AGE</b>													
Av. Age (yrs)	44.4	48.0	38.5	48.8	47.6	43.3	45.7	49.2	28.5	46.2	42.9	35.5	45.9
<b>SEGMENT</b>													
Disint. Gambler	21.6%	18.9%	4.5%	19.6%	28.2%	24.8%	19.0%	22.0%	18.9%	10.5%	14.7%	29.1%	16.7%
Occ. Gambler	37.5%	24.2%	19%	24.4%	44.5%	38.1%	53.8%	42.6%	45.3%	19.0%	10%	33.7%	18.3%
Social Gambler	9.3%	30.8%	50.8%	29.3%	11.2%	20.9%	10.6%	15.4%	8.8%	9.1%	7.5%	0%	29.5%
Ack. Gambler	4.6%	14.6%	10.3%	15.8%	6.4%	6.8%	5.7%	14.0%	10.6%	6.5%	0	14.3%	5.8%
Commit. Gambler	8.1%	11.5%	15.4%	10.9%	9.8%	9.3%	10.9%	6.0%	16.4%	55.0%	67.8%	22.9%	29.6%

 Higher than average compared to the total population

 Lower than average compared to the total population

Note: Profile information not provided for Greyhounds, Sportsbet, Soccer Pools and Internet gambling as sample sizes for these activities are too small to provide reliable estimates.

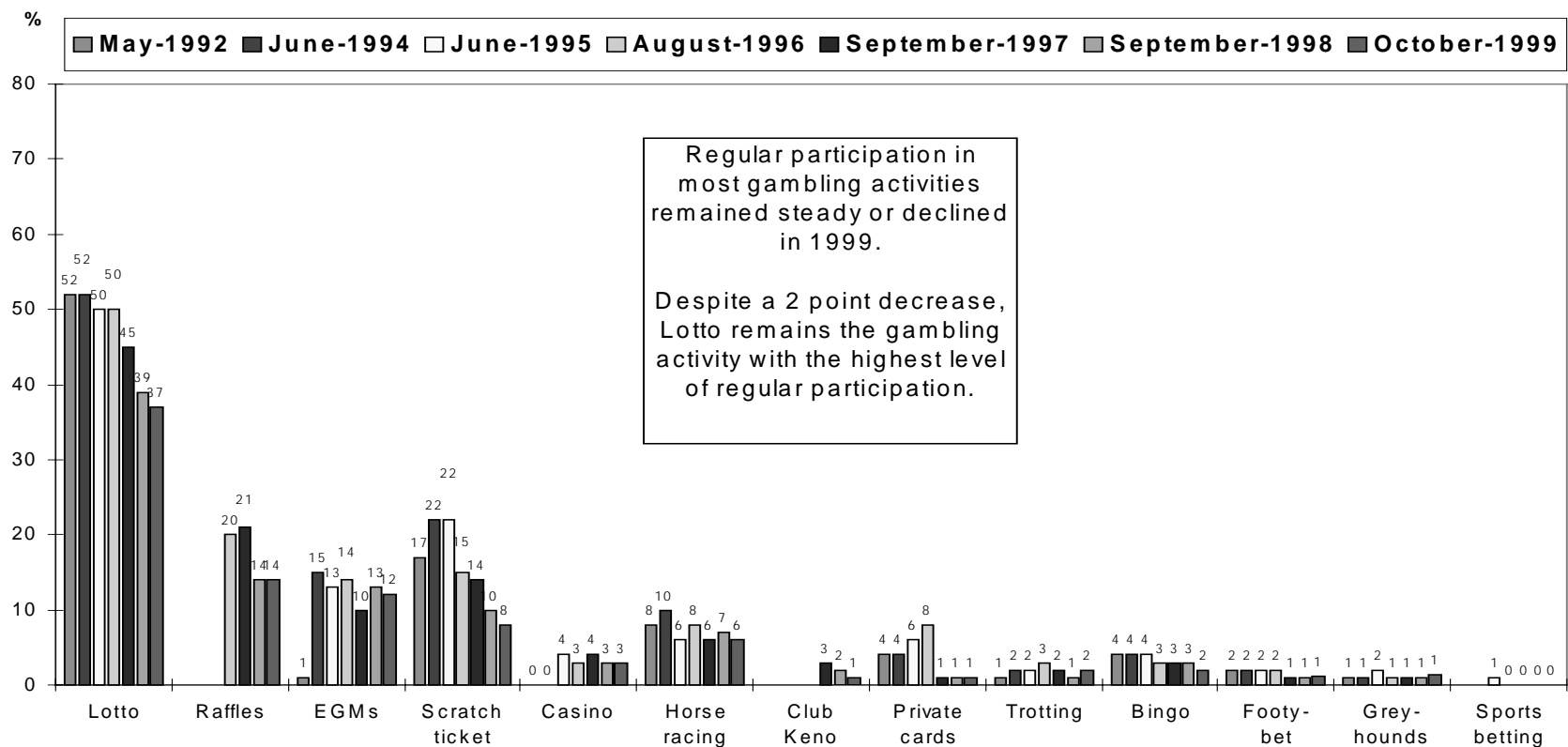
Table 3.4B opposite outlines a profile, by age gender and gambling segment, of regular gamblers (those who participate at least once per month) undertaking the various gambling activities measured. The main findings regarding the demographic profile of regular gamblers included:

- ✓ Regular casino players comprised a higher than average proportion (51%) of Social Gamblers, who represent only 9% of the general population. Occasional Gamblers and Disinterested Gamblers were under-represented amongst regular Casino gamblers;
  - ✓ Regular EGM players had a mean age of 49 years, and were more likely to be Social Gamblers or Acknowledged Heavy Gamblers;
  - ✓ Regular lotto entrants were slightly older than the general population. In terms of Gambling Segments, regular lotto gamblers tended to be Disinterested Gamblers and Occasional Gamblers;
  - ✓ Regular scratch ticket entrants were similar to the overall population in terms of age, and were more likely than average to be Social Gamblers;
  - ✓ Regular raffles entrants were more likely to be Occasional Gamblers;
  - ✓ Regular bingo players were more likely to be older females, and tended to be Acknowledged Heavy Gamblers;
  - ✓ Regular private cards players were much more likely to be male, much more likely to be younger than average age, and slightly more likely to be Committed Heavy Gamblers;
  - ✓ Regular horse racing betters were more likely to be male. Regular trotting betters were also more likely to be male, but had a younger age bias. Both regular horse racing gamblers and regular trotting gamblers were much more likely to be to be Committed Heavy Gamblers;
  - ✓ Regular Footybet betters were more likely to be younger males; and
  - ✓ Regular Club Keno players were slightly older than the general population, and were more likely to be Committed Heavy Gamblers or Social Gamblers.
-

## TOTAL VICTORIAN GAMBLING PATTERNS

Note: Number of activities included in the survey increased in 1995, 1996 and 1997.

### FIGURE 3.5 REGULAR PARTICIPATION - TOTAL POPULATION



BASE: Total Respondents

Note: Soccer Pools and Casino games for money on the Internet have not been included in the chart above because of very low participation rates.



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### **3.5 Regular Participation in Gambling Activities Amongst Total Population**

The following section outlines the level of regular participation in activities as a proportion of the total Victorian adult population.

Figure 3.5<sup>7</sup> opposite highlights the level of regular participation in activities amongst the total population. These figures are the product of those presented in figures 3.3 and 3.4. The main findings were:

- ✓ Over one third (37%) of the total Victorian population participated in lotto at least once a month in the last year. Although significantly lower than the 50% levels recorded between 1992 and 1996, lotto remains the gambling activity with the highest level of regular participation amongst Victorian adults;
- ✓ Regular participation in raffles remained steady at 14% in 1999;
- ✓ Regular EGM gambling decreased slightly, with 12% of Victorians participating regularly in the last 12 months—down 2 points from 1998;
- ✓ Regular participation in scratch ticket activities decreased in 1999, with 8% of Victorians participating regularly, compared with 10% in 1998 and a peak of 22% in 1994 and 1995;
- ✓ A total of 6% of the Victorian population regularly participated in horse racing gambling—down 1 point from 1998;
- ✓ The percentage of regular Victorian casino gambling participants was stable at 3%;
- ✓ Regular participation in bingo also remained stable at 2% of adult Victorians;
- ✓ Betting on trotting was regularly participated in by 2% of Victorian adults;
- ✓ Regular participation in Club Keno was undertaken by 1% of the adult Victorian population—down from 2% in 1998;
- ✓ Private cards were played by regularly by 1% of Victorian adults; and
- ✓ Regular participation in Footybet, Soccer Pools, greyhounds and sports betting was very low (each 1% or lower).

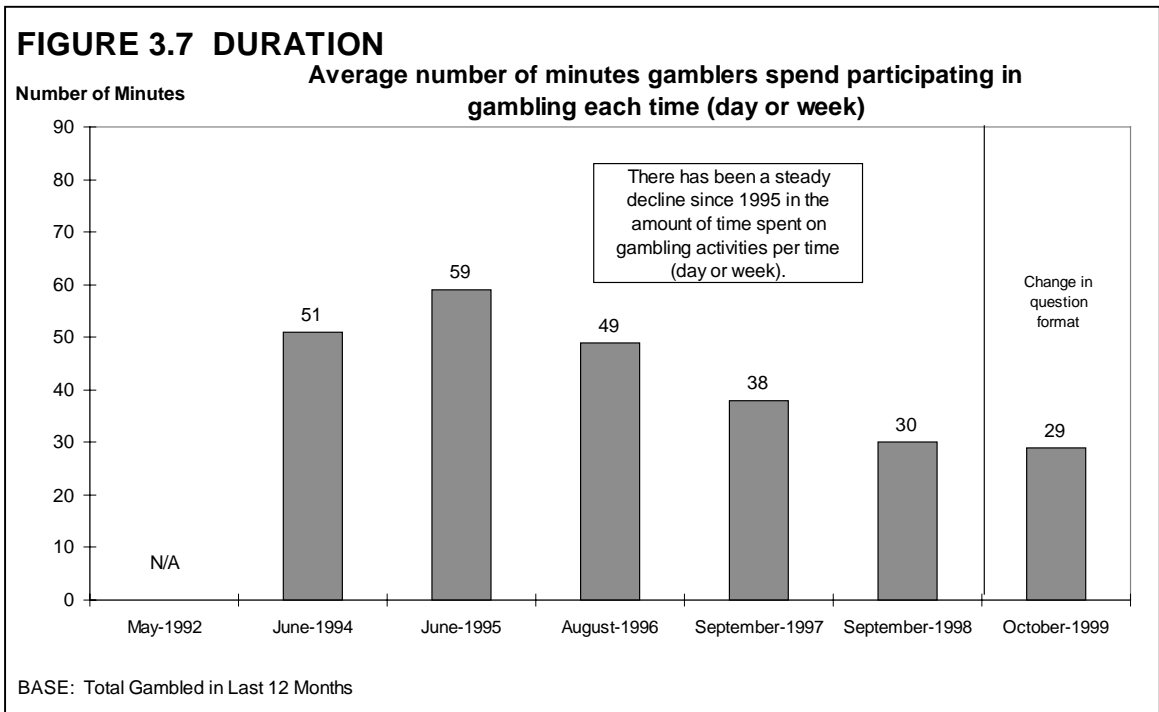
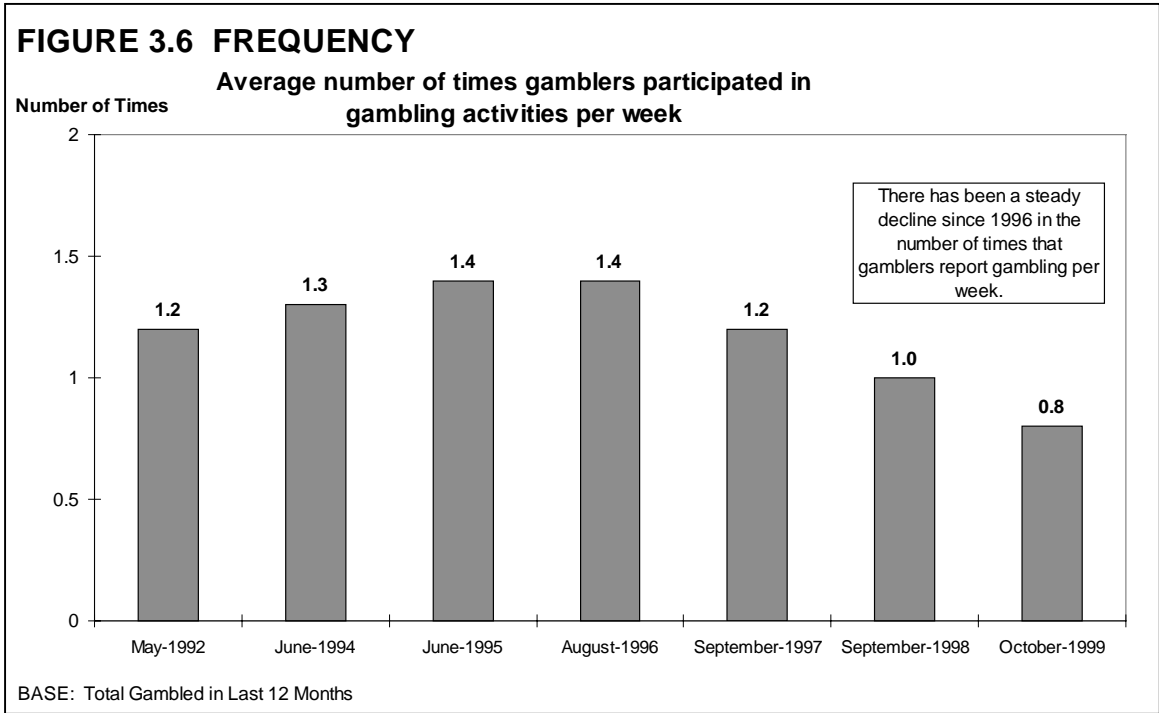
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<sup>7</sup> Question 3A–P: How often do you play/enter/bet on...(gambling activity)?

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## TOTAL VICTORIAN GAMBLING PATTERNS

Note: Number of activities included in the survey increased in 1995, 1996 and 1997.



### 3.6 Frequency of Participation

Figure 3.6<sup>8</sup> opposite shows the average frequency with which those having undertaken gambling activities did so per week by time series (May 1992 to October 1999). In 1999, on average, those participating in gambling activities did so less than once per week (i.e. 0.8 times per week). This is the third successive year of decrease in the number of times Victorians gamble per week, and the lowest frequency recorded in this survey to date.

In 1999, there was a higher than average frequency of participation undertaken by:

- ✓ Committed Heavy Gamblers (1.5); and
- ✓ Acknowledged Heavy Gamblers (1.1).

In 1999, there was a lower than average frequency of participation undertaken by:

- ✓ Disinterested Gamblers (0.7); and
- ✓ Occasional gamblers (0.6).

The frequency of participation for Social Gamblers was 1.0 (i.e. once per week).

### 3.7 Duration of Activities

Figure 3.7<sup>9</sup> opposite provides a time-series analysis of duration of gambling activities each time (day or week) played. Figures from 1999 demonstrate an easing in the steady rate of decline in the amount of time reported spent on gambling activities since 1995. This is the fourth successive year that duration of gambling decreased (29 minutes in 1999—down 1 minute from 1998; down 30 minutes from the 1995 peak).

Please note that in 1999 the question was changed so that respondents were asked how much time they spend per day or week, depending on which of these time periods gambling cycle is most closely based on, for each gambling activity, with a more inclusive approach for racing activities, Footybet and sports betting (see footnote).

In 1999, the *highest* amount of time spent gambling per week, on average, was by the following groups:

- ✓ Those identified as being “At Risk” on SOGS (157 minutes);
- ✓ Committed Heavy Gamblers (96 minutes);
- ✓ Social Gamblers (57 minutes); and
- ✓ Acknowledged Heavy Gamblers (52 minutes).

In 1999, the *lowest* amount of time spent gambling per week, on average, was by the following groups:

- ✓ Household duties (7 minutes);
- ✓ Single parents with children not at home (7 minutes); and
- ✓ Para-professionals (10 minutes).

<sup>8</sup> Question 3A–P: How often do you play/enter/bet on...(gambling activity)?

<sup>9</sup> Question 4B, 4E, 4O, 4P: On each day/in each week you play/enter/bet on...(gambling activity)..., on average, how much time do you spend on this activity?

Question 4F, 4G, 4H: On each day you bet on...(gambling activity)..., on average, how much time do you spend studying the form, placing your bets and listening to and/or watching the races?

Question 4I, 4J: On each day you play poker machines (“pokies”) at a club or hotel/at the Melbourne Crown casino or casinos outside Victoria, on average, how much time do you spend playing the machines?

Question 4K: On each day you play card, table or any game other than poker machines (“pokies”) at the Melbourne Crown casino or casinos outside Victoria, on average, how much time do you spend at the gaming tables?

Question 4L1, 4M1 & 4L2, 4M2: In each week you bet on...(gambling activity)..., on average, how much time do you spend studying the form and placing your bets? And how much time do you spend listening to and/or watching the games/events?

**TOTAL VICTORIAN GAMBLING PATTERNS**

**FIGURE 3.8 PERCEIVED WEEKLY EXPENDITURE**

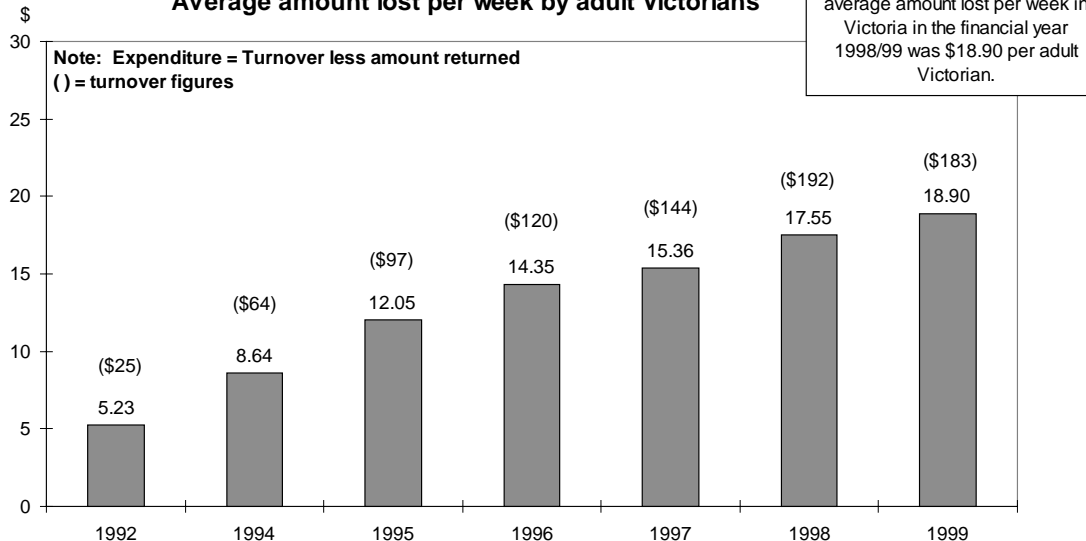
Average claimed weekly expenditure on gambling by Victorian gamblers



BASE: Total Gambled in Last 12 Months

**FIGURE 3.9 ACTUAL WEEKLY EXPENDITURE**

Average amount lost per week by adult Victorians



SOURCE: The Authority (the figures are supplied to the Tasmanian Gaming Commission which has published some of them in "Australian Gambling Statistics" 1972-73 to 1996-97)

### 3.8 Perceived Weekly Expenditure

Figure 3.8<sup>10</sup> opposite provides a time-series analysis of the overall perceived average weekly expenditure by Victorians participating in gambling activities. Respondents were asked to estimate their total weekly outlay on gambling activities. In 1999, Victorian gamblers estimated that they spent, on average, \$31 per week—up a substantial \$14 from the 1998 figure of \$17.

In 1999, the following groups estimated higher than average dollars spent per week on gambling:

- ✓ Acknowledged Heavy Gamblers (\$135);
- ✓ Labourers/related workers (\$87);
- ✓ Committed Heavy Gamblers (\$78);
- ✓ Social gamblers (\$51);
- ✓ Males (\$51);
- ✓ Managers/(senior) administrators (\$47);
- ✓ Those aged 20–29 years (\$44);
- ✓ Those aged 30–39 years (\$40);
- ✓ Those employed full-time (\$40); and
- ✓ Those living in the metropolitan area (\$38).

In 1998, the following groups estimated lower than average dollars spent per week on gambling:

- ✓ Those with pre-tax annual income of \$10,000 or less (\$8);
- ✓ Disinterested Gamblers (\$10);
- ✓ Females (\$12);
- ✓ Those aged 70 years or older (\$13);
- ✓ Para-professionals (\$14); and
- ✓ Occasional Gamblers (\$15).

In respect of the substantial increase in 1999, it should be noted that this question was reworded to ask respondents about average expenditure per week, rather than expenditure in the ambiguous and confusing “average week”. A definite time period of the last 12 months was also provided for respondents’ deliberations. Probably as a result of the changes in the question, the proportion gamblers giving an answer of “\$0” decreased appreciably between the 1998 and 1999 surveys.

Additionally, high expenditure figures which had been excluded as outliers in previous years of the survey (i.e. \$2,000+ in 1998) were retained in 1999, being figures of \$2,000–\$4,000 which appeared consistently across years and gave every appearance of being not data entry mis-punches but legitimate responses. Had such high expenditure figures been excluded from calculation of the mean for 1999, the figure would have been \$19. For a full discussion, see Section 2.2.

It should also be noted that the weighting procedure in 1998 resulted in a weighted mean which represented a reduction from the raw mean, whereas the weighting procedure in 1999 resulted in a weighted mean which represented an increase from the raw mean. This would appear to be due to the fact that those respondents reporting weekly expenditure of \$2000 or more in 1999 were all from weighting cells which received weights greater than 1.

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<sup>10</sup> Question 10: Thinking about all your gambling activities over the last 12 months, on average, how much did you spend or outlay each week?

**TABLE 3.9**

Regulated Forms of Gambling in Victoria by Expenditure for the Financial Years Ending 30 June 1998 and 30 June 1999

CATEGORY	FINANCIAL YEAR		CHANGE %
	1997–1998 \$million	1998–1999 \$million	
<b>RACING</b>			
Bookmakers <sup>1</sup>	17.338	15.693	-9.49%
Totalisators	413.984	439.090	6.06%
<b>TOTAL RACING</b>	<b>431.322</b>	<b>454.783</b>	<b>5.44%</b>
<b>GAMING</b>			
Tattersall's Gaming Products <sup>2</sup>	298.943	312.559	4.56%
Electronic Gaming Machines	1,711.290	1,954.192	14.19%
Casino	742.292	721.852	-2.75%
Club Keno <sup>3</sup>	7.084	7.197	1.60%
<b>TOTAL GAMING</b>	<b>2,759.609</b>	<b>2,995.800</b>	<b>8.56%</b>
<b>SPORTSBETTING<sup>3,4</sup></b>	<b>6.166</b>	<b>5.904</b>	<b>-4.25%</b>
<b>TOTAL GAMBLING</b>	<b>3,197.097</b>	<b>3,456.487</b>	<b>8.11%</b>

Notes:

<sup>1</sup> The turnover for bookmakers from which the expenditure figure is derived is an estimate and not an actual figure.

<sup>2</sup> Tattersall's gaming products include Tattslotto, Oz Lotto, Powerball, Super 66, Instant Tatts, Tatts 2, Tatts Keno, Soccer Pools and Consultations.

<sup>3</sup> The retention rates used to estimate Club Keno, Sports Bookmaking and Sportsbet have been reviewed.

<sup>4</sup> Expenditure reported in the new Sportsbetting category was previously included in Totalisators under the Racing category and in sportsbetting under the Gaming category.

Due to administrative changes, expenditure figures for minor gaming (bingo, raffles, etc.) are no longer available.

### **3.9 Actual Weekly Expenditure**

Figure 3.9 provides a time-series analysis of the *actual* weekly expenditure per adult Victorian (i.e. the amount lost per week) on gambling in Victoria for the financial years ending June 30 of the years indicated. The figures for turnover (i.e. the outlay or amount invested) are given in brackets. Expenditure is the turnover less the amount returned to the gambler.

Table 3.9 gives the official expenditure figures for the various forms of regulated gambling in Victoria for the financial years 1997–1998 and 1998–1999. It should be noted that these are actual expenditure figures as supplied by the Victorian Casino and Gaming Authority (they will consequently be incorporated in the tables of Australian Gambling Statistics compiled by the Tasmanian Gaming Commission).

Note that the concepts of turnover, outlay and expenditure are difficult and the terms may be interpreted and reported in different ways by different survey respondents.

Interpretations and self-reporting vary dramatically across the different gambling activities, possibly due to the nature of these activities. For example, respondents are unlikely to appreciate the number of times they replay their investment on an EGM, and therefore their concept of outlay is closer to that of expenditure rather than turnover. However, for lotto there are far less individual collects and hence substantially less replaying or recycling of the investment, and therefore the lotto players' concept of outlay is closer to that of turnover than expenditure.

Care should therefore be exercised in the interpretation of results from respondents' perceptions of their gambling outlay, as this does not necessarily reflect the actual known outlay. However, the questions in the survey which ask respondents for their perceptions of outlay are useful in providing comparative data across different respondent groups, and in obtaining a deeper understanding of the profile of various gambling segments within the population.

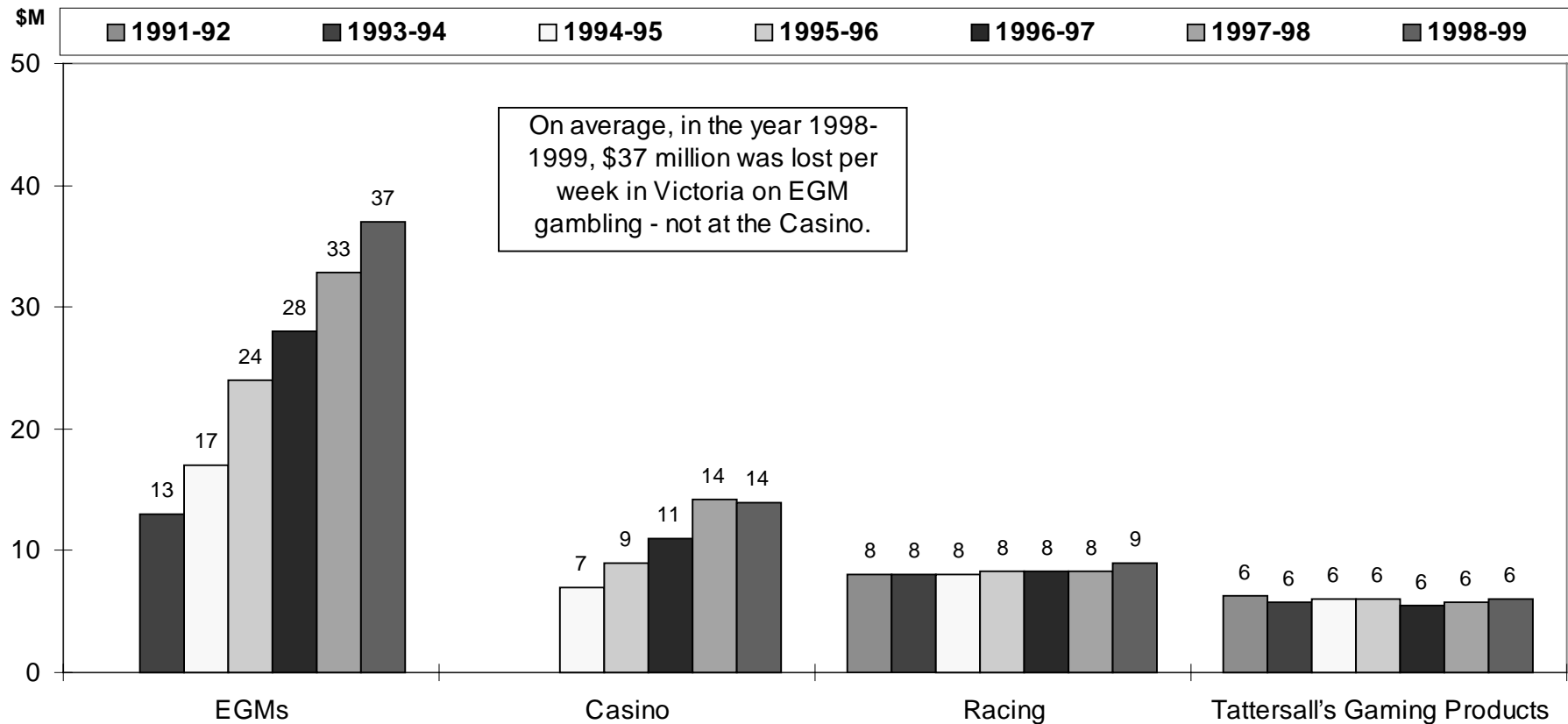
The close correspondence between actual weekly expenditure figures (based on official figures) and estimated weekly outlay (based upon Q.10 in the survey) over the past three years is noteworthy, but, on past experience, should probably not be taken to indicate a high level of accuracy in people's self-reporting of their gambling outlay in the future.

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# TOTAL VICTORIAN GAMBLING PATTERNS

## FIGURE 3.10 ACTUAL WEEKLY EXPENDITURE

Average amount lost per week



SOURCE: The Authority (the figures are supplied to the Tasmanian Gaming Commission which has published some of the figures in "Australian Gambling Statistics" 1972-73 to 1996-97)



### **3.10 Overall Actual Weekly Expenditure**

Figure 3.10 opposite provides a time-series analysis of the *overall actual* weekly expenditure (i.e. amount lost) on gambling in Victoria for each of the main legal forms of gambling.

The average weekly expenditure<sup>11</sup> on EGMs not at the Casino in the financial year 1998–1999 was around \$37.48 million in Victoria. This was followed by casino activities (\$13.84 million), racing (\$8.72 million) and Tattersall's Gaming Products (Tattslotto, Oz Lotto, Powerball, Super 66, Instant Tatts, Tatts 2, Tatts Keno, Soccer Pools and Consultations) (\$5.99 million).

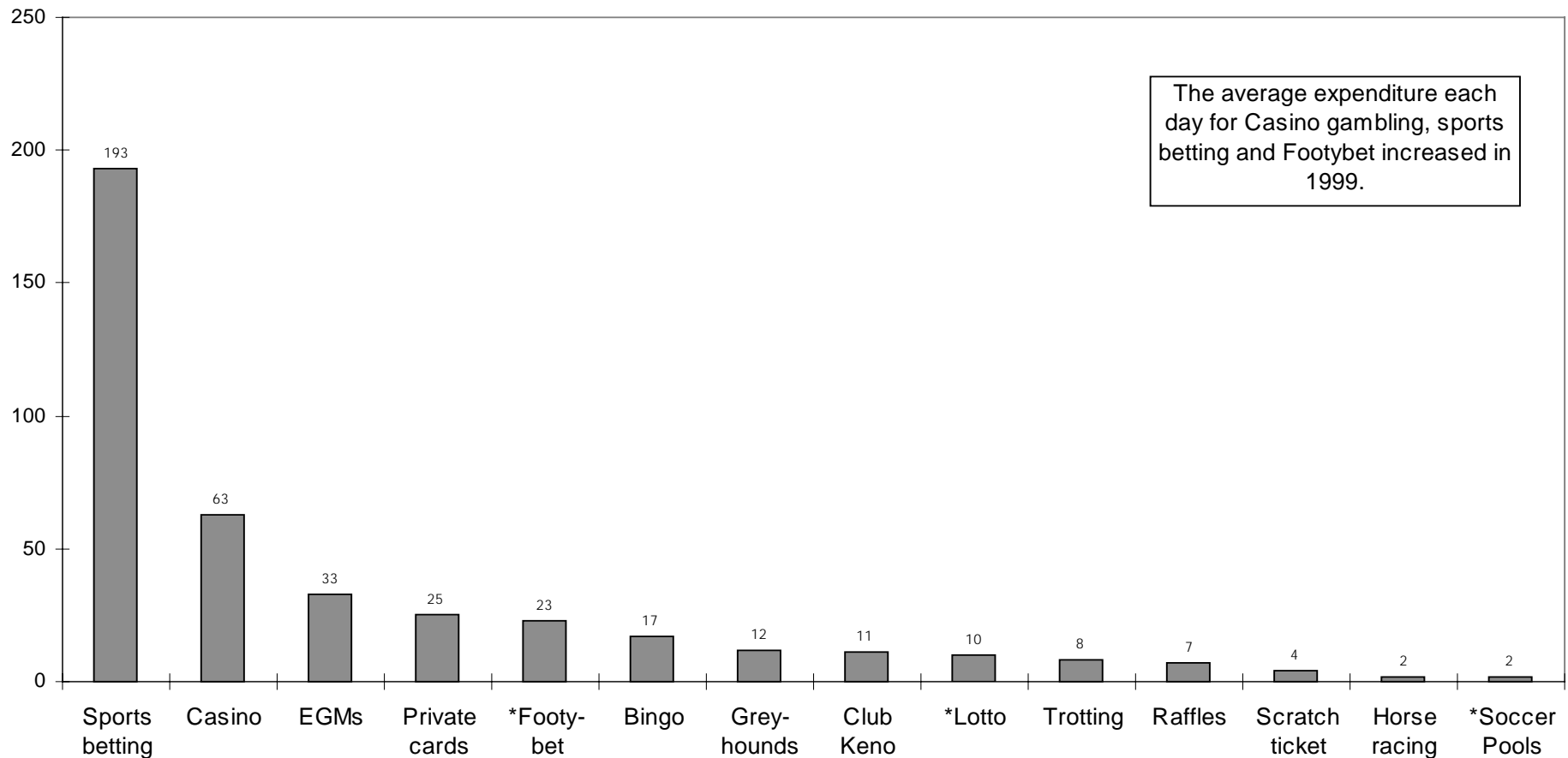
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<sup>11</sup> Amount invested less amount returned.

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## TOTAL VICTORIAN GAMBLING PATTERNS

**FIGURE 3.11 EXPENDITURE EACH TIME (DAY/WEEK) PARTICIPATE**



The average expenditure each day for Casino gambling, sports betting and Footybet increased in 1999.

BASE: Participants In Each Gambling Activity In Last 12 Months

In 1999, changes in question format resulted in expenditure being asked on a “per week” basis (\*) for Footybet, lotto and Soccer Pools, and on a “per day” basis for all other gambling activities. More substantial changes were made in question format for horse racing, trotting, private cards and greyhounds.

### 3.11 Expenditure Each Time Played

Figure 3.11<sup>12</sup> opposite displays the amount that gamblers spent each time they gambled<sup>13</sup>. For racing activities and private cards, respondents were first asked how much money they set aside to bet with each day, on average, and then how much money they had left at the end of the day, on average. For all other gambling activities, respondents were simply asked to indicate, on average, how much money they spent or outlaid on a gambling activity each time (day or week) they participated in it.

Probably due to the unreliability of its small sample size, sports betting recorded the highest amount of expenditure per time (day) of all gambling activities measured in 1999 (\$193), followed by Casino gambling expenditure at \$63 per time (day). Other findings to emerge included:

- ✓ EGM players spent an average of \$33 each time (day) they played EGMs;
- ✓ Average amount spent by private cards players per time (day) was \$25, but it should be noted that this was only a small sample;
- ✓ Horse racing betters spent \$2, on average, each time (day) they participated in horse racing gambling. However, this average may have been distorted by a group claiming very high winnings; and
- ✓ Footybet was the only other gambling activity recording an average expenditure in excess of \$20 per time, although in the case of Footybet it should be noted that this is on a “per week” basis.

As mentioned in the note under Chart 3.11 opposite, changes in question format resulted in expenditure being asked on a “per week” basis (\*) for Footybet, lotto and Soccer Pools, and on a “per day” basis for all other gambling activities. Further, a two-stage question was used to calculate expenditure on private cards, thoroughbred horse racing, trotting and greyhounds. Due to these changes, results from 1999 are no longer directly comparable with previous years. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999.

<sup>12</sup> Q5A, 5B, 5C, 5D, 5I, 5J, 5K, 5L, 5M, 5N, 5O, 5P: On each day/in each week you play/enter/bet on...(gambling activity)...on average, how much money do you outlay on this activity?

Q5E1 & 5E2: On each day you play/enter/bet on...(private cards)...on average, how much money do you usually start with? And how much money do you usually finish with?

Q5F1 & 5F2: On each day you bet on thoroughbred horse racing (the gallops)—not including Melbourne Cup sweeps—on average, how much money do you usually set aside to bet with? On each day you bet on thoroughbred horse racing (the gallops)—not including Melbourne Cup sweeps—on average, how much money do you usually have left at the end of the day’s betting?

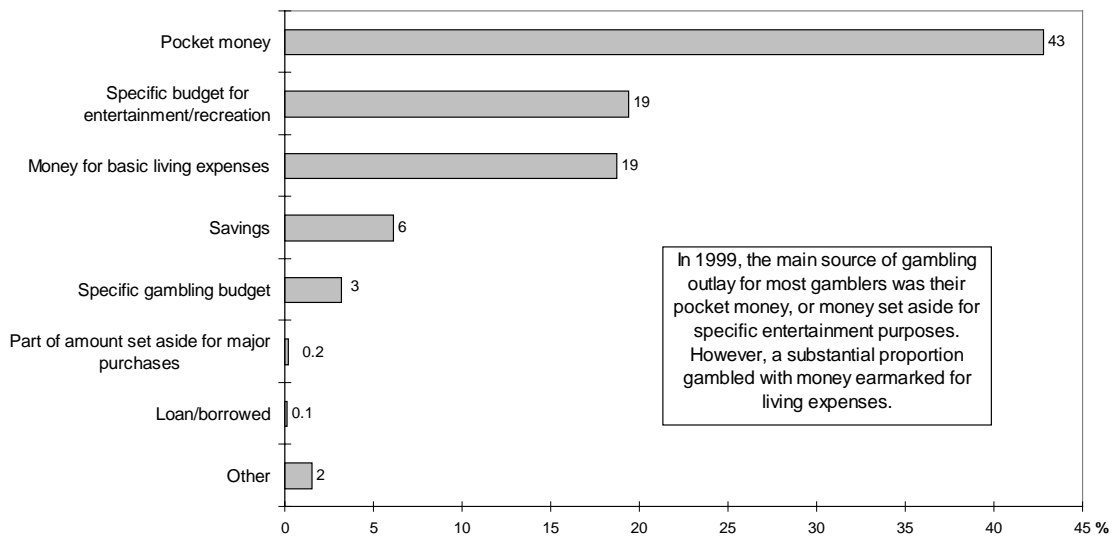
Q5G1, 5H1 & 5G2, 5H2: On each day you bet on...(Horse racing/Trotting/Greyhounds)...on average, how much money do you usually set aside to bet with? On each day you bet on...(Horse racing/Trotting/Greyhounds)...on average, how much money do you usually have left at the end of the day’s betting?

<sup>13</sup> Please note that this figure is an average. An explanation of how the averages were calculated is included in Section 2.

## TOTAL VICTORIAN GAMBLING PATTERNS

**FIGURE 3.12 SOURCE OF GAMBLING OUTLAY**

**Main sources of gambling outlay reported by Victorian gamblers**



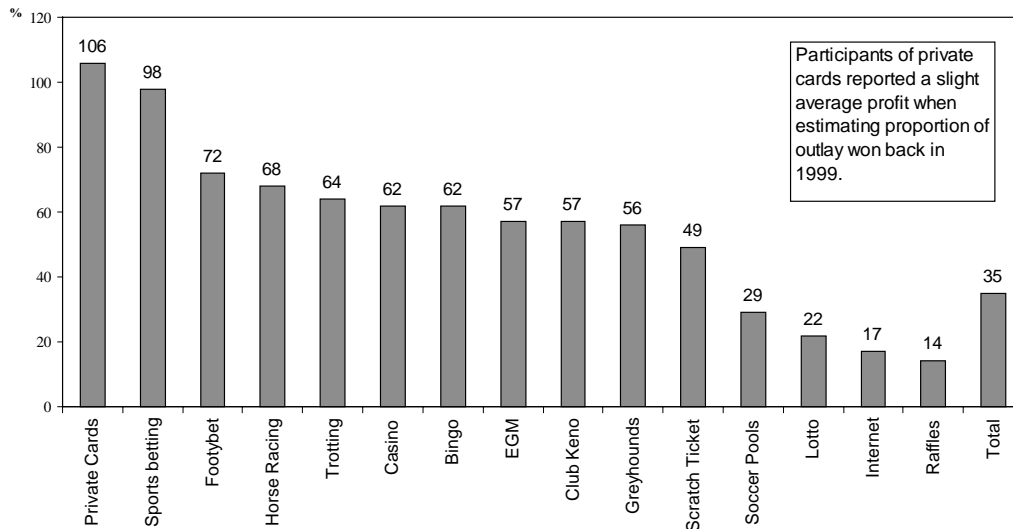
In 1999, the main source of gambling outlay for most gamblers was their pocket money, or money set aside for specific entertainment purposes. However, a substantial proportion gambled with money earmarked for living expenses.

BASE: Total Gambled in Last 12 Months

The form of this question changed in 1999 from an unprompted to a prompted question.

**FIGURE 3.13 PROPORTION OF OUTLAY REPORTED AS WON BACK**

**Proportion of outlay won back by individual activity, and overall**



Participants of private cards reported a slight average profit when estimating proportion of outlay won back in 1999.

BASE: Total Gambled on Activity in Last 12 Months

In 1999, changes in question format resulted in responses being based upon breaking even meaning winning 100% of outlay back.

### 3.12 Source of Gambling Expenditure

Respondents were also asked where the money they spent or outlaid on gambling activities came from. Responses are summarised in Figure 3.12<sup>14</sup>. The most common source (43%) was “pocket money”, while 19% of respondents used money from a “specific budget for entertainment or recreation”. Nineteen per cent (19%) said money for gambling came from “money for basic living expenses”, and 6% said it came from “savings”. Only 3% sourced money for gambling from a special gambling budget.

Concurrent with a change in the question from unprompted to prompted format, if respondents simply referred to a source of income (e.g. job, wage, salary, pension, etc.), they were prompted for what the money might otherwise have been spent on, so results are not comparable with those from previous years.

### 3.13 Proportion of Outlay Reported as Won Back

Figure 3.13<sup>15</sup> reveals that the proportion of outlay Victorian gamblers believe they won back across all gambling activities in 1999 was 35%. However, as previously mentioned, the concepts of outlay, turnover and expenditure are difficult ones, and are interpreted differently by different respondents. The nature of the gambling activity undertaken and the way in which dividends are re-invested also influences people’s perceptions of these concepts.

Groups which reported a *higher* proportion of outlay won back include:

- ✓ Those aged 18–19 year (56% of outlay won back);
- ✓ Committed Heavy Gamblers (51%);
- ✓ Social Gamblers (45%);
- ✓ Acknowledged Heavy Gamblers (45%);
- ✓ Unemployed (43%); and
- ✓ Labourers (42%).

Groups which reported a *lower* proportion of outlay won back include:

- ✓ Those aged 50–59 years (29% of outlay won back);
- ✓ Disinterested Gamblers (31%);
- ✓ Occasional Gamblers (31%);
- ✓ Those not employed (33%); and
- ✓ Those with a pre-tax annual income of \$40,000 to \$60,000 (33%).

Respondents’ perceptions of the proportion won back appeared to decline as age increases: those aged 18–19 years on average reported a 56% return, those aged 20–29 years reported a 43% return, those aged 40–49 years reported a 36% return, while those aged 50–59 years reported a return of around 29% on average.

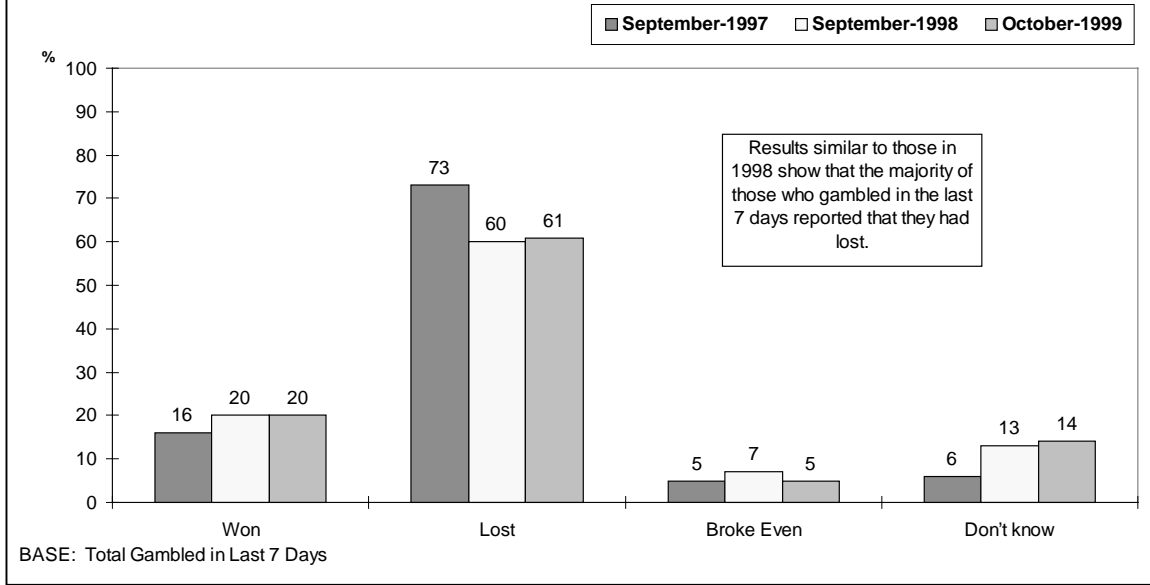
As mentioned in the note under Chart 3.13 opposite, changes in question format resulted in responses being based upon breaking even meaning winning 100% of outlay back. Due to these changes, results from 1999 are no longer directly comparable with previous years. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999.

<sup>14</sup> Question 11: Thinking about all the money you spent or outlaid on gambling activities over the last 12 months, from which one of the following sources did it mostly come?

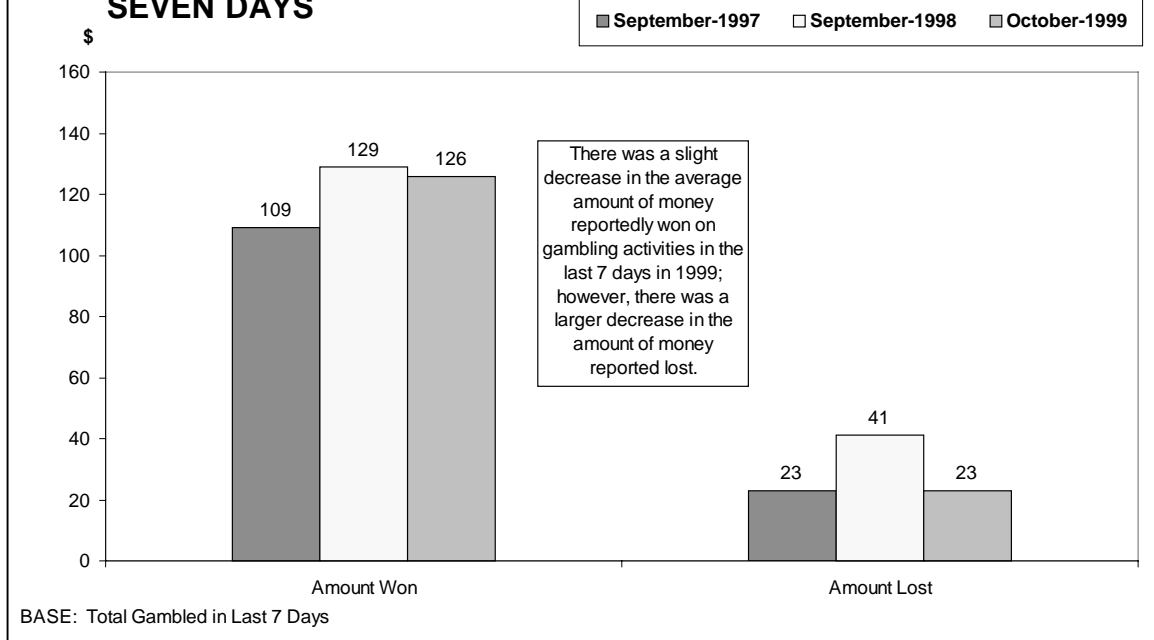
<sup>15</sup> Question 6A2–6P2: If breaking even represents winning back 100% of your outlay back, what percentage of your outlay over the past 12 months do you think you won back on...(gambling activity)...?

## TOTAL VICTORIAN GAMBLING PATTERNS

**FIGURE 3.14 WON OR LOST ON GAMBLING ACTIVITIES - LAST SEVEN DAYS**



**FIGURE 3.15 AMOUNT WON OR LOST GAMBLING - LAST SEVEN DAYS**



### 3.14 Won or Lost on Gambling Activities – Last 7 Days

Figure 3.14<sup>16</sup> opposite provides an analysis of whether gamblers reported they had won or lost on gambling activities in the last 7 days. Of the 33% of Victorians who had gambled in the last 7 days, the majority (61%) said they had lost. Only 20% of those who had gambled in the last 7 days thought they had won in total, while 5% said they broke even.

Overall, there was a *higher* level of reporting of a *loss* in the following groups:

- ✓ 60–69 year olds (67%);
- ✓ Para-professionals (73%); and
- ✓ Occasional Gamblers (63%).

Overall, there was a *higher* level of reporting a *win* in the following groups:

- ✓ Social Gamblers (26%); and
- ✓ Committed Heavy Gamblers (26%).

### 3.15 Amount Won or Lost Gambling – Last 7 Days

Figure 3.15<sup>17</sup> opposite shows the average amount of money claimed as won or lost on gambling in the last 7 days. For winning gamblers, the average amount reported as won in the last 7 days was \$126, and for losing gamblers, the reported average loss in the last 7 days was \$23 (findings below are based on a small sample).

The following groups reported *higher* levels of amount won:

- ✓ Labourers (\$285);
- ✓ Single people (\$279);
- ✓ 50–59 year olds (\$261); and
- ✓ Acknowledged Heavy Gamblers (\$229).

The following groups reported *lower* levels of amount won:

- ✓ Plant/machine operators/drivers (\$53);
- ✓ 60–69 year olds (\$56);
- ✓ Self-supporting retirees (\$57);
- ✓ Occasional Gamblers (\$71); and
- ✓ Social Gamblers (\$91).

The following groups reported *higher* average amounts lost:

- ✓ Committed Heavy Gamblers (\$55); and
- ✓ Acknowledged Heavy Gamblers (\$46).

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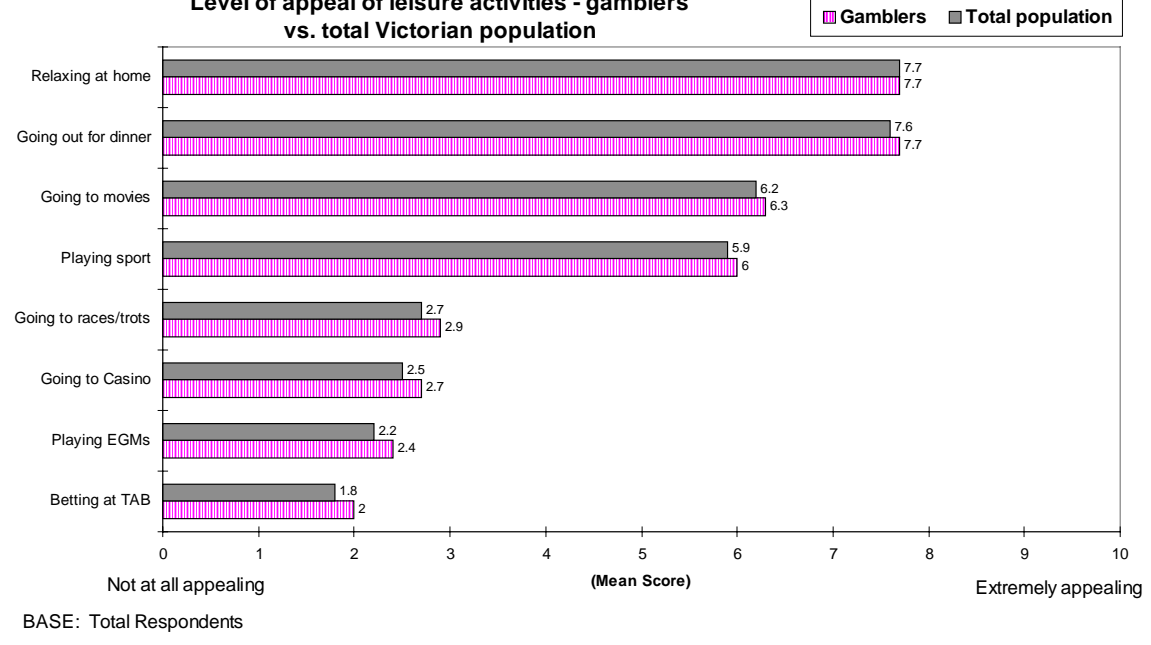
<sup>16</sup> Question 13: Thinking of all the gambling activities you participated in during the past week. Overall, did you win or lose in total on gambling activities this week?

<sup>17</sup> Question 14A: How much more money did you have at the end of the week, due to gambling, than you had at the start?  
Question 14B: How much less money did you have at the end of the week, due to gambling, than you had at the start?

# TOTAL VICTORIAN GAMBLING PATTERNS

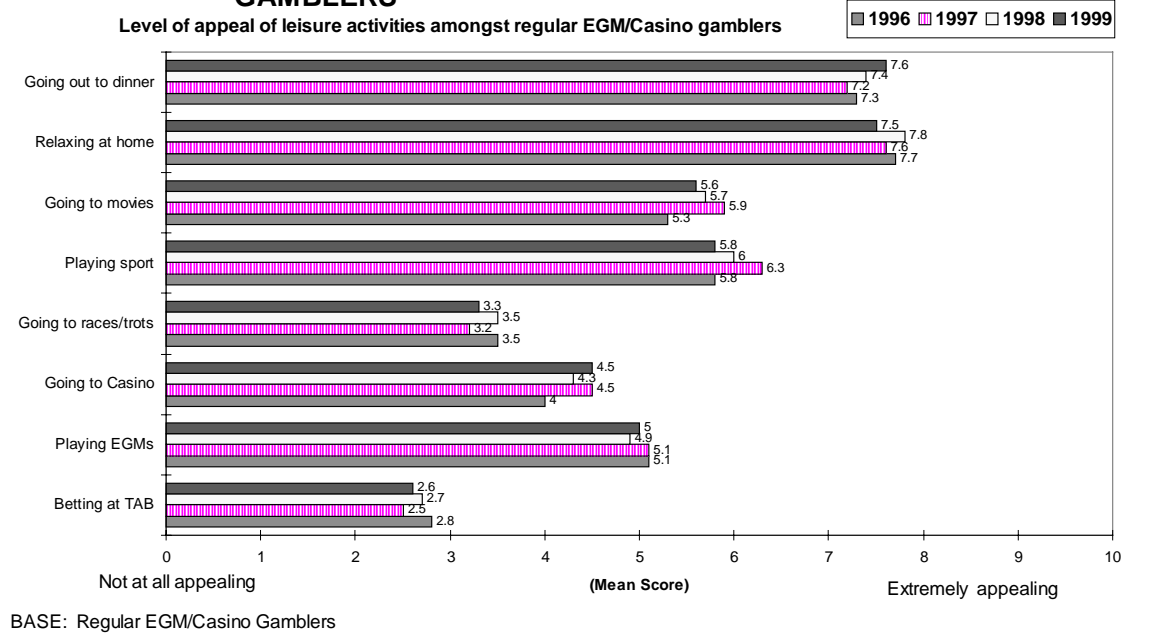
**FIGURE 3.16 APPEAL OF LEISURE ACTIVITIES**

Level of appeal of leisure activities - gamblers vs. total Victorian population



**FIGURE 3.17 APPEAL OF LEISURE ACTIVITIES - REGULAR EGM/CASINO GAMBLERS**

Level of appeal of leisure activities amongst regular EGM/Casino gamblers





### 3.16 Appeal of Leisure Activities – Gamblers

Respondents were asked to rate a number of spare time or leisure activities on a scale of 1 to 10, where 1 corresponded to “not at all appealing” and 10 corresponded to “extremely appealing”.

The leisure activities respondents were asked to rate in terms of appeal were as follows:

- ✓ Betting at the TAB;
- ✓ Playing sport;
- ✓ Going to the movies;
- ✓ Going to the races or trots;
- ✓ Going out for dinner;
- ✓ Relaxing at home (e.g. watching TV);
- ✓ Playing poker machines (“pokies”); and
- ✓ Going to the Casino.

In previous years, this question was asked only of those who had participated in gambling activities within the last 12 months. In 1999, the question was asked of all respondents, thereby permitting a comparison between total population and the 81% thereof who had gambled within the last year.

Figure 3.16<sup>18</sup> opposite provides an analysis of the mean scores in relation to the ratings of appeal of various leisure activities amongst the total population and the sub-population of gamblers.

There was a high level of appeal for passive activities such as *relaxing at home* (total population mean rating of 7.7) and *relaxing at home* (7.6), and a moderate level of appeal for more active pursuits such as *going to the movies* (6.2) and *playing sport* (5.9).

There was a low level of appeal for specific gambling activities such as *going to the races or trots* (2.7), *going to the Casino* (2.5), *playing poker machines (“pokies”)* (2.2) and *betting at the TAB* (1.8).

Those reporting having gambled within the last 12 months were only slightly more interested in gambling activities than the total population—probably due to the diversity of activities available to those wishing to gamble. However, of interest, those reporting gambling activity also tended to be slightly more interested in most non-gambling activities than the total population.

### 3.17 Appeal of Leisure Activities – Regular EGM/Casino Gamblers

Figure 3.17 provides an analysis of the mean scores in relation to the ratings of appeal of various leisure activities amongst those who gambled at least once per month on EGMs or at the Casino.

The appeal of gambling activities such as *going to the Casino* (mean rating of 4.5), *going to the races/trots* (3.3), *playing EGMs* (5.0) and *betting at the TAB* (2.6) was higher for regular EGM/Casino gamblers than for gamblers in general. However, these were still of less appeal to them than the non-gambling activities.

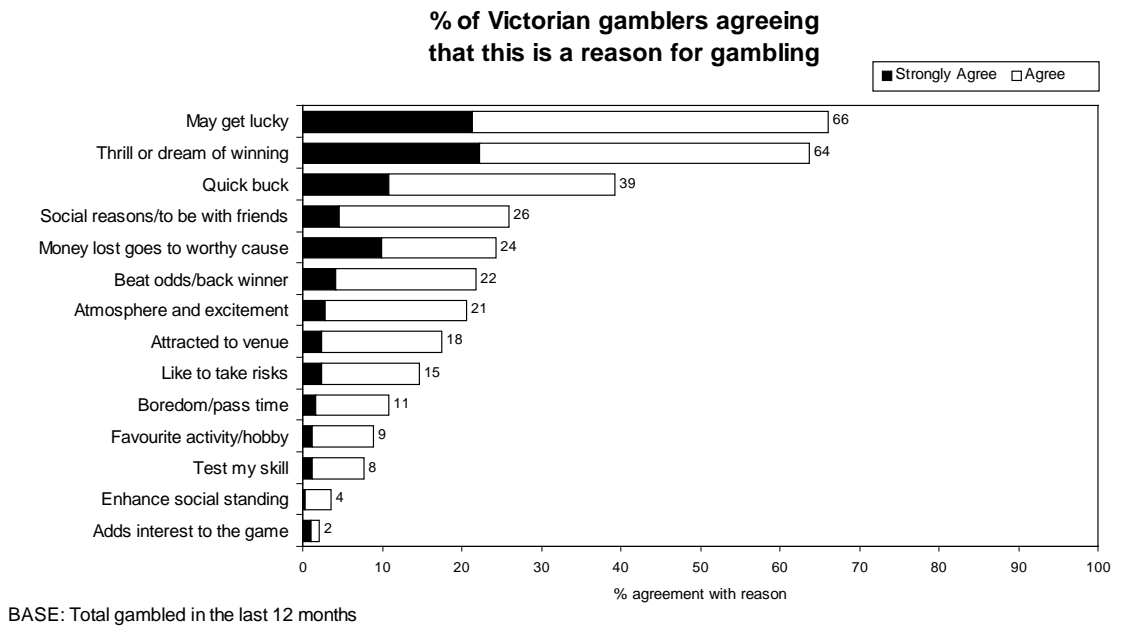
The appeal of non-gambling activities for these regular EGM/Casino players was similar to that for all those who reported having gambled.

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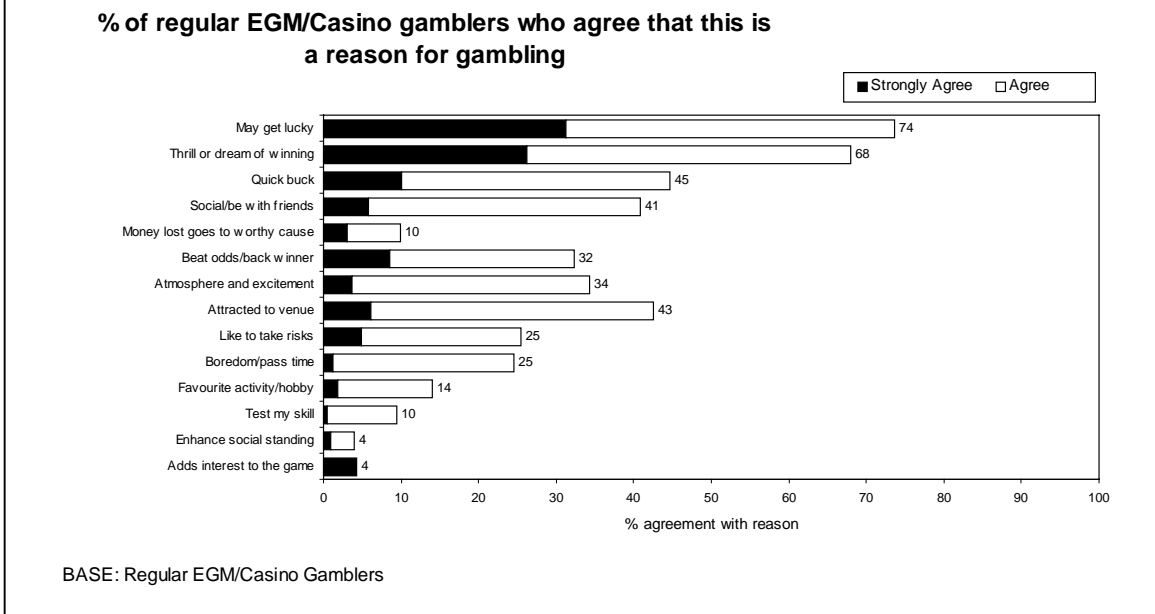
<sup>18</sup> Questions 23A–H: We would now like you to rate a number of spare time or leisure activities on a scale of 1 to 10 where a 1 is not at all appealing and 10 is extremely appealing. So on a scale of 1 to 10, how appealing is (betting at the TAB/playing sport/going to the movies/going to the races or trots/going out for dinner/relaxing at home e.g. watching TV/playing the poker machines (“pokies”)/going to the casino)?

# TOTAL VICTORIAN GAMBLING PATTERNS

**FIGURE 3.18 REASONS - GAMBLERS**



**FIGURE 3.19 REASONS - REGULAR EGM/CASINO GAMBLERS**



### 3.18 Reasons – Gamblers

For each gambling activity played in the last 12 months, gamblers were asked the extent of their agreement with a series of possible reasons for participating in that activity (reasons not relevant to all activities were presented to respondents only in respect of those to which they were considered relevant). Figure 3.18<sup>19</sup> opposite illustrates the reasons for gambling amongst Victorian gamblers.

The two reasons for gambling that had the highest level of agreement among gamblers were found to be:

- ✓ “Because I believe I may get lucky” (66%); and
- ✓ “For the thrill or dream of winning” (64%).

The only other reason agreed with by more than one third of gamblers was:

- ✓ “To make a quick buck” (39%).

Unlike most of the other reasons presented to respondents, the three reasons mentioned above all relate to gambling’s potential financial rewards. Of the other reasons presented, only one was agreed with by more than one quarter of gamblers:

- ✓ “For social reasons/to be with friends” (26%).

In 1999, this question was asked as a series of closed, agreement-scale questions, rather than as one open-ended, multiple-response question, as in previous years. Due to these changes, results from 1999 are no longer directly comparable with previous years. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999.

### 3.19 Reasons – Regular EGM/Casino Gamblers

Figure 3.19<sup>19</sup> opposite shows that regular EGM/Casino gamblers were more likely than gamblers in general to agree with reasons put to them as possible reasons why they gamble, including the three most frequent:

- ✓ “Because I believe I may get lucky” (74%);
- ✓ “For the thrill or dream of winning” (68%); and
- ✓ “To make a quick buck” (45%).

However, the two reasons for which level of agreement among regular EGM/Casino gamblers most outstripped that among gamblers in general were:

- ✓ “Because I am attracted to the venue” (43%, vs. 18%—but not a reason which is relevant to all gambling activities); and
- ✓ “For social reasons/to be with friends” (41%, vs. 26%).

The only reason for which level of agreement was lower among regular EGM/Casino gamblers was:

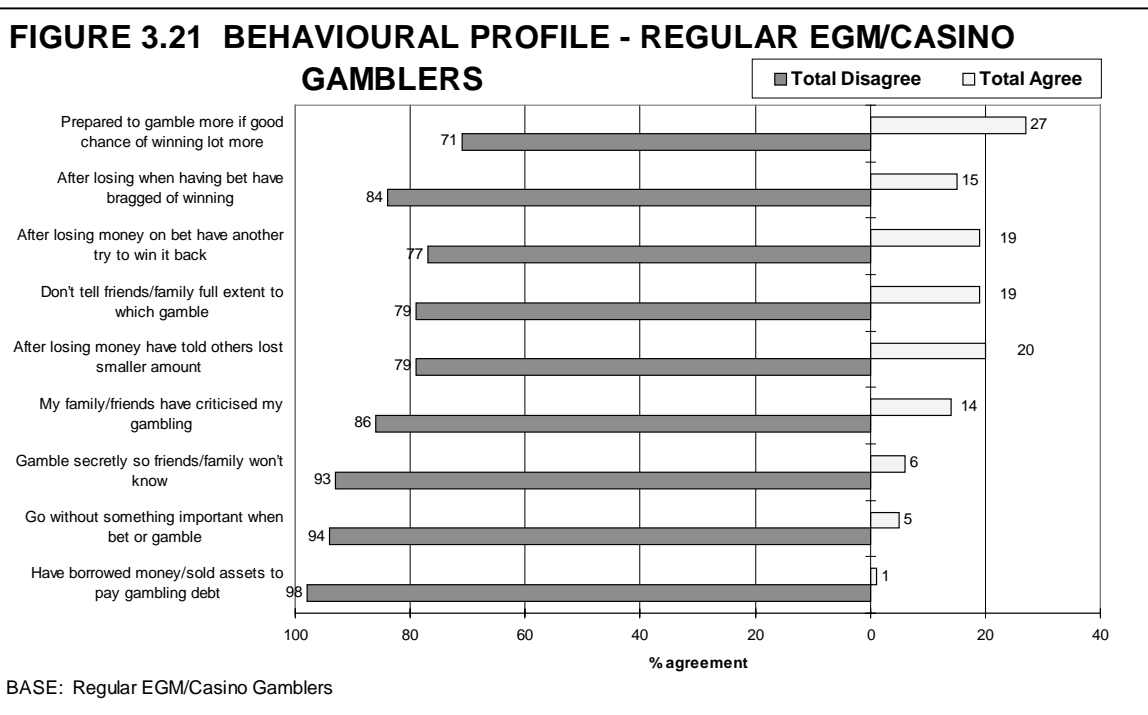
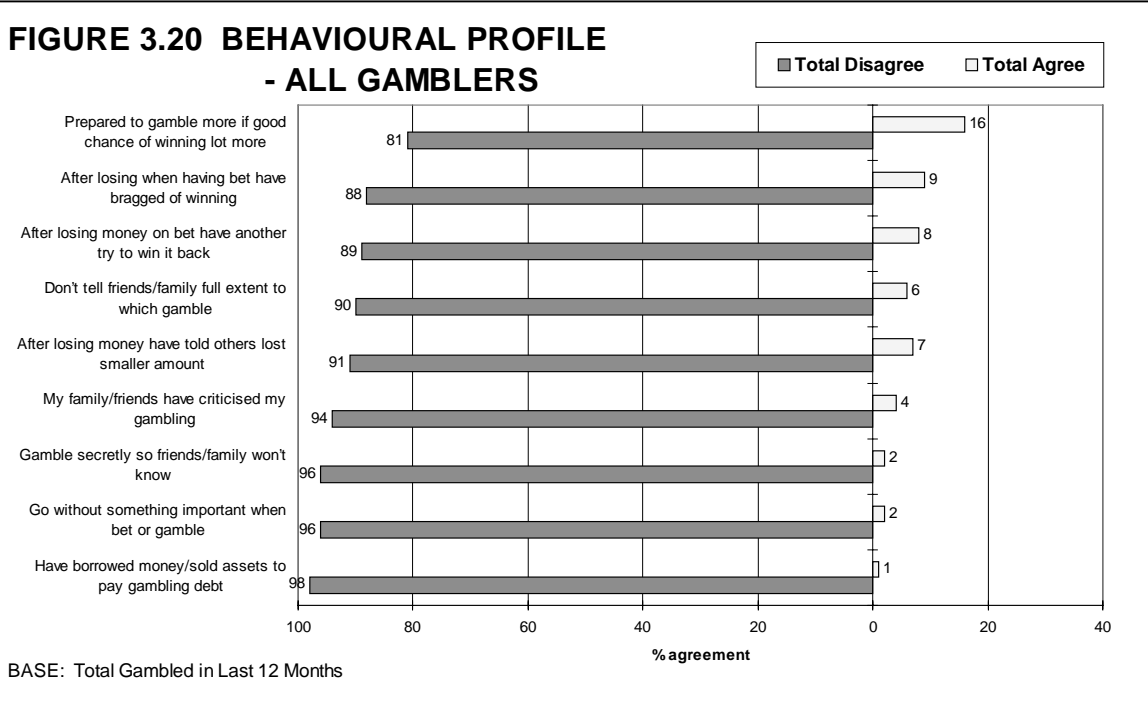
- ✓ “Because money lost goes to a worthy cause” (10%, vs. 24%).

<sup>19</sup> Question 7A–7N: I’m now going to read out a series of reasons for playing/entering/betting on... (gambling activity)...I want you to tell me how strongly you agree or disagree that each is a reason for playing/entering/betting on... (gambling activity).

(7A: For the thrill or dream of winning/7B: Because it’s a favourite recreational activity or hobby/7C: Out of boredom to pass the time/7D: Because I like to beat the odds and back a winner/7E: Because I believe I may get lucky/7F: To test my skill/7G: To make a quick buck/7H: Because I like to take risks/7I: To enhance my social standing/7J: Because money lost goes to a worthy cause/7K: For social reasons or to be with friends/7L: Because of the atmosphere and excitement—it gives me a buzz/7M: Because I am attracted to the venue itself/7N: Because it adds interest to listening to or watching the game)

(Presented only in respect of private cards and racing activities; <sup>a</sup>Presented only in respect of Footybet and sports betting)

## TOTAL VICTORIAN GAMBLING PATTERNS



### 3.20 Behavioural Profile – Gambling Population

Figure 3.20<sup>20</sup> illustrates the behavioural profile in relation to a number of important gambling behaviours for the gambling population. Respondents who had gambled in the last 12 months were asked the extent of their agreement with a series of statements relating to gambling behaviour. There was very high general disagreement with all of the statements read to respondents, with no less than four in five gamblers disagreeing with any statement.

More than nine in ten of those reporting gambling activity disagreed that:

- ✓ “I have borrowed money or sold assets to pay a betting or gambling debt” (98%);
- ✓ “I gamble secretly so that my friends, family and acquaintances will not know” (96%);
- ✓ “My family or friends have criticised my gambling” (94%); and
- ✓ “After losing money when having a bet or gambling, I have told others that I have lost a smaller amount” (91%).

The highest levels of agreement among those who had gambled were with statements that:

- ✓ “I am prepared to bet or gamble more money if I think there is a good chance of winning a lot more” (16%);
- ✓ “After losing when having a bet or gambling, I have bragged about winning” (9%); and
- ✓ “After losing money when having a bet or gambling, I have another bet to try and win it back” (8%).

### 3.21 Behavioural Profile – Regular EGM/Casino Gamblers

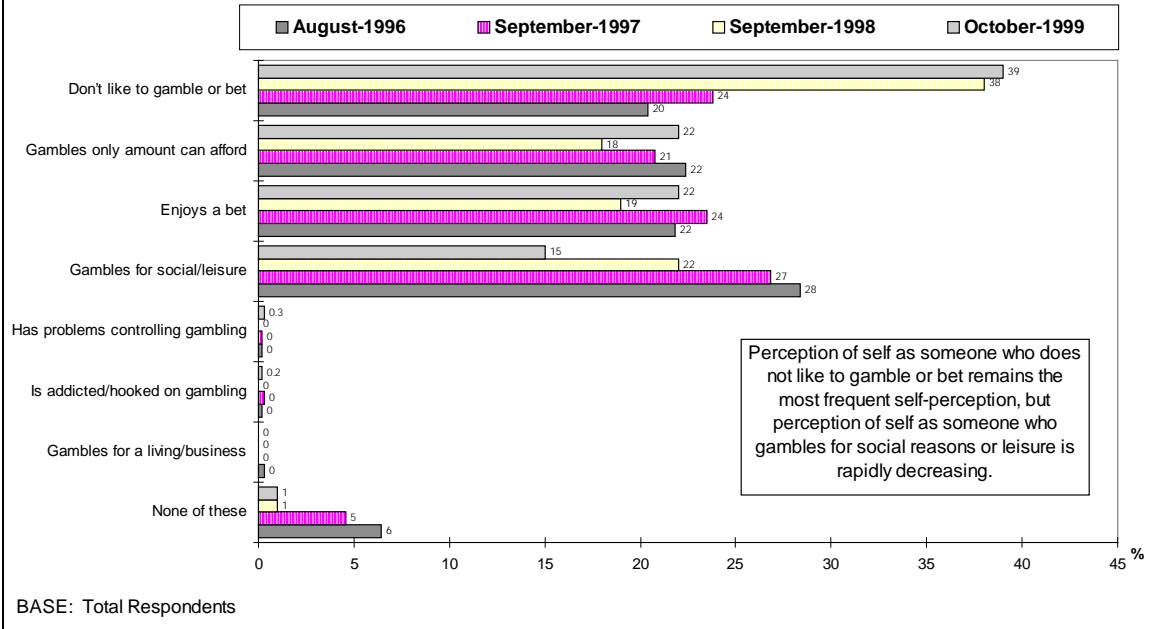
Figure 3.21 displays the behavioural profile of regular EGM/Casino gamblers. When compared with the general gambling population, they had a higher level of agreement with almost all statements. More than one quarter (27%) agreed that they would bet more if they thought there was a good chance of winning a lot more. Statements with which regular EGM/Casino players most appreciably agreed more frequently than the gambling population in general included:

- ✓ “My family or friends have criticised my gambling” (14%, vs 4%);
- ✓ “I don’t tell my family or friends the full extent of how much I bet or gamble” (19%, vs. 6%);
- ✓ “I gamble secretly so that my friends, family and acquaintances will not know” (6%, vs. 2%);
- ✓ “After losing money when having a bet or gambling, I have told others that I have lost a smaller amount” (20%, vs. 7%); and
- ✓ “After losing money when having a bet or gambling, I have another bet to try and win it back” (19%, vs. 8%).

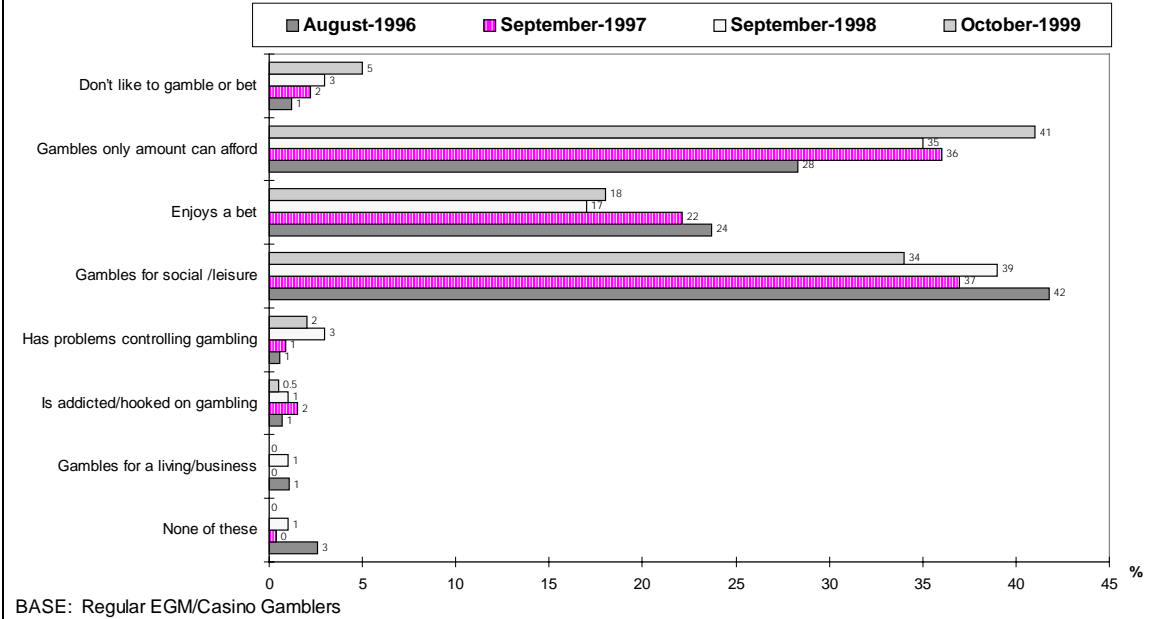
<sup>20</sup> Question 30A–30I: I am now going to read out a series of statements. I want you to tell me how strongly you agree or disagree with each statement. (30a. After losing money, when having a bet or gambling I have another bet to try and win it back/30b. After losing money when having a bet or gambling, I have told others that I have lost a smaller amount/Q30c. . After losing when having a bet or gambling, I have bragged about winning/Q30d. I am prepared to bet or gamble more money if I think there is a good chance of winning a lot more/Q30e. . My family or friends have criticised my gambling/Q30f. I don’t tell my family or friends the full extent of how much I bet or gamble/Q30g. I go without something that is important to me when I bet or gamble/Q30h. I have borrowed money or sold assets to pay a betting or gambling debt/Q30i. I gamble secretly so that my friends, family and acquaintances will not know.) Do you agree or disagree? (IF NECESSARY: Is that strongly (agree/disagree) or just (agree/disagree)?)

# TOTAL VICTORIAN GAMBLING PATTERNS

**FIGURE 3.22 SELF-PERCEPTIONS RELATING TO GAMBLING PATTERNS - TOTAL POPULATION**



**FIGURE 3.23 SELF-PERCEPTIONS RELATING TO GAMBLING PATTERNS - REGULAR EGM/CASINO GAMBLERS**



### **3.22 Self-Perceptions – Total Population**

Figure 3.22<sup>21</sup> highlights the self-perception of gambling behaviour of the total Victorian adult population. All respondents were read a series of statements and asked which one best described them personally in terms of gambling behaviour.

As in 1998, respondents most frequently described themselves as someone who does not like to gamble or have a bet (39%—up 1 point from 1998).

Other descriptions with relatively high endorsement as self-perceptions included:

- ✓ Enjoys a bet or flutter (22%)—up 3 points from 1998;
- ✓ Gambles, but only an amount which can be afforded (22%)—up 4 points from 1998; and
- ✓ Gambles for social interaction or leisure (15%)—down 7 points from 1998, and increasing its rate of decline.

As in previous years, very few respondents (less than 1%) considered themselves best described as having a problem in controlling the level of gambling, being addicted or hooked on gambling, or gambling for a living.

Those more likely to describe themselves as someone who doesn't like to bet or gamble included:

- ✓ Those born in eastern Europe (63%);
- ✓ Those born in New Zealand (63%);
- ✓ Single parents with children not at home (57%);
- ✓ Those born in the Asia/Pacific region (51%);
- ✓ Students (48%); and
- ✓ Professionals (47%).

### **3.23 Self-Perceptions – Regular EGM/Casino Gamblers**

Figure 3.23 opposite displays the self-perceptions of regular EGM/Casino players.

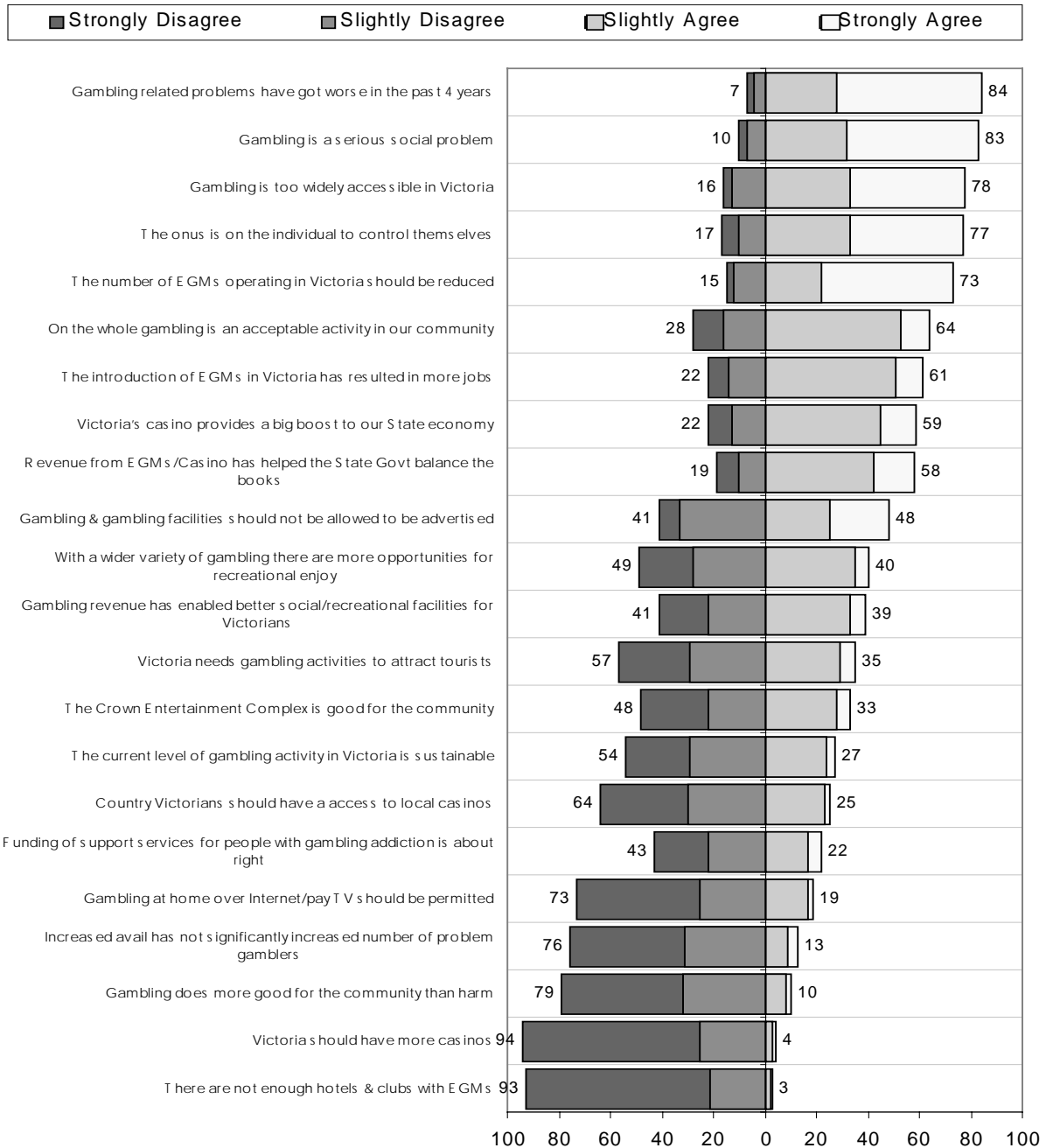
As might be expected, relatively few regular EGM/Casino players (5%) said they would describe themselves as someone who does not like to gamble or bet. As might also be expected, all other self-perceptions—all of which reflect a liking for or involvement in gambling—were more highly endorsed by regular EMG/Casino players than among the total population.

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<sup>21</sup> Question 29: Which ONE of the following statements BEST describes you personally? Are you someone who...(statement list)?

## TOTAL VICTORIAN GAMBLING PATTERNS

### FIGURE 3.24 ATTITUDES TO GAMBLING



BASE: Total Respondents



### 3.24 Attitudes to Gambling

Figure 3.24 provides a summary of Victorians' attitudes to gambling<sup>22</sup>. Respondents were read a series of statements of attitudes towards gambling and asked to indicate their level of agreement with each statement<sup>23</sup>.

Generally, there were high levels of agreement with statements that:

- ✓ “Gambling-related problems have become worse in the past four years”;
- ✓ “Gambling is a serious social problem”;
- ✓ “Gambling is too widely accessible in Victoria”;
- ✓ “The onus is on the individual to control themselves when gambling by knowing what he or she can afford”; and
- ✓ “The number of poker machines (“pokies”) operating within Victoria should be reduced”.

There were moderate levels of agreement with statements that:

- ✓ “On the whole, gambling is an acceptable activity in our community”;
- ✓ “The introduction of poker machines (“pokies”) in Victoria has resulted in more jobs”;
- ✓ “Victoria’s Casino provides a big boost to our state economy”; and
- ✓ “Revenue from poker machines (“pokies”) and the Casino has helped the State Government balance the books”.

Agreement and disagreement were relatively evenly divided on statements that:

- ✓ “Gambling and gambling facilities should not be allowed to be advertised”;
- ✓ “Now that Victoria has a greater variety of gambling available, there are more opportunities for recreational enjoyment”; and
- ✓ “Gambling revenue has enabled better social and recreational facilities to be provided for Victorians”.

There were moderate levels of disagreement with statements that:

- ✓ “Victoria needs gambling activities to attract tourists”;
- ✓ “The Crown Entertainment Complex is good for the community”;
- ✓ “The current level of gambling activity in Victoria is sustainable”;
- ✓ “Country Victorians should have access to local casinos”; and
- ✓ “Funding of support services for people with gambling addictions is about right to meet current problems”.

There were high levels of disagreement with statements that:

- ✓ “Gambling at home, either over the Internet or via pay TV, should be permitted”;
- ✓ “The increased availability of gambling opportunities has not significantly increased the numbers of problem gamblers”;
- ✓ “Gambling does more good for the community than harm”;
- ✓ “Victoria should have more casinos”; and
- ✓ “There are not enough hotels and clubs with poker machines (“pokies”).

<sup>22</sup> It should be noted that the graph does not show the “neither agree nor disagree” category nor the “can’t say”. Hence, for statements where there is a large proportion of responses in these categories, the overall length of the bar will be substantially shorter than other bars. An instance of this is the bar for “Funding of support services for people with gambling addictions is about right”.

<sup>23</sup> See Question 31A–32M.

**TABLE 3.24 ATTITUDES TO GAMBLING – TIME SERIES<sup>24</sup>**

	Total %	Strongly Disagree	Slightly Disagree	Neither	Slightly Agree	Strongly Agree	Can't Say
Gambling-related problems have got worse in the last four years							
1996.....	100	3	4	6	17	67	4
1997.....	100	3	3	2	17	67	7
1998.....	100	2	5	4	32	50	7
1999.....	100	3	4	3	28	56	6
Gambling is a serious social problem							
1996.....	100	5	6	4	29	55	1
1997.....	100	4	10	2	22	60	3
1998.....	100	3	10	5	32	48	2
1999.....	100	3	7	4	32	51	3
The onus is on the individual to control themselves when gambling by knowing what he or she can afford							
1996.....	100	10	7	2	19	61	0
1997.....	100	8	8	2	24	57	2
1998.....	100	7	9	4	40	39	1
1999.....	100	7	10	4	33	44	2
Gambling is too widely accessible in Victoria							
1996.....	100	8	12	4	19	56	0
1997.....	100	6	13	3	22	54	2
1998.....	100	4	16	5	34	39	2
1999.....	100	3	13	4	33	45	2
The introduction of poker machines (“pokies”) in Victoria has resulted in more jobs							
1996.....	100	12	8	8	40	30	3
1997.....	100	12	10	3	45	23	8
1998.....	100	8	12	7	51	14	9
1999.....	100	8	14	8	51	10	9
The number of poker machines (“pokies”) operating in Victoria should be reduced							
1996.....	100	9	15	17	15	42	2
1997.....	100	6	17	7	18	47	4
1998.....	100	5	13	11	27	41	4
1999.....	100	3	12	9	22	51	3
Victoria’s Casino provides a big boost to our state economy							
1996.....	100	20	11	7	30	31	0
1997.....	100	14	9	4	36	29	8
1998.....	100	15	16	8	40	12	10
1999.....	100	9	13	8	45	14	11
On the whole, gambling is an acceptable activity in our community							
1996.....	100	20	10	7	37	24	0
1997.....	100	20	13	5	43	18	1
1998.....	100	11	14	8	53	12	2
1999.....	100	12	16	7	53	11	1

<sup>24</sup> See Question 31A–32N.



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Table 3.24 on Pages 78, 80 and 81 shows a time-series analysis of Victorians' attitudes to gambling. The time series compares results from the current survey with those from years 1998 and 1997 of the current survey and those from the "Positive and Negative Perceptions of Gambling Survey" conducted in 1996.

Overall, the 1999 survey found more respondents who *strongly* agreed with negative attitudinal statements and *strongly* disagreed with positive attitudinal statements about gambling than had been reported for the 1998 survey. Although the results were less negative than those for the 1997 and 1996 surveys, in general, it appears that the overall flavour of opinion concerning gambling in Victoria is receding from its most positive point in this survey to date (1998), and it will be of interest to see whether this slight change in direction of opinion stabilises or continues to head towards the more negative opinion of previous years.

In particular, a more negative general orientation towards gambling and gambling-related problems is suggested by increases in proportions of respondents *strongly* agreeing with the statements:

- ✓ "The number of poker machines ("pokies") operating in Victoria should be reduced" (51%—up 10 points from 1998, and the first time in this survey that more than half of respondents have *strongly* agreed with this statement);
- ✓ "Gambling-related problems have got worse in the last 4 years" (56%—up 6 points);
- ✓ "Gambling is too widely accessible in Victoria" (45%—up 6 points);
- ✓ "Gambling and gambling facilities should not be allowed to be advertised" (23%—up 4 points);
- ✓ "Gambling is a serious social problem" (51%—up 3 points);

...and by increases in proportions of respondents *strongly* disagreeing with the statements:

- ✓ "There are not enough hotels and clubs with poker machines ("pokies")" (72%—up 8 points);
- ✓ "Gambling at home over the Internet/pay TV should be permitted" (48%—up 8 points); and
- ✓ "Increased availability has not significantly increased the number of problem gamblers" (45%—up 5 points).

A slightly pragmatic shift in opinion is suggested by:

- ✓ An increase in proportion *strongly* agreeing that "The onus is on the individual to control themselves when gambling by knowing what he/she can afford" (44%—up 5 points);
- ✓ An increase in proportion *strongly* agreeing that "Revenue from poker machines ("pokies") and the Casino has helped the State Government balance the books" (16%—up 4 points);
- ✓ An increase in overall agreement that "Victoria's Casino provides a big boost to our State economy (*slight* agreement up 5 points, at 45%; *strong* agreement up 2 points, at 14%); and
- ✓ A decrease in proportion *strongly* disagreeing that "Country Victorians should have access to local casinos" (34%—down 5 points, and continuing a steady trend to date).

...although any perceptions of economic benefit suggested above do not appear to extend to the State's employment situation, as suggested by:

- ✓ A decrease in proportion *strongly* agreeing that "The introduction of poker machines ("pokies") in Victoria has resulted in more jobs" (10%—down 4 points).

...and there appears to be growing doubt about the duration of any such benefits, as suggested by:

- ✓ An increase in the proportion *strongly* disagreeing that "The current level of gambling activity in Victoria is sustainable" (25%—up 4 points).
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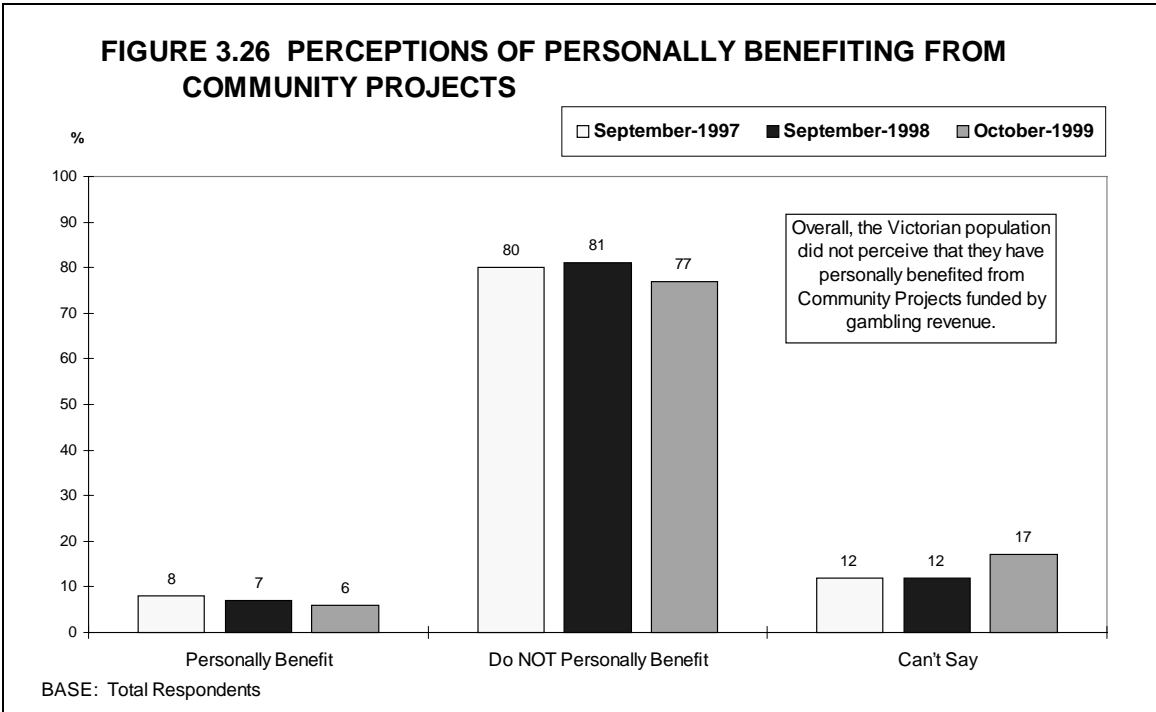
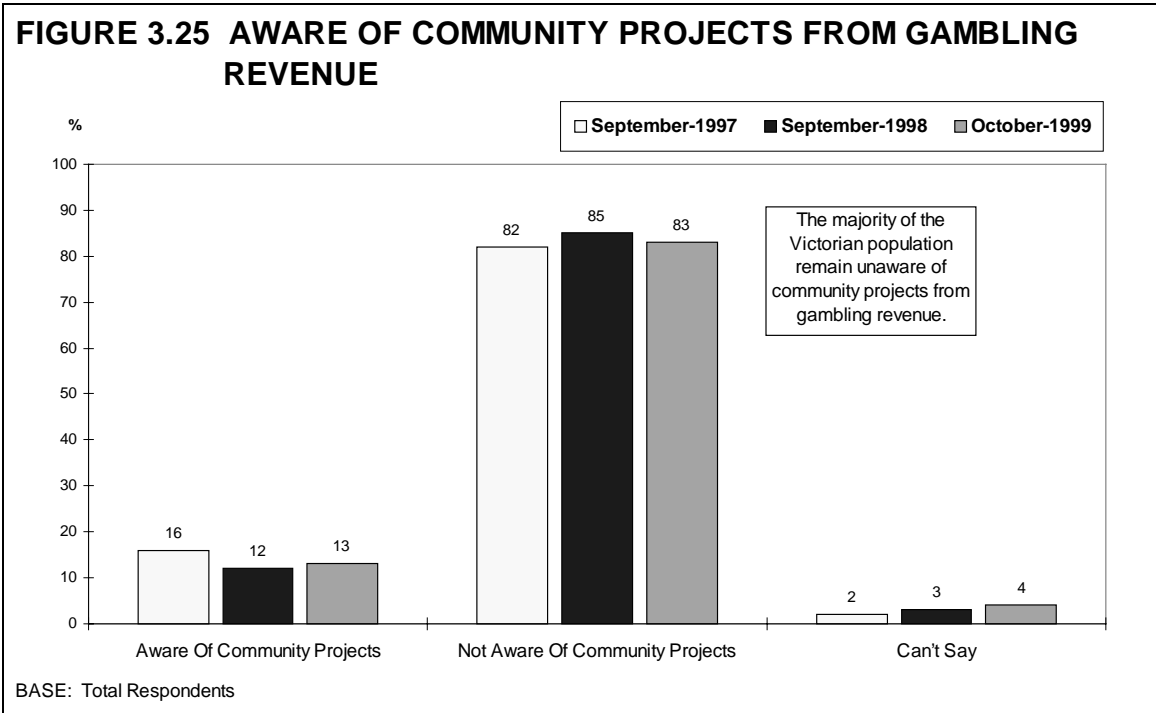
**TABLE 3.24 ATTITUDES TO GAMBLING – TIME SERIES (Continued)**

	Total %	Strongly Disagree	Slightly Disagree	Neither	Slightly Agree	Strongly Agree	Can't Say
Revenue from poker machines (“pokies”) and the Casino has helped the State Government balance the books							
1996.....	100	16	6	9	32	31	5
1997.....	100	12	8	5	36	21	19
1998.....	100	11	12	9	40	12	17
1999.....	100	9	10	8	42	16	15
Gambling revenue has enabled better social and recreational facilities to be provided for Victorians							
1996.....	100	32	12	12	26	12	6
1997.....	100	22	19	4	33	12	11
1998.....	100	20	20	8	34	7	11
1999.....	100	19	22	8	33	6	12
The Crown Entertainment Complex is good for the Community							
1996.....	100	N/A	N/A	N/A	N/A	N/A	N/A
1997.....	100	27	14	8	30	14	6
1998.....	100	26	21	13	28	7	6
1999.....	100	26	22	14	28	5	5
Gambling and gambling facilities should not be allowed to be advertised							
1996.....	100	17	21	11	17	34	1
1997.....	100	13	35	6	17	27	3
1998.....	100	11	34	10	24	19	3
1999.....	100	8	33	9	25	23	2
Victoria needs gambling activities to attract tourists							
1996.....	100	38	18	3	21	19	1
1997.....	100	32	21	2	29	15	2
1998.....	100	29	27	5	28	9	3
1999.....	100	28	29	5	29	6	3
Now that Victoria has a greater variety of gambling available, there are more opportunities for recreational enjoyment							
1996.....	100	34	17	8	26	11	2
1997.....	100	31	22	4	30	10	3
1998.....	100	21	23	7	37	7	5
1999.....	100	21	28	7	35	5	4
The current level of gambling activity in Victoria is sustainable							
1996.....	100	28	17	14	23	12	6
1997.....	100	30	22	3	26	7	12
1998.....	100	21	25	8	27	7	12
1999.....	100	25	29	8	24	3	11

**TABLE 3.24 ATTITUDES TO GAMBLING – TIME SERIES Continued**

	Total %	Strongly Disagree	Slightly Disagree	Neither	Slightly Agree	Strongly Agree	Can't Say
<b>Funding of support services for people with gambling addictions is about right</b>							
1996.....	100	27	16	21	12	6	18
1997.....	100	27	16	4	19	12	23
1998.....	100	19	22	12	18	5	24
1999.....	100	21	22	10	17	5	25
<b>Country Victorians should have access to local casinos</b>							
1996.....	100	54	15	9	14	5	2
1997.....	100	46	20	4	22	5	4
1998.....	100	39	23	8	22	4	4
1999.....	100	34	30	6	23	2	5
<b>Gambling at home, either over the Internet or via pay TV, should be permitted</b>							
1996.....	100	70	8	8	7	5	2
1997.....	100	52	17	4	17	5	6
1998.....	100	40	27	8	18	3	5
1999.....	100	48	25	6	17	2	2
<b>Increased availability of gambling opportunities has not significantly increased the number of problem gamblers</b>							
1996.....	100	44	24	7	10	10	4
1997.....	100	56	20	1	10	5	7
1998.....	100	40	33	5	12	4	7
1999.....	100	45	31	4	9	4	7
<b>Gambling does more good for the community than harm</b>							
1996.....	100	33	44	13	7	0	3
1997.....	100	57	23	5	9	3	3
1998.....	100	48	29	8	7	1	5
1999.....	100	47	32	7	8	2	4
<b>There are not enough hotels and clubs with poker machines ("pokies")</b>							
1996.....	100	75	11	7	2	3	2
1997.....	100	75	17	1	2	3	3
1998.....	100	64	25	3	3	1	4
1999.....	100	72	21	2	2	1	2
<b>Victoria should have more casinos</b>							
1996.....	100	89	6	1	2	1	0
1997.....	100	80	14	1	3	2	1
1998.....	100	68	26	2	3	1	1
1999.....	100	69	25	1	3	1	1

## TOTAL VICTORIAN GAMBLING PATTERNS



### **3.25 Awareness of Community Projects From Gambling Revenue**

Figure 3.25<sup>25</sup> opposite shows the level of awareness amongst Victorians of community projects from gambling revenue.

Respondents were told that the Victorian Government takes a percentage of the gambling revenues and spends this on community projects. They were then asked if they knew of any of these projects. Respondents were asked (in an unprompted fashion) to name projects of which they were aware.

Respondents were able to name Hospitals (4%), Gambler's Anonymous/Gamblers Helpline (2%) and the Albert Park Sports & Aquatic Centre (1%). Most (83%) of respondents were unable to name any community projects funded by gambling revenue.

### **3.26 Personally Benefit From Community Projects**

Figure 3.26<sup>26</sup> opposite displays the level of perception of personal benefits from community projects funded by gambling revenue.

Respondents were asked if they believed they personally benefited from any initiatives funded by gambling revenue. Overall, the Victorian public did not believe that they personally benefited from community projects funded by gambling revenue (6% benefited, 77% not benefited). Seventeen per cent (17%) were unable to say whether or not they had personally benefited from any of these projects.

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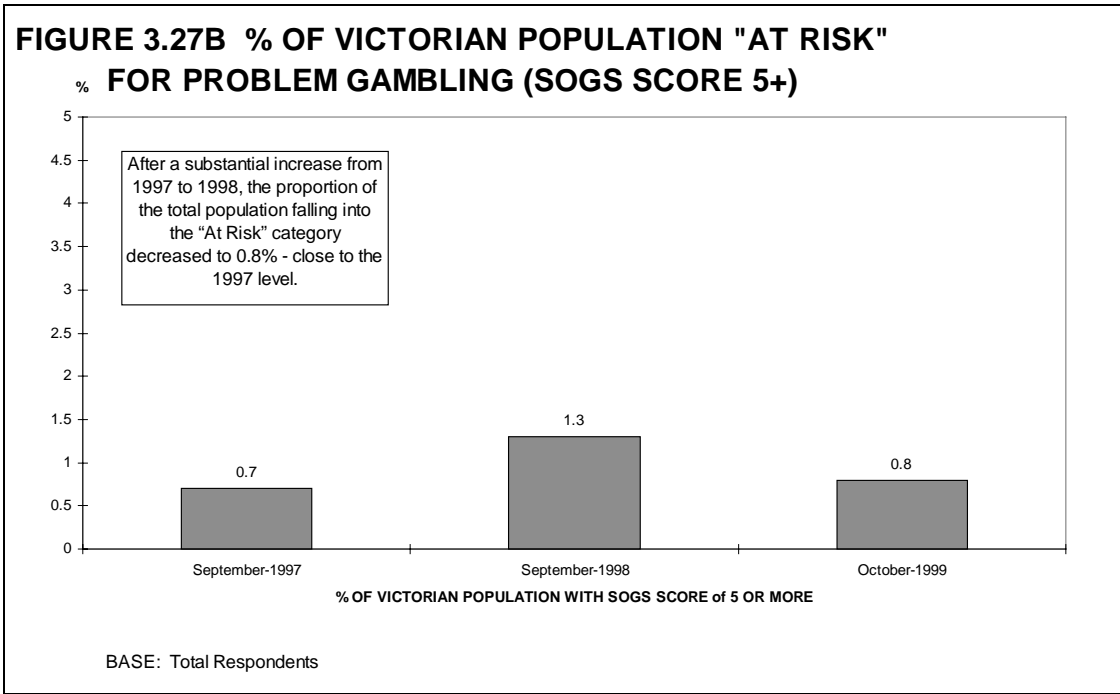
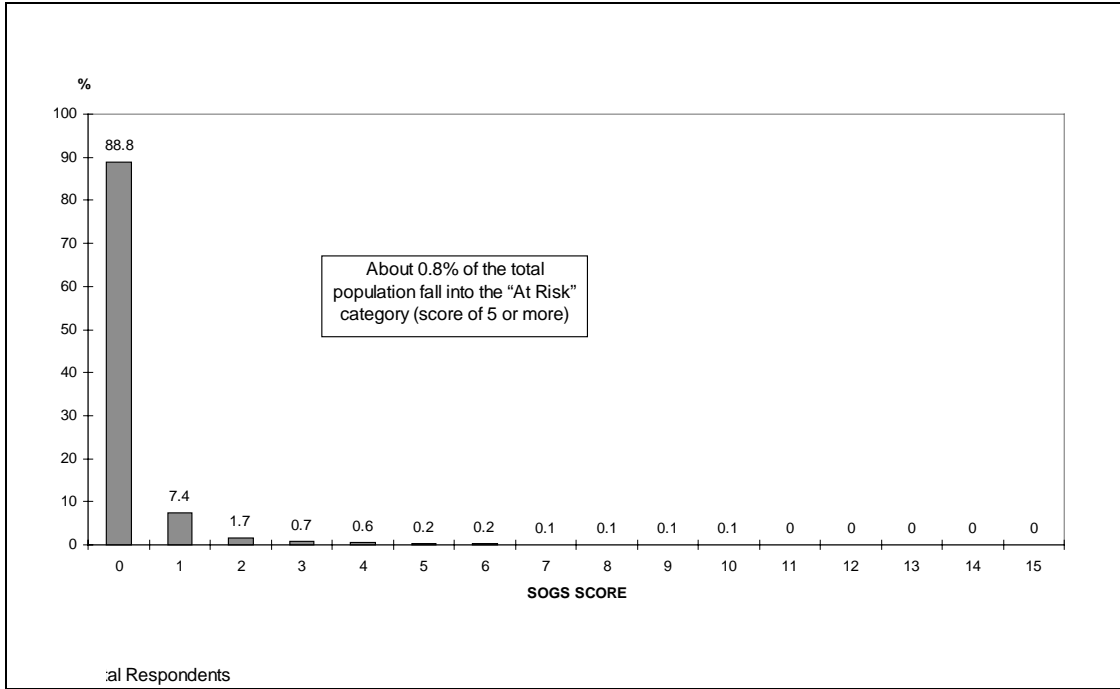
<sup>25</sup> Question 33A: The Victorian Government takes a percentage of the gambling revenues and spends this on community projects. Do you know what any of these community projects are?

<sup>26</sup> Question 33B: Do you believe that you, personally, have benefited from these community projects?

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**TOTAL VICTORIAN GAMBLING PATTERNS**



### 3.27 Problem Gambling

As mentioned in Section 2.3, the South Oaks Gambling Screen (SOGS), which was adapted for Australia and first used in this survey in 1997 to identify gambling risk levels amongst the total Victorian adult population, was once more employed. A series of 23 questions was included in the questionnaire and scores were allocated according to affirmative responses to these questions (a score of 1 is given for each affirmative response).

Figure 3.27 shows the distribution of the SOGS scores for the total Victorian population (inferred from weighted survey responses). Table 3.27 below compares scores for the total population score with those for people who have gambled in the last 6 months:

**TABLE 3.27**

SOGS Score	Total Population			Gambled in Last 6 Months		
	1997	1998	1999	1997	1998	1999
0	84.8%	88.4%	88.8%	74.4%	72.6%	77.4%
1	10.3%	6.7%	7.4%	17.3%	15.9%	15.0%
2	2.8%	2.2%	1.7%	4.8%	5.3%	3.4%
3	0.9%	0.7%	0.7%	1.5%	1.7%	1.5%
4	0.4%	0.4%	0.6%	0.7%	0.9%	1.2%
5	0.4%	0.6%	0.2%	0.7%	1.3%	0.4%
6	–	–	0.2%	–	–	0.5%
7	*	0.2%	0.1%	0.1%	0.6%	0.2%
8	0.1%	–	0.1%	0.1%	–	0.2%
9	0.1%	0.2%	0.1%	0.2%	0.6%	0.2%
10	–	–	0.1%	–	–	0.1%
11	*	*	*	0.1%	0.1%	*
12	–	0.1%	*	–	0.1%	*
13	–	–	–	–	–	–
14	–	0.1%	*	–	0.2%	*
15+	0.1%	0.1%	*	0.2%	0.2%	*
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

\* Less than 0.1%

– No response (0.0%)

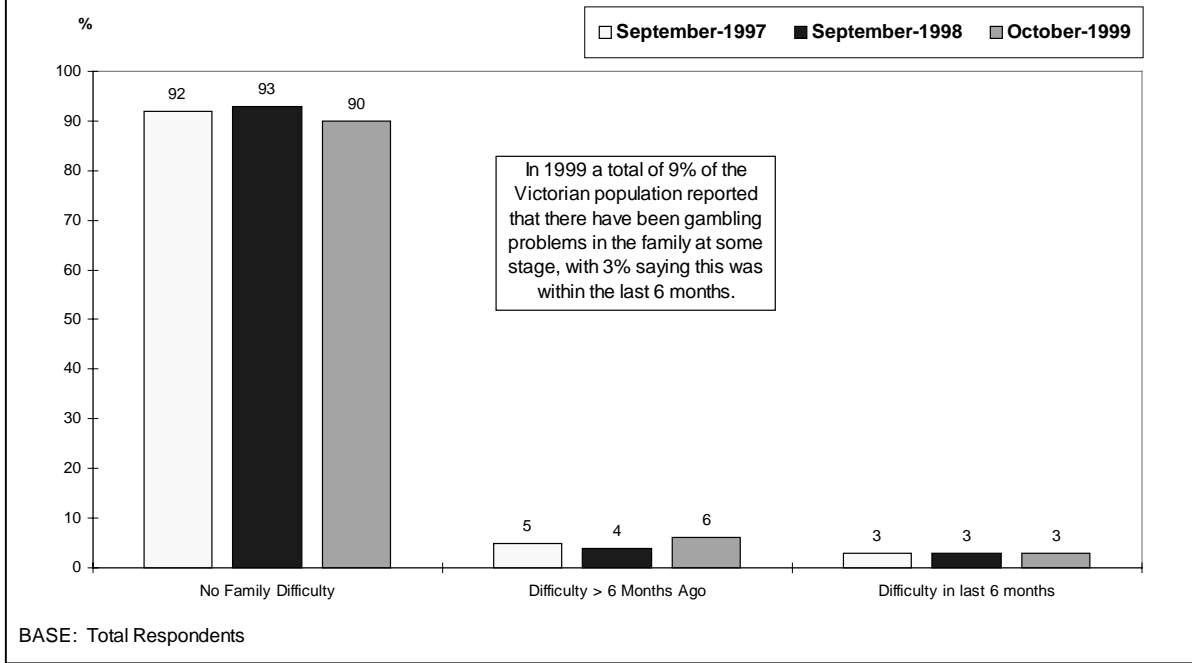
The results show that in 1999, 0.8% of the total adult population in Victoria scored in the “At Risk” category on the SOGS—a 0.7 point decrease from 1998, but almost a return to the 1997 figure of 0.7%.

The current figure of 0.8% compares with the following results for all states and for Australia as a whole from the Productivity Commission’s National Gambling Survey (1999):

- ✓ Victoria (2.01% “at risk” with SOGS score 5+);
- ✓ NSW (2.80% “at risk”);
- ✓ Queensland (2.52% “at risk”);
- ✓ South Australia (2.19% “at risk”);
- ✓ Western Australia (1.80% “at risk”);
- ✓ Tasmania (0.47% “at risk”);
- ✓ Northern Territory (1.79% “at risk”);
- ✓ Australian Capital Territory (2.12% “at risk”); and
- ✓ Australia (2.33% “at risk”).

**TOTAL VICTORIAN GAMBLING PATTERNS**

**FIGURE 3.28 GAMBLING PROBLEMS IN THE FAMILY**



The figure of 0.8% in this survey is appreciably lower than the figure of 2.1% for Victoria from the National Gambling Survey. These two surveys did not differ markedly in terms of overall sample size (1,760 vs. 2,200 for the Victorian component of the National Gambling Survey), but while the current survey was based upon sampling a random representative sample of the population, the sample design of the National Gambling Survey deliberately over-sampled gamblers and regular gamblers, then used weighting techniques to re-proportion the data to accurately represent the overall population. The potential benefits of this approach can include the increase in statistical reliability attributable to measures such as SOGS scores. On the other hand, the National Gambling Survey was conducted during a period that took in Easter and two weeks of school holidays, with unknown impact on the results.

It is important to remember that sampling error is relevant in all sample surveys, and can be estimated. Accordingly, the 95% confidence limits about an estimate of 0.8% derived from a random sample of 1,760 cases would be  $\pm 0.4\%$ . This would imply that if the survey were repeated with different samples, it may be expected that 95 times out of 100 the proportion of the population scoring in the “At Risk” category on the SOGS would be found to be between 0.4% and 1.2%.

A point to consider when evaluating data for SOGS is that it is based on the self-reports of individuals who choose their replies from options presented to them over the telephone. Answers will be to an extent influenced by the existing social and cultural context. Further discussion of the use and interpretation of SOGS in the Australian context can be found in the report “Definition and Incidence of Problem Gambling, Including the Socio-economic Distribution of Gamblers” (The Authority, August 1997).

**3.28 Gambling Problems in the Family**

Figure 3.28<sup>27</sup> opposite and Table 3.28A below show the proportion of the Victorian adult population (inferred from the weighted survey response) who would respond “yes” to the question “Have you, yourself, or any of your family members ever experienced difficulties with excessive gambling?”. Table 3.28B shows the same proportion for the adult populations in New South Wales and Tasmania. The survey respondents were also asked whether the difficulties were experienced “within the last 6 months or more than 6 months ago?”<sup>28</sup>

The results show that 3% of the Victorian population would consider that there have been gambling difficulties in their family during the last six months. In addition, the results showed that a further 6% would consider that there had been gambling difficulties in the family more than six months ago.

**TABLE 3.28A**

	<b>Vic. 1997</b>	<b>Vic. 1998</b>	<b>Vic. 1999</b>
Family member ever experiencing difficulties with excessive gambling	7%	7%	9%
Family member experiencing difficulties with excessive gambling in the past 6 months	2%	3%	3%

Those more likely to report that they have had gambling difficulties in the family at any time include:

- ✓ Acknowledged Heavy Gamblers (24%);
- ✓ Single parents with dependent children (19%);
- ✓ Those with respondent income of \$20,000–\$40,000 (13%);
- ✓ Those aged 30–39 years (11%); and
- ✓ Those born in Australia (10%).

<sup>27</sup> Question 30J: Have you, yourself, or any of your family members ever experienced difficulties with excessive gambling?

<sup>28</sup> Question 30K: Was that during the last 6 months or more than 6 months ago?

**PROFILE OF “AT RISK” GAMBLERS**

**TABLE 3.29**

	Total Population (N=1760)	No Risk (Score 0 to 4) (n=1748)	At Risk (Score ≥ 5) (n=12)
<b>GENDER</b>			
Male	49%	49%	73%
Female	51%	51%	27%
<b>AGE</b>			
Average Age	44 yrs	45 yrs	40 yrs
<b>RESPONDENT’S OCCUPATION</b>			
Managers/administrators	11%	11%	16%
Professionals	19%	19%	10%
Para-professionals	7%	7%	0%
Tradespersons	12%	12%	8%
Clerks	10%	10%	6%
Sales/Personal Service Workers	12%	12%	17%
Plant/Machine Operators/Drivers	4%	4%	17%
Labourers/Related workers	9%	9%	20%
Can't Say	3%	3%	0%
<b>TOTAL NOW EMPLOYED</b>	59%	59%	86%
Employed full time	44%	44%	77%
Employed part time	15%	15%	9%
<b>TOTAL NOT EMPLOYED</b>	41%	41%	14%
Household duties	8%	8%	6%
Student	8%	8%	0%
Self Supporting Retiree	8%	8%	0%
Pensioner	14%	15%	8%
Unemployed	2%	2%	0%
<b>LOCATION</b>			
Melbourne Metropolitan	73%	73%	78%
Other Victoria non-metropolitan	27%	27%	22%
<b>SOGS SCORE</b>			
(0-4)	99%	100%	0%
(5-20)	1%	0%	100%
<b>SEGMENT</b>			
Disinterested Gambler	22%	22%	12%
Occasional Gambler	38%	38%	9%
Social Gambler	9%	9%	7%
Acknowledged Heavy Gambler	5%	4%	56%
Committed Heavy Gambler	8%	8%	17%



Higher than average compared to the total population



Lower than average compared to the total population

TABLE 3.28B

	NSW 1995/1996	NSW 1997/1998	Tas. 1994	Tas. 1996
Family member ever experiencing difficulties with excessive gambling	14.5%	11.8%	6.1%	8.0%
Family members experiencing difficulties with excessive gambling in the past 6 months	3.8%	3.3%	1.1%	2.3%

### 3.29 Profile of “At Risk” Gamblers

Table 3.29 profiles the “No Risk” group and the “At Risk” groups compared to the total population. The main points of interest follow for both the “No Risk” and “At Risk” categories:

#### No Risk

(SOGS Score of 0–4)

- ✓ No bias according to gender;
- ✓ Evenly distributed across age groups, with an average age of 44 years;
- ✓ No bias according to occupational categories;
- ✓ No bias according to metropolitan or country areas; and
- ✓ No bias according to gambling segment.

#### At Risk

(SOGS Score of 5+)

- ✓ A higher than average proportion of males;
- ✓ A younger than average age profile (average age of 40 years)
- ✓ A higher proportion of plant/machine operators/drivers;
- ✓ A higher proportion of those employed full-time; and
- ✓ More likely to be an Acknowledged Heavy Gambler.



### 3.30 Victorian Gambling Patterns – Summary

The key findings regarding Victorian gambling patterns outlined in this section included:

- ✓ For the third year in succession, the mean number of gambling activities undertaken by people reporting gambling activity decreased, returning to levels last recorded prior to 1994;
- ✓ Following a decrease in 1998, the gambling participation rate increased 5 points in 1999, with 81% of adult Victorians having participated in at least one of the gambling activities measured in the survey within the last 12 months. However, despite this increase, the participation rate remains lower than the levels recorded in 1996 and 1997 (87% and 86%, respectively);
- ✓ Participation in EGM gambling decreased slightly to 30% in 1999—down 1 point from the 1998 figure of 31%—but retained the third highest participation rate after lotto and raffles;
- ✓ Actual expenditure on regulated forms of gambling in Victoria for the financial year ending June 1999 was \$3,456 million—an 8.11% increase from 1998. This expenditure amounts to an average loss per week of \$18.90 for each adult Victorian;
- ✓ The overall trend since 1992 appears to have been towards a gradual decrease in frequency of participation in gambling activities. On average, people reporting gambling activity participated in some form of gambling activity a little less than once a week (0.8 times per week);
- ✓ There was a very slight decrease in the average amount of time those reporting gambling activity spent on gambling activities in 1999—at 29 minutes per week, down 1 minute from the 1998 figure of 30 minutes (please note that there was a change in format of duration questions in 1999);
- ✓ The average weekly expenditure on gambling activities by people reporting gambling activity in 1999 was \$31 (please note that a change in question format in 1999 means that expenditure data from this year's survey may not be directly comparable with those from previous years);
- ✓ People reporting EGM gambling activity spent \$33 on average each day they played EGMs in 1999 (please note that a change in question format in 1999 means that expenditure data from this year's survey may not be directly comparable with those from previous years);
- ✓ Those reporting casino gambling activity spent an average of \$63 each day they played at the casino in 1999 (please note that a change in question format in 1999 means that expenditure data from this year's survey may not be directly comparable with those from previous years);
- ✓ For 43% of those reporting gambling activity, the main source of their expenditure on gambling was “pocket money”, and for another 19% it came from a “specific budget for entertainment or recreation”. For another 19% their expenditure on gambling came mainly from “money for basic living expenses”, and for 6% it came from “savings”, with only 3% funding their gambling from a “specific gambling budget”;
- ✓ People reporting gambling activity believed that they won back 35% of their outlay on all gambling activities, overall (please note that a change in question format in 1999 means that return data from this year's survey may not be directly comparable with those from previous years);
- ✓ One third (33%) of Victorians reported having gambled in the last 7 days. The majority of these (61%) claimed to have lost money (\$23 on average), 20% reported having won money (\$126 on average), and 5% claimed to have broken even on their gambling activities;
- ✓ People reporting gambling activity found activities such as going to the Casino, playing EGMs and betting at the TAB a little more appealing than did the Victorian population in general—but they found non-gambling activities slightly more appealing also;
- ✓ The reasons for gambling most frequently agreed with by those reporting gambling activity were “may get lucky” (66%), “the thrill or dream of winning” (64%) and to “make a quick buck” (39%). Another reason frequently agreed with was “for social reasons/to be with friends” (26%). In 1999, 43% of those reporting regular EGM/casino activity agreed that one of their reasons for gambling was that they were “attracted to the venue”;
- ✓ As in 1998, the single most common self-perception concerning gambling behaviour among adult Victorians in 1999 was that they “don't like to gamble or bet” (39%), followed by “gamble, but only



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an amount which can be afforded” (22%) and “enjoy a bet or flutter” (22%). The self-perception as being someone who “gambles for social interaction or leisure” decreased appreciably to 15%, and appears to be declining rapidly. Less than 1% of those reporting regular EGM/Casino activity said they were “addicted to or hooked on gambling”;

- ✓ Generally, there were high levels of agreement among adult Victorians that “gambling-related problems have become worse in the last four years” (84%), “gambling is a serious social problem” (83%) and “gambling is too widely accessible in Victoria” (78%).
  - ✓ Although less frequently agreed with, the majority of adult Victorians also agreed that “the onus is on the individual to control themselves when gambling by knowing what he or she can afford” (77%), “on the whole, gambling is an acceptable activity in our community” (64%), “the introduction of poker machines (“pokies”) in Victoria resulted in more jobs” (61%), “Victoria’s Casino provides a big boost to our state economy” (59%) and “revenue from poker machines (“pokies”) and the Casino has helped the State Government balance the books” (58%);
  - ✓ There were high levels of disagreement that “Victoria should have more casinos” (94%), “there are not enough hotels and clubs with poker machines (“pokies”)” (93%) and “gambling does more good for the community than harm” (79%);
  - ✓ Overall, there was a moderate negative swing in attitudes towards gambling and its effects, following a positive swing in 1998. However, attitudes remain more positive than in 1996 or 1997;
  - ✓ As in previous years, the level of awareness of community projects funded by gambling revenue was very low amongst the Victorian population (13%), and the proportion believing that they had personally benefited from such projects was lower still (6%);
  - ✓ Use of the South Oaks Gambling Screen for problem gamblers showed that only 0.8% of Victorian adults scored in the “At Risk” category—down from 1.5% in 1998;
  - ✓ Three per cent (3%) of the Victorian adult population considered that there had been gambling difficulties in their family during the preceding 6 months, with a further 6% considering that there had been gambling difficulties in their family prior to the last 6 months;
  - ✓ The demographic profile of gamblers closely reflected that of the general population overall; and
  - ✓ The demographic profile of the “At Risk” group showed a younger age profile and higher than average proportions of males, full-time workers, plant/machine operators/drivers and Acknowledged Heavy Gamblers.
-

**SECTION 4**

**CASINO  
GAMBLING PATTERNS**

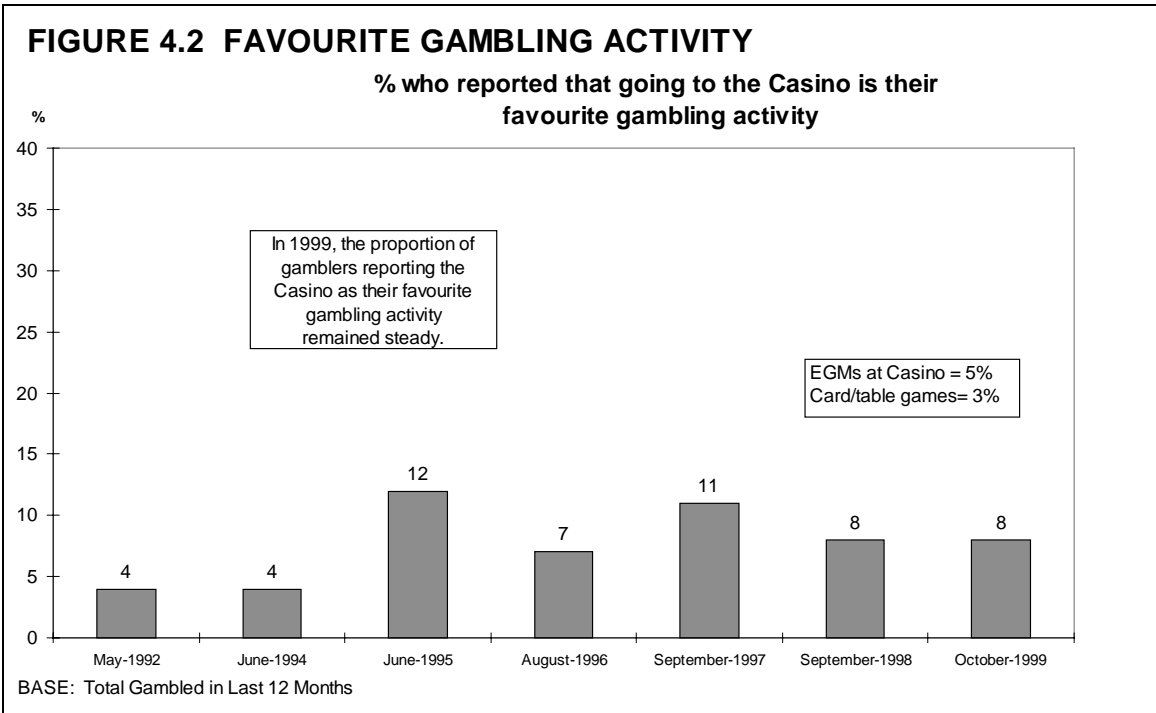
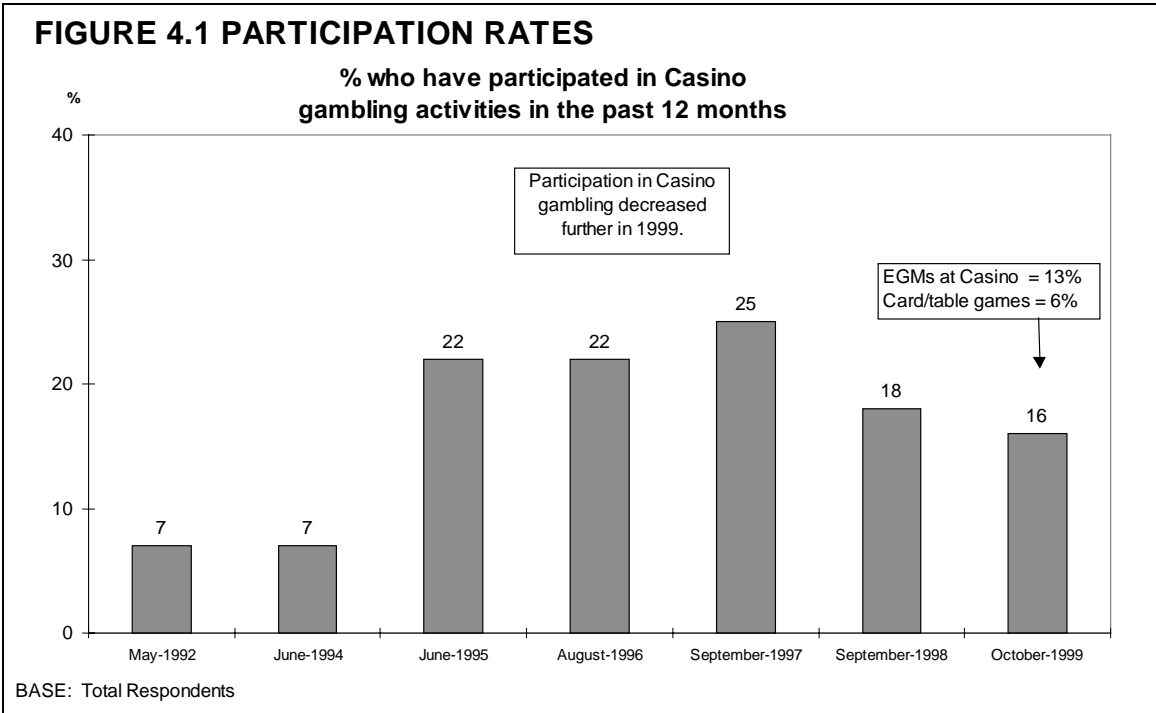


## **4. CASINO GAMBLING PATTERNS**

Section 4 provides an analysis of Casino gambling patterns, including:

- ✓ Participation;
  - ✓ Favourite Gambling Activity;
  - ✓ Frequency;
  - ✓ Duration;
  - ✓ Expenditure;
  - ✓ Proportion of Outlay Won Back;
  - ✓ Satisfaction;
  - ✓ Reasons;
  - ✓ Visitation to Melbourne's Crown Casino;
  - ✓ Casino Gambling Activities; and
  - ✓ Gambler Profiles.
-

## CASINO GAMBLING PATTERNS



## 4.1 Participation Rates

Figure 4.1<sup>29</sup> opposite highlights the participation rates in casino gambling activities over the last 12 months.

Following an appreciable decrease in 1998, participation in casino gambling activities decreased a further 2 points in 1999—at 16%, appreciably lower than 1995–1997 levels. Thirteen percent (13%) of this activity was accounted for by EGM gambling at the Casino, and 6% was accounted for by other gambling activities (card/table games) at the Casino. Consistent with previous years, EGM gambling was the most popular activity undertaken at the Casino. Of those who gambled at the Casino, almost two thirds (63%) said they played only EGMs there, 21% played only other (card/table) games, and 16% played both EGMs and other games.

Amongst the total population of Victoria, participation in casino gambling activities was found to be *higher* amongst:

- ✓ Social Gamblers (48%);
- ✓ Those with a pre-tax annual income of \$125,001–\$150,000 (38%);
- ✓ Non-English speakers (37%);
- ✓ Committed Heavy Gamblers (35%);
- ✓ Acknowledged Heavy Gamblers (35%); and
- ✓ Plant/machine operators/drivers (28%).

Participation in casino gambling activities was found to be *lower* amongst:

- ✓ Pensioners (10%);
- ✓ Self-supporting retirees (11%);
- ✓ Those aged 70+ years (11%);
- ✓ Those with a pre-tax annual income of \$60,001–\$75,000 (11%);
- ✓ Those aged 60–69 years (11%);
- ✓ Professionals (11%); and
- ✓ Disinterested Gamblers (11%).

## 4.2 Favourite Gambling Activity

Figure 4.2<sup>30</sup> provides the proportion of those reporting gambling activity for whom casino gambling is their favourite gambling activity.

In 1999, 8% of gamblers said that gambling at the Casino was their favourite gambling activity. This was consistent with 1998, as was the finding that playing EGMs at the Casino was more popular as a favourite gambling activity (5%) than playing other games at the Casino (3%).

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<sup>29</sup> Question 1: “Which of the following activities or games have you played, entered or bet on in the past 12 months?”

<sup>30</sup> Question 2: “Which ONE of these is your favourite game or activity?” (unprompted)

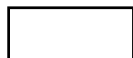
**PROFILE OF CASINO GAMBLERS**

**TABLE 4.1A**

	<b>Total Population</b>	<b>Casino Gamblers (Last 12 mths)</b> <b>16% of total pop</b>	<b>Reg. Casino Gamblers (Once a mth+)</b> <b>3% of total pop</b>
<b>GENDER</b>			
Male	49%	55%	58%
Female	51%	45%	42%
<b>AGE</b>			
Average Age	44 years	40 years	39 years
<b>RESPONDENT'S WORK STATUS</b>			
<b>TOTAL FULL-TIME</b>	44%	52%	41%
<b>TOTAL PART-TIME</b>	15%	13%	20%
<b>TOTAL NOT IN PAID WORK FORCE</b>	41%	35%	38%
Household duties	8%	6%	0%
Student	8%	11%	15%
Self-supporting retiree	8%	5%	7%
Pensioner	14%	9%	16%
Unemployed	2%	2%	0%
<b>RESPONDENT'S CURRENT/LAST OCCUPATION (OLD ASCO)</b>			
Managers/(senior) administrators	11%	11%	12%
Professionals	19%	13%	15%
Para-professionals	7%	4%	0%
Tradespersons	12%	16%	10%
Clerks	10%	9%	5%
Sales/personal service workers	12%	18%	29%
Plant/machine operators/drivers	4%	7%	4%
Labourers/related workers	9%	10%	18%
<b>LOCATION</b>			
Melbourne Metropolitan	73%	75%	86%
Other Victoria non-metropolitan	27%	25%	14%
<b>SOGS SCORE</b>			
0-4 (Not at risk)	99.2%	99.1%	100.0%
5-20 (At risk)	0.8%	0.9%	0.0%
<b>SEGMENT</b>			
Disinterested Gambler	22%	15%	5%
Occasional Gambler	38%	29%	19%
Social Gambler	9%	28%	51%
Acknowledged Heavy Gambler	5%	10%	10%
Committed Heavy Gambler	8%	18%	15%



Higher than average compared to the Total Population



Lower than Average compared to the Total Population

Table 4.1A opposite provides a profile of all those playing at the Casino and those who do so regularly (once a month or more), in comparison with the total population. A description follows:

### **Casino Gamblers**

Those having played at the Casino in the last 12 months were relatively likely to be:

- ✓ A full-time worker;
- ✓ A Salesperson/personal Service worker or plant/machine operator/driver;
- ✓ From the Social Gambler, Acknowledged Heavy Gambler or Committed Heavy Gambler segments.

They were also relatively unlikely to be:

- ✓ A pensioner;
- ✓ A professional;
- ✓ From the Disinterested Gambler or Occasional Gambler segments.

### **Regular Casino Gamblers**

Regular casino players (those who reported playing at least once a month) were more likely to be:

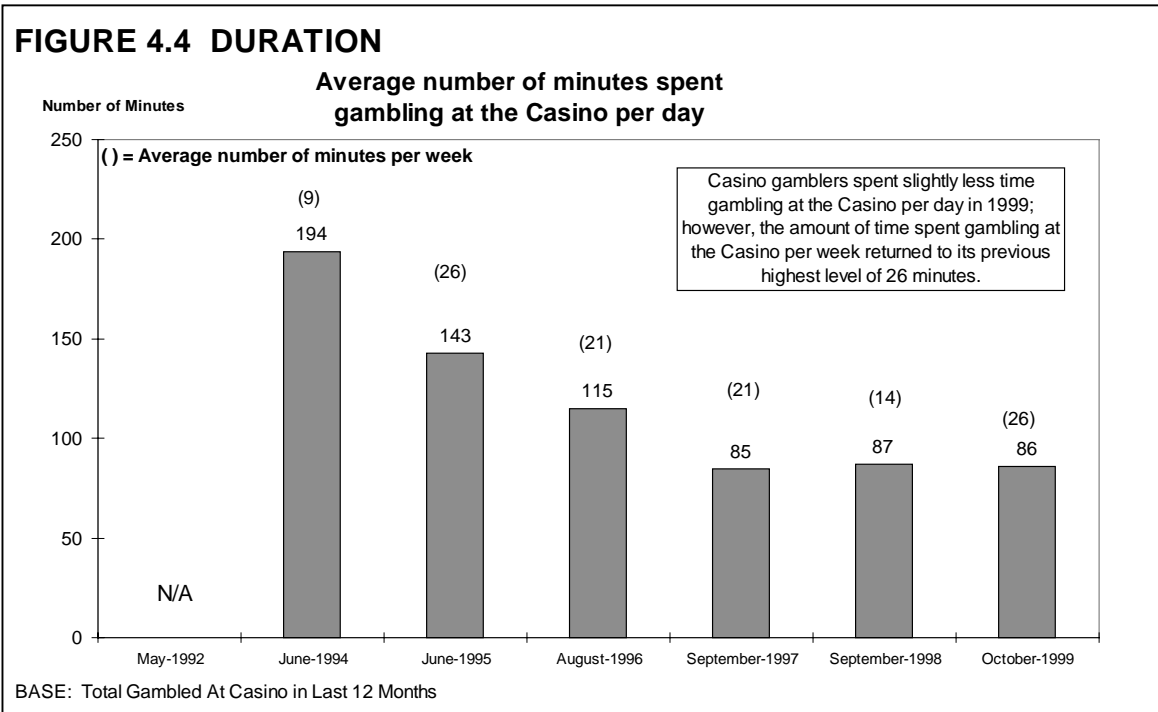
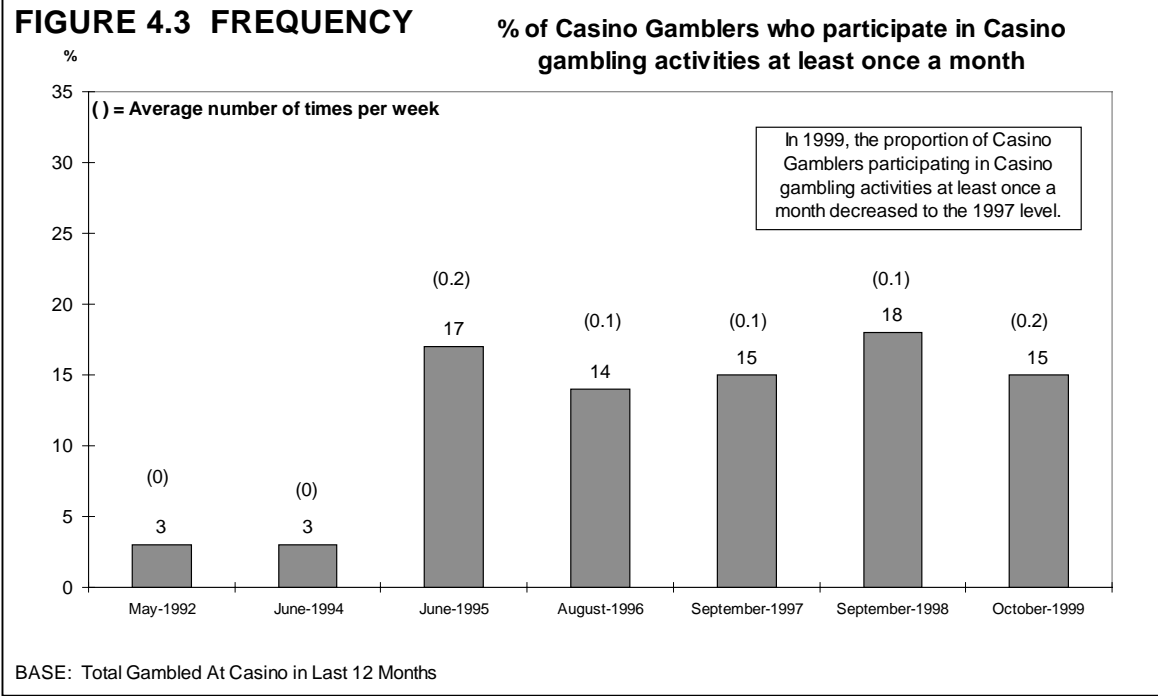
- ✓ A salesperson/personal service worker or labourer/related worker;
- ✓ From the Social Gambler or Acknowledged Heavy Gambler segments.

They were also less likely to be:

- ✓ From the Disinterested Gambler or Occasional Gambler segments.
-



## CASINO GAMBLING PATTERNS



### 4.3 Frequency

Figure 4.3<sup>31</sup> opposite shows the percentage of casino players who participated in casino gambling activities at least once a month (May 1992 to October 1999). In 1999, the frequency of such regular participation in casino gambling activities decreased 3 points to the 1997 level of 15%. However, on a weekly basis, casino players participated in this activity 0.16 times per week, on average, in 1999—higher than in any of the previous three years.

### 4.4 Duration

Figure 4.4<sup>32</sup> highlights the average number of minutes casino players spent gambling on casino activities each time they did so. The amount of time dedicated to casino gambling activities per visit fell slightly in 1999—at 86 minutes, down one minute from 1998. However, the average amount of time spent gambling at the Casino each week rose appreciably in the same period, with an increase of 12 minutes seeing a return to the 1995 figure of 26 minutes per week—presumably due to the above-mentioned increase in weekly frequency.

However, please note that in 1999 the question was changed so that respondents were asked how much time they spent each day they played, rather than each “time” they played, in the interests of more accurate response.

In 1999, the *highest* amount of time spent gambling at the Casino on each visit was by the following groups:

- ✓ Those with annual pre-tax incomes of \$60,001–\$75,000 (134 minutes);
- ✓ Those aged 50–59 years (124 minutes);
- ✓ Those aged 40–49 years (121 minutes);
- ✓ Those with annual pre-tax incomes of \$75,001–\$100,000 (119 minutes);
- ✓ Plant/Machine Operators/Drivers (119 minutes);
- ✓ Pensioners (111 minutes);
- ✓ Couples with no children (109 minutes);
- ✓ Those aged 70+ years (108 minutes);
- ✓ Managers/(senior) Administrators (108 minutes).

In 1998, the *lowest* amount of time spent gambling at the Casino on each visit was by the following groups:

- ✓ Those aged 20–29 years (65 minutes);
- ✓ Those employed part-time (61 minutes);
- ✓ Occasional Gamblers (58 minutes);
- ✓ Para-professionals (57 minutes);
- ✓ Those aged 18–19 years (55 minutes);
- ✓ Students (54 minutes);
- ✓ Those with annual pre-tax incomes of \$10,000 or less (53 minutes).

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<sup>31</sup> Question 3J/3K: How often do you play (poker machines (“pokies”)/card, table or any game other than poker machines (“pokies”)) at the Melbourne Crown casino or casinos outside Victoria?

<sup>32</sup> Question 4I/4J: On each day you play (poker machines (“pokies”)/card, table or any game other than poker machines (“pokies”)) at the Melbourne Crown casino or casinos outside Victoria, on average, how much time do you spend (playing the machines/at the gaming tables)?



## 4.5 Expenditure

Casino players spent \$63, on average, each time (day)<sup>33</sup> they participated in casino gambling activities. Expenditure among Casino players who played card/table games (\$106) was substantially higher than expenditure among those who played EGMs (\$57). When considered on a weekly basis, this represents an average expenditure of \$56 per week.

In 1999, there was *higher* than average expenditure per time (day) among the following groups of Casino players:

- ✓ Managers/(senior) administrators (\$117);
- ✓ Those with annual pre-tax income greater than \$50,000 (\$117);
- ✓ Self-supporting retirees (\$109);
- ✓ Students (\$94);
- ✓ Single persons (\$94); and
- ✓ Acknowledged Heavy Gamblers (\$91).

Please note that in 1999 the question was changed to ask respondents how much money they do spend or outlay each day they participated (in previous years, the question asked respondents the dollar value they were prepared to or would outlay each time they participated). Due to these changes, results from 1999 are no longer directly comparable with previous years. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999. A summary graphic of expenditure for all gambling activities in 1999 is available at Figure 3.11.

## 4.6 Proportion of Outlay Reported as Won Back

In 1999, Casino gamblers perceived the return on their outlay to be around 62% when gambling at the Casino<sup>34</sup>.

The estimated proportion won back on card/table games at the Casino (64%) was slightly higher than the estimated proportion won back on EGM gambling at the Casino (59%).

Estimates of proportion won back on Casino gambling were *higher* amongst the following groups of Casino gamblers:

- ✓ Those with an annual pre-tax income of \$75,001–\$100,000 (89% of outlay won back);
- ✓ Household duties (85%);
- ✓ Those aged 70+ years (82%);
- ✓ Rural residents (82%);
- ✓ Professionals (79%); and
- ✓ Social Gamblers (76%).

Changes in question format resulted in responses being based upon breaking even meaning winning 100% of outlay back. Due to these changes, results from 1999 are no longer directly comparable with previous years. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999. A summary graphic of proportion of outlay won back for all gambling activities in 1999 is available at Figure 3.13.

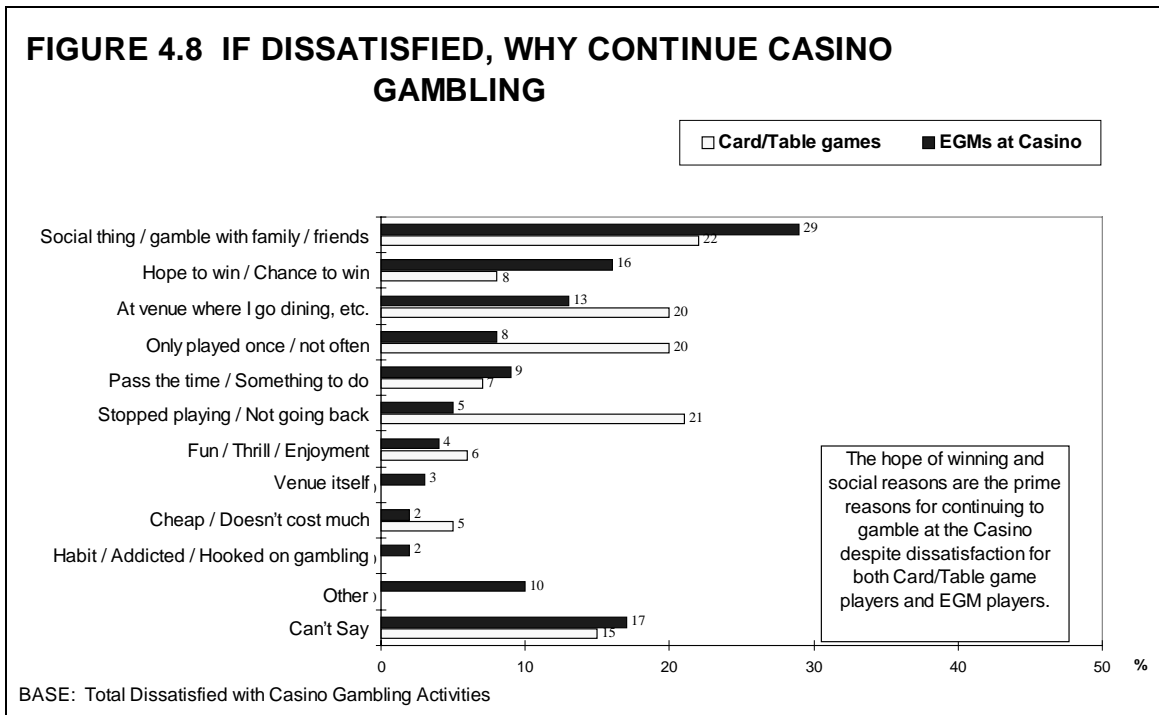
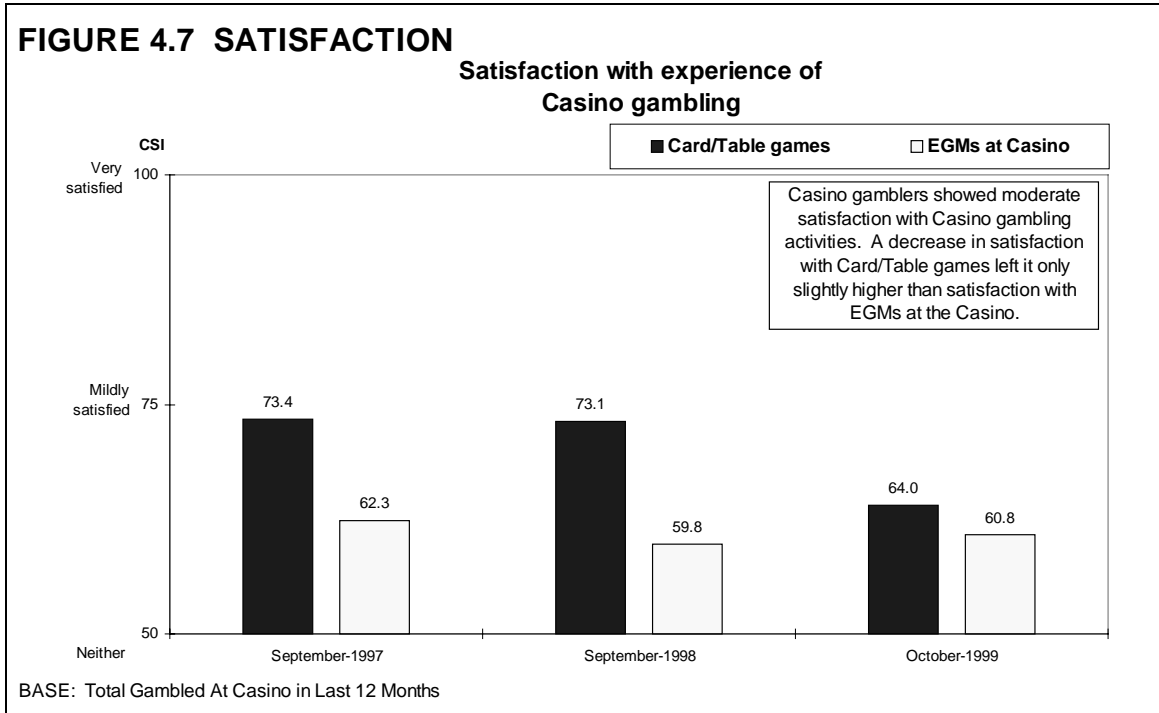
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<sup>33</sup> Question 5J/5K: On each day you play (poker machines ("pokies")/card, table or any game other than poker machines ("pokies")) at the Melbourne Crown Casino or casinos outside Victoria, how much money do you spend or outlay on this activity?

<sup>34</sup> Question 6J1/6K1: Thinking about all your playing (poker machines ("pokies")/card, table or any game other than poker machines ("pokies")) at the Melbourne Crown Casino or casinos outside Victoria over the last 12 months, do you think that you won back more than you outlaid, less than you outlaid, or about the same as you outlaid?

Question 6J2/6K2: If breaking even means winning back 100% of your outlay, what percentage of your outlay over the past 12 months do you think you have won back on (poker machines ("pokies")/card, table or any game other than poker machines ("pokies")) at the Melbourne Crown Casino or casinos outside Victoria?

## CASINO GAMBLING PATTERNS



#### **4.7 Satisfaction**

Figure 4.7<sup>35</sup> shows the level of satisfaction with the experience of casino gambling activities. Overall, Casino players showed moderate satisfaction with casino gambling activities (CSI=61.1). Although Casino players showed a higher level of satisfaction with card/table games (CSI=64.0) than with EGMs played at the Casino (CSI=60.8), this represents a decrease of approximately 9 points from satisfaction with card/table games in 1998.

#### **4.8 If Dissatisfied – Why Continue**

Figure 4.8<sup>36</sup> shows the reasons why Casino players who are dissatisfied with EGMs and/or card/table games continue either activity despite their dissatisfaction.

The main reasons for continuing to play EGMs at the casino despite dissatisfaction were:

- ✓ Social thing/Gamble with family/friends (29%);
- ✓ Hope to win/Chance to win (16%);
- ✓ At venue where I go dining, etc. (13%); and
- ✓ Pass the time/Something to do (9%).

The main reasons for continuing to play card/table games at the casino despite dissatisfaction were:

- ✓ Social thing/Gamble with family/friends (22%); and
- ✓ At venue where I go dining, etc. (20%).

In addition, 21% of those asked why they continue playing card/table games despite being dissatisfied with them reported that they had stopped playing/weren't going back, and 20% said that they had only played once/not often.

Overall, there was an increase in prominence of social or coincidental reasons and a decrease in compulsive reasons (e.g. Habit/Addicted/hooked on gambling) from 1998.

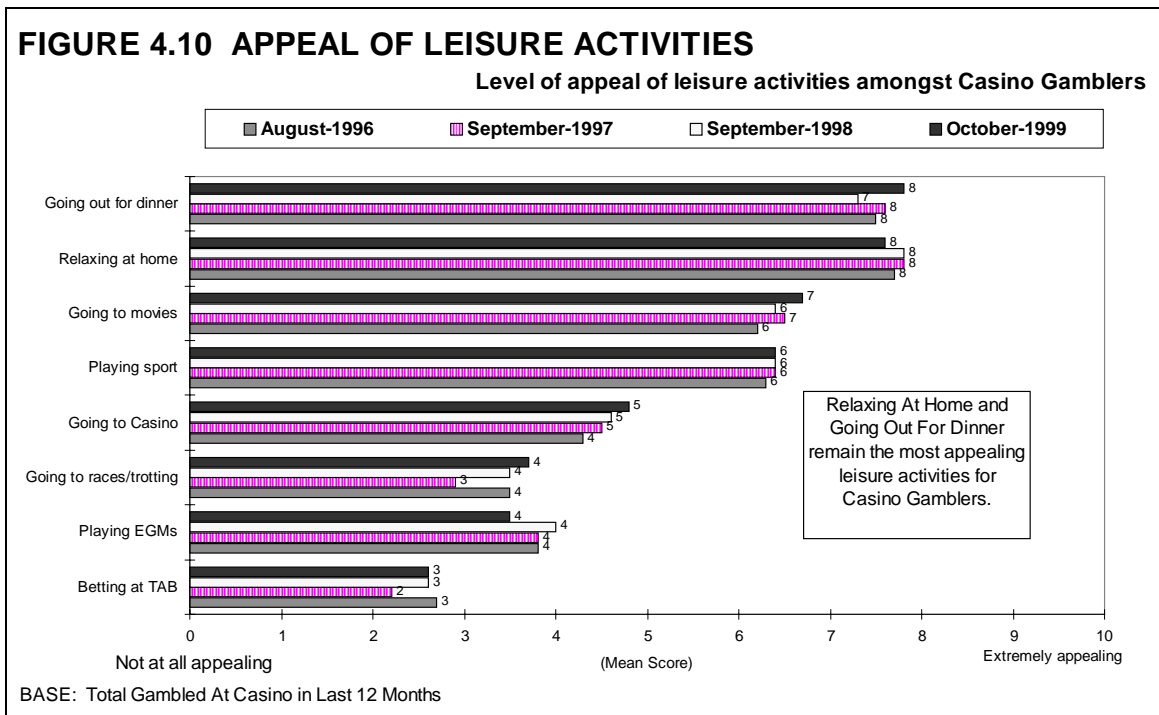
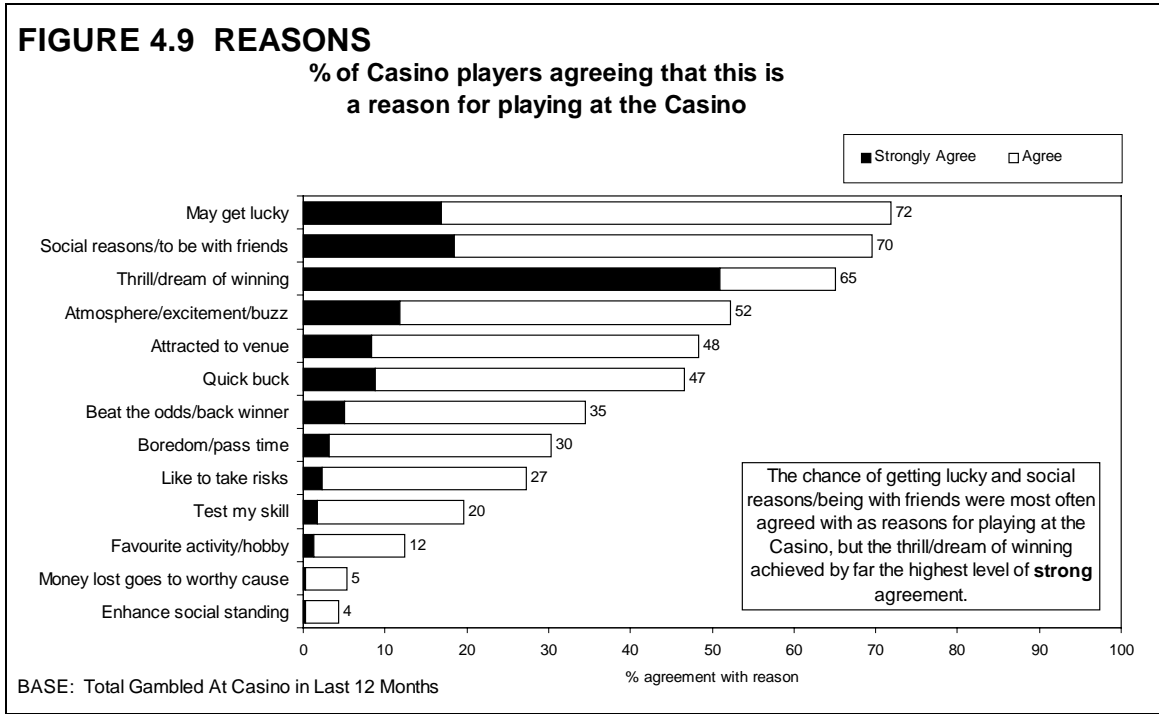
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<sup>35</sup> Question 8J/K: Would you say that you are satisfied or dissatisfied with your experience of playing (poker machines ("pokies")/card, table or any game other than poker machines ("pokies")) at the Melbourne Crown Casino or casinos outside Victoria?

<sup>36</sup> Question 9J/9K: Why do you keep playing (poker machines ("pokies")/card, table or any game other than poker machines ("pokies")) at the Melbourne Crown Casino or casinos outside Victoria if you are dissatisfied?

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## CASINO GAMBLING PATTERNS



## 4.9 Reasons

Figure 4.9<sup>37</sup> provides an analysis of the reasons for playing at the Casino amongst those who reported having done so. Reasons for participating were determined using an agreement scale question.

The main reasons for playing at the Casino were found to be:

- ✓ May get lucky (72%);
- ✓ Social/be with friends (70%); and
- ✓ Thrill/dream of winning (65%).

However, by far the highest level of **strong** agreement was with the latter (thrill/dream of winning) being a reason for playing at the Casino.

In 1999, this question was asked as a series of closed, agreement-scale questions, rather than as one open-ended, multiple-response question, as in previous years. Due to these changes, results from 1999 are no longer directly comparable with previous years. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999.

## 4.10 Appeal of Leisure Activities

Figure 4.10<sup>38</sup> provides an analysis of the mean rating scores for appeal of various leisure activities amongst all Casino players. Respondents were asked to rate the appeal of eight leisure activities using a scale of 1 to 10 where 1 meant “not at all appealing” and 10 meant “extremely appealing”. In comparison with 1998, going out for dinner has once more become the most appealing leisure activity for Casino gamblers. Going to the movies also recorded its highest level of appeal as a leisure activity for Casino players since this survey began.

There was a *high* level of appeal amongst Casino players for the following activities:

- ✓ Going out for dinner (7.8);
- ✓ Relaxing at home (7.6); and
- ✓ Going to the movies (6.7).

There was a *low* level of appeal amongst Casino players for the following activities:

- ✓ Betting at the TAB (2.6);
- ✓ Playing EGMs (3.5); and
- ✓ Going to the races or trots (3.7).

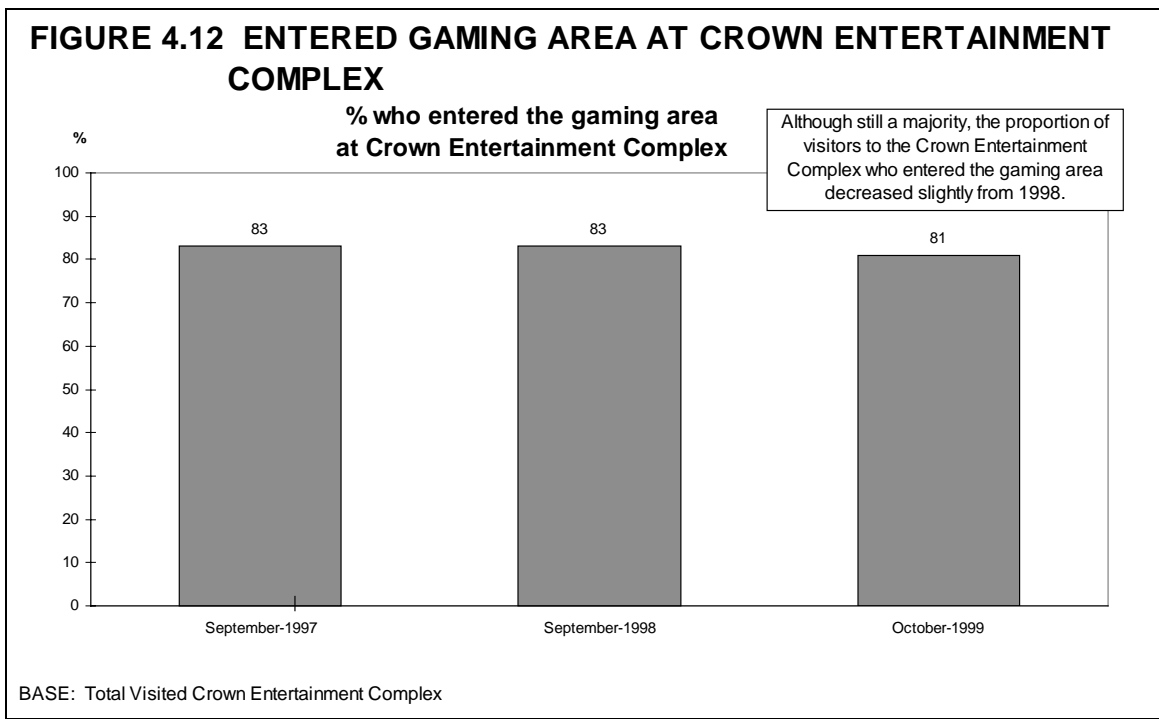
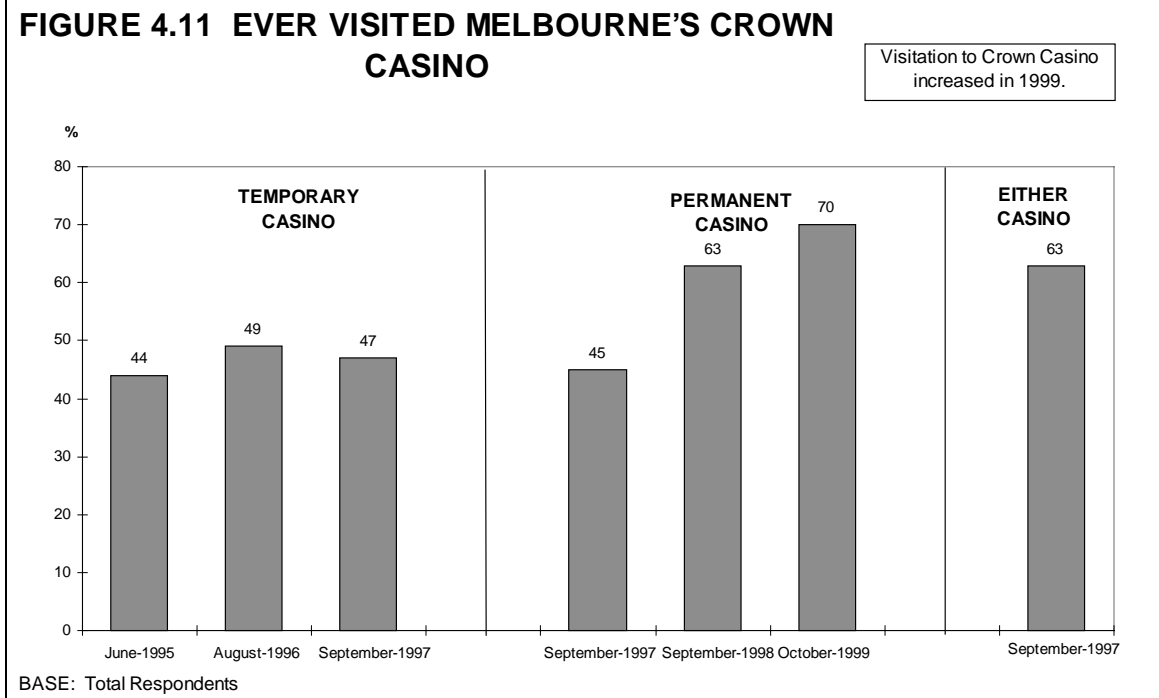
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<sup>37</sup> Questions 7J/K: I'm now going to read out a series of reasons for playing (poker machines (“pokies”)/card, table or any game other than poker machines (“pokies”)) at the Melbourne Crown Casino or casinos outside Victoria. I want you to tell me how strongly you agree or disagree that each is a reason you play poker machines (“pokies”)/card, table or any game other than poker machines (“pokies”)) at the Melbourne Crown Casino or casinos outside Victoria.

<sup>38</sup> Questions 23A-H: We would now like you to rate a number of spare time or leisure activities on a scale of 1 to 10 where a 1 is not at all appealing and 10 is extremely appealing. So on a scale of 1 to 10, how appealing is (betting at the TAB/Playing sport/Going to the movies/Going to the races or trots/Going out for dinner/Relaxing at home eg. Watching TV/Playing the Electronic Gaming Machines/Going to the casino)?



**CASINO GAMBLING PATTERNS**



#### 4.11 Ever Visited Crown Casino

Figure 4.11<sup>39</sup> provides a time-series analysis showing overall Crown Casino visitation. The proportion of Victorians having visited the Crown Entertainment Complex (opened in May 1997) continues to grow, and by October 1999 seven in ten Victorians (70%) had done so. This compares with the 63% of Victorians who had visited by September 1998 and the 63% of Victorians who had visited either the temporary Casino (opened in June 1994) or the permanent Crown Entertainment Complex by September 1997.

Those *more likely* to have visited the Crown Complex were:

- ✓ Social Gamblers (91%);
- ✓ Those aged 20–29 years old (85%);
- ✓ Students (84%);
- ✓ Acknowledged Heavy Gamblers (84%); and
- ✓ Committed Heavy Gamblers (82%);
- ✓ Those with pre-tax annual income of more than \$50,000 per year (79%);
- ✓ Salespersons/personal service workers (77%);
- ✓ Those employed full-time (76%); and
- ✓ Those who reside in the metropolitan area (75%).

Those *less likely* to have visited the Crown Complex were:

- ✓ Pensioners (49%);
- ✓ Self-supporting retirees (58%);
- ✓ Those aged 60–69 years old (59%);
- ✓ Those who live in the country (59%);
- ✓ Non-gamblers (60%);
- ✓ Disinterested gamblers (62%); and
- ✓ Labourers/related workers (63%).

#### 4.12 Entered Gaming Area at the Crown Entertainment Complex

Figure 4.12<sup>40</sup> opposite provides an analysis of whether visitors to the Crown Entertainment Complex entered the gaming area. Respondents were asked if they had entered the gaming area when they visited the Crown Entertainment Complex. Despite a marginal decrease of 2 points since 1998, the majority (81%) of visitors to the Crown Complex reported entering the gaming area.

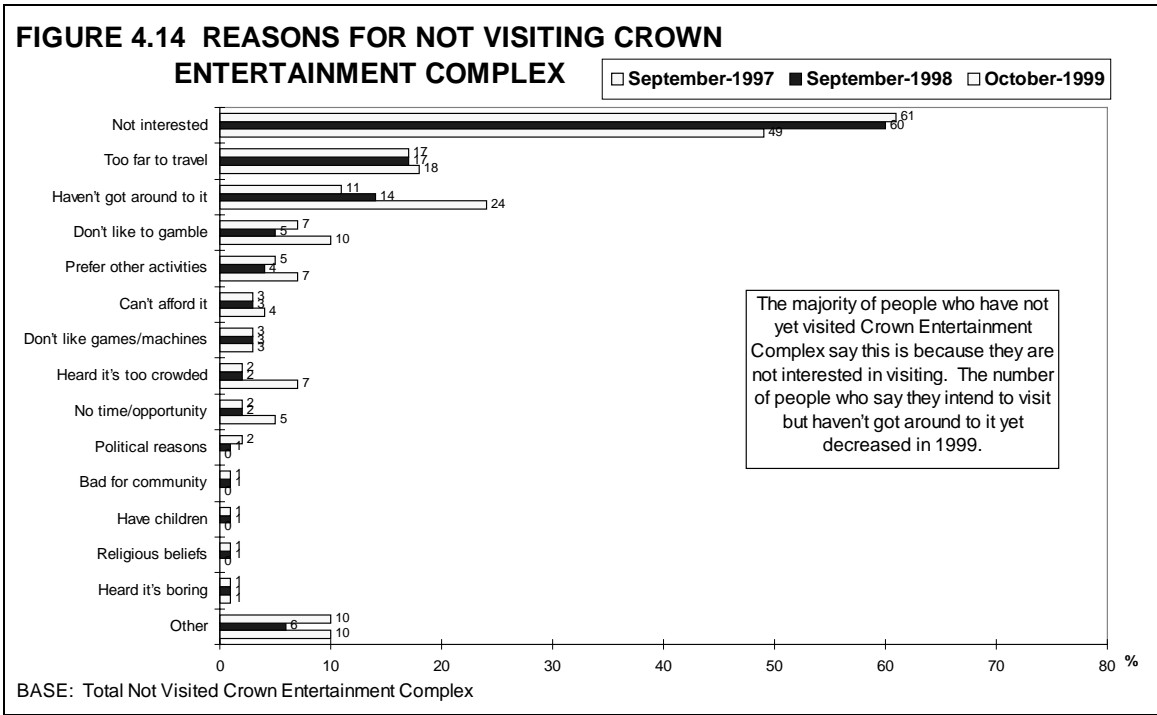
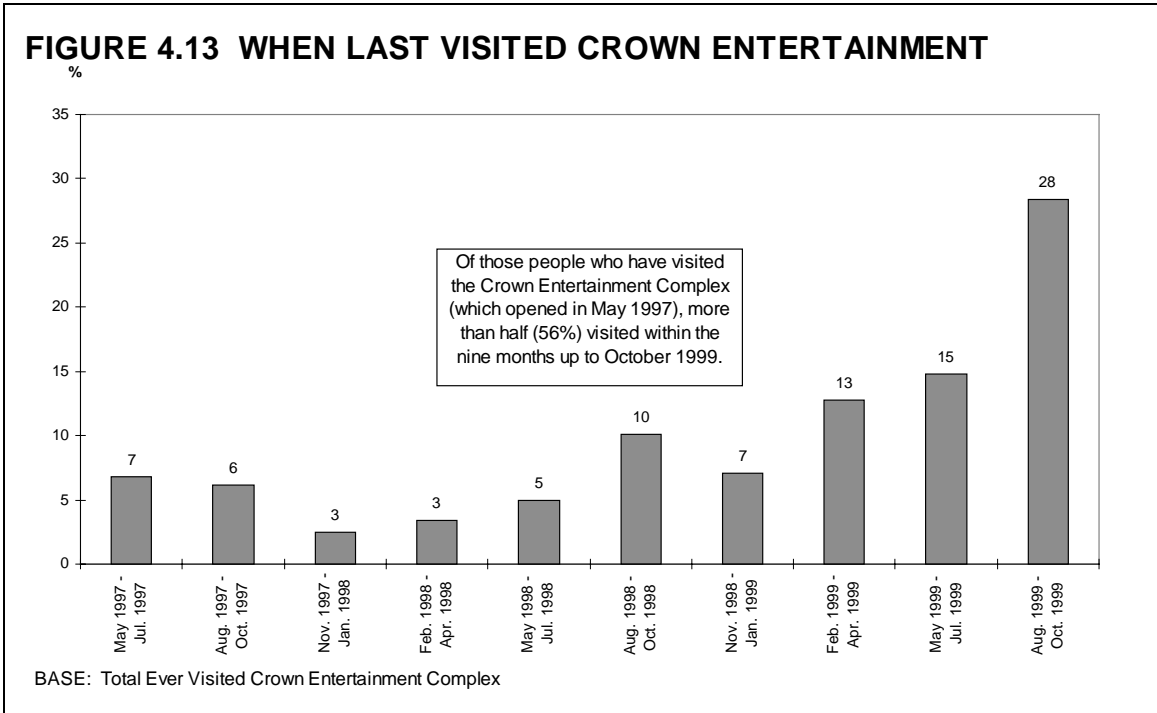
Crown visitors *more likely* to enter the gaming area were:

- ✓ Committed Heavy Gamblers (96%);
- ✓ Acknowledged Heavy Gamblers (91%);
- ✓ Social Gamblers (90%);
- ✓ Those who had gambled in the last 6 months (89%);
- ✓ Tradespersons/personal service workers (88%); and
- ✓ Couples without children (88%).

<sup>39</sup> Question. 24B: Have you visited the Crown Entertainment complex in Melbourne? (opened May 8<sup>th</sup> 1997)

<sup>40</sup> Question 24C: Did you enter the gaming area at this complex?

## CASINO GAMBLING PATTERNS



### 4.13 When Last Visited Crown Entertainment Complex

Figure 4.13<sup>41</sup> provides an analysis of the length of time since the last visit to the Crown Entertainment Complex. More than half (59%) of respondents who had visited the Crown Complex did so earlier in 1999, prior to being interviewed in October. Less than one quarter (24%) of visitors to the Crown Casino last did so in 1998, and only 15% last visited in 1997.

Amongst Crown visitors, those *most likely* to have last visited the Crown Entertainment Complex in 1999 were:

- ✓ 18–19 year olds (83%);
- ✓ Those living in a group household (81%);
- ✓ Social Gamblers (81%); and
- ✓ Acknowledged Heavy Gamblers (76%).

Groups of Crown visitors *more likely* than others to have last visited the Crown Entertainment Complex in 1997 were:

- ✓ Those aged 70 years and over (26%);
- ✓ Those with annual pre-tax income of \$60,001–\$75,000 (25%);
- ✓ Pensioners (24%);
- ✓ Those aged 60–69 years (23%);
- ✓ Those who haven't gambled in the last 12 months (22%);
- ✓ Couples with children no longer at home (21%);
- ✓ Disinterested Gamblers (20%); and
- ✓ Managers/(Senior) Administrators (20%).

### 4.14 Reasons For Not Visiting Crown Entertainment Complex

Figure 4.14<sup>42</sup> provides an analysis of the reasons given for not having visited the Crown Entertainment Complex since it opened. Those who had not visited the Crown Entertainment Complex were asked why they had not done so. Similar to 1998, the majority (61%) said they had no interest in the Crown Entertainment Complex. Other more commonly given reasons for not visiting the Casino were as follows:

- ✓ Too far to travel (17%);
- ✓ Haven't got around to it (11%); and
- ✓ Don't like to gamble (7%).

Some 18% of Victorians have never visited the Crown Entertainment Complex and reported that they are not interested in doing so, while some 3% said they intend to visit but haven't got around to it yet. However, these figures continue to decline as the proportion of Victorians who have visited the Crown Complex continues to rise, as illustrated below:

**TABLE 4.14**

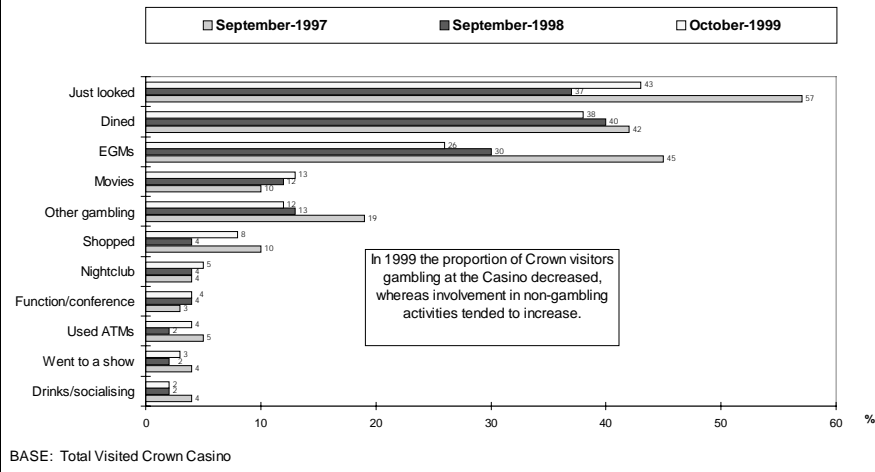
	September 1997	September 1998	October 1999
Have visited Crown Entertainment Complex	45%	63%	70%
Haven't visited but intend to	13%	4%	3%
Haven't visited and don't intend to	42%	23%	18%

<sup>41</sup> Question 25: When was your last visit to the Crown Entertainment Complex in Melbourne?

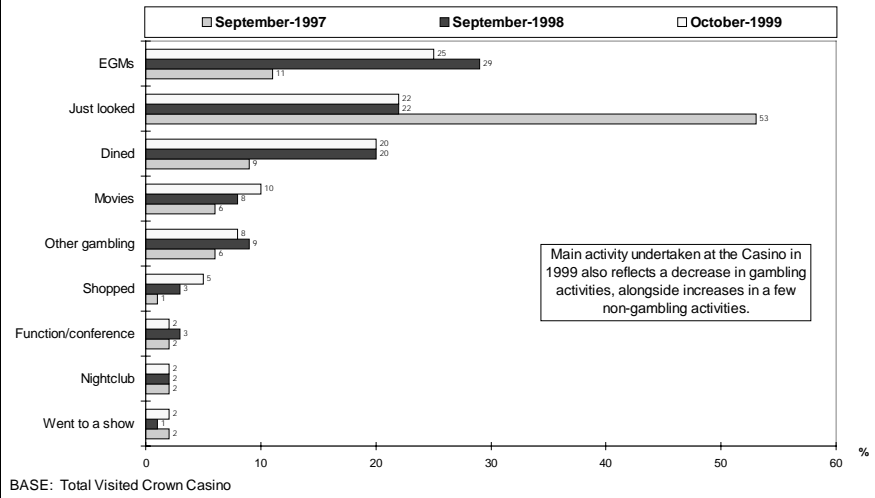
<sup>42</sup> Question 28: Why haven't you visited the Crown Entertainment Complex?

# CASINO GAMBLING PATTERNS

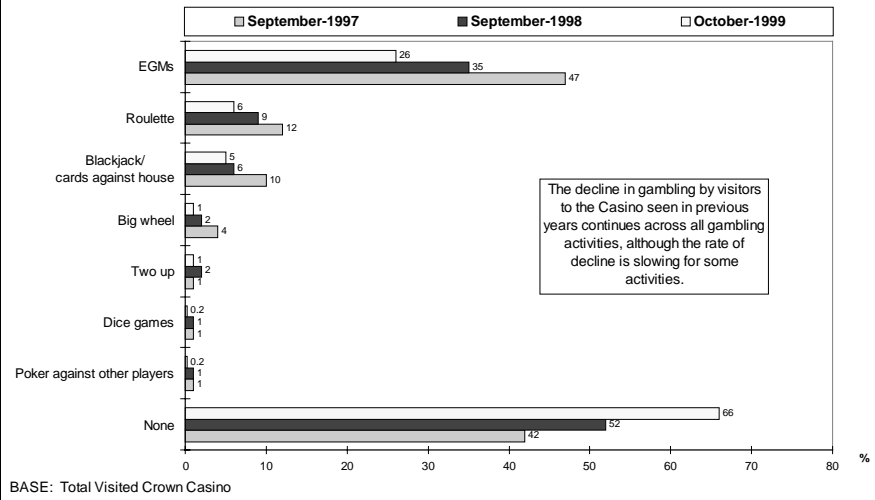
**FIGURE 4.15 ACTIVITIES UNDERTAKEN ON LAST CASINO VISIT**



**FIGURE 4.16 MAIN ACTIVITY ON LAST CASINO VISIT**



**FIGURE 4.17 GAMES PLAYED ON LAST CASINO VISIT**



#### 4.15 Activities Undertaken on Last Casino Visit

Figure 4.15<sup>43</sup> provides a time-series analysis of the activities conducted by visitors to Crown Casino on their last visit. Respondents who had visited the Crown Casino were asked which other activities they had undertaken while they were there.

Just looking/seeing what the place was like was the most popular activity undertaken on a trip to the Casino (43% of Crown visitors—up 6 points from 1998). Dining was the next most popular activity (38%—down 2 points from 1998). Going to the movies remains a popular activity, undertaken by one in eight Casino visitors (13%).

As in previous years, the proportion of visitors having gambled on their last visit to the Casino decreased, although the rate of decrease is slowing:

- ✓ Played EGMs (26%—down 4 points from 1998); and
- ✓ Played other gambling games (12%—down 1 point).

#### 4.16 Main Activity Undertaken on Last Casino Visit

Figure 4.16<sup>44</sup> provides a time-series analysis of the main activity undertaken by visitors to the Crown Casino on their last visit. After respondents had been asked which activities they had undertaken on their last visit to the Casino, they were asked which of these activities was the **main** thing they did at the Casino. Despite a 4-point decrease from 1998, playing EGMs remained the activity most commonly regarded as the **main** activity undertaken on the last visit to the Casino—so regarded by one quarter of Crown visitors (25%). The proportions of visitors regarding just looking/seeing what the place is like (22%) and dining (20%) as the main activities on their last visit remained steady.

The only increases in frequency of activities being regarded as the main activity were for:

- ✓ Going to the movies (10%—up 2 points from 1998);
- ✓ Shopping (5%—up 2 points); and
- ✓ Going to a show (2%—up 1 point).

#### 4.17 Games Played on Last Casino Visit

Figure 4.17<sup>45</sup> illustrates which games were played by visitors to the Crown Casino on their last visit. EGMs remained the most popular game to play at the Casino. However, like all other games it experienced a decrease in participation by Crown visitors (down 9 points from 1998).

The largest change was an increase in the proportion of visitors to the Casino who did not play any games at all—almost two thirds (66%) in 1998, compared with little more than half (52%) in 1998.

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<sup>43</sup> Question 26A: “What activities did you undertake at the Casino on your last visit?”

<sup>44</sup> Question 26B: “And which one of these activities would you say is the main thing you went to the Casino to do?”

<sup>45</sup> Question 27: “Which games did you play at the Casino?”



#### **4.18 Casino Gambling Patterns – Summary**

The key findings regarding casino gambling in Victoria as outlined in this section included:

- ✓ The reported level of participation in casino gambling continues to fall. In 1999, 16% of adult Victorians said they had gambled at the Casino in the last 12 months, compared with 18% in 1998, after a peak of 25% in 1997;
- ✓ The proportion of gamblers for whom going to the Casino is their favourite gambling activity remained steady at 8%;
- ✓ The proportion of casino gamblers who play at least once per month decreased slightly to 15%—down 3 points from 18% in 1998;
- ✓ Among casino gamblers, 63% said they played only EGMs there, 21% played only other (card/table) games, and 16% played both EGMs and other games;
- ✓ In 1999, the average duration of playing at the Casino was almost 1½ hours (86 minutes) per day on which played. When considered on a weekly basis, the average amount of time spent playing at the Casino by those who did so was 26 minutes per week (please note that there was a change in format of duration questions in 1999);
- ✓ Among those reporting casino gambling activity, average expenditure per day on which played was \$63. When considered on a weekly basis, the average expenditure on playing at the Casino among those who did so was \$56 per week. As in previous years, outlay was substantially higher on card/table games (\$106) than on EGMs (\$57) (please note that a change in question format in 1999 means that expenditure data from this year’s survey may not be directly comparable with those from previous years);
- ✓ People reporting casino gambling activity believed that they had won back 62% of their outlay on this activity (please note that a change in question format in 1999 means that return data from this year’s survey may not be directly comparable with those from previous years);
- ✓ The proportion of outlay perceived as won back on card/table games (78%) was substantially higher than the reported proportion of outlay won back on EGMs at the Casino;
- ✓ Casino gamblers once more reported moderate satisfaction with casino gambling activities (Customer Satisfaction Index (CSI) = 61), but unlike 1998, satisfaction with card/table games (CSI = 64) was not much higher than satisfaction with EGMs (CSI = 61);
- ✓ The most frequent reason given for continuing to gamble at the Casino despite dissatisfaction with casino gambling was that it is “a social thing/to gamble with family or friends” (29%);
- ✓ Main reasons for gambling at the Casino among all who reported having done so were “may get lucky” (72%), “for social reasons/to be with friends” (70%) and “the thrill or dream of winning” (65%);
- ✓ Leisure activities with greatest appeal for casino gamblers were “going out for dinner” and “relaxing at home (e.g. watching TV)”, with “betting at the TAB” the least appealing leisure activity;
- ✓ By October 1999, more than two thirds (70%) of Victorians had visited the Crown Entertainment Complex, compared with less than two thirds (63%) in September 1998. However, the proportion of visitors entering the gaming area decreased a little—at 81%, down 2 points from both 1998 and 1997;
- ✓ More than half (59%) of the Victorians who had visited the Crown Entertainment Complex by October 1999 last did so within that year (i.e. January–October 1999);
- ✓ Eighteen per cent (18%) of Victorians have never visited the Crown Entertainment Complex and are not interested in doing so, while 3% said they intend to visit but haven’t got around to it yet. However, these figures continue to decline as the proportion of Victorians who have visited the Crown Entertainment Complex continues to rise;
- ✓ Although EGMs remained the most popular gambling activity for visitors to the Casino (undertaken by 26% of Crown visitors), all games experienced a decline in participation by visitors. The proportion of Crown visitors playing no games at all increased to almost two thirds (66%) in 1999 from little more than half (52%) in 1998.





**SECTION 5**

**EGM  
GAMBLING PATTERNS**

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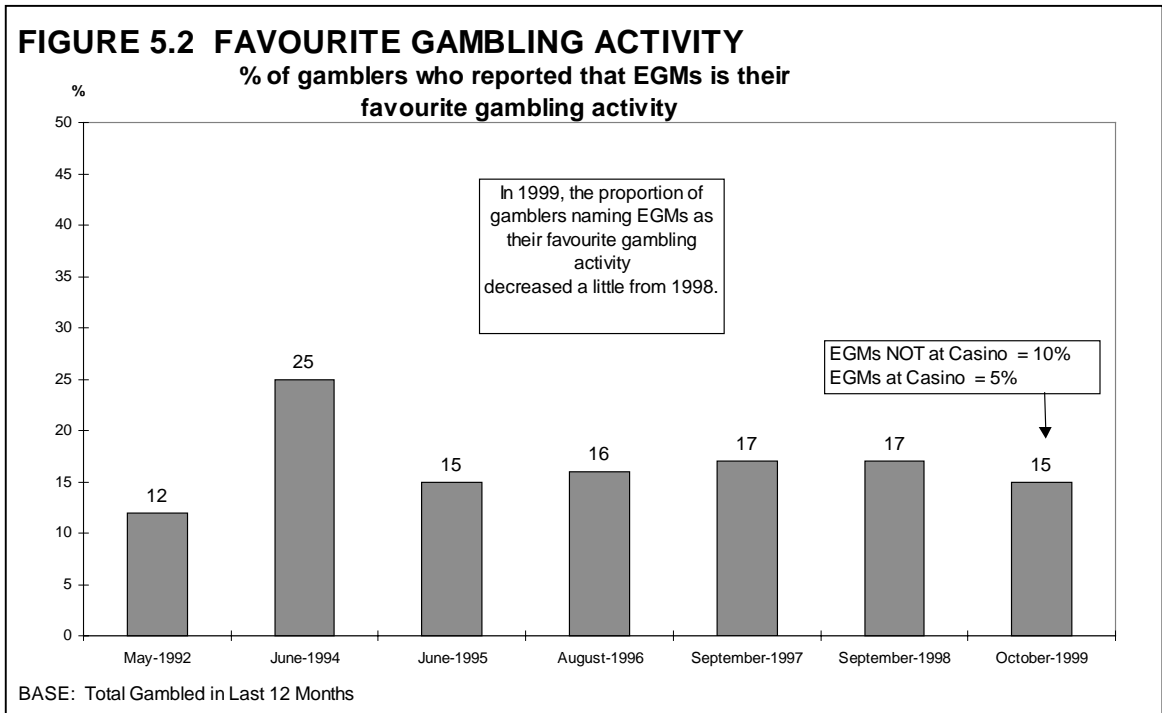
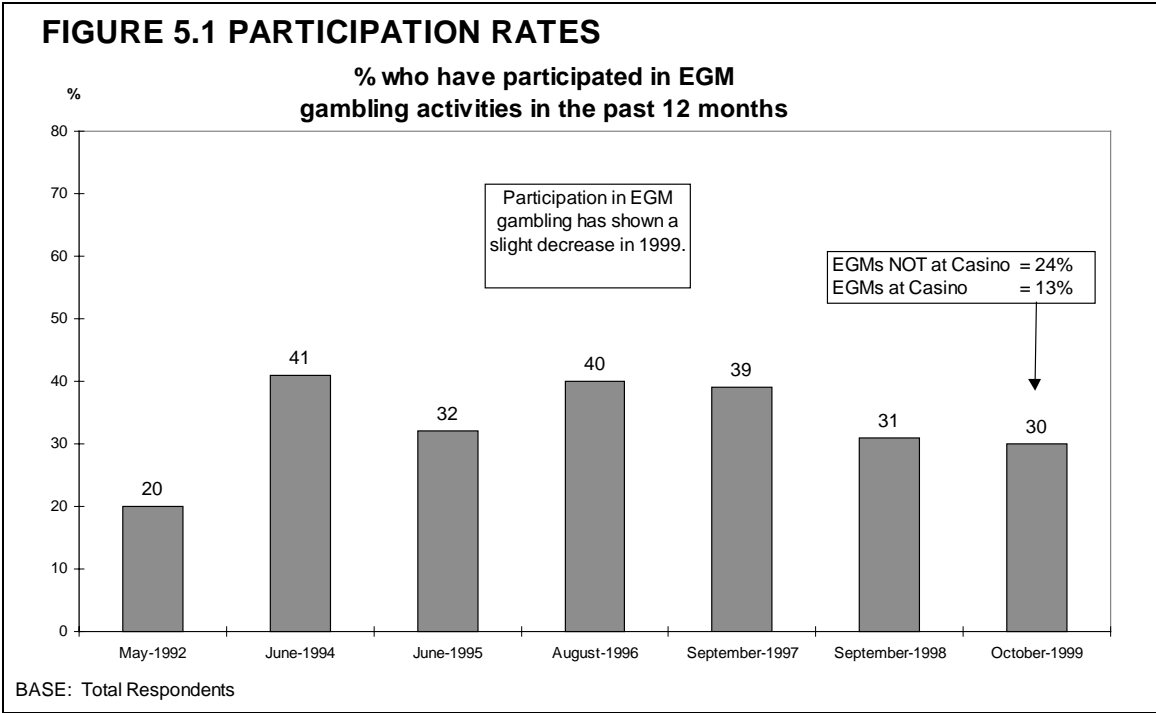


## **5. EGM GAMBLING PATTERNS**

Section 5 provides a detailed analysis of EGM Gambling Patterns in Victoria, including:

- ✓ Participation;
  - ✓ Favourite Gambling Activity;
  - ✓ Frequency;
  - ✓ Duration;
  - ✓ Expenditure;
  - ✓ Proportion of Outlay Won Back;
  - ✓ Satisfaction;
  - ✓ Reasons;
  - ✓ Visitation to EGM Venues;
  - ✓ Activities Combined with EGM Gambling;
  - ✓ Won or Lost Last Time on EGMs;
  - ✓ Visiting EGM Venues to Play Linked Jackpots;
  - ✓ Travelling Behaviour of EGM Gamblers; and
  - ✓ Gambler Profiles.
-

**EGM GAMBLING PATTERNS**



## 5.1 Participation Rates

Figure 5.1<sup>46</sup> opposite outlines the participation rates in Electronic Gaming Machine (EGM) gambling activities since EGMs were introduced into Victoria in 1992. Following an increase in 1996 and 1997 in the participation rates of EGM gambling, participation rates in 1999 have continued to decline to 1995 levels. Thirty per cent (30%) of Victorians have participated in EGM gambling in the last 12 months. Twenty-four per cent (24%) of Victorians played EGMs not at the Casino, whilst 13% of Victorians played EGMs at the Casino. Both participation rates have decreased slightly from 1998.

The *highest* participation rates for playing EGMs occurred amongst:

- ✓ Social Gamblers (71%);
- ✓ Acknowledged Heavy Gamblers (69%);
- ✓ Those identified as being “At Risk” (53%);
- ✓ Those who have gambled in the last 6 months (48%);
- ✓ Committed Heavy Gamblers (41%);
- ✓ Those with annual incomes of \$20,000 to \$40,000 (35%); and
- ✓ Visitors to Crown Casino (26%).

The *lowest* participation rates for playing EGMs occurred amongst:

- ✓ Those who have not visited Crown Casino (20%);
- ✓ Single parents (21%); and
- ✓ The unemployed (26%).

## 5.2 Favourite Gambling Activity

Figure 5.2<sup>47</sup> highlights the percentage of gamblers who reported EGM gambling activities as their favourite gambling activity. The percentage of gamblers who claimed EGM gambling was their favourite gambling activity decreased to 15% in 1999 from 17%. Again, as in 1998, playing EGMs not at the Casino was more likely to be cited as gamblers’ favourite gambling activity (10%) than was playing EGMs at the Casino (5%).

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<sup>46</sup> Question 1. Which of the following activities or games have you played or gambled on in the past 12 months?

<sup>47</sup> Question 2 “Which one of these activities is your favourite game or activity?” (unprompted)

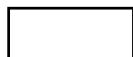
**PROFILE OF EGM GAMBLERS**

TABLE 5.1A

	Total Population	EGM Gamblers (Last 12 mths) 31% of total pop	Reg. EGM Gamblers (Once a mth+) 12% of total pop
<b>GENDER</b>			
Male	48.8	48.2	48.6
Female	51.2	51.8	51.4
<b>AGE</b>			
Average Age	44 yrs	44 yrs	45 yrs
<b>RESPONDENT'S OCCUPATION</b>			
Managers/(senior) administrators	11.4	11.7	10.6
Professionals	18.8	13.1	11.9
Professionals	7.2	5.9	4.1
Tradespersons	11.9	16.0	19.6
Clerks	10.1	11.9	9.6
Sales/personal service workers	11.9	15.0	13.8
Plant/machine operators/drivers	3.8	5.7	6.8
Labourers/related workers	9.0	8.2	12.9
Can't Say	2.7	1.4	1.7
TOTAL NOW EMPLOYED	59.1	61.4	55.7
Employed full time	44.1	45.8	41.7
Employed part time	14.9	15.6	14.0
TOTAL NOT EMPLOYED	40.7	38.6	44.3
Household duties	7.6	7.4	4.3
Student	8.1	7.0	3.4
Self Supporting Retiree	8.2	7.9	10.3
Pensioner	14.4	14.4	22.1
Unemployed	2.3	2.0	4.2
<b>LOCATION</b>			
Melbourne Metropolitan	73.3	69.8	66.9
Other Victoria non-metropolitan	26.7	30.2	33.1
<b>SOGS SCORE</b>			
(0-4)	99.2	98.7	96.7
(5-20)	0.8	1.3	3.3
<b>SEGMENT</b>			
Disinterested Gambler	21.6	22.1	19.6
Occasional Gambler	37.5	34.6	24.4
Social Gambler	9.3	22	29.3
Acknowledged Heavy Gambler	4.6	10.5	15.8
Committed Heavy Gambler	8.1	10.9	10.9



Significantly Higher than average compared to the general population



Significantly Lower than average compared to the general population

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Table 5.1A opposite provides a profile of all those playing at the Casino and those who do so regularly (once a month or more), in comparison with the total population. A description follows:

### **EGM Gamblers**

The demographic profile of those who played EGMs in the last 12 months revealed:

- ✓ An approximately even distribution of males and females, with a slight bias towards females;
- ✓ No bias according to age (average age 44 years);
- ✓ Significantly more likely to be a tradesperson;
- ✓ Significantly less likely to be professional;
- ✓ No bias according to metropolitan or country areas; and
- ✓ EGM gamblers were more likely to be Social Gamblers, Acknowledged Heavy Gamblers, or Committed Heavy Gamblers.

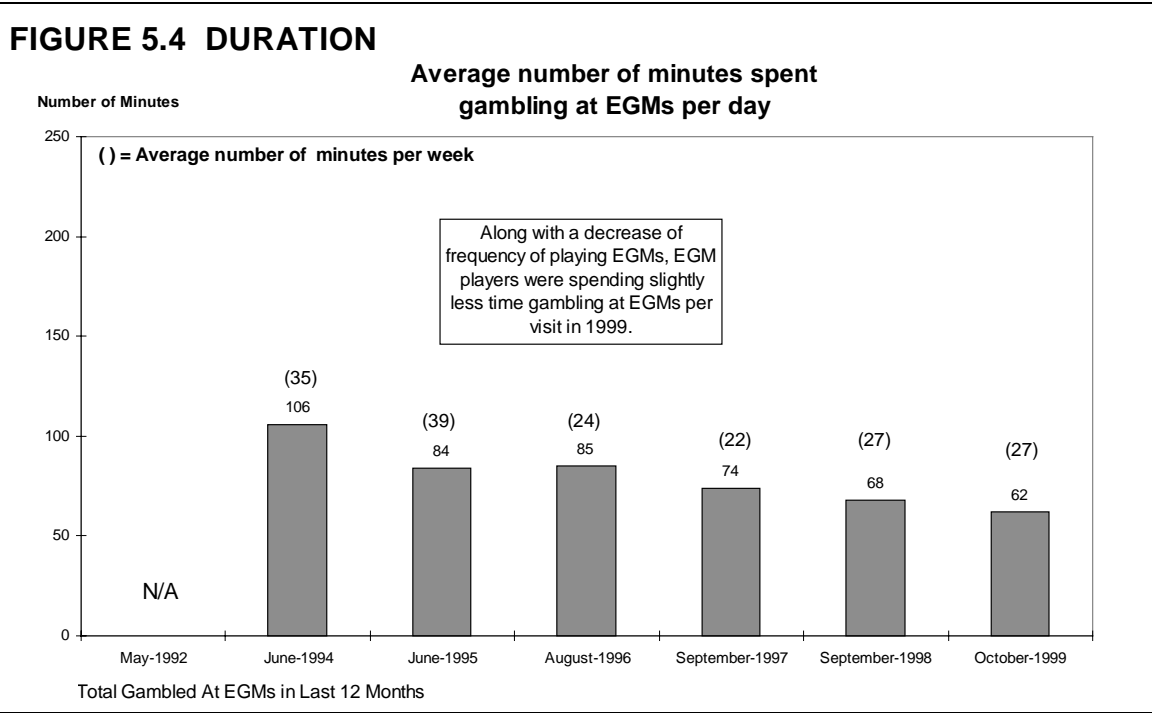
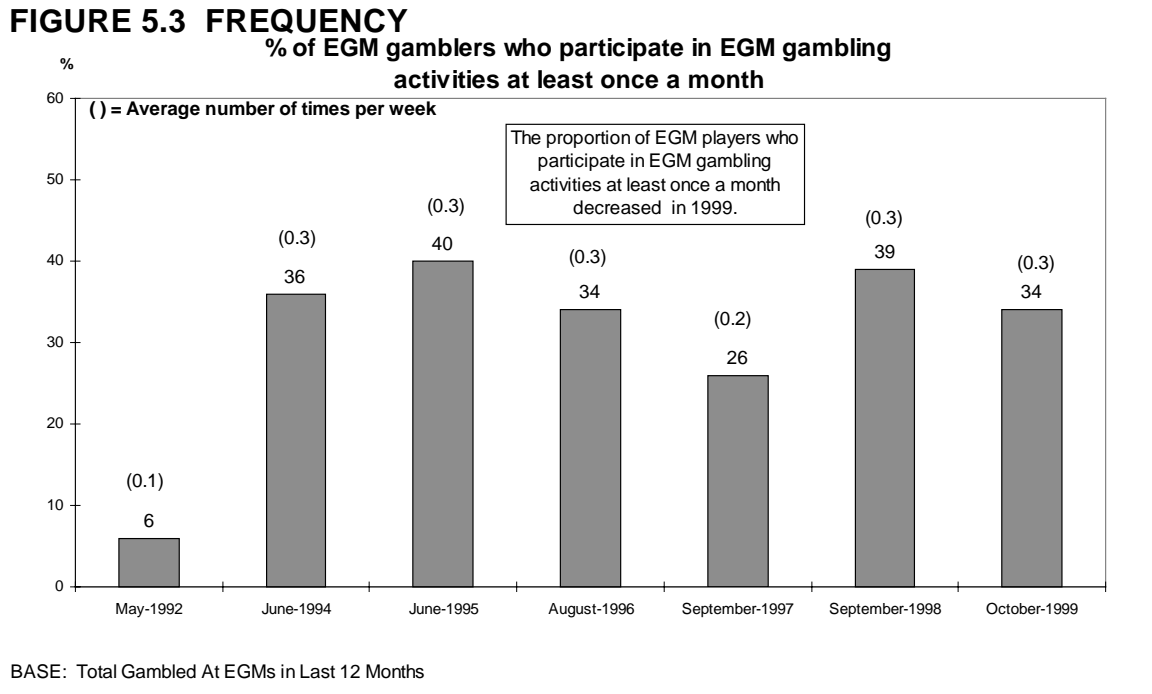
### **Regular EGM Gamblers**

The demographic profile of regular EGM players (who play EGMs once a month or more often) revealed:

- ✓ An approximately even distribution of males and females, with a slight bias towards females;
  - ✓ No significant bias according to age (average age 45 years);
  - ✓ A lower proportion of professionals;
  - ✓ Slight bias to non-metropolitan regions;
  - ✓ A higher proportion of those identified as being “At Risk” on SOGS; and
  - ✓ EGM regular gamblers were more likely to be Social Gamblers or Acknowledged Heavy Gamblers but not Committed Heavy Gamblers.
-



**EGM GAMBLING PATTERNS**



### 5.3 Frequency

Figure 5.3<sup>48</sup> opposite provides a time-series analysis of EGM gambling behaviour and shows the proportion of EGM players who engaged in this activity at least once per month. The figures in brackets represent the average number of times per week all EGM gamblers participate in this activity.

Following a rise to 38% in 1998, in 1999 the proportion of regular EGM players decreased to the 1996 level of 34%.

In 1999, EGM players participated in EGM gambling activities an average of 0.30 times per week—a slight decrease from the average of 0.33 times per week in 1998.

### 5.4 Duration

Figure 5.4<sup>49</sup> opposite shows the average number of minutes spent playing EGMs per visit. The figures provided in brackets give the average number of minutes spent on EGM gambling per week.

Over the last 12 months, the duration of EGM gambling activities per week remained stable, despite a slight decrease in the amount of time spent gambling per occasion. In 1997, 22 minutes per week were spent on EGM gambling activities, while in 1998 and 1999, on average, 27 minutes per week were spent on EGM gambling activities. On average, EGM gamblers spent approximately 62 minutes participating in this activity each time they did so (compared with 68 minutes in 1998).

In 1999, the following groups of EGM players spent the *highest* amount of time per week on EGM gambling activities:

- ✓ Those identified as being “At Risk” on SOGS (195 minutes per week);
- ✓ Those whose household type was categorised as Single Parent and dependent children (70 minutes per week);
- ✓ Salespersons/personal service workers (56 minutes per week);
- ✓ Those born outside Australia (55 minutes per week);
- ✓ Acknowledged Heavy Gamblers (53 minutes per week); and
- ✓ Those who refused to answer questions about their income (46 minutes per week).

In 1999, the following groups of EGM players spent the *lowest* amount of time per week on their EGM gambling activities:

- ✓ Those employed in household duties (8 minutes per week);
- ✓ 18–19 year olds (9 minutes per week);
- ✓ 40–49 year olds (12 minutes per week);
- ✓ Those employed part-time (13 minutes per week);
- ✓ Disinterested Gamblers (14 minutes per week);
- ✓ Those with pre-tax annual income of \$10,000 or less (14 minutes per week); and
- ✓ Those with a pre-tax annual income of less than \$50,000 (20 minutes per week).

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<sup>48</sup> Question 3.2 “How often do you play EGM gambling?”

<sup>49</sup> Question 4I/J “And each day you play (EGMs not at the Casino/EGMs at the Casino), on average, how much time do you spend playing then machines?”

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## 5.5 Expenditure

In 1999, EGM players estimated that they spent an average of \$33 on EGMs each time (day) that they played them.<sup>50</sup> When considered on a weekly basis, this represents an average expenditure of \$26 per week on EGM gambling activities.

There was *higher* outlay per week by EGM players who were:

- ✓ Those identified as being “At Risk” (\$240);
- ✓ Salespersons/personal service workers (\$100);
- ✓ Social Gamblers (\$83);
- ✓ 20–29 Years of age (\$79); and
- ✓ Acknowledged Heavy Gamblers (\$31).

Please note that in 1999 the question was changed to ask respondents how much money they do spend or outlay each day they participated (in previous years, the question asked respondents the dollar value they were prepared to or would outlay each time they participated). Due to these changes, results from 1999 are no longer directly comparable with previous years. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999. A summary graphic of expenditure for all gambling activities in 1999 is available at Figure 3.11.

## 5.6 Proportion of Outlay Reported as Won Back

In 1999, the mean amount of their outlay that EGM players believed that they won back on EGMs was around 57%.<sup>51</sup> In other words, EGM gamblers believed that they incurred a loss of greater than 40%.

Lower returns of outlay were reported for playing EGMs at the Casino (55%) than for playing EGMs at clubs and hotels (59%).

Higher proportions of outlay won back were reported by:

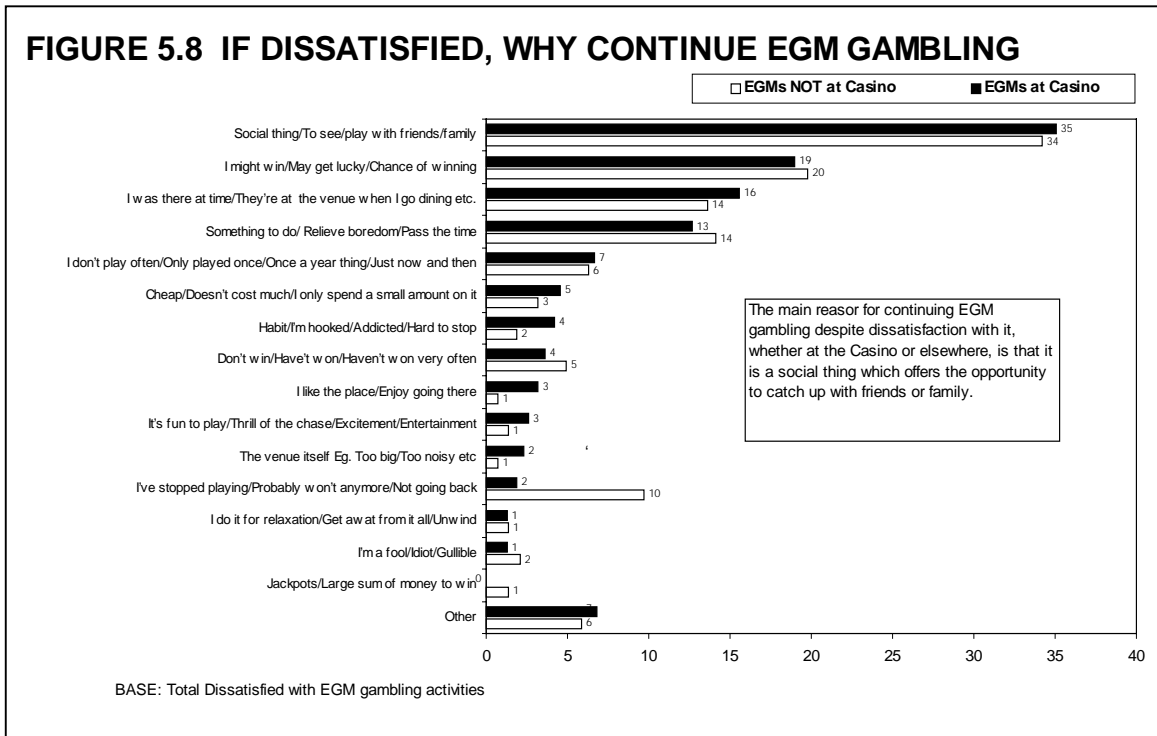
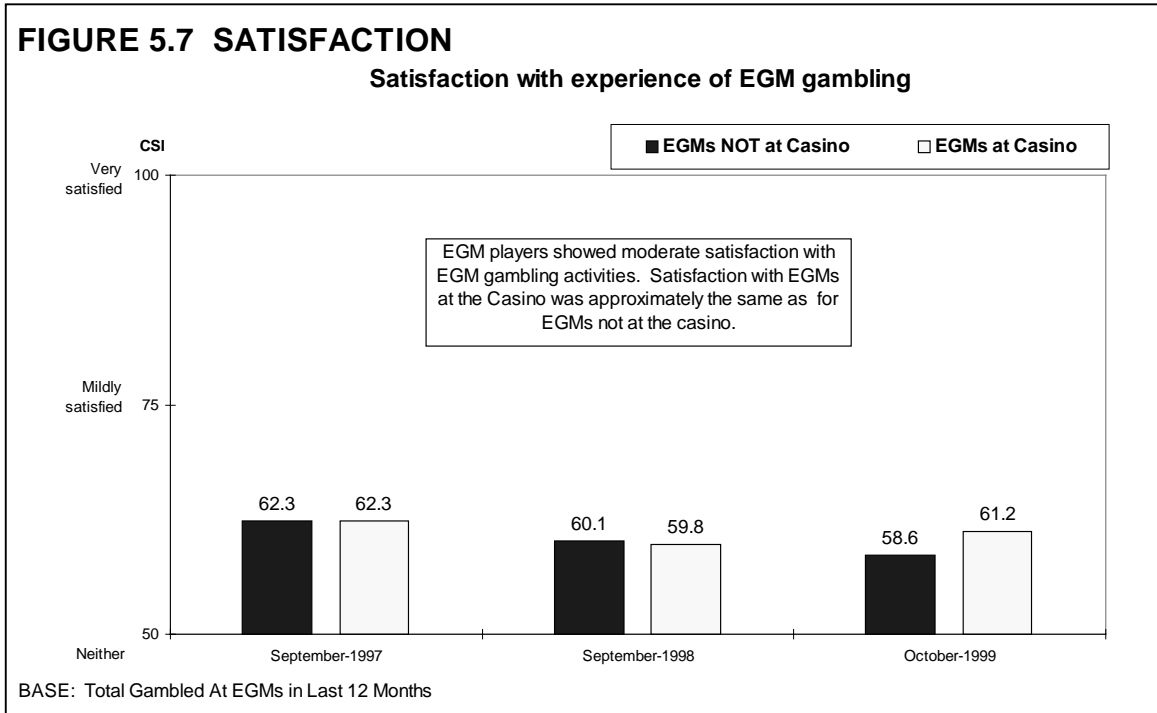
- ✓ 18–19 year olds (72%);
- ✓ Salespersons/personal services workers (66%);
- ✓ Those engaged in household duties (66%);
- ✓ Acknowledged Heavy Gamblers (64%); and
- ✓ Females (62%).

Changes in question format resulted in responses being based upon breaking even meaning winning 100% of outlay back. Due to these changes, results from 1999 are no longer directly comparable with previous years. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999. A summary graphic of proportion of outlay won back for all gambling activities in 1999 is available at Figure 3.13.

<sup>50</sup> Question 5I/J “And each day you play (EGMs not at the Casino/EGMs at the Casino), on average, how much money do you spend or outlay on this activity?”

<sup>51</sup> Question 6I/J “If breaking even means winning 100% of your outlay back, what percentage of your outlay over the past 12 months do you think you won back?”

**EGM GAMBLING PATTERNS**



## 5.7 Satisfaction

Figure 5.7<sup>52</sup> opposite shows the level of satisfaction with the experience of EGM gambling activities.

Overall, Victorians who participated in EGM activities not at the Casino (i.e. at clubs and hotels) reported moderate levels of satisfaction (CSI = 58.6), as did Victorians who participated in EGM gambling activities at the Casino (CSI = 61.2).

Casino EGM players with the *highest* satisfaction levels included:

- ✓ Social Gamblers (CSI = 67.6);
- ✓ Household Duties (62.2);
- ✓ Employed full time (60.7); and
- ✓ Unemployed (67.2).

Non-Casino EGM players with the *highest* satisfaction levels included:

- ✓ Social Gamblers (CSI = 63.6);
- ✓ 18-19 year olds (61.2); and
- ✓ Self-supporting retirees (63.0).

## 5.8 If Dissatisfied – Why Continue

Figure 5.8<sup>53</sup> opposite shows EGM players' reasons for continuing the activity despite being dissatisfied with EGM gambling.

The reasons given for continuing EGM gambling were similar for both EGM players who participate in this activity at the Casino and for those who play EGMs at other venues.

Casino EGM players reported continuing to play despite dissatisfaction for the following reasons:

- ✓ "For social reasons or an outing" (35%);
- ✓ "Hope to win" (19%);
- ✓ "There at time" (16%); and
- ✓ "Something to do" (13%).

Non-Casino EGM players reported continuing to play despite dissatisfaction for the following reasons:

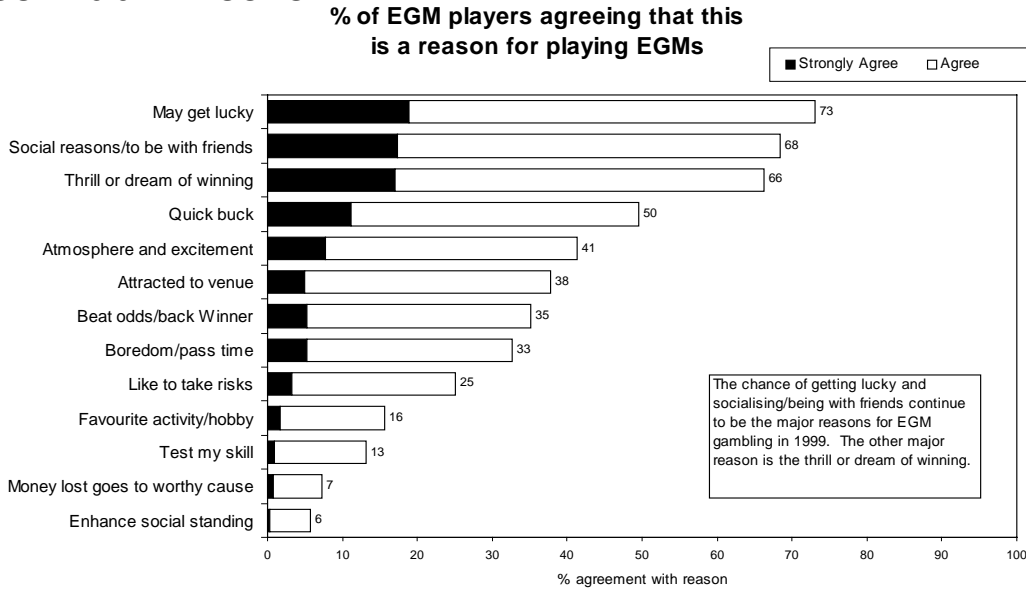
- ✓ "For social reasons or an outing" (34%);
- ✓ "Hope to win" (20%);
- ✓ "To pass the time/for something to do" (14%); and
- ✓ "There at the time" (14%).

<sup>52</sup> Question 8IJ "Would you say that you are satisfied or dissatisfied with your experience of playing EGM gambling?"

<sup>53</sup> Q9I/J Why do you keep gambling on (EGMs not at the Casino/EGMs at the Casino) if you are dissatisfied?

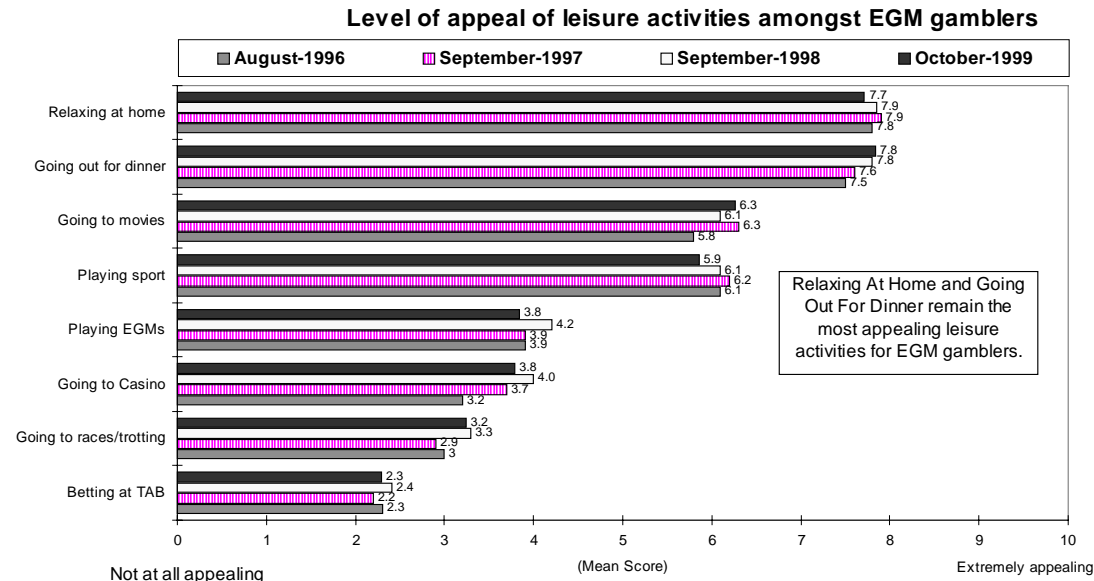
**EGM GAMBLING PATTERNS**

**FIGURE 5.9 REASONS**



The chance of getting lucky and socialising/being with friends continue to be the major reasons for EGM gambling in 1999. The other major reason is the thrill or dream of winning.

**FIGURE 5.10 APPEAL OF LEISURE ACTIVITIES**



Relaxing At Home and Going Out For Dinner remain the most appealing leisure activities for EGM gamblers.

## 5.9 Reasons

Figure 5.9<sup>54</sup> opposite provides an analysis of the reasons for playing EGMs amongst those who do so. Reasons for participating were determined using an agreement scale question.

Reasons most frequently agreed with for playing EGMs at the Casino included:

- ✓ “May get lucky” (74%);
- ✓ “For social reasons or to be with friends” (73%); and
- ✓ “For the thrill or dream of winning” (68%).

Reasons most frequently agreed with for playing EGMs at clubs and hotels included:

- ✓ “May get lucky” (75%);
- ✓ “For the thrill or dream of winning” (69%); and
- ✓ “For social reasons or to be with friends” (68%).

In 1999, this question was asked as a series of closed, agreement-scale questions, rather than as one open-ended, multiple-response question, as in previous years. Due to these changes, results from 1999 are no longer directly comparable with previous years. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999.

## 5.10 Appeal of Leisure Activities

Figure 5.10<sup>55</sup> opposite provides an analysis of the appeal of various leisure activities amongst EGM players. Respondents were asked to rate each of eight spare time or leisure activities on a scale of 1 to 10, where a 1 represents “not at all appealing” and 10 represents “extremely appealing”.

Overall, like the gambling population in general, EGM players considered relaxing at home a highly appealing leisure activity.

Other leisure activities considered highly appealing by EGM players included:

- ✓ Going out for dinner (7.8); and
- ✓ Relaxing at home (7.7).

Leisure activities they regarded as moderately appealing included:

- ✓ Going to the movies (6.3);
- ✓ Playing sport (5.9); and
- ✓ Playing EGMs (3.8).

EGM players reported relatively little appeal in the following leisure activities:

- ✓ Going to the Casino (3.8);
- ✓ Going to the races or trots (3.2); and
- ✓ Betting at the TAB (2.3).

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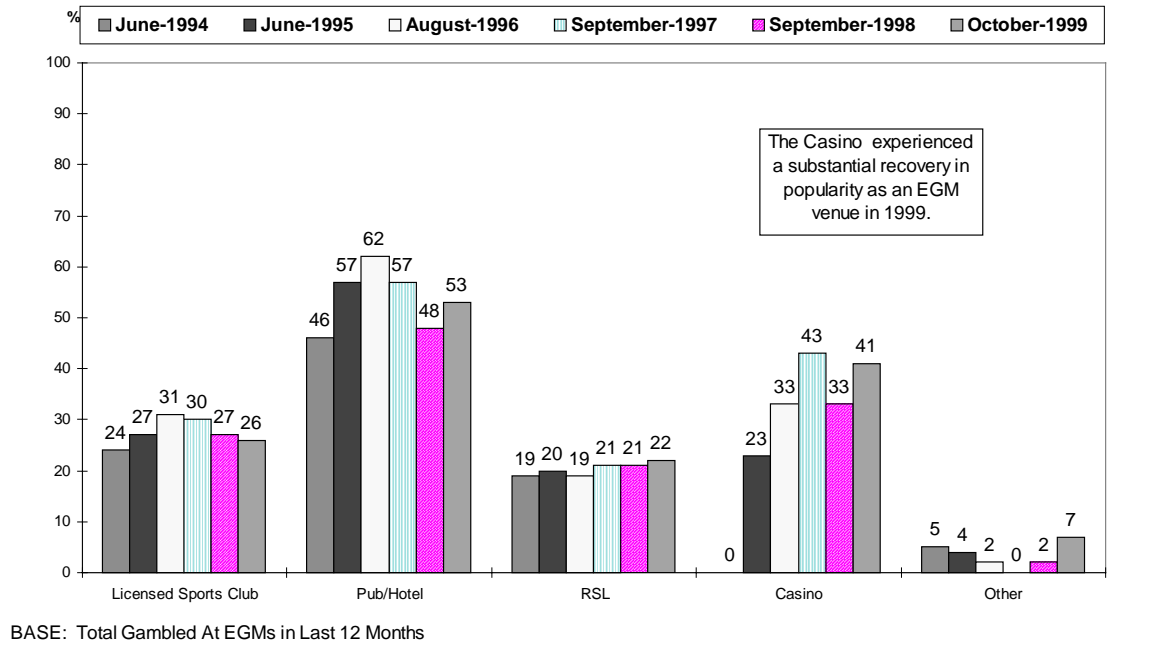
<sup>54</sup> Question 7J “I am now going to read out a series of reasons for playing (EGMs not at the Casino/EGMs at the Casino). I want you to tell me how strongly you agree or disagree that each is a reason for you play (EGMs not at the Casino/EGMs at the Casino).”

<sup>55</sup> Please refer to Appendix 1 - The questionnaire : see Q.23 a)-h).



**EGM GAMBLING PATTERNS**

**FIGURE 5.11 EGM VENUES VISITED**



**FIGURE 5.12 EGM VENUES VISITED MOST OFTEN**



### 5.11 EGM Venues Visited

Figure 5.11<sup>56</sup> opposite provides a time-series analysis of the types of EGM venues visited. Similar to 1998, overall, pubs/hotels were the most popular venues at which to participate in EGM gambling activities. Visitation to such venues to play EGMs increased slightly in 1999, with 53% (up from 48% in 1998) of EGM players going to pubs/hotels to play EGMs. The popularity of RSL clubs and licensed sports clubs as EGM venues has remained relatively stable since 1996. Visitation to the Casino for EGM activities increased noticeably in 1999 (41%, up from 33% in 1998).

EGM players who visited pubs/hotels tended to be from the following groups:

- ✓ Single Parents (79%);
- ✓ Those “At Risk” (64%);
- ✓ 30–39 year olds (64%);
- ✓ Those employed full-time (57%);
- ✓ Those with annual incomes of less than \$50,000 (56%);
- ✓ Those born in Australia (55%); and
- ✓ Acknowledged Heavy Gamblers (50%).

EGM gamblers who visited licensed sports clubs tended to be from the following groups:

- ✓ Country Victorians (48%); and
- ✓ 60–69 year olds (36%).

### 5.12 EGM Venues Visited Most Often

Figure 5.12<sup>57</sup> opposite shows the EGM venues visited most often. Similar to figures in 5.11, Casino visitation increased in 1999 to 41% (up from 20% in 1998). The EGM Venues visited most often by EGM players were:

- ✓ Casino (41%)
- ✓ Pub/hotels (39%);
- ✓ Licensed sports clubs (19%); and
- ✓ RSL Clubs (13%).

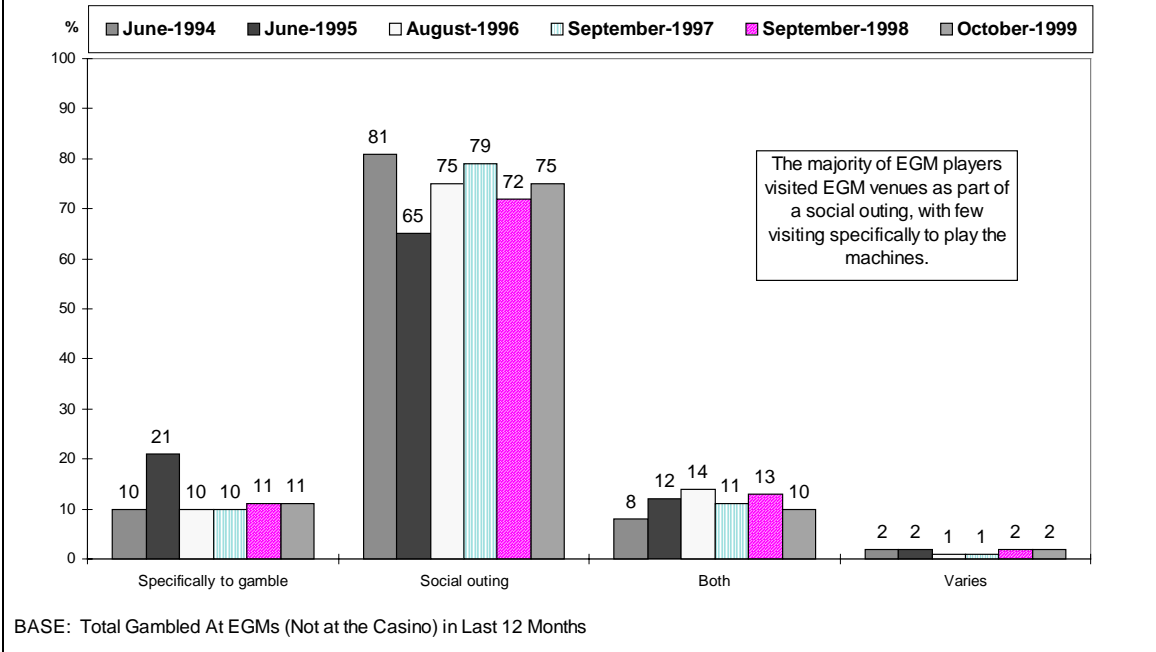
A further 4% reported mostly visiting other venues, while 5% could not say which venue they most often visited to play EGMs.

<sup>56</sup> Question 15a “Which type of venues do you play poker machines (“pokies”) at?”

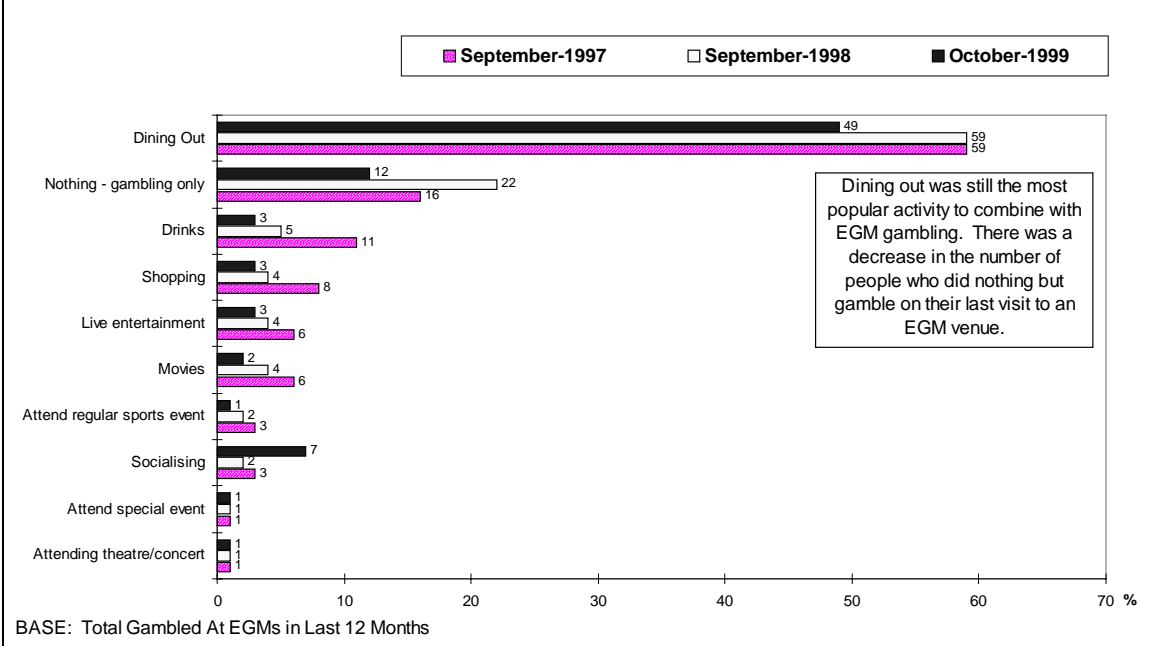
<sup>57</sup> Question 15b: “And which of these venues do you go to the MOST to play poker machines (“pokies”)?” (one only)”

**EGM GAMBLING PATTERNS**

**FIGURE 5.13 REASON FOR ATTENDING EGM VENUES**



**FIGURE 5.14 ACTIVITIES COMBINED WITH EGMs ON LAST VISIT**



### 5.13 Reasons for Attending EGM Venue

EGM players (who play EGMs at venues other than the Casino) were asked whether they visited EGM venues specifically to play the machines or as part of a social outing. The breakdown of their responses, as illustrated in Figure 5.13<sup>58</sup> opposite, was:

- ✓ “For a social outing” (75%);
- ✓ “Both to play the machines and for a social outing” (10%); and
- ✓ “Specifically to play the machines” (11%).

In 1999, 2% of EGM gamblers (who gamble at EGM venues other than the Casino) were unable to say what their reason was for visiting EGM venues.

### 5.14 Activities Combined with EGMs on Last Visit

Figure 5.14<sup>59</sup> opposite provides a time-series analysis of the activities most likely to be combined with EGM gambling.

In 1999, the main leisure activity to be combined with EGM gambling (on last visit) was dining out (49%). The proportion of players combining these two activities decreased from 1998. There was a decrease in the proportion of people who did not do anything other than play the machines on their last visit to an EGM venue (12 %—down 10 points from the 1998 figure of 22%).

Those *most likely* to combine EGM gambling and *dining out* were:

- ✓ Those with annual incomes of \$20,000 to \$40,000 (54%);
- ✓ Older couples (61%);
- ✓ Employed full-time (65%);
- ✓ Couple with no children (57%); and
- ✓ Occasional gamblers (56%);

Those *least likely* to combine EGM gambling and *dining out* were:

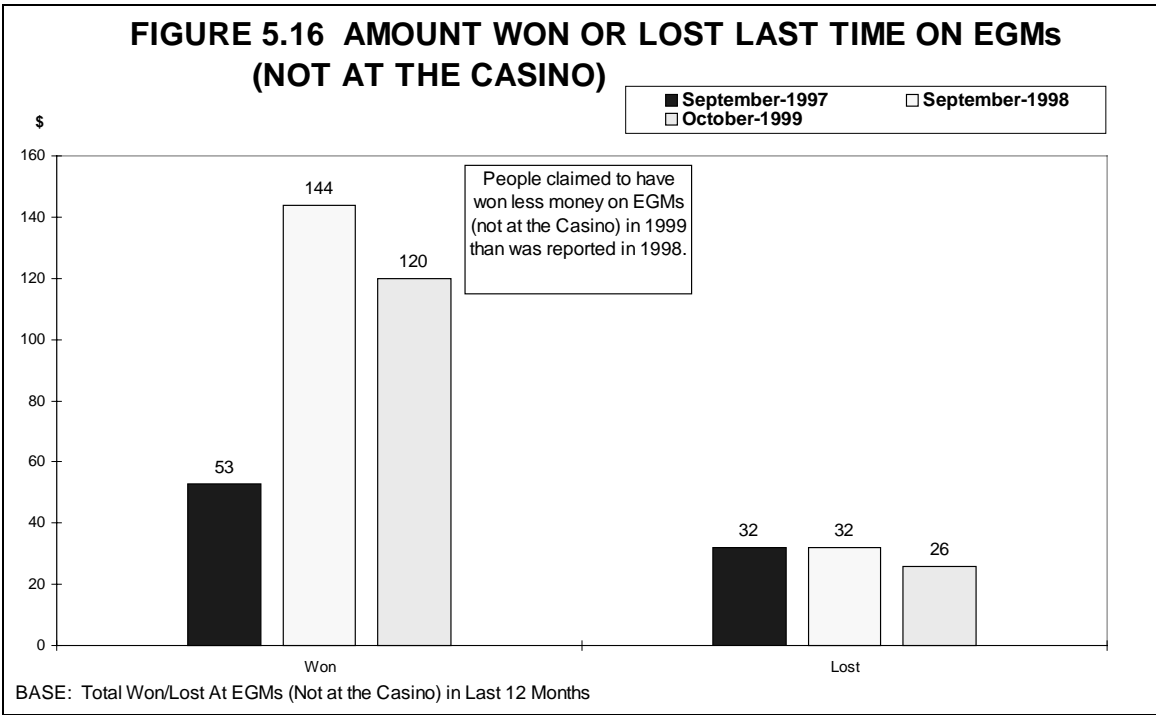
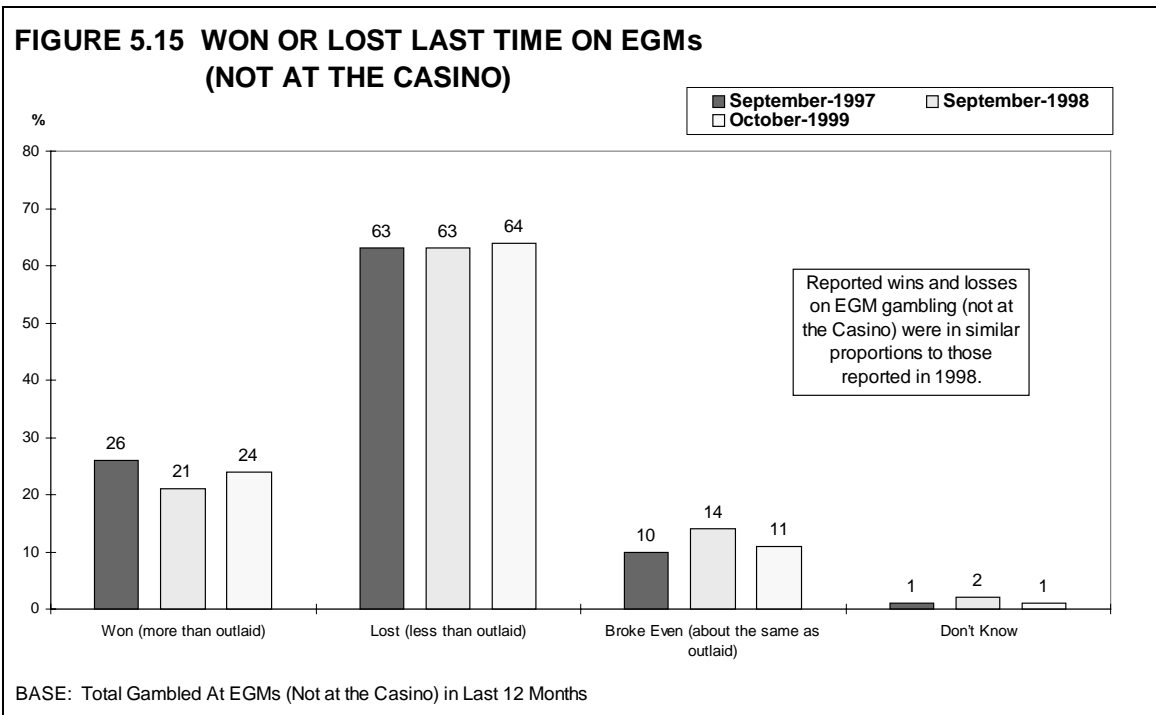
- ✓ Singles (47%);
- ✓ Acknowledged heavy gamblers (27%);
- ✓ Students (19%);
- ✓ 18–19 year olds (28%);
- ✓ Those “At Risk” (35%); and
- ✓ Single parents with dependent children (35%).

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<sup>58</sup> Question 17: “Do you visit poker machines (“pokies”) venues specifically to play the machines or as a part of a social outing?”

<sup>59</sup> Question 22: “Still thinking of the last time you went to a club or hotel to play a poker machine “pokies” in Victoria, what other activities did you undertake?”

**EGM GAMBLING PATTERNS**



### 5.15 Won or Lost Last Time on EGMs (not at the Casino)

Figure 5.15<sup>60</sup> opposite provides an analysis of whether EGM players (not at the Casino) won or lost on EGM gambling activities on the last occasion they played EGMs.

The proportion of EGM players (not at the Casino) who reported that they lost was 64%, with only 24% claiming to have won on the last occasion they played.

### 5.16 Amount Won or Lost Last Time on EGMs (not at the Casino)

Figure 5.16<sup>61</sup> opposite provides an analysis of the amount won or lost on EGM gambling (not at the Casino) on the last occasion played.

On average, reported winnings on EGM gambling (not at the Casino) on the last occasion played were \$120, a lower figure than that reported in 1998 (\$144). The average amount lost, among those who reported they lost on the last occasion, was \$26—somewhat lower than in the previous two years (\$32).

*Higher* levels of winnings were reported amongst the following groups:

- ✓ Those aged 30–39 years (\$216);
- ✓ Occasional Gamblers (\$178);
- ✓ Females (\$152);
- ✓ Acknowledged Heavy Gamblers (\$130); and
- ✓ Metropolitan residents (\$127).

*Lower* levels of losses were reported amongst the following groups:

- ✓ Students (\$7).
- ✓ Salespersons/personal service workers (\$14);
- ✓ 18–19 year olds (\$14);
- ✓ Occasional Gamblers (\$15); and
- ✓ Social Gamblers (\$21).

*Higher* levels of losses were reported amongst the following groups:

- ✓ Those scoring “At risk” on SOGS (\$118);
- ✓ Acknowledged Heavy Gamblers (\$64);
- ✓ Committed Heavy Gamblers (\$44); and
- ✓ Managers/(senior) administrators (\$42).

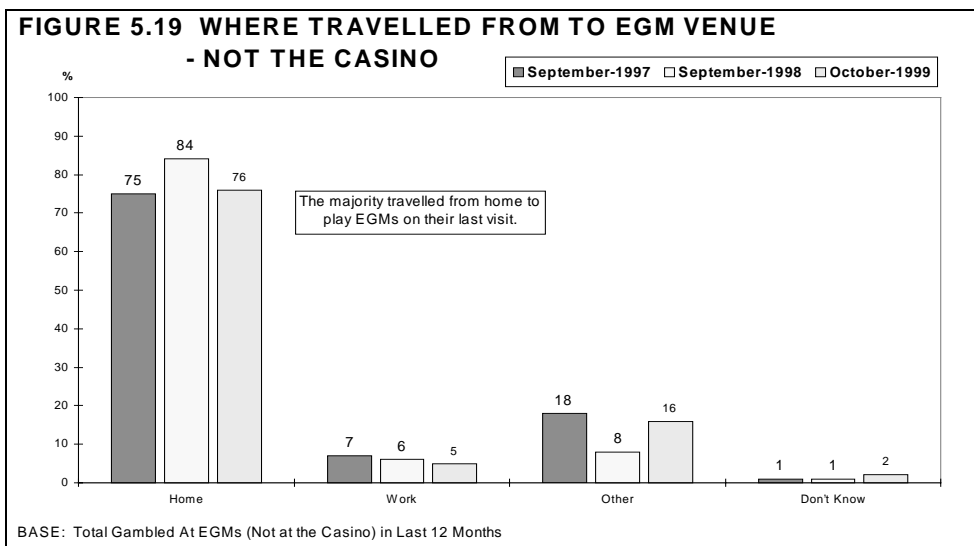
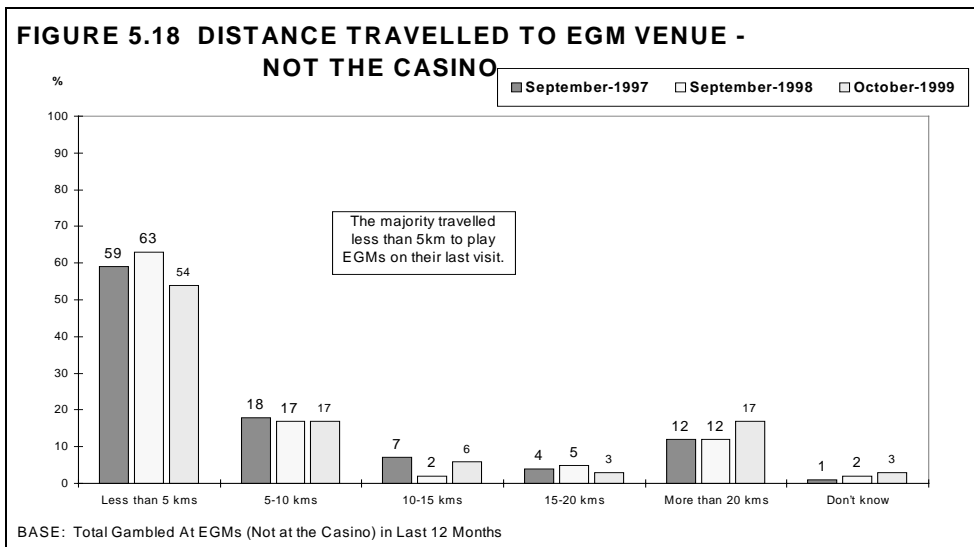
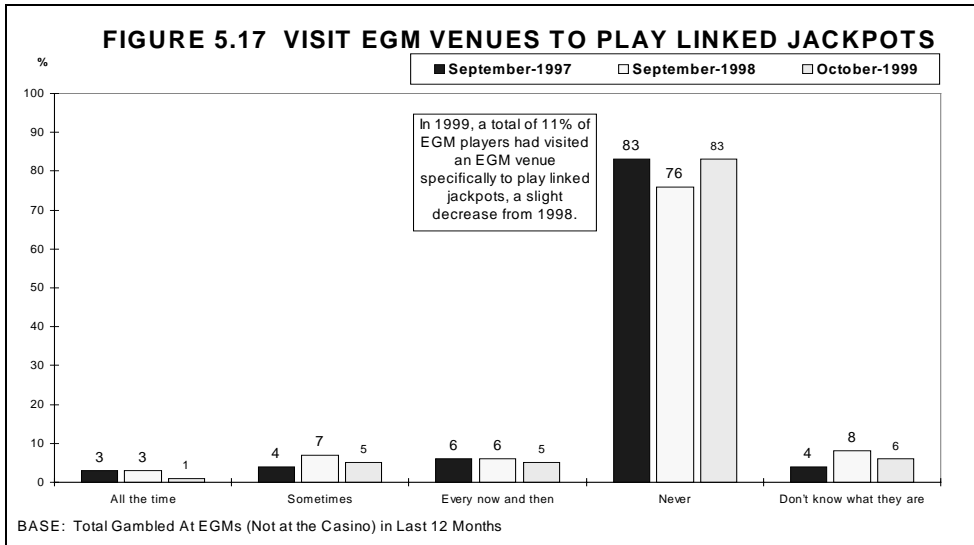
Please note that the question was changed in 1999 to ask respondents how much more (or less) money they had when they finished playing than when they started, rather than asking how much they won (or lost) on this last occasion, as in previous years.

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<sup>60</sup> Question 20: “Thinking of this last time you played poker machines (“pokies”) at a club or hotel in Victoria, did you win or lose on this occasion?”

<sup>61</sup> Question 21: “How much more/less money did you have when you finished playing than when you started??”

**EGM GAMBLING PATTERNS**



### 5.17 Visiting EGM Venues to Play Linked Jackpots

Figure 5.17<sup>62</sup> opposite provides an analysis of whether EGM players visited EGM venues (not at the Casino) specifically to play linked jackpots. When asked “Some hotel and club venues have machines with linked jackpots. Do you specifically go to these venues so you can play electronic gaming machines which have linked jackpots?”, 1% responded “all the time”. In 1999, 5% of Victorians “sometimes” went to venues to play EGMs with linked jackpots and 5% went to play linked jackpots “every now and then”.

A total of 11% of EGM gamblers specifically visited EGM venues to play linked jackpots—5 points lower than the 1998 result of 16%.

The main reason cited for visiting EGM venues was for the social experience (75%), rather than the gambling experience (11%). This is consistent with only a small proportion (11%) of EGM gamblers (not at the Casino) visiting an EGM venue specifically to play linked jackpots.

EGM gamblers (not at the Casino) who visit EGM venues specifically to play linked jackpots did not differ significantly in profile from the Victorian population.

### 5.18 Distance Travelled to get to EGM Venue (not the Casino)

Figure 5.18<sup>63</sup> opposite provides an analysis of the distance travelled to an EGM venue (not the Casino) on the last visit. Most (54%) EGM players not at the Casino travelled less than 5 kilometres to get to the EGM venue (not the Casino) they last gambled at. This was a slight decrease from 1998 (63%). Furthermore, 17% travelled 5–10 kilometres (17% in 1998), 6% travelled between 10 and 15 kilometres (2% in 1998) whilst 17% travelled more than 20 kilometres to play EGMs on their last visit (12% in 1998).

EGM players not at the Casino who travelled further (i.e. more than 20 kilometres) to play EGMs tended to be:

- ✓ Disinterested Gamblers (26%);
- ✓ Occasional Gamblers (26%);
- ✓ Those living in country areas (25%); and
- ✓ Female (21%).

### 5.19 Where Travelled from to EGM Venue (not the Casino)

Figure 5.19<sup>64</sup> opposite provides an analysis of where EGM players travelled from to get to an EGM venue (not the Casino) on their last visit.

In 1999, the number of people travelling from home to play EGMs (not at the Casino) decreased by 8% (84% in 1998 to 76% in 1999), while 5% travelled from work to an EGM venue. Those who gave “other” locations included 4% who travelled from a friend’s/relative’s house, 3% who were on holiday and 1% who travelled from a restaurant.

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<sup>62</sup> Question 16: “Some hotels and club venues have machines with linked jackpots. Do you specifically go to these venues so you can play poker machines (“pokies”) which have linked jackpots?”

<sup>63</sup> Question 18B: “How far did you travel to get to this venue?”

<sup>64</sup> Question 18C: “Did you travel to this venue directly from)...?”





## **5.20 EGM Gambling Patterns – Summary**

The main findings regarding EGM gambling patterns include:

- ✓ Reported EGM activity decreased slightly in 1999 to 30%—down 1 point from 1998;
  - ✓ The proportion of people naming playing EGMs as their favourite gambling activity decreased slightly in 1999 to 15%—down 2 points from 1998;
  - ✓ EGM gamblers closely resemble the Victorian population, although including higher proportions of Social Gamblers, Acknowledged Heavy Gamblers, Committed Heavy Gamblers and those identified as being “At Risk” on the SOGS;
  - ✓ The proportion of all EGM gamblers who participated regularly (at least once a month) decreased in 1999 to 34%—down 5 points from 39% in 1998;
  - ✓ The amount of time spent by those playing EGMs each time (day) they played decreased to 62 minutes in 1999—down 6 minutes from the 1998 figure of 68 minutes. When considered on a weekly basis, the average amount of time spent playing EGMs by those who did so was 27 minutes per week (please note that there was a change in format of duration questions in 1999);
  - ✓ In 1999, the average expenditure on EGMs each time (day) played increased to \$33. When considered on a weekly basis, the average expenditure on EGMs among those who reported playing them was \$26 per week (please note that a change in question format in 1999 means that expenditure data from this year’s survey may not be directly comparable with those from previous years);
  - ✓ In 1999, people reporting EGM gambling activity reported on average that they won back 57% of their outlay on EGM gambling activities (please note that a change in question format in 1999 means that return data from this year’s survey may not be directly comparable with those from previous years);
  - ✓ EGM players reported moderate satisfaction with EGM gambling activities. The difference in level of satisfaction between playing EGMs at the Casino and playing EGMs at clubs and hotels was larger than in previous years, but still less than 3 points (CSI = 61.2 and 58.6, respectively);
  - ✓ The most frequent reason given for continuing to play EGMs despite dissatisfaction with playing EGMs was that it is “a social thing/to gamble with family or friends” (35% of those playing at the Casino; 34% of those playing at clubs and hotels);
  - ✓ The main reasons for playing EGMs were “may get lucky” (73%), “for social reasons/to be with friends” (68%), and “the thrill or dream of winning” (66%) (please note that a change in question format in 1999 means that data concerning reasons for participation from this year’s survey may not be directly comparable with those from previous years);
  - ✓ People reporting EGM gambling activity found “relaxing at home”, “going out for dinner”, “going to the movies” and “playing sport” relatively appealing leisure activities. The level of appeal for playing EGMs amongst those who reported having done so within the last 12 months decreased slightly from 1998;
  - ✓ Pubs/hotels were the venues mentioned most often by EGM players as places at which they play EGMs (53%)—up 5 points from 1998. The most appreciable change, however, was an increase in visitation of the Casino for the playing of EGMs—at 41%, up 8 points from 1998. Further, the Casino was the venue mentioned most often as the venue visited the most to play EGMs—at 41%, up 21 points from 1998, and the first time the Casino has been mentioned more often than pubs/hotels in this regard;
  - ✓ When people reporting EGM gambling activity at EGM venues other than the Casino were asked whether they visited these venues specifically to play the machines or as part of a social outing, three quarters (75%) said they visited as part of a social outing, 10% said both reasons were a factor, and only 11% said that they visited EGM venues specifically to play the machines;
-

- ✓ The main activity combined with EGM gambling in 1999 was dining out, and the proportion of EGM players who did nothing but play the machines on their last visit to a venue decreased to 12%—down 10 points from 1998, and the lowest level seen yet in this survey;
  - ✓ Similar to previous years, almost two thirds (64%) of those having played EGMs at clubs and hotels reported a loss (average of \$26) the last time they played. Eleven per cent (11%) reported that they broke even the last time they played EGMs at a club or hotel, and 24% claimed they won money (average of \$120);
  - ✓ As in previous years, the majority of those reporting EGM gambling activity (83%) never visited EGM venues specifically to play linked jackpots. Only 1% of EGM players said they play linked jackpots all the time—down 2 points from both 1998 and 1997—and 6% did not know what linked jackpots are;
  - ✓ The majority (54%) of those playing EGMs at clubs and hotels still travelled less than 5 kilometres to get to the venue, but there was an increase in the proportion who travelled more than 20 kilometres to do so—at 17%, up 5 points from both 1998 and 1997; and
  - ✓ As in previous years, the majority (76%) of those playing EGMs at clubs and hotels still travelled to the venue direct from their home.
-

**SECTION 6**

**LOTTO  
GAMBLING PATTERNS**

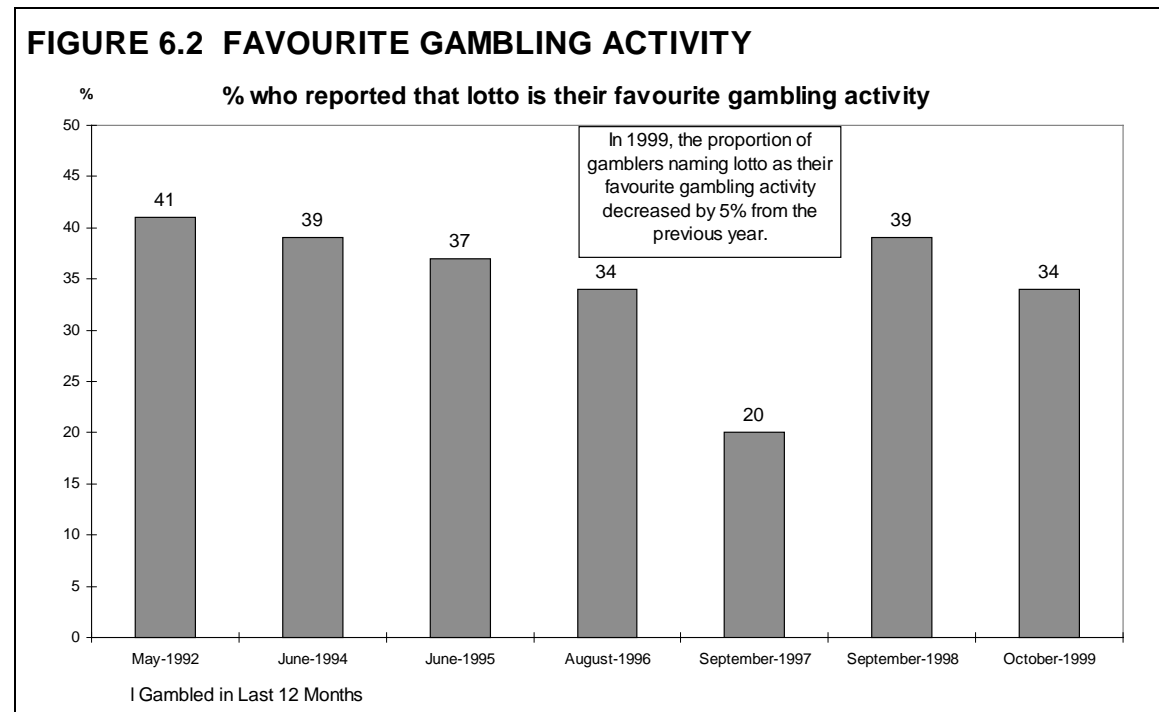
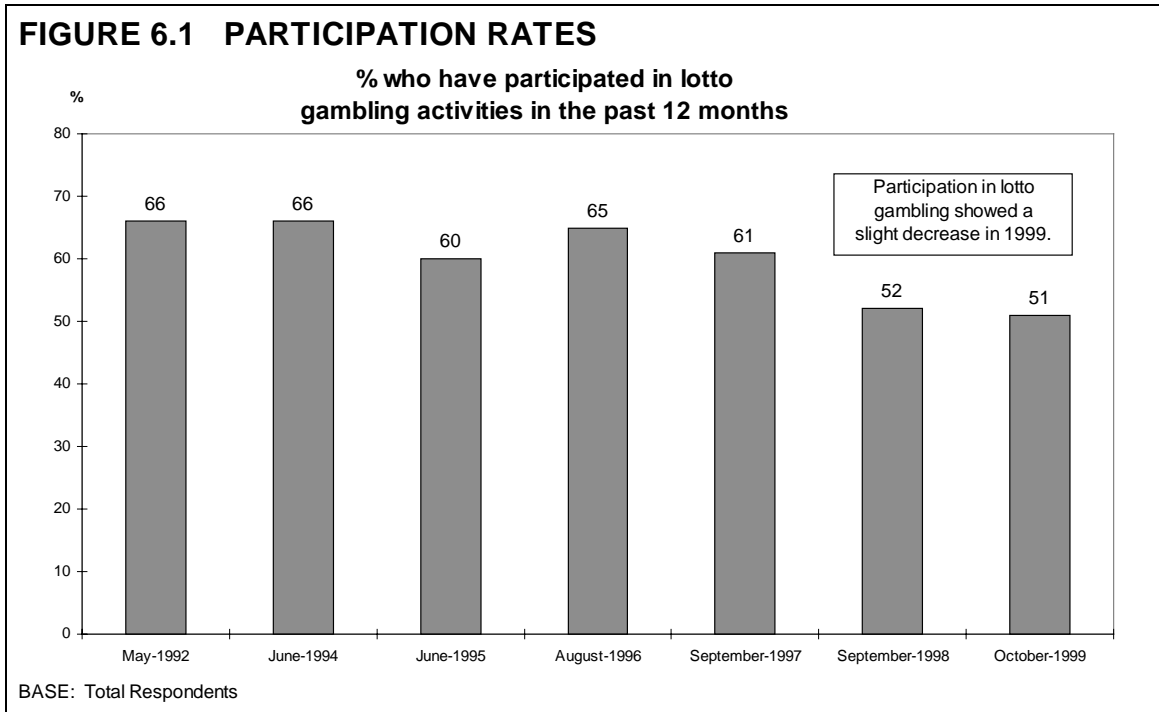


## **6. LOTTO GAMBLING PATTERNS**

Section 6 provides a brief summary of lotto gambling patterns. “Lotto” encompasses Lotto, Tattsлото, Oz Lotto, Tatts Keno and Powerball in its definition. As in all previous years of this survey, lotto was again the most popular of the gambling activities surveyed, with more than half of the Victorian population participating, despite a slight decrease in participation. Outlined below are the key findings regarding lotto gambling patterns.

- ✓ Lotto gambling fluctuated between 60% and 66% for the 1992–1997 period. In 1999 participation in lotto decreased slightly to 51%, the lowest level recorded since survey commencement;
  - ✓ The percentage of those reporting gambling activity who named lotto as their favourite gambling activity declined in 1999 to 34%, down from 39% in 1998;
  - ✓ Lotto entrants were significantly more likely to be in full-time employment, and to be either Disinterested Gamblers or Occasional Gamblers;
  - ✓ In 1999, the proportion of Lotto entrants who participate in Lotto gambling activities at least once a month decreased from 76% in 1998 to 72%;
  - ✓ The amount that lotto entrants were prepared to outlay each time they entered lotto was \$10 in 1999 (\$9, 1998);
  - ✓ Lotto entrants showed low levels of satisfaction with lotto gambling activities (CSI = 49.0)—a decrease of more than 8 points from the 1998 figure of 57.9;
  - ✓ The main reasons for participating in lotto were “the thrill or dream of winning” (90%) and “may get lucky” (86%);
  - ✓ Leisure activities rated as most appealing by lotto gamblers were “relaxing at home” and “going out for dinner”.
-

**LOTTO GAMBLING PATTERNS**



<sup>65</sup> Question 1 "Which of the following activities or games have you played or gambled on in the past 12 months?"

Question 2 "Which one of these activities is your favourite game or activity?" (unprompted)

**PROFILE OF LOTTO GAMBLERS**

**TABLE 6.1**

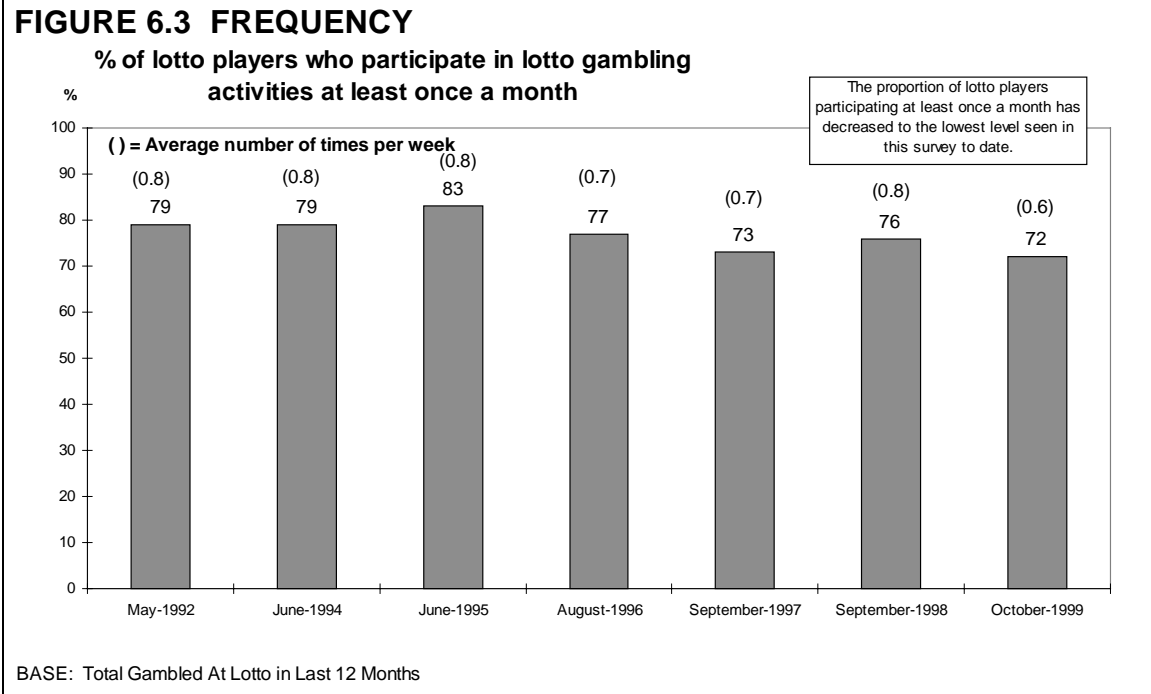
	<b>Total Population</b>	<b>Lotto Gamblers (Last 12 mths)</b> 51% of total pop	<b>Reg. Lotto Gamblers (Once a mth+)</b> 37% of total pop
<i>GENDER</i>			
Male	49%	50%	53%
Female	51%	50%	47%
<i>AGE</i>			
Average Age	44 yrs	45 yrs	48 yrs
<i>RESPONDENT'S OCCUPATION</i>			
<b>TOTAL FULL-TIME</b>	<b>44%</b>	<b>49%</b>	<b>50%</b>
Managers/(senior) administrators	11%	13%	13%
Professionals	19%	17%	17%
Para-professionals	7%	7%	8%
Tradespersons	12%	13%	14%
Clerks	10%	11%	11%
Sales/personal service workers	12%	13%	13%
Plant/machine operators/drivers	4%	5%	5%
Labourers/related workers	9%	8%	8%
<b>TOTAL PART-TIME</b>	<b>15%</b>	<b>15%</b>	<b>14%</b>
<b>TOTAL NOT IN PAID WORKFORCE</b>	<b>41%</b>	<b>36%</b>	<b>37%</b>
Household duties	8%	8%	6%
Student	8%	5%	3%
Self-supporting retiree	8%	7%	8%
Pensioner	14%	15%	17%
Unemployed	2%	2%	3%
<i>LOCATION</i>			
Melbourne Metropolitan	73%	71%	71%
Other Victoria non-metropolitan	27%	29%	29%
<i>SOGS SCORE</i>			
(0-4)	92.2%	99.2%	99.1%
(5-20)	0.8%	0.8%	0.9%
<i>SEGMENT</i>			
Disinterested Gambler	22%	27%	28%
Occasional Gambler	38%	46%	45%
Social Gambler	9%	11%	11%
Acknowledged Heavy Gambler	5%	6%	6%
Committed Heavy Gambler	8%	10%	10%

 Significantly higher than average

 Significantly lower than average



**LOTTO GAMBLING PATTERNS**



**6.4 Duration**

In 1999, lotto entrants were not asked how much time they spend participating because duration is of little relevance to this activity. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999.

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<b>LOTTO GAMBLING PATTERNS</b>
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### 6.5 Expenditure

In 1999, lotto entrants estimated that they spend, on average, \$10 each time (week) that they enter lotto. When considered on a weekly basis, this represents an average expenditure of \$7 per week.

Please note that in 1999 the question was changed to ask respondents how much money they do spend or outlay each week they participated (in previous years, the question asked respondents the dollar value they were prepared to or would outlay each time they participated). Due to these changes, results from 1999 are no longer directly comparable with previous years. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999. A summary graphic of expenditure for all gambling activities in 1999 is available at Figure 3.11.

### 6.6 Proportion of Outlay Reported as Won Back

In 1999, lotto entrants estimated that they won back an average of 22% of their overall outlay on lotto in the previous 12 months.

Changes in question format resulted in responses being based upon breaking even meaning winning 100% of outlay back. Due to these changes, results from 1999 are no longer directly comparable with previous years. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999. A summary graphic of proportion of outlay won back for all gambling activities in 1999 is available at Figure 3.13.

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<sup>69</sup> Question 5C "In each week you play Lotto, Tattslotto, Oz Lotto, Tatts Keno or Powerball, on average, how much money do you spend or outlay on this activity?"

<sup>70</sup> Question 6C1. Thinking about all your playing Lotto, Tattslotto, Oz Lotto, Tatts Keno or Powerball over the last 12 months, do you think that you won back more than you outlaid, less than you outlaid, or about the same as you outlaid?"

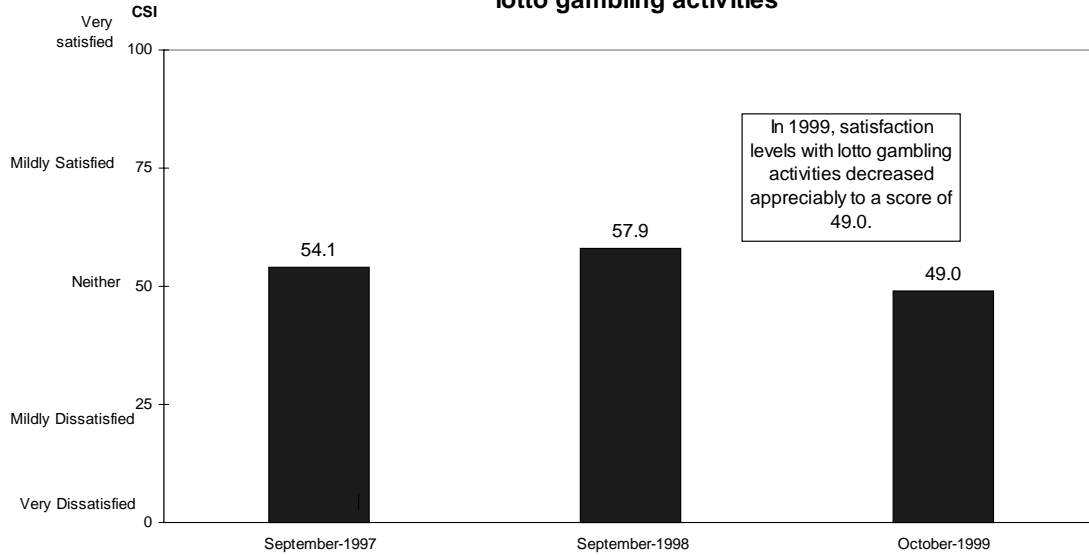
Question 6C2. If breaking even means winning back 100% of your outlay, what percentage of your outlay over the past 12 months do you think you won back on Lotto, Tattslotto, Oz Lotto, Tatts Keno, or Powerball?"

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**LOTTO GAMBLING PATTERNS**

**FIGURE 6.7 SATISFACTION**

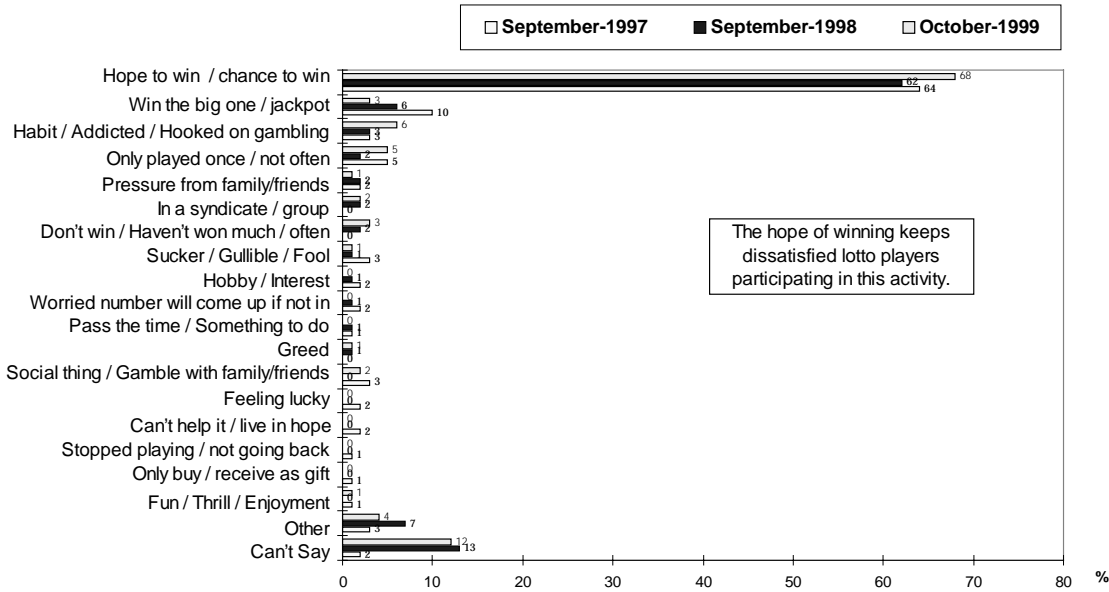
Satisfaction with experience of lotto gambling activities



In 1999, satisfaction levels with lotto gambling activities decreased appreciably to a score of 49.0.

BASE: Total Gambled At Lotto in Last 12 Months

**FIGURE 6.8 IF DISSATISFIED, WHY CONTINUE LOTTO GAMBLING**



The hope of winning keeps dissatisfied lotto players participating in this activity.

BASE: Total Dissatisfied with Lotto Gambling Activities

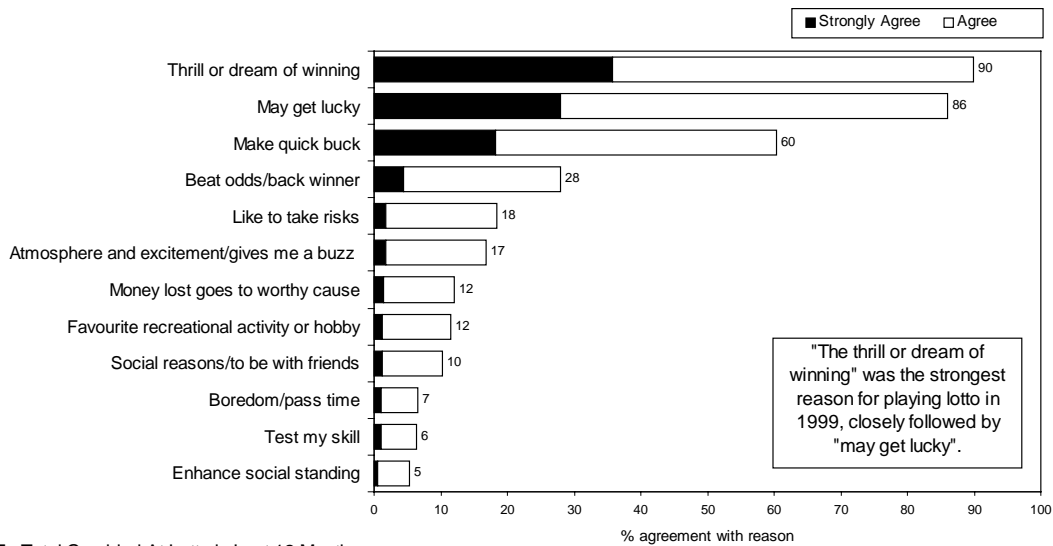
<sup>71</sup> Question 8C "Would you say that you are satisfied or dissatisfied with your experience of playing Lotto, Tattsлото, Oz Lotto, Tatts Keno or Powerball?"

<sup>72</sup> Question 9C "Why do you keep entering Lotto if you are dissatisfied?"

**LOTTO GAMBLING PATTERNS**

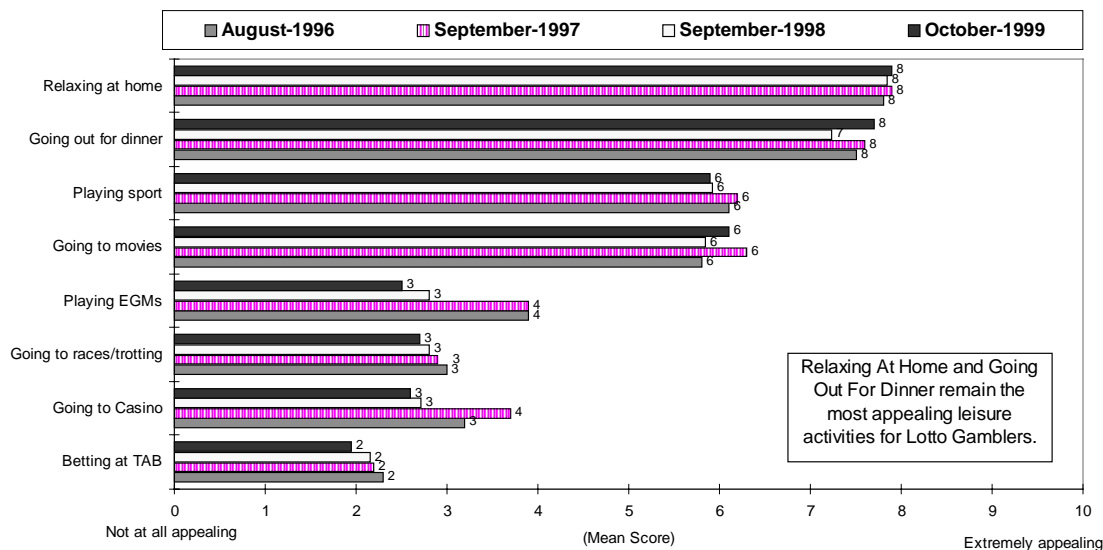
**FIGURE 6.9 REASONS**

**% of lotto players agreeing that this is a reason for playing lotto**



**FIGURE 6.10 APPEAL OF LEISURE ACTIVITIES**

**Level of appeal of leisure activities amongst lotto players**



<sup>71</sup> Question 7CA-7CN "I'm now going to read out a series of reasons for playing Lotto Tattslotto, Oz Lotto, Tatts Keno or Powerball. I want you to tell me how strongly you agree or disagree that each is a reason you play Lotto, Tattslotto, Oz Lotto, Tatts, Keno or Powerball."

<sup>72</sup> Questions 23A-H: "We would now like you to rate a number of spare time or leisure activities on a scale of 1 to 10 where a 1 is not at all appealing and 10 is extremely appealing. So on a scale of 1 to 10, how appealing is (betting at the TAB/Playing sport/Going to the movies/Going to the races or trots/Going out for dinner/Relaxing at home eg. Watching TV/Playing the Electronic Gaming Machines/Going to the casino)?"



**SECTION 7**

**SCRATCH TICKET  
GAMBLING PATTERNS**

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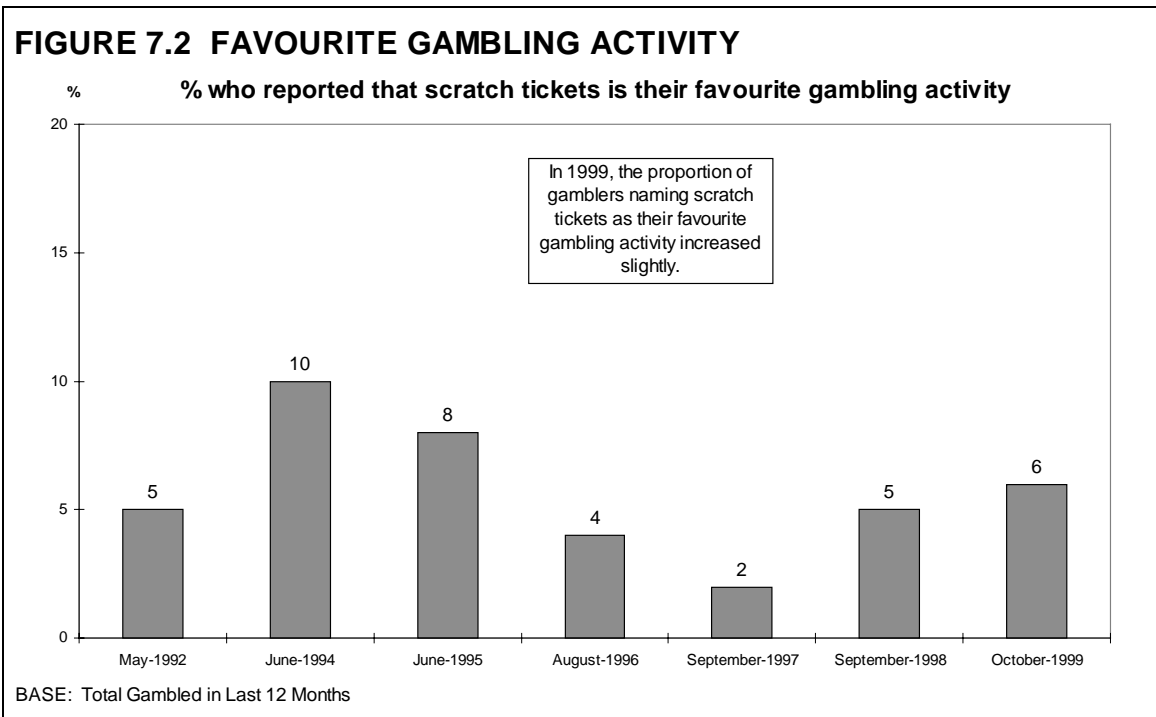
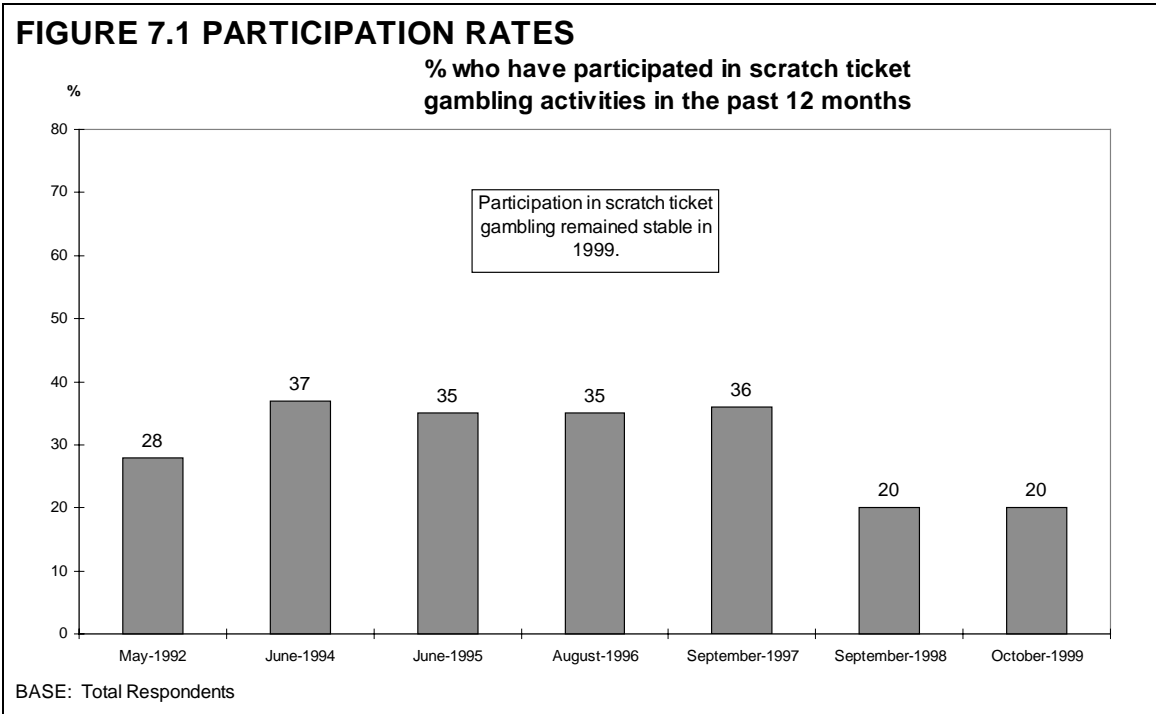
## **7. SCRATCH TICKET GAMBLING PATTERNS**

Section 7 provides a brief summary of scratch ticket gambling patterns. “Scratch tickets” includes Instant Lotto & Scratch ‘n’ Win. When asked which activities or games they had played or gambled on in the past 12 months, 20% of respondents mentioned scratch tickets. The key findings regarding scratch ticket gambling patterns are outlined below:

- ✓ Scratch ticket gambling participation remained stable in 1999 at 20%;
  - ✓ Six per cent (6%) of those having gambled in the last 12 months reported scratch tickets as their favourite gambling activity—a 1% increase from 1998 (5%);
  - ✓ Scratch ticket entrants in 1999 were significantly more likely to live in country areas and to be Social Gamblers;
  - ✓ In 1999, the proportion of scratch ticket entrants who participated in this activity at least once a month decreased to 42%—down 5 points from 47% in 1998;
  - ✓ On average, scratch ticket entrants were prepared to outlay \$4 each time they participated;
  - ✓ There were relatively low levels of satisfaction with scratch ticket gambling (CSI = 54.4) among those participating in this gambling activity;
  - ✓ The main reason given by dissatisfied Scratch ticket gamblers in 1999 for continuing with this activity was “the hope of winning” (49 %);
  - ✓ The main reasons for participating in scratch ticket gambling were “may get lucky” (87%), “the thrill or dream of winning” (81%) and “to make a quick buck” (32%);
  - ✓ The most appealing leisure activities for scratch ticket entrants gamblers in 1999 were “relaxing at home” and “going out for dinner”.
-



**SCRATCH TICKET GAMBLING PATTERNS**




<sup>71</sup> Question 1 "Which of the following activities or games have you played, entered or bet on in the past 12 months?"

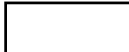
<sup>72</sup> Question 2. "Which one of these activities is your favourite game or activity?" (unprompted)

**PROFILE OF SCRATCH TICKET GAMBLERS**

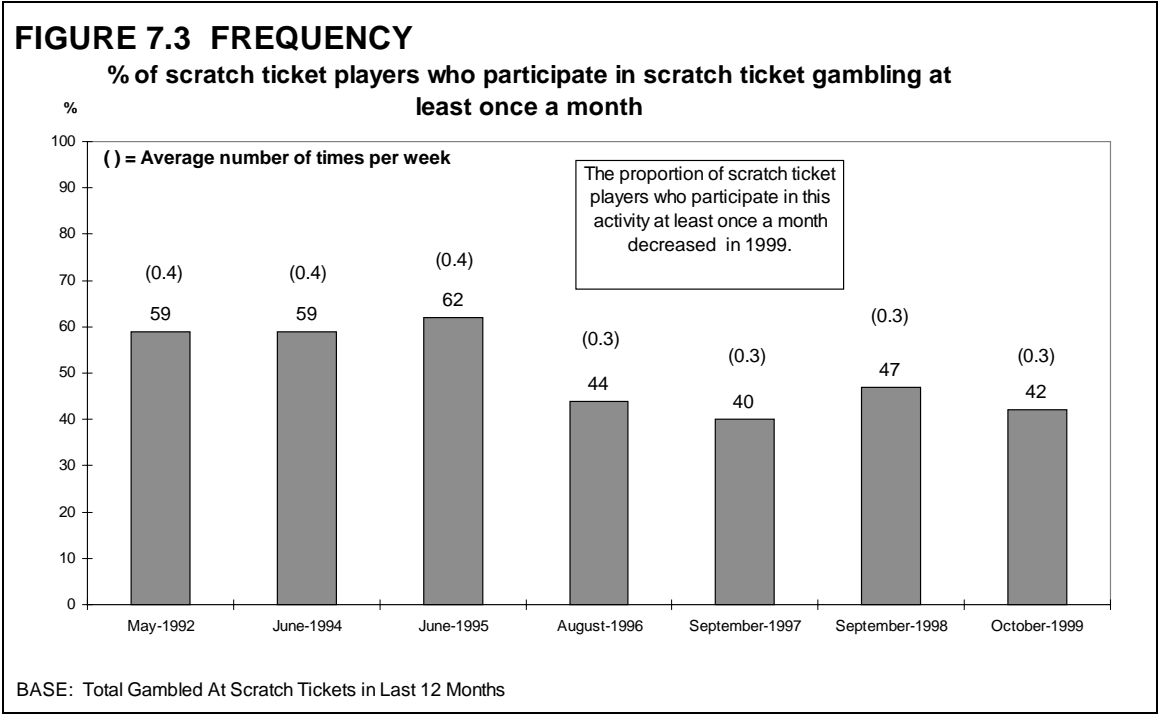
**TABLE 7.1**

	<b>Total Population</b>	<b>Scratch ticket Gamblers (Last 12 mths)</b> 20% of total pop	<b>Reg. Scratch ticket Gamblers (Once a mth+)</b> 8% of total pop
<i><b>GENDER</b></i>			
Male	49%	43%	49%
Female	51%	57%	51%
<i><b>AGE</b></i>			
Average Age	44 yrs	42 yrs	43 yrs
<i><b>RESPONDENT'S OCCUPATION</b></i>			
<b>TOTAL FULL-TIME</b>	<b>44%</b>	<b>47%</b>	<b>45%</b>
Managers/(senior) administrators	11%	12%	10%
Professionals	19%	15%	16%
Para-professionals	7%	6%	6%
Tradespersons	12%	11%	11%
Clerks	10%	11%	10%
Sales/personal service workers	12%	16%	16%
Plant/ machine operators/drivers	4%	5%	7%
Labourers/related workers	9%	8%	9%
<b>TOTAL PART-TIME</b>	<b>15%</b>	<b>18%</b>	<b>15%</b>
<b>TOTAL NOT IN PAID WORKFORCE</b>	<b>41%</b>	<b>35%</b>	<b>40%</b>
Household duties	8%	8%	6%
Student	8%	7%	8%
Self-supporting retiree	8%	5%	6%
Pensioner	14%	12%	17%
Unemployed	2%	3%	3%
<i><b>LOCATION</b></i>			
Melbourne Metropolitan	73%	62%	60%
Other Victoria non-metropolitan	27%	38%	40%
<i><b>SOGS SCORE</b></i>			
(0-4)	99.2%	99.4%	100%
(5-20)	0.8%	0.6%	2.4%
<i><b>SEGMENT</b></i>			
Disinterested Gambler	22%	26%	25%
Occasional Gambler	38%	41%	38%
Social Gambler	9%	17%	21%
Acknowledged Heavy Gambler	5%	6%	7%
Committed Heavy Gambler	8%	10%	9%

 Significantly higher than average

 Significantly lower than average

**SCRATCH TICKET GAMBLING PATTERNS**



**7.4 Duration**

In 1999, scratch ticket entrants were not asked how much time they spend participating because duration is of little relevance to this activity. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999.

<sup>73</sup> Question 3D "How often do you enter Scratch ticket, Instant Lotto or Scratch 'n Win?"

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<b>SCRATCH TICKET GAMBLING PATTERNS</b>
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### 7.5 Expenditure

In 1999, scratch ticket entrants estimated that they spend an average of \$4 each time (day) that they enter scratch tickets. When considered on a weekly basis, this represents an average expenditure of \$1 per week.

Please note that in 1999 the question was changed to ask respondents how much money they do spend or outlay each day they participated (in previous years, the question asked respondents the dollar value they were prepared to or would outlay each time they participated). Due to these changes, results from 1999 are no longer directly comparable with previous years. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999. A summary graphic of expenditure for all gambling activities in 1999 is available at Figure 3.11.

### 7.6 Proportion of Outlay Reported as Won Back

In 1999, scratch ticket entrants estimated their average proportion of outlay won back on scratch tickets in the previous 12 months as 49%.

Changes in question format resulted in responses being based upon breaking even meaning winning 100% of outlay back. Due to these changes, results from 1999 are no longer directly comparable with previous years. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999. A summary graphic of proportion of outlay won back for all gambling activities in 1999 is available at Figure 3.13.

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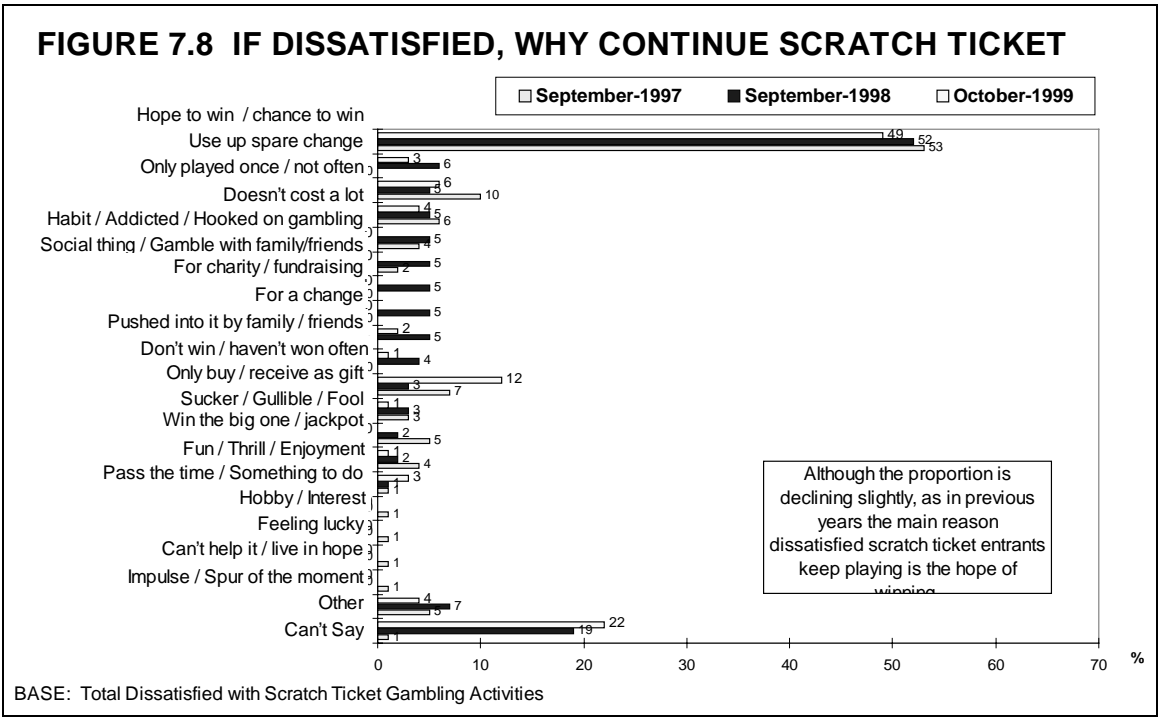
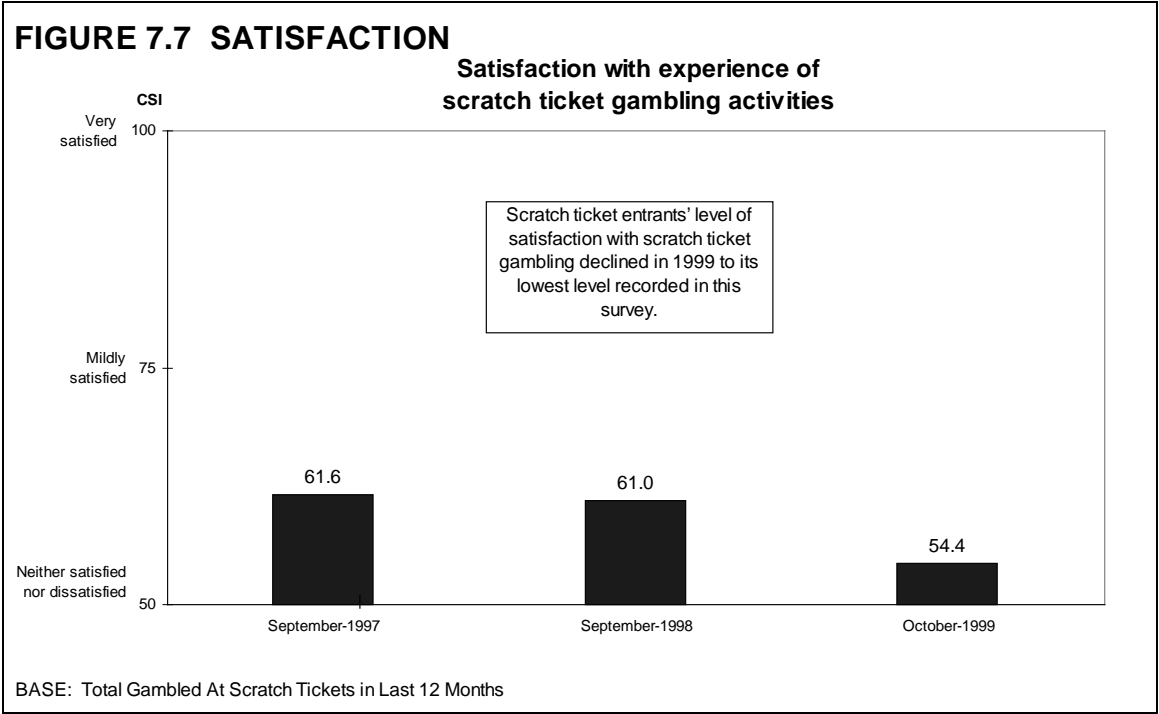
<sup>75</sup> Question 5D "On each day you enter Scratch ticket, Instant Lotto or Scratch 'n Win, on average, how much money do you spend or outlay on this activity?"

<sup>76</sup> Question 6D1 "Thinking about all your entering Scratch Ticket, Instant Lotto, or Scratch 'n Win over the past 12 months, do you think that you have won back more than than you outlaid, less than you outlaid, or about the same as you outlaid?"

Question 6D2 "If breaking even means winning back 100% of your outlay, what percentage of your outlay over the past 12 months do you think you won back on Scratch ticket, Instant Lotto or Scratch 'n Win?"

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**SCRATCH TICKET GAMBLING PATTERNS**

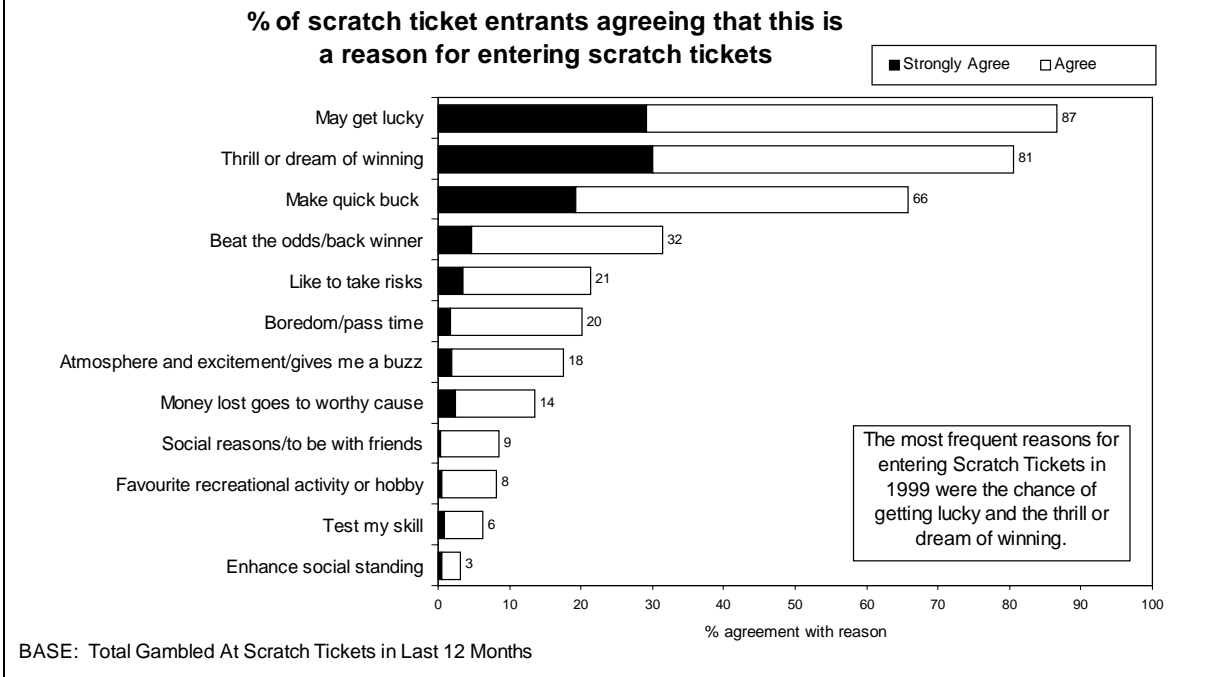


<sup>77</sup> Question 8D "Would you say that you are satisfied or dissatisfied with your experience of entering Scratch ticket, Instant Lotto or Scratch 'n Win?"

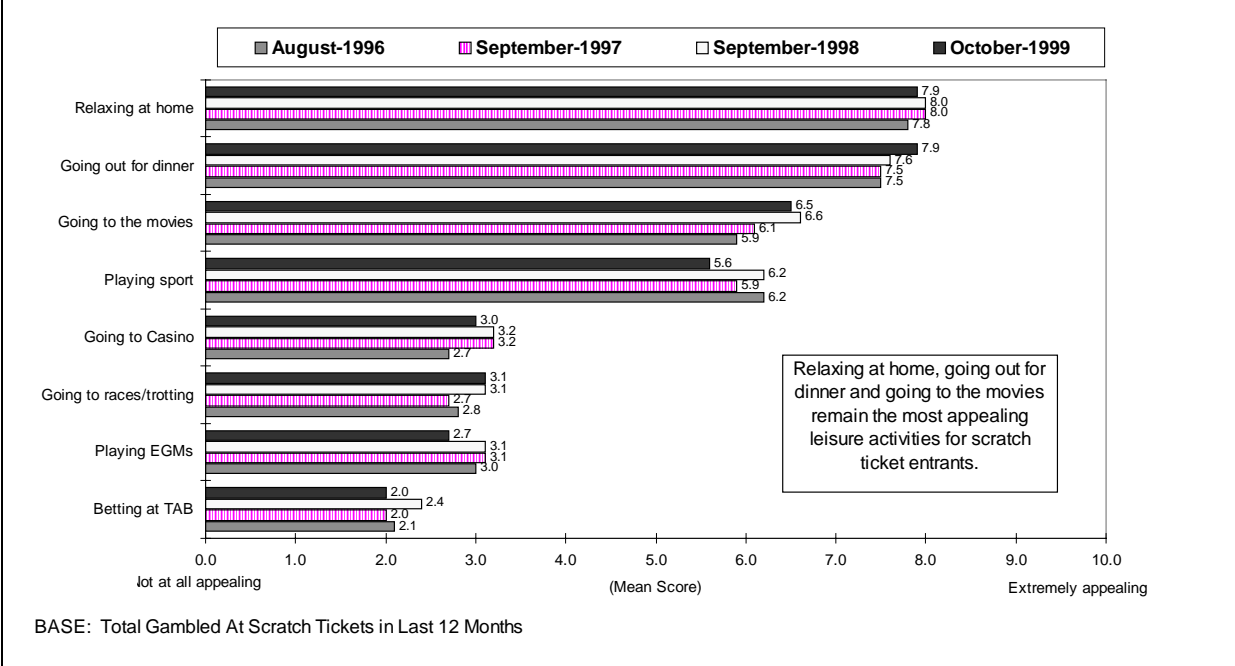
<sup>78</sup> Question 9D "Why do you keep entering Scratch ticket, Instant Lotto or Scratch 'n Win if you are dissatisfied?"

## SCRATCH TICKET GAMBLING PATTERNS

**FIGURE 7.9 REASONS**



**FIGURE 7.10 APPEAL OF LEISURE ACTIVITIES**



<sup>79</sup> Question 7DA-7DN "I'm now going to read out a series of reasons for entering Scratch ticket, Instant Lotto or Scratch'n'win. I want you to tell me how strongly you agree or disagree that each is a reason you enter Scratch ticket, Instant Lotto or Scratch 'n Win?"

<sup>80</sup> Questions 23A-H: "We would now like you to rate a number of spare time or leisure activities on a scale of 1 to 10 where a 1 is not at all appealing and 10 is extremely appealing. So on a scale of 1 to 10, how appealing is (betting at the TAB/Playing sport/Going to the movies/Going to the races or trots/Going out for dinner/Relaxing at home eg. Watching TV/Playing the Electronic Gaming Machines/Going to the casino)?"



**SECTION 8**

**RAFFLES  
GAMBLING PATTERNS**





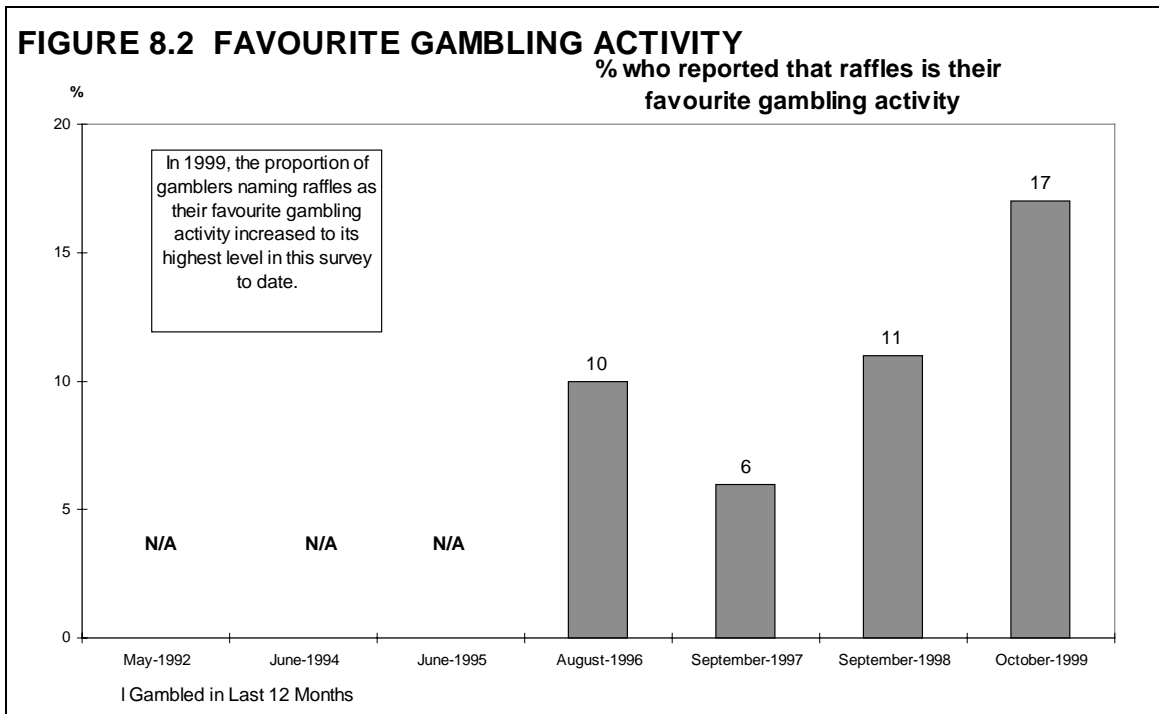
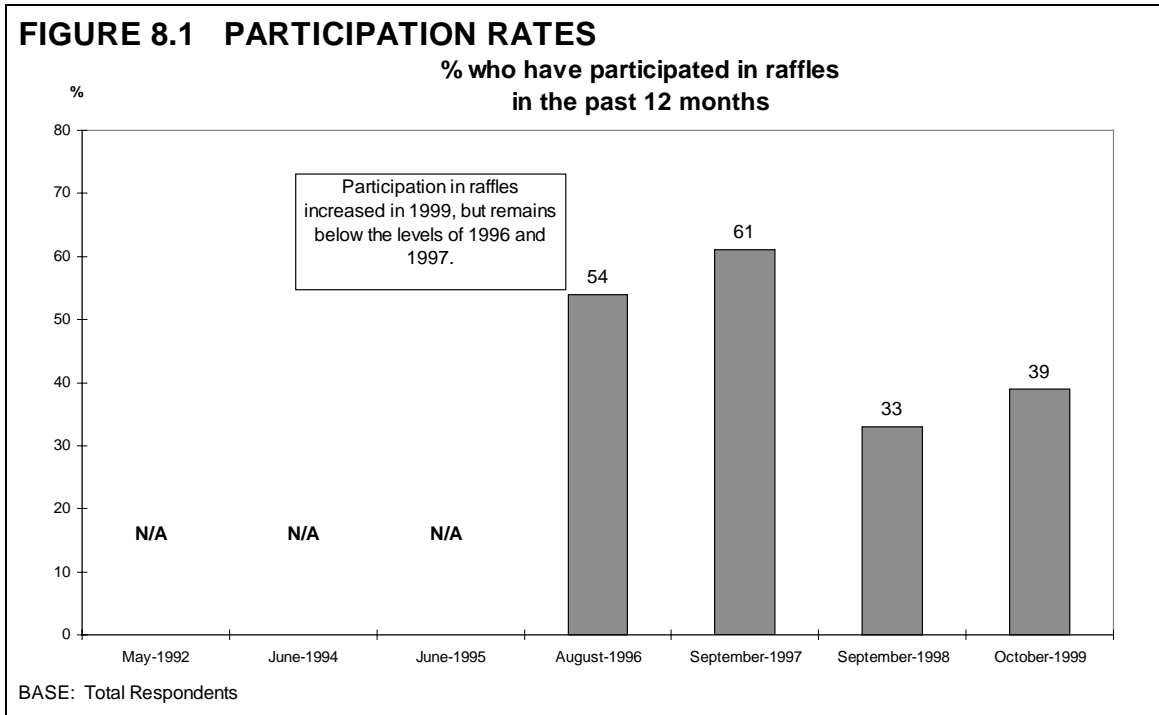
## **8. RAFFLES GAMBLING PATTERNS – SUMMARY**

Section 8 provides a graphical summary of raffles gambling patterns.

A brief summary of raffles gambling patterns is outlined below. More than one third (39%) of Victorian adults participated in raffles in 1999. Other key findings regarding raffles gambling patterns include:

- ✓ Raffles was the second most commonly undertaken gambling activity by Victorians in 1999 (39%). This represents an increase of 6% from 1998, when 33% of Victorians participated in raffles, but remains below participation levels observed for raffles in 1996 and 1997;
  - ✓ 17% of gamblers reported Raffles as their favourite gambling activity—a 6 point increase from 1998 (11%), and the highest level recorded to date in this survey for raffles;
  - ✓ Raffles entrants were significantly more likely than the Victorian population to be female, to live in country areas, and to be Occasional Gamblers or Disinterested Gamblers. Those participating regularly were more likely to live in rural areas and to be Occasional Gamblers;
  - ✓ In 1999, the proportion of raffles entrants participating once a month or more often decreased 4 points from the 1998 level, but at 37%, remained more than one in three;
  - ✓ Raffles entrants spent \$7 each time (day) that they participated in this activity, which represents a “per week” cost of only \$1;
  - ✓ As in 1998, raffles gamblers reported relatively low levels of satisfaction with this activity (CSI = 62.2);
  - ✓ Perhaps the most distinctive feature of raffles as a gambling activity is that almost all raffles entrants (96%) agree that they participate in the activity because “money lost goes to a worthy cause”;
  - ✓ The most appealing leisure activities for raffles entrants were “relaxing at home”, “going out for dinner” and “going to the movies”.
-

**RAFFLES GAMBLING PATTERNS**




<sup>71</sup> Question 1. Which of the following activities or games have you played, entered or bet on in the past 12 months?


<sup>72</sup> Question 2 "Which one of these activities is your favourite game or activity?" (unprompted)

**PROFILE OF RAFFLES GAMBLERS**

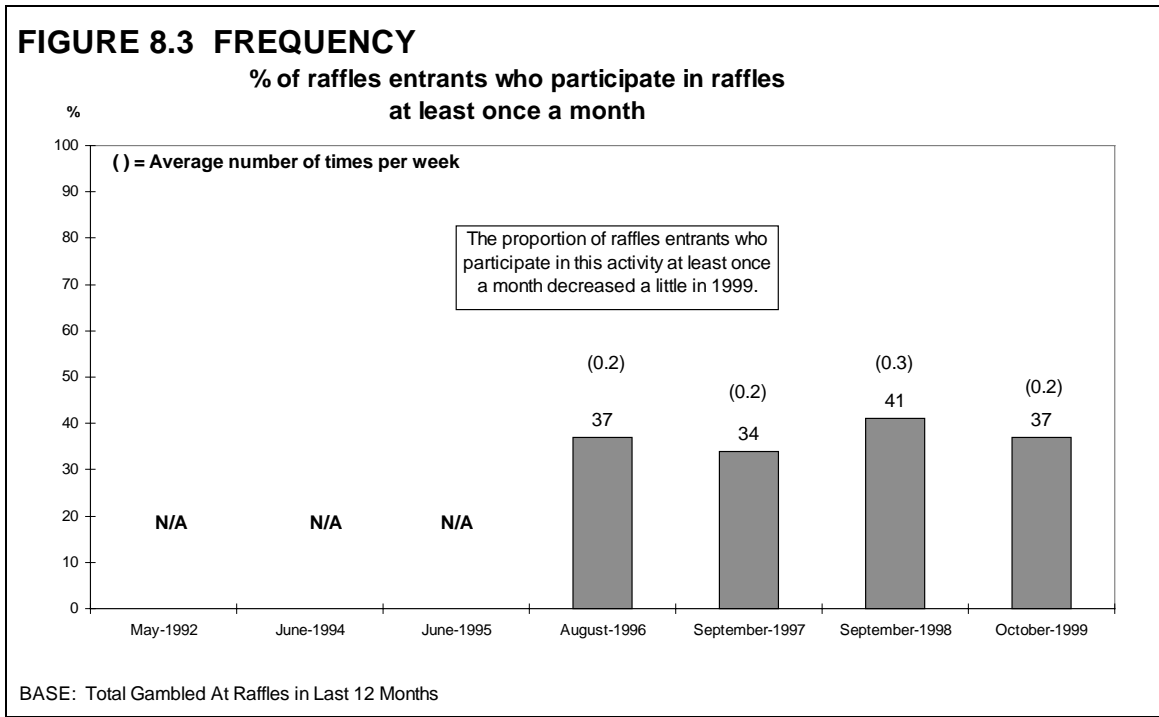
**TABLE 8.1**

	<b>Total Population</b>	<b>Raffle Gamblers (Last 12 mths)</b> 39% of total pop	<b>Reg. Raffle Gamblers (Once a mth+)</b> 14% of total pop
<i>GENDER</i>			
Male	49%	42%	47%
Female	51%	58%	53%
<i>AGE</i>			
Average Age	44 yrs	45 yrs	46 yrs
<i>RESPONDENT'S OCCUPATION</i>			
<b>TOTAL FULL-TIME</b>	<b>44%</b>	<b>45%</b>	<b>48%</b>
Managers/(senior) administrators	11%	13%	14%
Professionals	19%	19%	16%
Para-professionals	7%	7%	6%
Tradespersons	12%	10%	13%
Clerks	10%	12%	12%
Sales/personal service workers	12%	12%	9%
Plant/machine operators/drivers	4%	5%	6%
Labourers/related workers	9%	6%	8%
<b>TOTAL PART-TIME</b>	<b>15%</b>	<b>17%</b>	<b>14%</b>
<b>TOTAL NOT IN PAID WORKFORCE</b>	<b>41%</b>	<b>37%</b>	<b>38%</b>
Household duties	8%	10%	9%
Student	8%	6%	5%
Self-supporting retiree	8%	8%	8%
Pensioner	14%	13%	15%
Unemployed	2%	1%	1%
<i>LOCATION</i>			
Melbourne Metropolitan	73%	66%	55%
Other Victoria non-metropolitan	27%	34%	45%
<i>SOGS SCORE</i>			
(0-4)	99.2%	99.7%	99.6%
(5-20)	0.8%	0.3%	0.4%
<i>SEGMENT</i>			
Disinterested Gambler	22%	27%	19%
Occasional Gambler	38%	50%	54%
Social Gambler	9%	10%	11%
Acknowledged Heavy Gambler	5%	4%	6%
Committed Heavy Gambler	8%	9%	11%

 Significantly higher than average compared to the total population

 Significantly lower than average compared to the total population

**RAFFLES GAMBLING PATTERNS**



**8.4 Duration**

In 1999, raffles entrants were not asked how much time they spend participating because duration is of little relevance to this activity. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999.

<sup>73</sup> Question 3A "How often do you enter Raffles?"

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<b>RAFFLES GAMBLING PATTERNS</b>
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**8.5 Expenditure**

In 1999, the average expenditure by raffles entrants each time (day) they participated in this activity was \$7. When considered on a weekly basis, this represents an average expenditure of \$1 per week.

Please note that in 1999 the question was changed to ask respondents how much money they do spend or outlay each day they participated (in previous years, the question asked respondents the dollar value they were prepared to or would outlay each time they participated). Due to these changes, results from 1999 are no longer directly comparable with previous years. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999. A summary graphic of expenditure for all gambling activities in 1999 is available at Figure 3.11.

**8.6 Proportion of Outlay Reported as Won Back**

In 1999, raffles entrants believed that on average they won back 14% of their outlay on this activity in the previous 12 months.

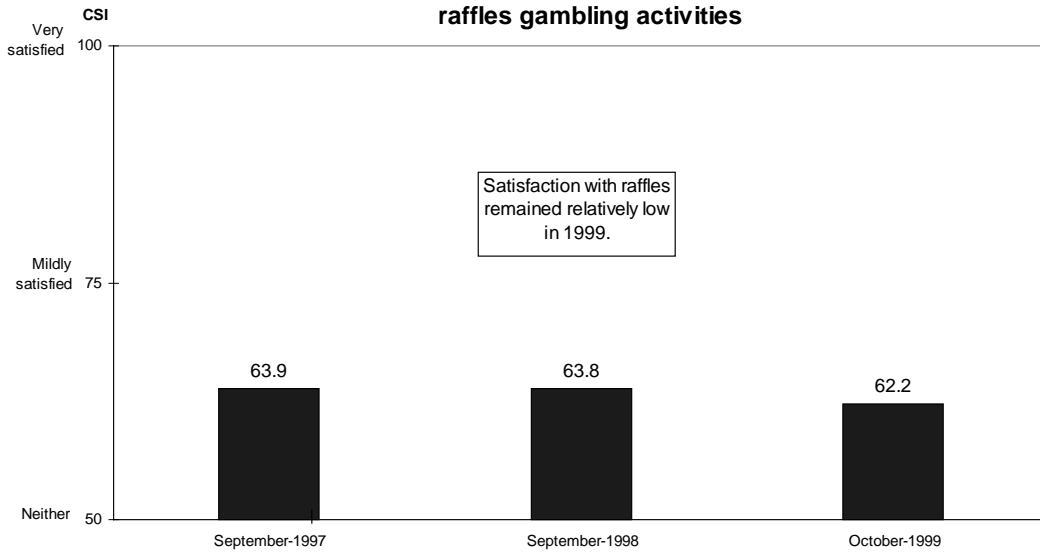
Changes in question format resulted in responses being based upon breaking even meaning winning 100% of outlay back. Due to these changes, results from 1999 are no longer directly comparable with previous years. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999. A summary graphic of proportion of outlay won back for all gambling activities in 1999 is available at Figure 3.13.

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**RAFFLES GAMBLING PATTERNS**

**FIGURE 8.7 SATISFACTION**

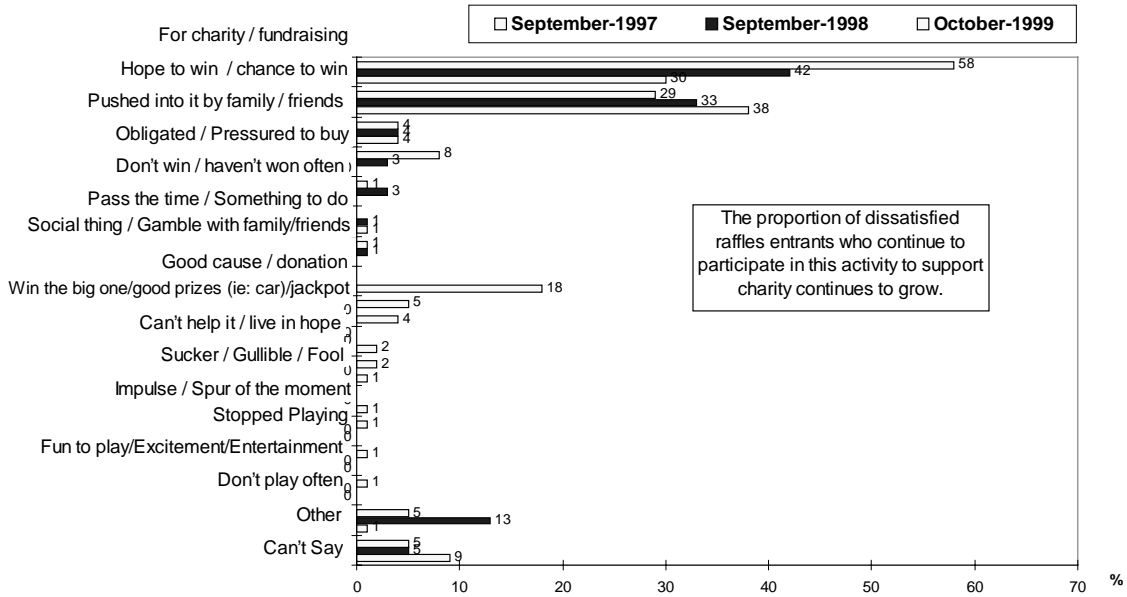
Satisfaction with experience of raffles gambling activities



Satisfaction with raffles remained relatively low in 1999.

BASE: Total Gambled At Raffles in Last 12 Months

**FIGURE 8.8 IF DISSATISFIED, WHY CONTINUE RAFFLES GAMBLING**



The proportion of dissatisfied raffles entrants who continue to participate in this activity to support charity continues to grow.

BASE: Total Dissatisfied with Raffles Gambling Activities

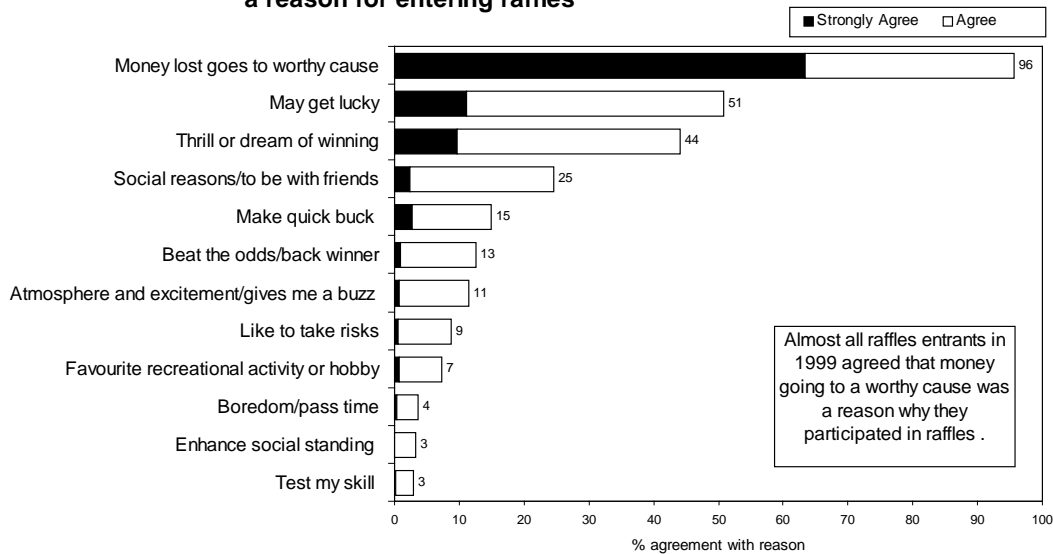
<sup>75</sup> Question 8A "Would you say that you are satisfied or dissatisfied with your experience of entering Raffles?"

<sup>76</sup> Question 9A "Why do you keep entering Raffles if you are dissatisfied?"

**RAFFLES GAMBLING PATTERNS**

**FIGURE 8.9 REASONS**

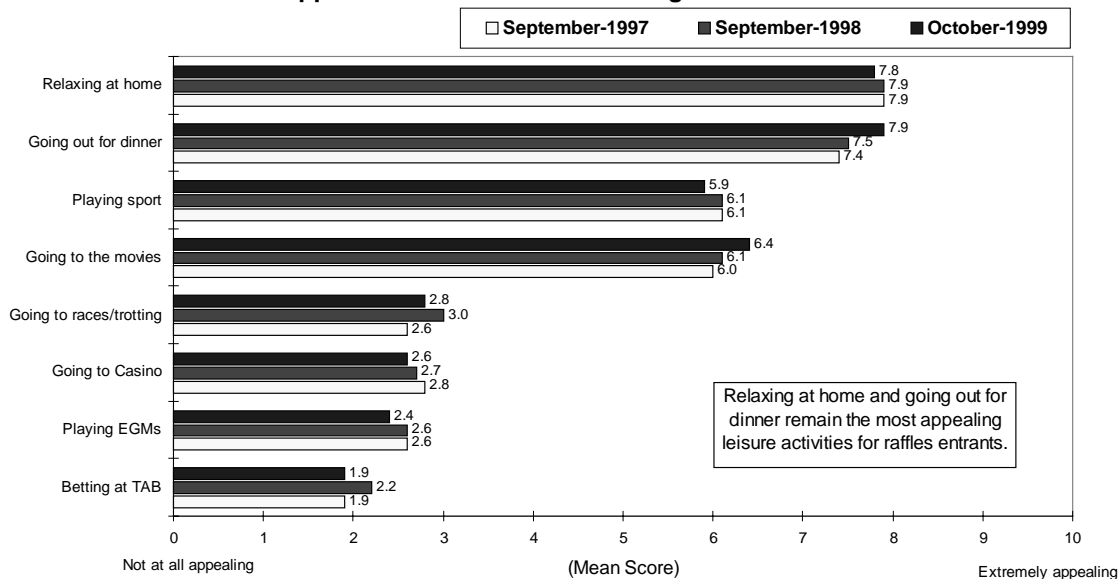
**% of raffles entrants agreeing that this is a reason for entering raffles**



Almost all raffles entrants in 1999 agreed that money going to a worthy cause was a reason why they participated in raffles .

**FIGURE 8.10 APPEAL OF LEISURE ACTIVITIES**

**Level of appeal of leisure activities amongst raffles entrants**



Relaxing at home and going out for dinner remain the most appealing leisure activities for raffles entrants.

<sup>77</sup> Question 7AA-7AN “I’m now going to read out a series of reasons for entering Raffles. I want you to tell me how strongly you agree or disagree that each is a reason you enter Raffles”

<sup>78</sup> Questions 23A-H: “We would now like you to rate a number of spare time or leisure activities on a scale of 1 to 10 where a 1 is not at all appealing and 10 is extremely appealing. So on a scale of 1 to 10, how appealing is (betting at the TAB/Playing sport/Going to the movies/Going to the races or trots/Going out for dinner/Relaxing at home eg. Watching TV/Playing the Electronic Gaming Machines/Going to the casino)?”





**SECTION 9**

**BINGO  
GAMBLING PATTERNS**

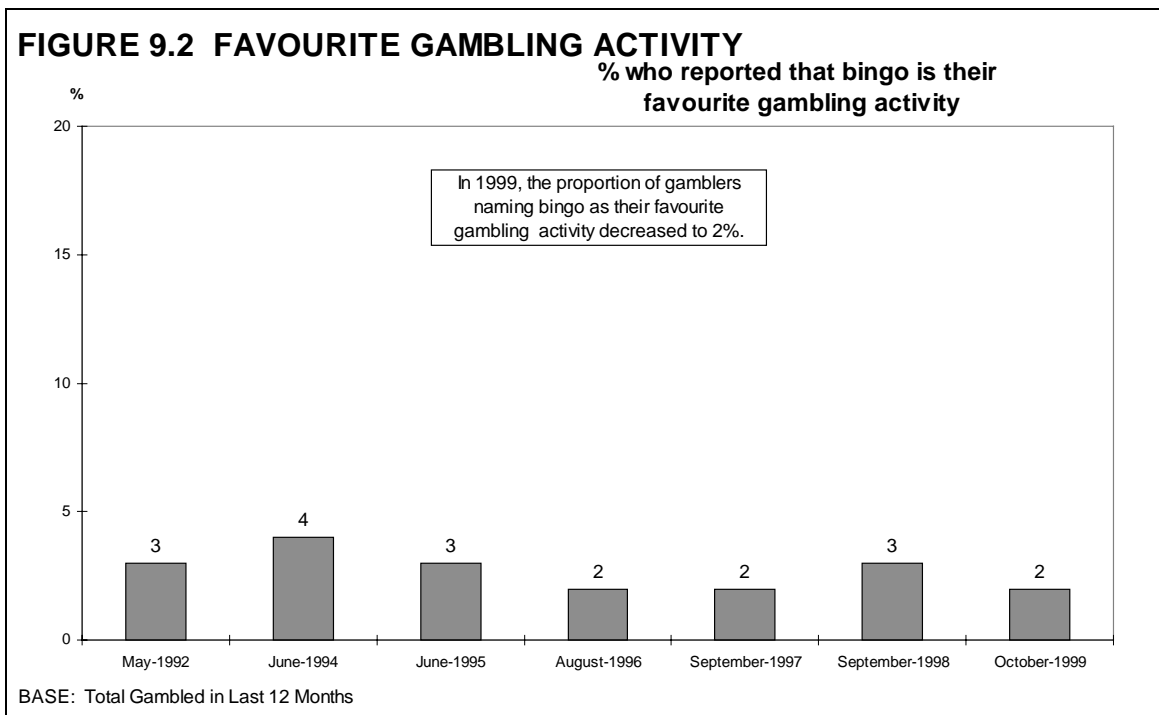
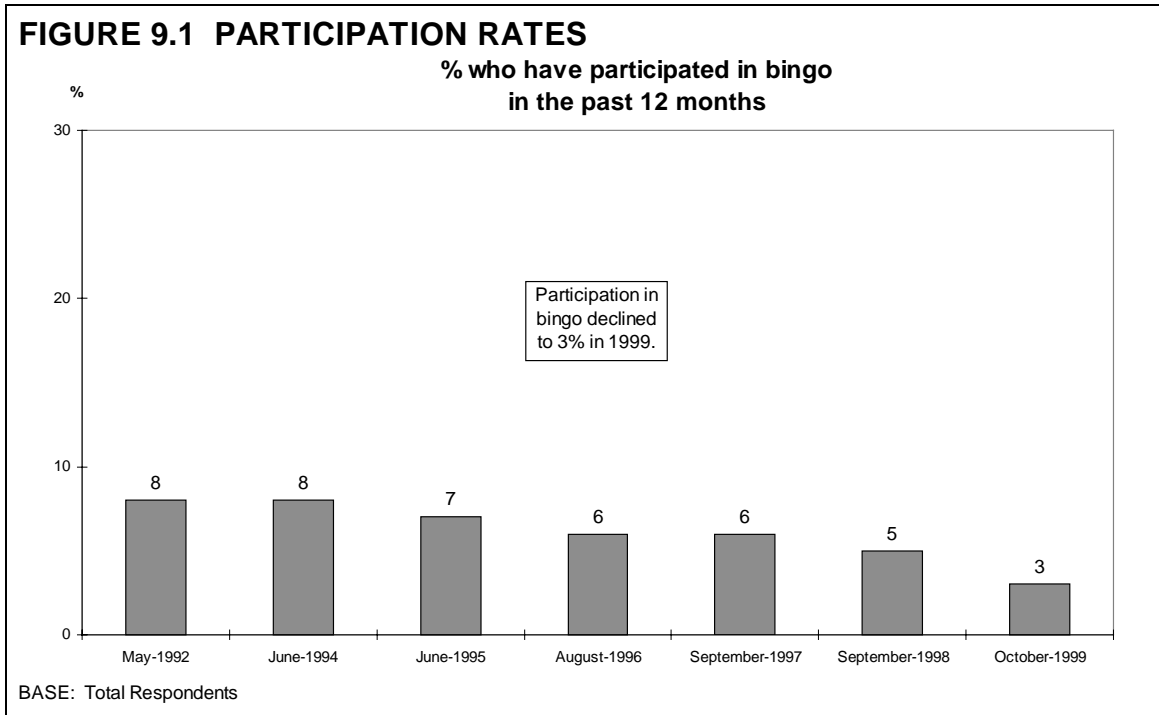


## **9. BINGO GAMBLING PATTERNS – SUMMARY**

Section 9 provides a brief summary of bingo gambling patterns. The key findings include:

- ✓ Bingo participation continued to decline in 1999, with only 3% of those reporting gambling activity having participated in this particular activity—down 2 points from 1998, and the lowest level of participation recorded for bingo to date in this survey;
  - ✓ The number of gamblers who reported bingo as their favourite gambling activity declined 1 point from 1998 to 2%, but is consistent with the level observed in 1997 and 1998;
  - ✓ Bingo players were significantly more likely to be female, clerks, not in paid employment, pensioners, and Social Gamblers or Acknowledged Heavy Gamblers;
  - ✓ There was an increase in the frequency of regular participation in bingo in 1999, with 63% of Bingo gamblers playing at least once a month or more frequently (50%, 1998)—suggesting that the decline in overall participation in bingo mostly comprises those who played less frequently than average;
  - ✓ Similar to 1998, bingo players spent almost 2 hours (114 minutes) on average each time they played bingo in 1999;
  - ✓ On average, Bingo players spent \$17 on bingo each time (day) they played it in 1999;
  - ✓ Bingo players reported a moderately high level of satisfaction with bingo gambling activities (CSI = 69.8);
  - ✓ The main reason cited by bingo players who continued to play despite dissatisfaction with the activity was “social reasons” (45%);
  - ✓ Reasons most participants agreed with for playing bingo included “social reasons” (82%) and “may get lucky” (64%);
  - ✓ Leisure activities found more appealing by bingo players included “relaxing at home” and “going out for dinner”. There was only a low level of interest in “betting at the TAB” and “going to the races or trots”.
-

**BINGO GAMBLING PATTERNS**




<sup>93</sup> Question 1. Which of the following activities or games have you played, entered or bet on in the past 12 months?

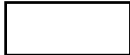
<sup>94</sup> Question 2 "Which one of these activities is your favourite game or activity?" (unprompted)

**PROFILE OF BINGO GAMBLERS**

**TABLE 9.1**

	<b>Total Population</b>	<b>Bingo Gamblers (Last 12 mths)</b> <b>3% of total pop</b>	<b>Reg. Bingo Gamblers (Once a mth+)</b> <b>2% of total pop</b>
<i><b>GENDER</b></i>			
Male	49%	34%	42%
Female	51%	66%	58%
<i><b>AGE</b></i>			
Average Age	44 yrs	48 yrs	49 yrs
<i><b>RESPONDENT'S OCCUPATION</b></i>			
<b>TOTAL FULL-TIME</b>	<b>44%</b>	<b>30%</b>	<b>30%</b>
Managers/(senior) administrators	11%	4%	4%
Professionals	19%	8%	7%
Para-professionals	7%	1%	2%
Tradespersons	12%	7%	10%
Clerks	10%	19%	16%
Sales/personal service workers	12%	13%	7%
Plant/ machine operators/drivers	4%	8%	13%
Labourers/related workers	9%	16%	15%
<b>TOTAL PART-TIME</b>	<b>15%</b>	<b>12%</b>	<b>6%</b>
<b>TOTAL NOT IN PAID WORKFORCE</b>	<b>41%</b>	<b>58%</b>	<b>63%</b>
Household duties	8%	11%	8%
Student	8%	4%	6%
Self-supporting retiree	8%	10%	14%
Pensioner	14%	28%	30%
Unemployed	2%	6%	6%
<i><b>LOCATION</b></i>			
Melbourne Metropolitan	73%	70%	68%
Other Victoria non-metropolitan	27%	30%	32%
<i><b>SOGS SCORE</b></i>			
(0-4)	99.2%	98.1%	97.1%
(5-20)	0.8%	1.9%	2.9%
<i><b>SEGMENT</b></i>			
Disinterested Gambler	22%	21%	22%
Occasional Gambler	38%	43%	43%
Social Gambler	9%	17%	15%
Acknowledged Heavy Gambler	5%	12%	14%
Committed Heavy Gambler	8%	7%	6%

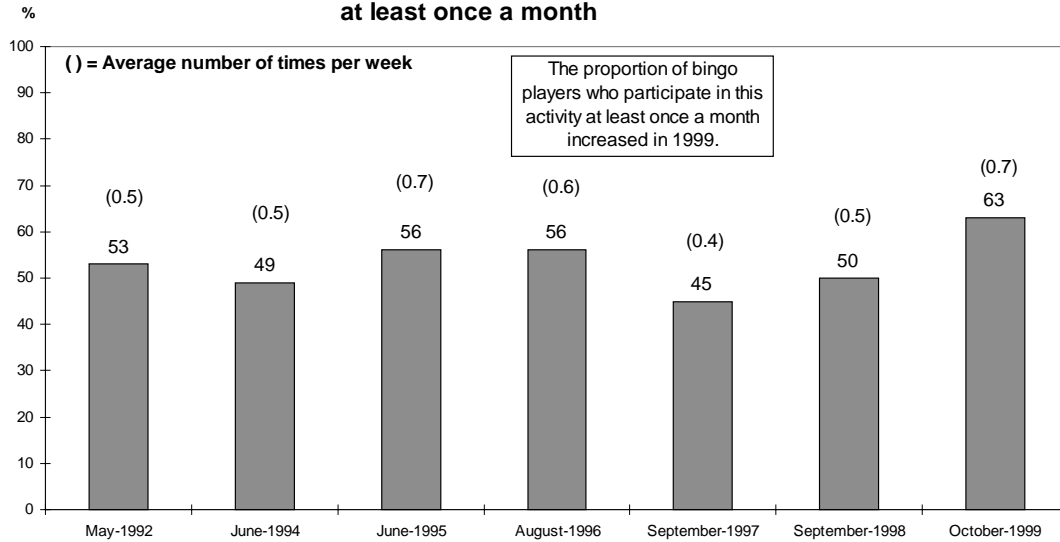
 Significantly higher than average compared to the total population

 Significantly lower than average compared to the total population

**BINGO GAMBLING PATTERNS**

**FIGURE 9.3 FREQUENCY**

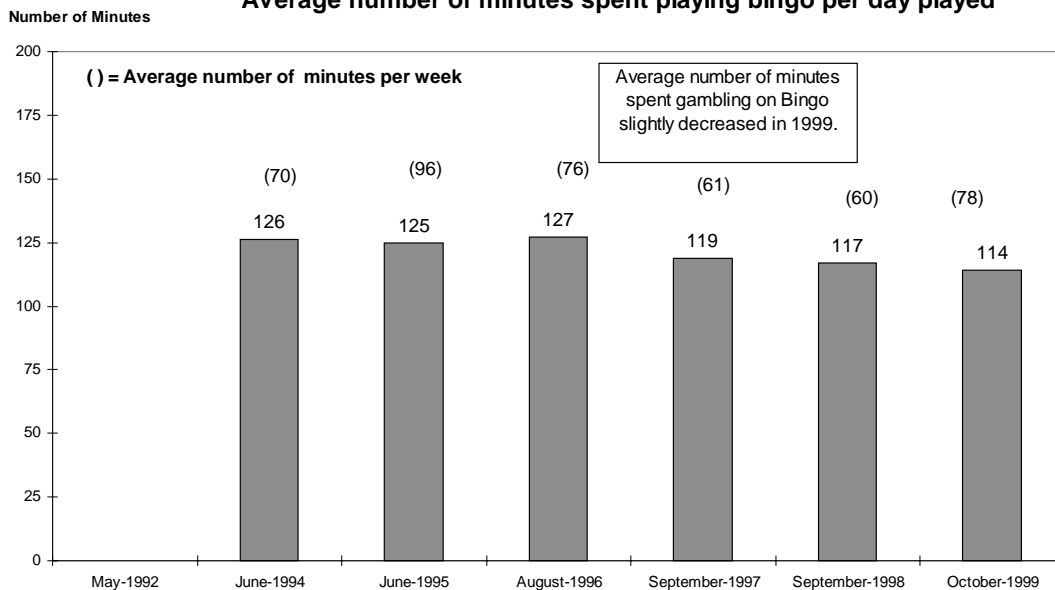
**% of bingo players who participate in bingo at least once a month**



BASE: Total Gambled At Bingo in Last 12 Months

**FIGURE 9.4 DURATION**

**Average number of minutes spent playing bingo per day played**



BASE: Total Gambled At Bingo in Last 12 Months

<sup>95</sup> Question 3B "How often do you play Bingo?"

<sup>96</sup> Question 4B "On each day you play BINGO, on average, how much time do you spend on this activity?"

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<b>BINGO GAMBLING PATTERNS</b>
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**9.5 Expenditure**

In 1999, bingo players spent an average of \$17 each time (day) they played bingo. When considered on a weekly basis, this represents an average expenditure of \$13 per week.

Please note that in 1999 the question was changed to ask respondents how much money they do spend or outlay each day they participated (in previous years, the question asked respondents the dollar value they were prepared to or would outlay each time they participated). Due to these changes, results from 1999 are no longer directly comparable with previous years. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999. A summary graphic of expenditure for all gambling activities in 1999 is available at Figure 3.11.

**9.6 Proportion of Outlay Reported as Won Back**

In 1999, the average proportion of outlay bingo players believed they won back was in the previous 12 months was 62%.

Changes in question format resulted in responses being based upon breaking even meaning winning 100% of outlay back. Due to these changes, results from 1999 are no longer directly comparable with previous years. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999. A summary graphic of proportion of outlay won back for all gambling activities in 1999 is available at Figure 3.13.

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<sup>97</sup> Question 5B "On each day you play BINGO, on average, how much money do you spend or outlay on this activity?"

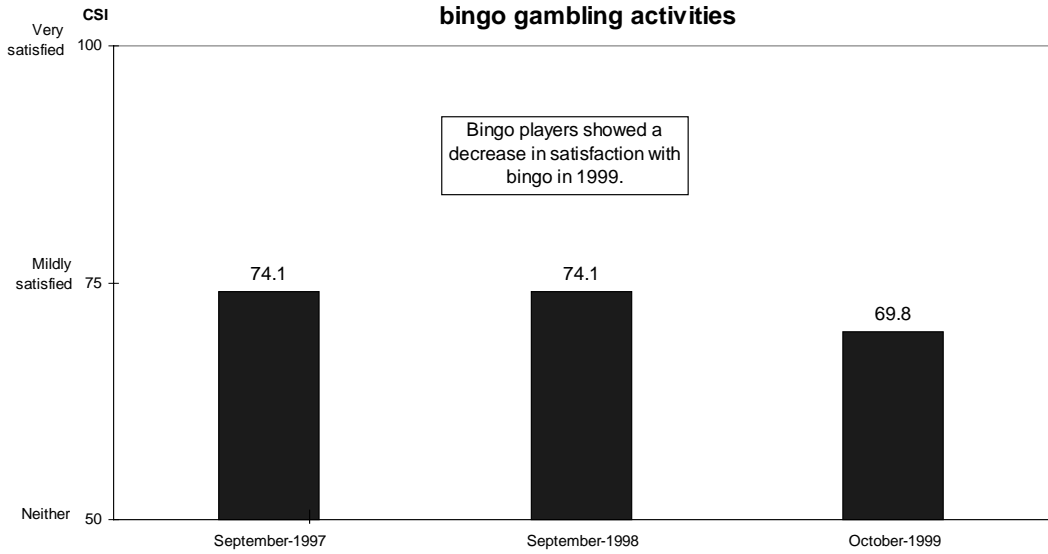
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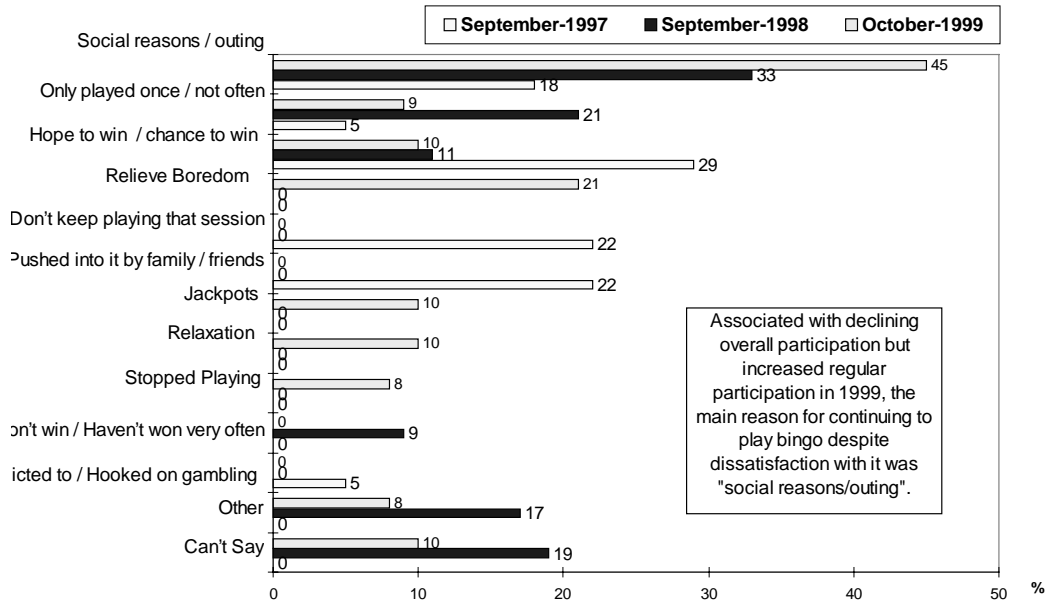
**BINGO GAMBLING PATTERNS**

**FIGURE 9.7 SATISFACTION**

Satisfaction with experience of bingo gambling activities



BASE: Total Gambled At Bingo in Last 12 Months



BASE: Total Dissatisfied with Bingo Gambling Activities

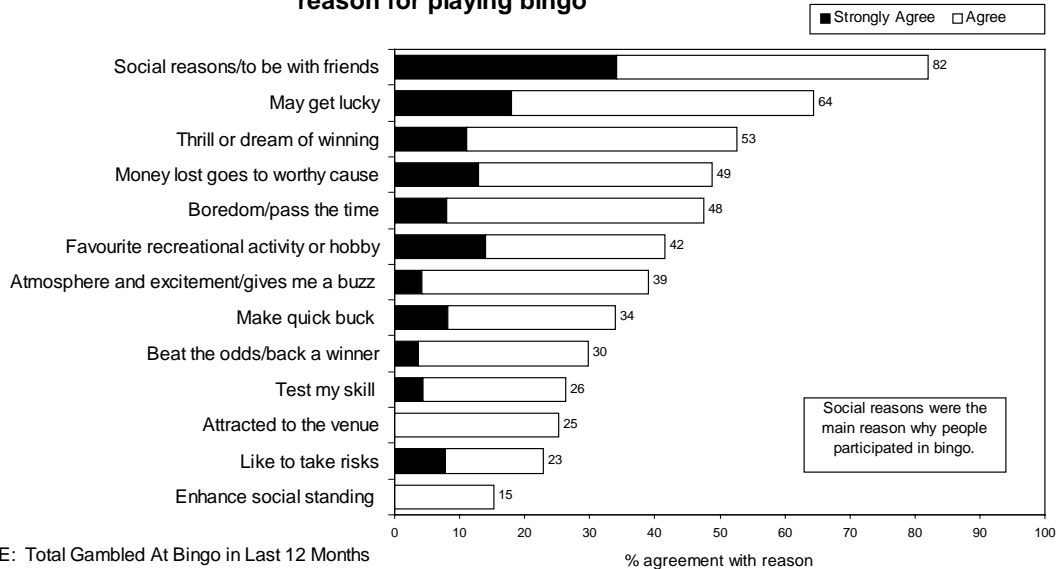
<sup>99</sup> Question 8B "Would you say that you are satisfied or dissatisfied with your experience of playing Bingo?"

<sup>100</sup> Question 9B "Why do you keep playing Bingo if you are dissatisfied?"

**BINGO GAMBLING PATTERNS**

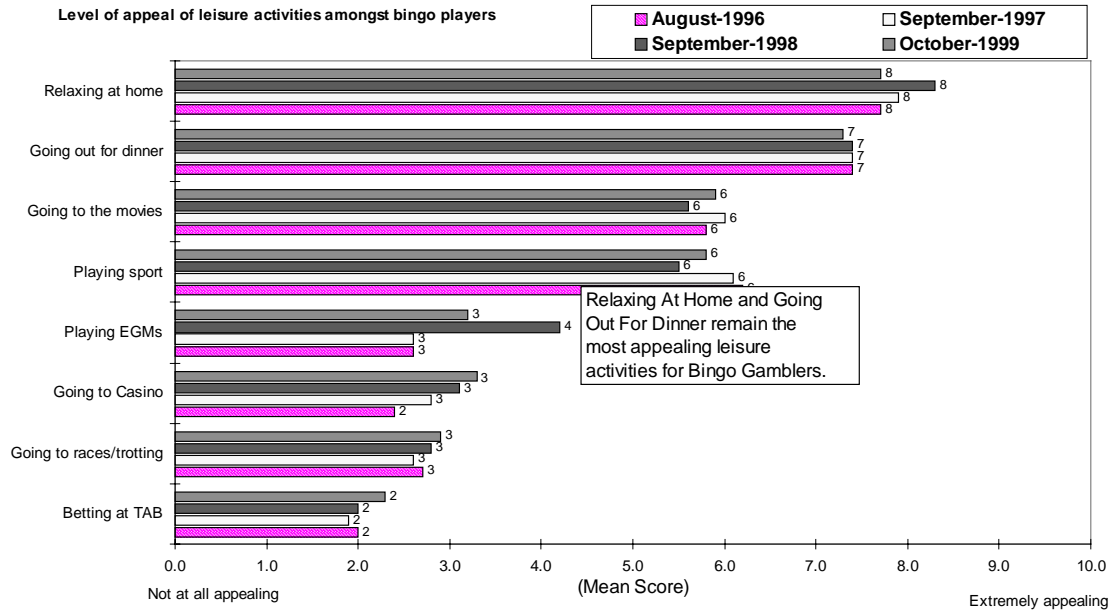
**FIGURE 9.9 REASONS**

% of bingo players agreeing that this is a reason for playing bingo



**FIGURE 9.10 APPEAL OF LEISURE ACTIVITIES**

Level of appeal of leisure activities amongst bingo players



<sup>101</sup> Question 7BA–7BN: “I’m now going to read out a series of reasons for playing Bingo. I want you to tell me how strongly you agree or disagree that each is a reason you play Bingo?”

<sup>102</sup> Questions 23A–H: “We would now like you to rate a number of spare time or leisure activities on a scale of 1 to 10 where a 1 is not at all appealing and 10 is extremely appealing. So on a scale of 1 to 10, how appealing is (betting at the TAB/Playing sport/Going to the movies/Going to the races or trots/Going out for dinner/Relaxing at home eg. Watching TV/Playing the Electronic Gaming Machines/Going to the casino)?”



**SECTION 10**

**PRIVATE CARDS  
GAMBLING PATTERNS**



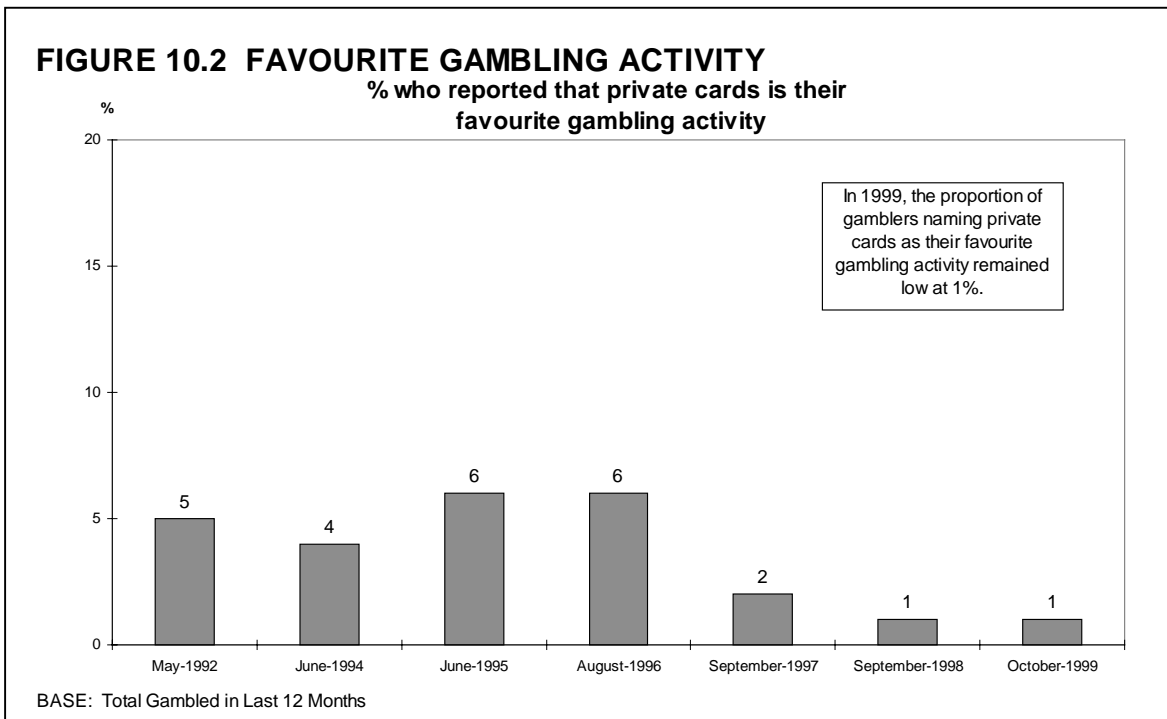
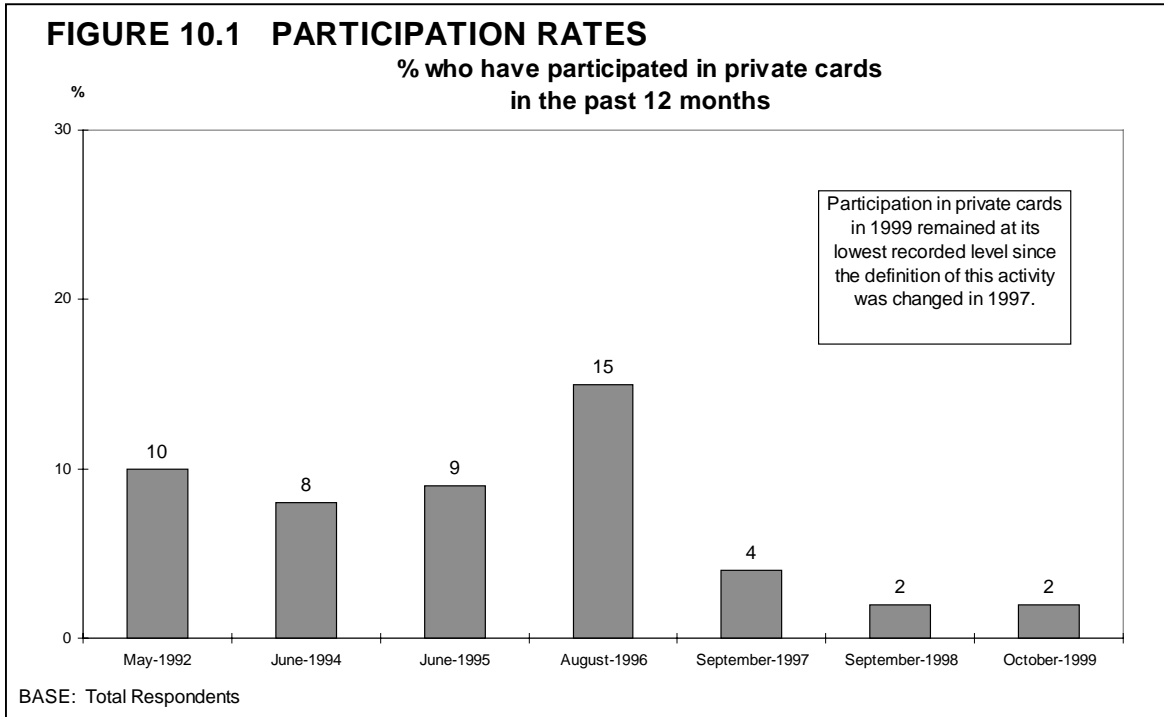
## **10. PRIVATE CARDS GAMBLING PATTERNS – SUMMARY**

Section 10 provides an outline of private cards gambling patterns. This activity was defined as “playing cards for money privately (at home or any other place)” in 1999, having been defined as “informal cards for money not at the casino” in 1998 and differently yet again prior to 1997. Outlined below are the key findings regarding private cards gambling patterns:

- ✓ At 2%, the participation rate for private cards remained stable in 1999;
  - ✓ Very few people (1%) reporting gambling activity considered private cards their favourite gambling activity;
  - ✓ Private cards gamblers were more likely to be young males, to reside in metropolitan areas, and to be Committed Heavy Gamblers;
  - ✓ Of the 2% of gamblers who played Private cards in the last 12 months, more than one third (37%) participated in this activity regularly (at least once a month);
  - ✓ Private cards gamblers spent over three hours (193 minutes) on this activity each time (day) they played private cards;
  - ✓ Private cards gamblers believed that, on average, they finished with \$25 more than they started with each time (day) they played cards for money—representing, when considered per week, a \$14 weekly profit;
  - ✓ Private cards gamblers believed that they won back 106% of their outlay, on average—representing a perceived 6% profit;
  - ✓ In 1999, satisfaction with private cards decreased slightly (CSI = 83.5, down from 87.8 in 1998), but remained high in comparison with many other gambling activities;
  - ✓ The great majority of private cards players (93%) agreed that to “socialise and see friends” was a reason why they participated in this activity;
  - ✓ Private cards players rated “relaxing at home”, “going out for dinner” and “playing sport” as more appealing than other leisure activities.
-



**PRIVATE CARDS GAMBLING PATTERNS**



<sup>85</sup> Question 1. Which of the following activities or games have you played, entered or bet on in the past 12 months?


<sup>96</sup> Question 2. Which one of these is your favourite game or activity? (unprompted)

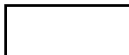


**PROFILE OF PRIVATE CARDS GAMBLERS**

**TABLE 10.1**

	<b>Total Population</b>	<b>Private Cards Gamblers (Last 12 mths)</b> 2% of total pop	<b>Reg. Private Cards Gamblers (Once a mth+)</b> 1% of total pop
<i>GENDER</i>			
Male	49%	78%	78%
Female	51%	22%	22%
<i>AGE</i>			
Average Age	44 yrs	32 yrs	28 yrs
<i>RESPONDENT'S OCCUPATION</i>			
<b>TOTAL FULL-TIME</b>	<b>44%</b>	<b>55%</b>	<b>35%</b>
Managers/(senior) administrators	11%	14%	8%
Professionals	19%	14%	24%
Para-professionals	7%	-	-
Tradespersons	12%	19%	-
Clerks	10%	7%	9%
Salespersons/personal service workers	12%	12%	11%
Plant/machine operators/drivers	4%	-	-
Labourers/related workers	9%	24%	30%
<b>TOTAL PART-TIME</b>	<b>15%</b>	<b>12%</b>	<b>6%</b>
<b>TOTAL NOT IN PAID WORKFORCE</b>	<b>41%</b>	<b>33%</b>	<b>59%</b>
Household duties	8%	5%	-
Student	8%	23%	50%
Self-supporting retiree	8%	3%	-
Pensioner	14%	3%	9%
Unemployed	2%	-	-
<i>LOCATION</i>			
Melbourne Metropolitan	73%	71%	83%
Other Victoria non-metropolitan	27%	29%	17%
<i>SOGS SCORE</i>			
(0-4)	99.2%	100%	100%
(5-20)	0.8%	0%	0%
<i>SEGMENT</i>			
Disinterested Gambler	22%	15%	19%
Occasional Gambler	38%	42%	45%
Social Gambler	9%	18%	9%
Acknowledged Heavy Gambler	5%	7%	11%
Committed Heavy Gambler	8%	18%	16%

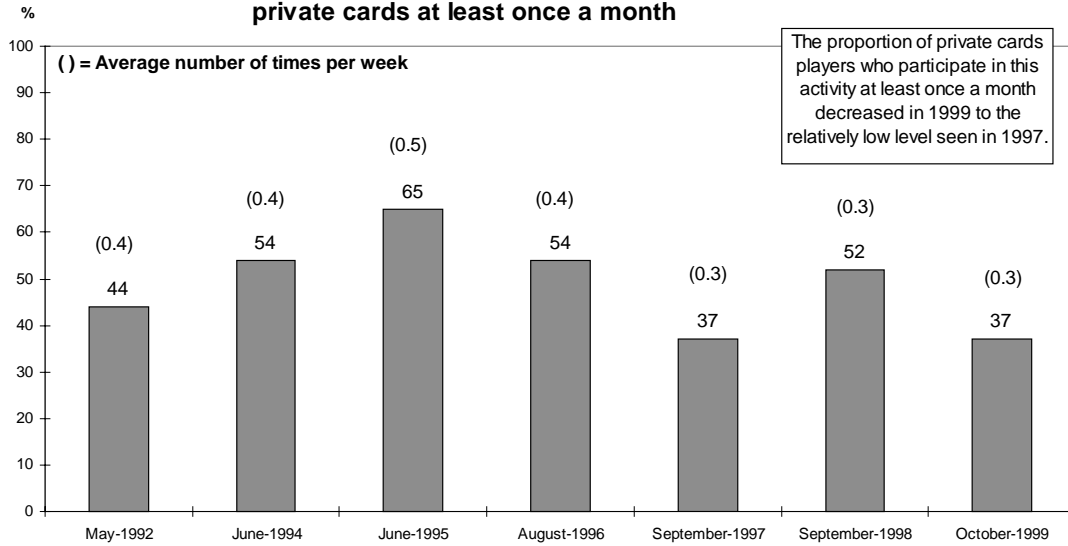
 Significantly higher than average compared to the total population

 Significantly lower than average compared to the total population

**PRIVATE CARDS GAMBLING PATTERNS**

**FIGURE 10.3 FREQUENCY**

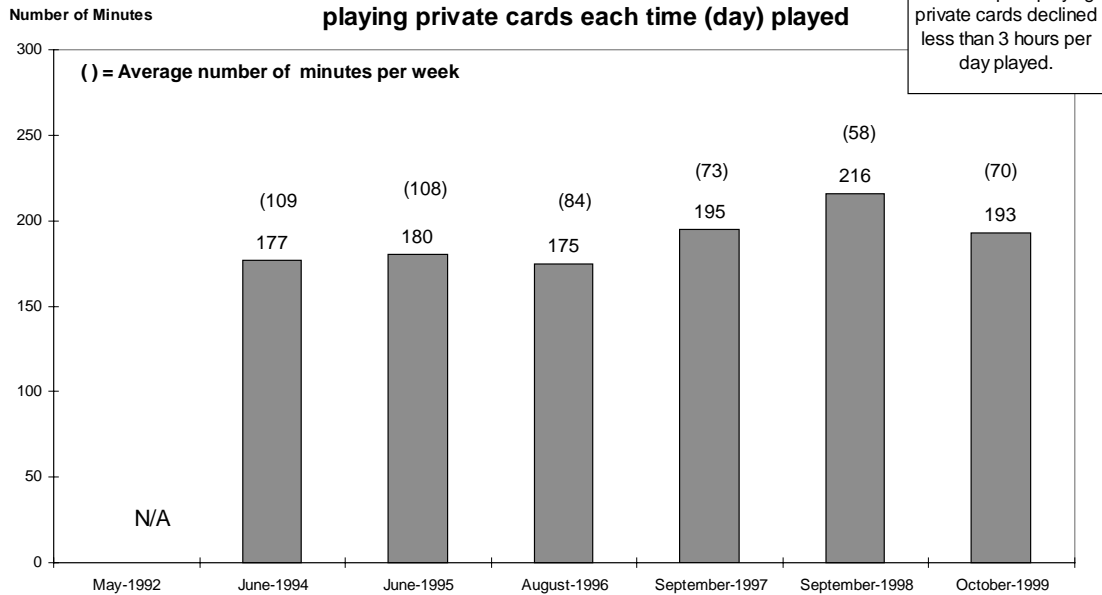
**% of private cards players who participate in private cards at least once a month**



BASE: Total Gambled At Informal Cards in Last 12 Months

**FIGURE 10.4 DURATION**

**Average number of minutes spent playing private cards each time (day) played**



BASE: Total Gambled At Informal Cards in Last 12 Months

<sup>97</sup> Question 3E "How often do you play cards for money privately (at home or any other place)?"

<sup>98</sup> Question 4E "On each day you play cards for money privately (at home or any other place), on average, how much time do you spend on this activity?"

<b>PRIVATE CARDS GAMBLING PATTERNS</b>
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**10.5 Expenditure**

In 1999, private cards players reported finishing with an average of \$25 more than they started with each time (day) they played private cards—that is, they reported a profit rather than an expenditure on this activity. When considered on a weekly basis, this represents an average profit of \$14 per week.

Please note that in 1999 the question was changed to ask respondents how much money they usually start with each day they participate, and then how much money they finish with each day they participate (in previous years, the question asked respondents the dollar value they were prepared to or would outlay each time they participated). Due to these changes, results from 1999 are no longer directly comparable with previous years. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999. A summary graphic of expenditure for all gambling activities in 1999 is available at Figure 3.11.

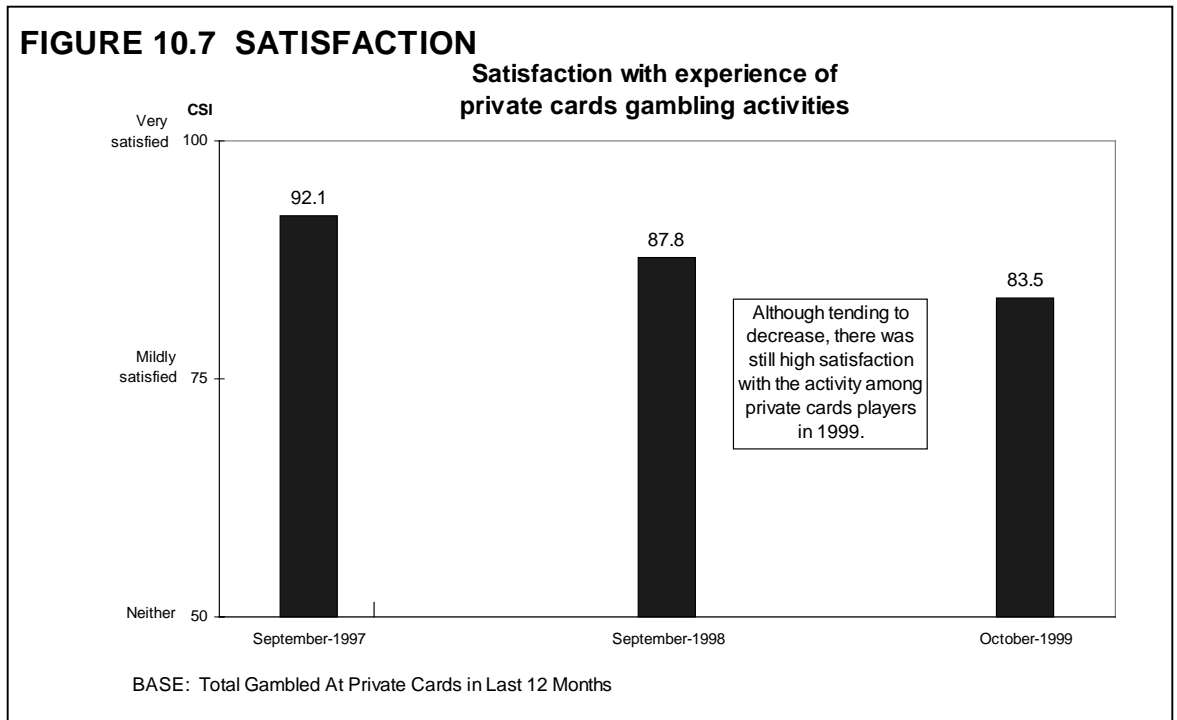
**10.6 Proportion of Outlay Reported as Won Back**

In 1999, private cards players reported that, on average, they won back 106% of their outlay on private cards in the previous 12 months. Further to the expenditure results above, this again represents a profit situation being reported on this activity in 1999.

Changes in question format resulted in responses being based upon breaking even meaning winning 100% of outlay back. Due to these changes, results from 1999 are no longer directly comparable with previous years. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999. A summary graphic of proportion of outlay won back for all gambling activities in 1999 is available at Figure 3.13.

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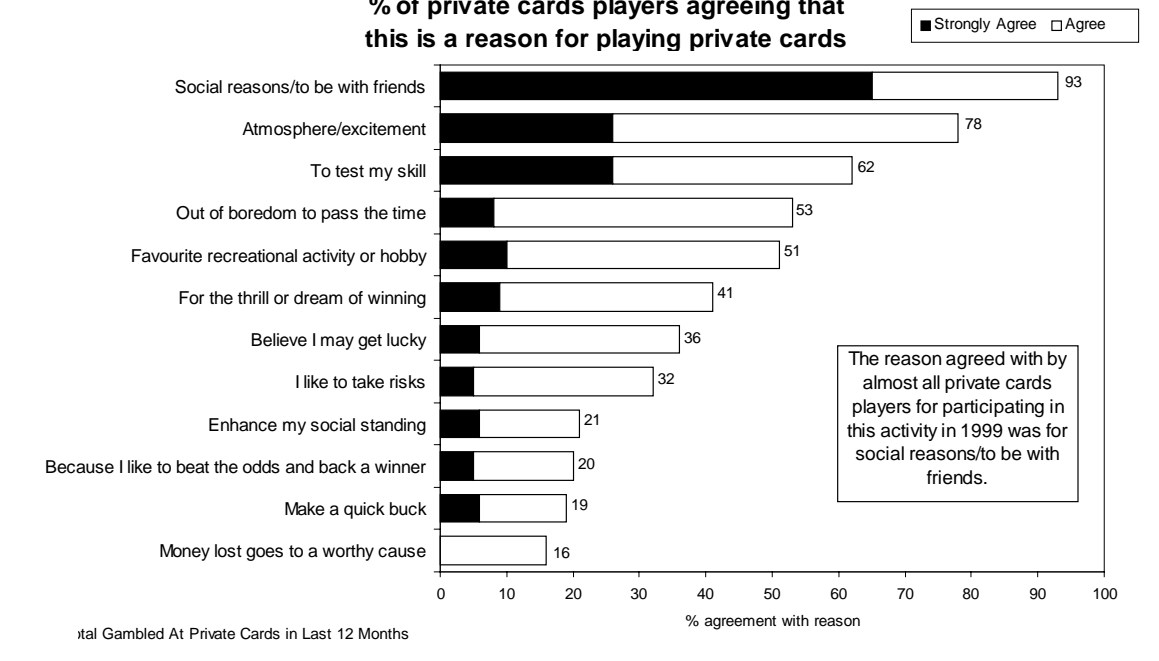
**PRIVATE CARDS GAMBLING PATTERNS**



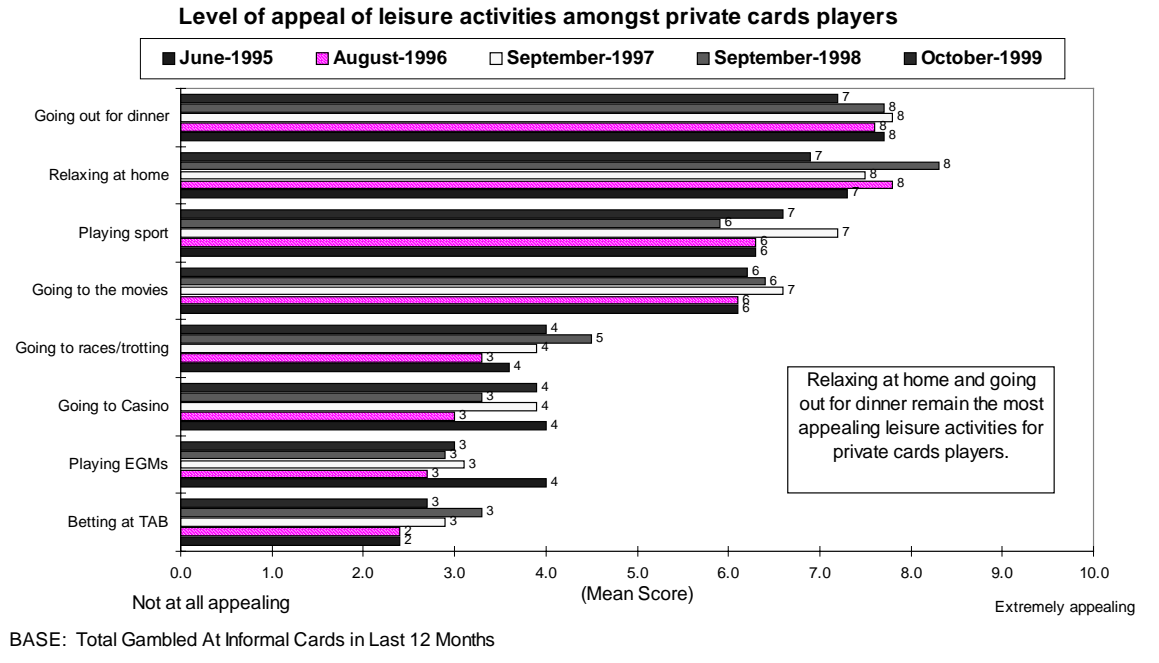
101 Question 8E "Would you say that you are satisfied or dissatisfied with your experience of playing cards for money privately (at home or any other place)?"

**PRIVATE CARDS GAMBLING PATTERNS**

**FIGURE 10.8 REASONS**



**FIGURE 10.9 APPEAL OF LEISURE ACTIVITIES**



102 Question 7E "I'm now going to read out a series of reasons for playing cards for money privately (at home or any other place). I want you to tell me how strongly you agree or disagree that each is a reason you play cards for money privately (at home or any other place)?"

103 Questions 23A-H: "We would now like you to rate a number of spare time or leisure activities on a scale of 1 to 10 where a 1 is not at all appealing and 10 is extremely appealing. So on a scale of 1 to 10, how appealing is (betting at the TAB/Playing sport/Going to the movies/Going to the races or trots/Going out for dinner/Relaxing at home eg. Watching TV/Playing the Electronic Gaming Machines/Going to the casino)?"

**SECTION 11**

**HORSE RACING  
GAMBLING PATTERNS**



## **11. HORSE RACING GAMBLING PATTERNS – SUMMARY**

The following section provides a graphical summary of thoroughbred horse racing gambling patterns (referred to as horse racing within this report). Outlined below are the main findings:

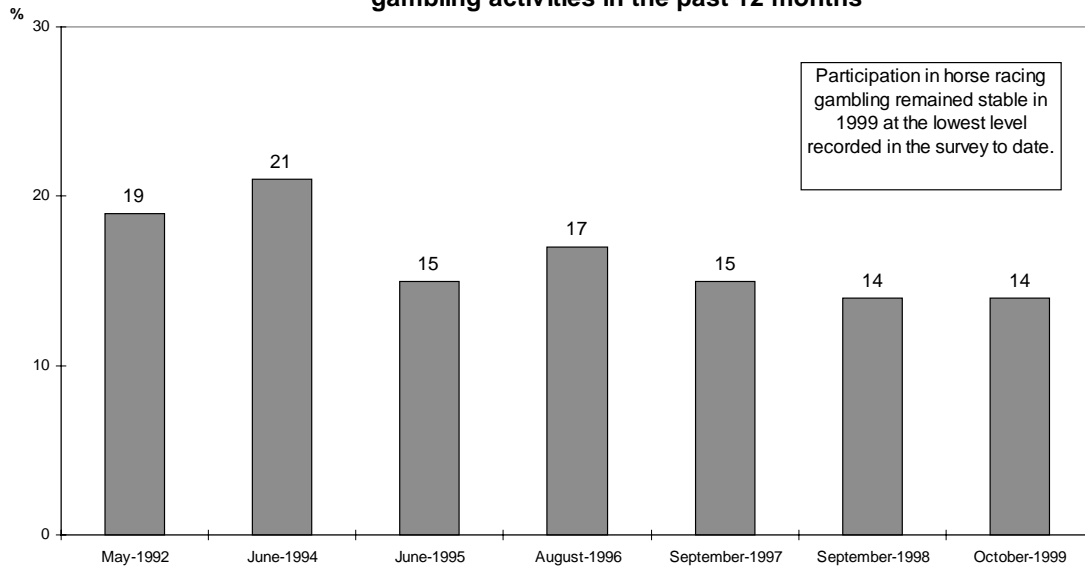
- ✓ In 1999, 14% of Victorians said they had gambled on horse racing in the last 12 months—no change from 1998, maintaining the lowest participation rate for horse since this survey began;
  - ✓ The proportion of those reporting gambling activity who said horse racing was their favourite activity declined 1 point to 9%;
  - ✓ Horse racing betters tended to be males, full-time workers, and particularly tradespersons and clerks. There was a significantly higher proportion of Committed Heavy Gamblers amongst this group;
  - ✓ Of the 14% of gamblers who had bet on horse racing in the last 12 months, 41% were regular horse racing betters who participated in this activity at least once a month—down 8 points from 1998;
  - ✓ The amount of time spent on horse racing by participants each time (day) they engaged in the activity was almost 1½ hours (87 minutes) in 1999—up 16 minutes from 1998, but associated with a change in question format to specifically include studying the form, placing bets and listening to and/or watching the races in respondents' estimates;
  - ✓ Horse racing betters reported spending an average of only \$2 each time they bet on this activity (on a weekly basis, \$10 expenditure on average)—however, this figure is probably affected by a number of respondents reporting high profits, rather than expenditure;
  - ✓ Overall, horse racing betters believed that they won back 68% of their outlay in 1999—higher than most other gambling activities;
  - ✓ Horse racing gamblers were reasonably satisfied with Horse racing gambling activities (CSI = 75.0);
  - ✓ The most common reason given for continuing to bet on horse racing despite dissatisfaction with the activity was “hope to win/chance to win”, mentioned by more than one third (37%) of the dissatisfied;
  - ✓ The main reasons for participating in horse racing gambling in 1999 were “the thrill or dream of winning” (72%), “may get lucky” (72%), “beating the odds/back a winner” (71%) and “atmosphere/excitement/buzz” (70%);
  - ✓ Horse racing gamblers found leisure activities such as “going out for dinner”, “relaxing at home” and “playing sport” particularly appealing.
-





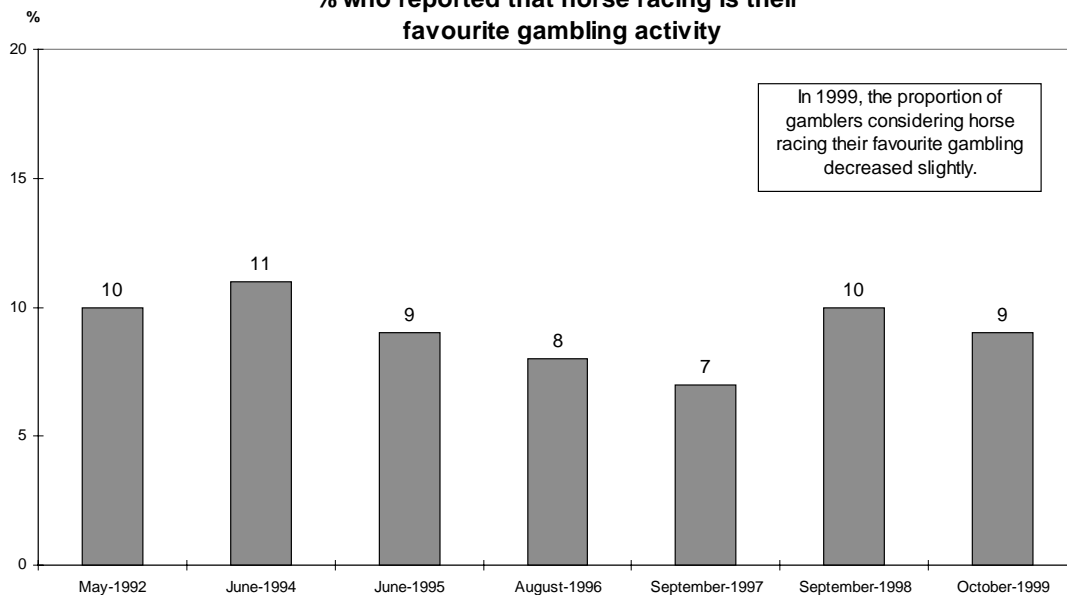
**HORSE RACING GAMBLING PATTERNS**

**FIGURE 11.1 PARTICIPATION RATES**  
 % who have participated in horse racing gambling activities in the past 12 months



BASE: Total Respondents

**FIGURE 11.2 FAVOURITE GAMBLING ACTIVITY**  
 % who reported that horse racing is their favourite gambling activity




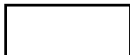
BASE: Total Gambled in Last 12 Months

**PROFILE OF HORSE RACING GAMBLERS**

**TABLE 11.1**

	<b>Total Population</b>	<b>Horse Racing Gamblers (Last 12 mths) 14% of total pop</b>	<b>Reg. Horse Racing Gamblers (Once a mth+) 6% of total pop</b>
<b>GENDER</b>			
Male	49%	62%	82%
Female	51%	38%	18%
<b>AGE</b>			
Average Age	44 yrs	42 yrs	46 yrs
<b>RESPONDENT'S OCCUPATION</b>			
<b>TOTAL FULL-TIME</b>	<b>44%</b>	<b>54%</b>	<b>58%</b>
Managers/(senior) administrators	11%	9%	9%
Professionals	19%	13%	8%
Para-professionals	7%	7%	3%
Tradespersons	12%	19%	28%
Clerks	10%	13%	13%
Salespersons/personal service workers	12%	12%	11%
Plant/machine operators/drivers	4%	6%	5%
Labourers/related workers	9%	11%	18%
<b>TOTAL PART-TIME</b>	<b>15%</b>	<b>13%</b>	<b>11%</b>
<b>TOTAL NOT IN PAID WORKFORCE</b>	<b>41%</b>	<b>33%</b>	<b>31%</b>
Household duties	8%	5%	1%
Student	8%	9%	3%
Self-supporting retiree	8%	7%	8%
Pensioner	14%	10%	17%
Unemployed	2%	2%	2%
<b>LOCATION</b>			
Melbourne Metropolitan	73%	75%	74%
Other Victoria non-metropolitan	27%	25%	26%
<b>SOGS SCORE</b>			
(0-4)	99.2%	99.1%	97.8%
(5-20)	0.8%	0.9%	2.2%
<b>SEGMENT</b>			
Disinterested Gambler	22%	11%	11%
Occasional Gambler	38%	33%	19%
Social Gambler	9%	15%	9%
Acknowledged Heavy Gambler	5%	4%	7%
Committed Heavy Gambler	8%	37%	55%

 Significantly higher than average compared to the general population

 Significantly lower than average compared to the general population

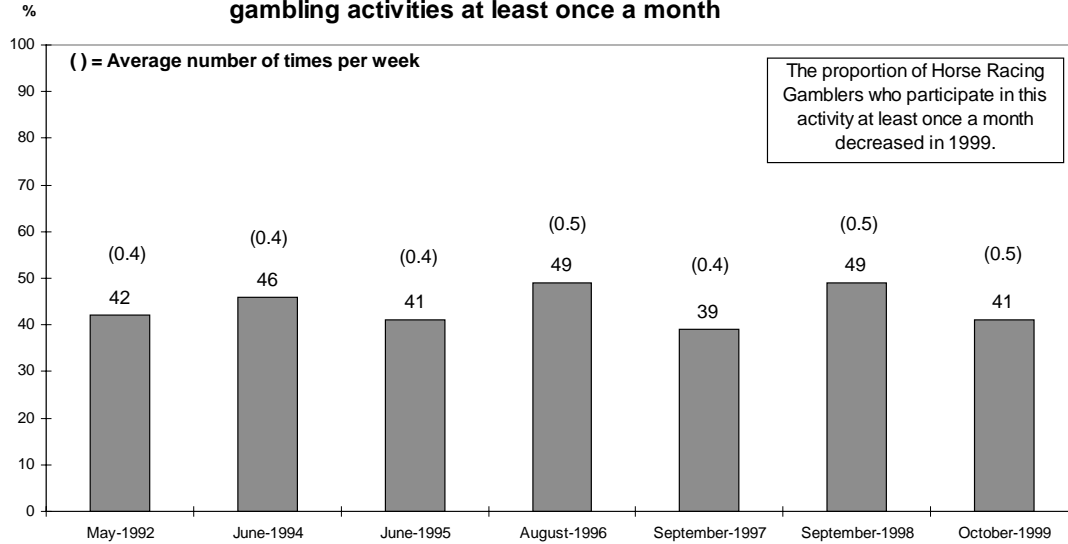
<sup>104</sup> Question 1. Which of the following activities or games have you played, entered or bet on in the past 12 months?

<sup>105</sup> Question 2. Which one of these is your favourite game or activity? (unprompted)

**HORSE RACING GAMBLING PATTERNS**

**FIGURE 11.3 FREQUENCY**

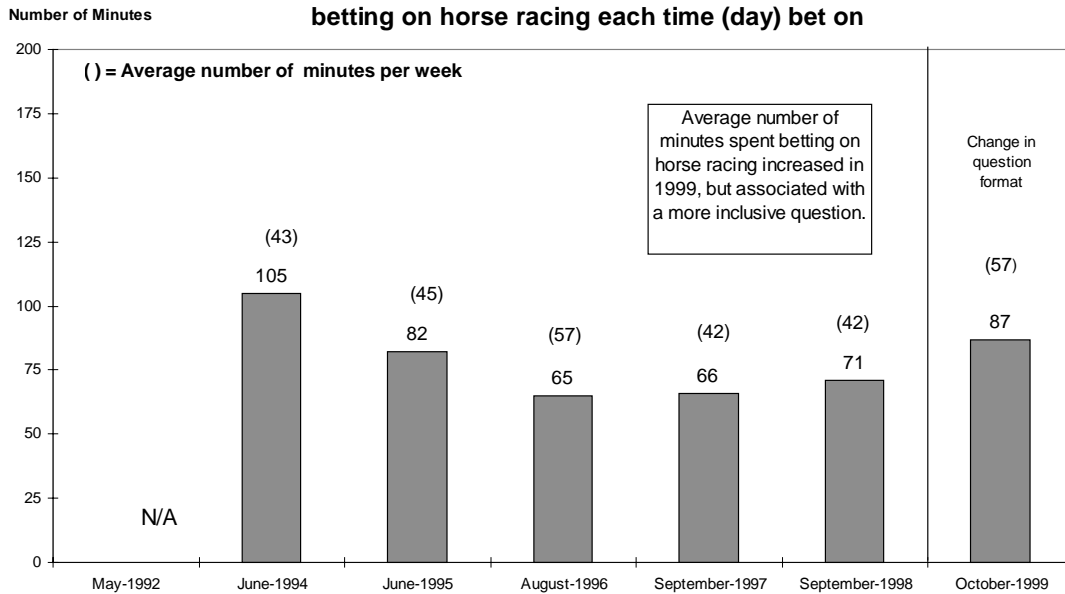
**% of horse racing bettors who participate in horse racing gambling activities at least once a month**



BASE: Total Gambled At Horse Racing in Last 12 Months

**FIGURE 11.4 DURATION**

**Average number of minutes spent betting on horse racing each time (day) bet on**



I Gambled At Horse Racing in Last 12 Months

<sup>106</sup> Question 3F How often do you bet on Thoroughbred Horse Racing?

<sup>107</sup> Question 4F On each day you bet on Thoroughbred Horse Racing, on average, how much time do you spend studying the form, placing your bets, and listening to and/or watching the races?

<sup>108</sup> Question 5F1: One each day you bet on Thoroughbred Horse Racing – not including Melbourne Cup sweeps - on average, how much money do you usually set aside to bet with?

Question 5F2: On each day you bet on Thoroughbred Horse Racing – not including Melbourne Cup sweeps - on average, how much money do you usually have left at the end of the day's betting?

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**HORSE RACING GAMBLING PATTERNS**

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**11.5 Expenditure**

In 1999, horse racing betters reported finishing with an average of only \$2 less than they started with each time (day) they bet on horse racing—that is, they nearly reported a profit rather than an expenditure on this activity. When considered on a weekly basis, this actually represents a profit of \$10 per week.

Please note that in 1999 the question was changed to ask respondents how much money they usually start with each day they participate, and then how much money they finish with each day they participate (in previous years, the question asked respondents the dollar value they were prepared to or would outlay each time they participated). Due to these changes, results from 1999 are no longer directly comparable with previous years. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999. A summary graphic of expenditure for all gambling activities in 1999 is available at Figure 3.11.

**11.6 Proportion of Outlay Reported as Won Back**

In 1999, horse racing betters reported that they won back an average of 68% of their outlay on this activity in the previous 12 months—the fourth highest proportion amongst gambling activities, behind private cards, sports betting and Footybet.

Changes in question format resulted in responses being based upon breaking even meaning winning 100% of outlay back. Due to these changes, results from 1999 are no longer directly comparable with previous years. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999. A summary graphic of proportion of outlay won back for all gambling activities in 1999 is available at Figure 3.13.

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<sup>109</sup> Question 6F1: Thinking about all your betting on Thoroughbred Horse Racing over the last 12 months, do you think you won back more than you outlaid, less than you outlaid, or about the same as you outlaid?

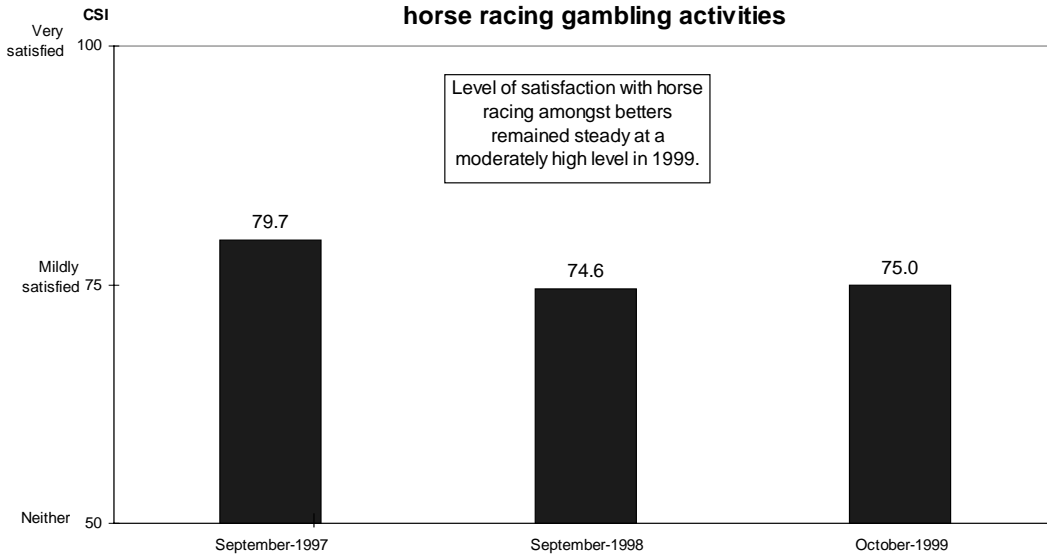
Question 6F2: If breaking even means winning back 100% of your outlay, what percentage of your outlay do you think you won back on Thoroughbred Horse Racing?

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**HORSE RACING GAMBLING PATTERNS**

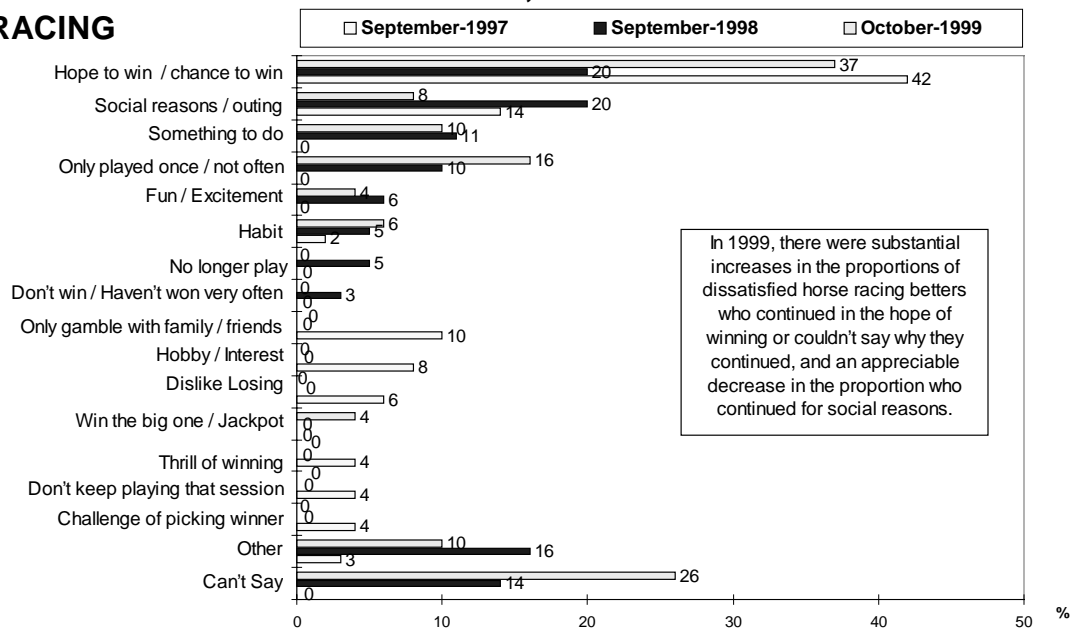
**FIGURE 11.7 SATISFACTION**

**Satisfaction with experience of horse racing gambling activities**



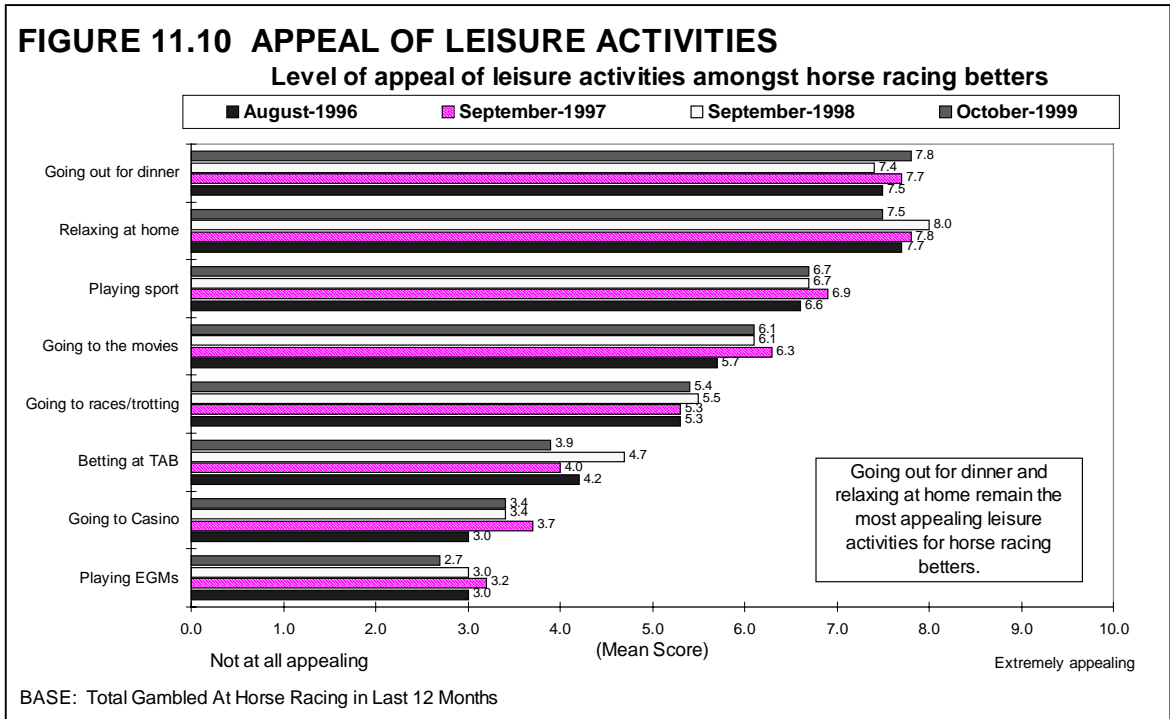
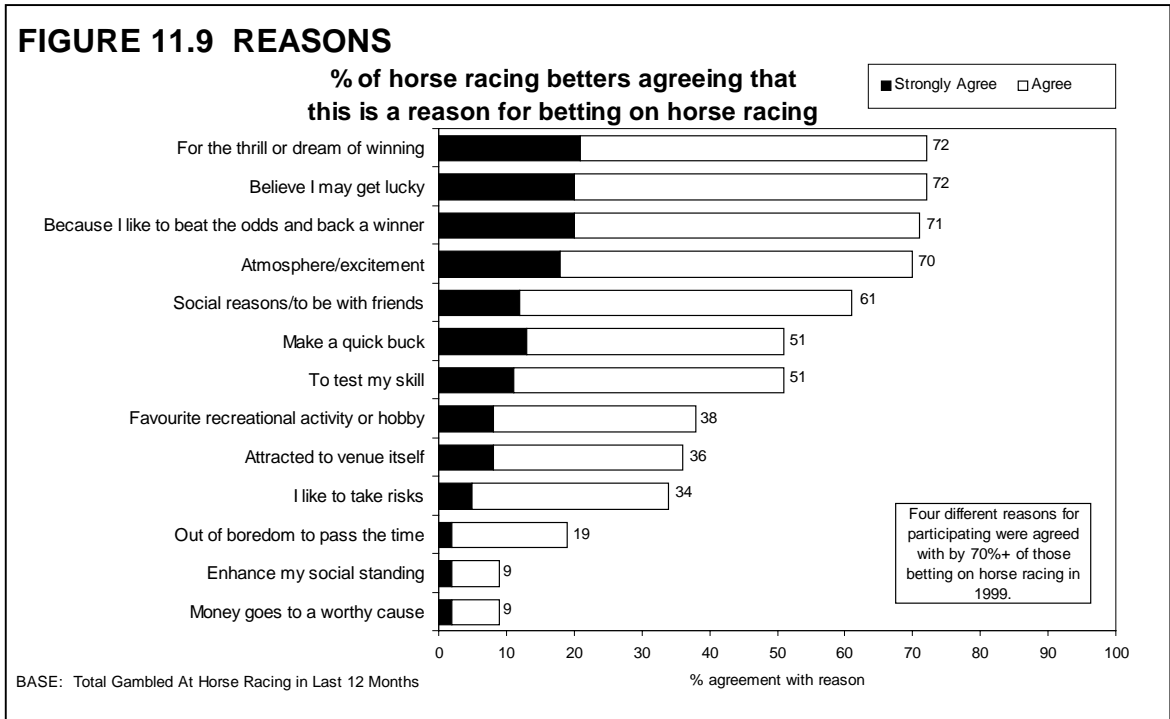
BASE: Total Gambled At Horse Racing in Last 12 Months

**FIGURE 11.8 IF DISSATISFIED, WHY CONTINUE HORSE RACING**



BASE: Total Dissatisfied with Horse Racing Gambling Activities

## HORSE RACING GAMBLING PATTERNS



112 Question 7F “I’m now going to read out a series of reasons for you betting on Thoroughbred Horse Racing. I want you to tell me how strongly you agree or disagree that each is a reason you bet on Thoroughbred Horse Racing”.

113 Questions 23A-H: “We would now like you to rate a number of spare time or leisure activities on a scale of 1 to 10 where a 1 is not at all appealing and 10 is extremely appealing. So on a scale of 1 to 10, how appealing is (betting at the TAB/Playing sport/Going to the movies/Going to the races or trots/Going out for dinner/Relaxing at home eg. Watching TV/Playing the Electronic Gaming Machines/Going to the casino)?”

**SECTION 12**

**TROTting  
GAMBLING PATTERNS**





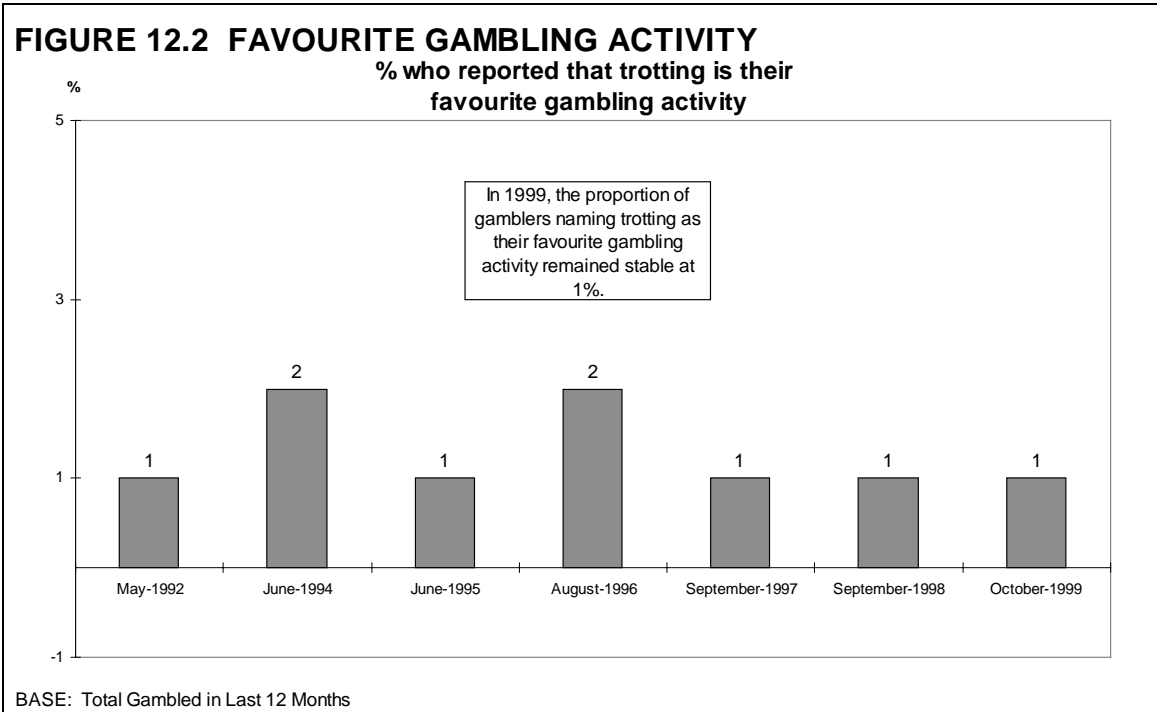
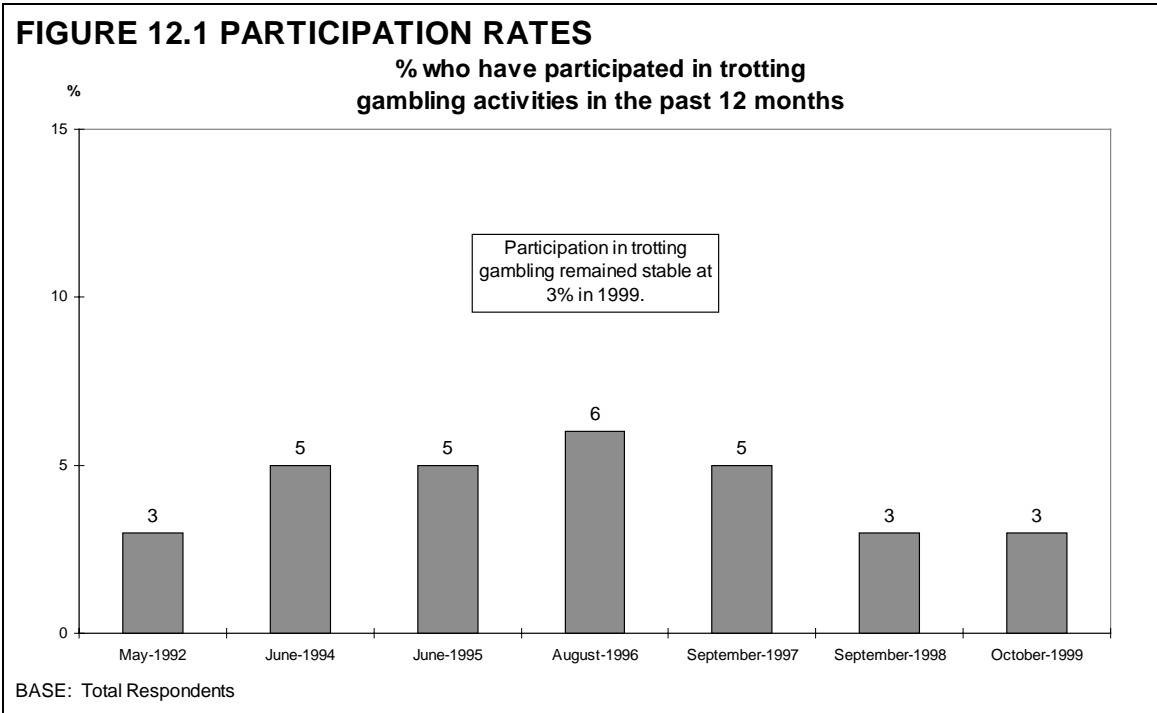
## **12. TROTTLING GAMBLING PATTERNS – SUMMARY**

Section 12 provides a graphical summary of trotting (harness racing) gambling behaviour. The main findings are outlined below:

- ✓ Participation in trotting gambling activities was low in 1999—at only 3%, maintaining the same level observed in 1998;
  - ✓ Only 1% of those reporting gambling activity in 1999 regarded trotting as their favourite activity; however, preference for trotting has risen no higher than 2% in any year of this survey;
  - ✓ Regular trotting betters were predominantly male, and were significantly more likely to be a tradesperson, labourer or clerk, and were also more likely to be Committed Heavy Gamblers;
  - ✓ Of the 3% of Victorians who bet on trotting in 1999, 51% did so regularly (at least once a month or more). This represents an 11 point increase from 1998, and suggests that despite the decrease in overall participation, there remains a core of consistent trotting betters;
  - ✓ The amount of time spent by participants each time (day) they bet on trotting was a little over 1 hour (67 minutes) in 1999—up 3 minutes from 1998, but associated with a change in question format to specifically include studying the form, placing bets and listening to and/or watching the races in respondents' estimates;
  - ✓ Trotting betters were moderately satisfied with the activity (CSI = 71.3 CSI) in 1999;
  - ✓ The main reason for continuing to bet on trotting amongst dissatisfied betters was “hope/chance to win” (35%);
  - ✓ The main reasons for participating in trotting gambling were “the thrill or dream of winning” (75%), “beat the odds/back a winner” (72%), “may get lucky” (70%) and “for social reasons/to be with friends” (64%); and
  - ✓ Trotting gamblers rated “relaxing at home” and “going out for dinner” as highly appealing leisure activities.
-



**TROTTLING GAMBLING PATTERNS**




<sup>93</sup> Question 1. "Which of the following activities or games have you played or gambled on in the past 12 months?"

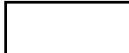
<sup>94</sup> Question 2 "Which one of these is your favourite game or activity?" (unprompted)

**PROFILE OF TROTTING GAMBLERS**

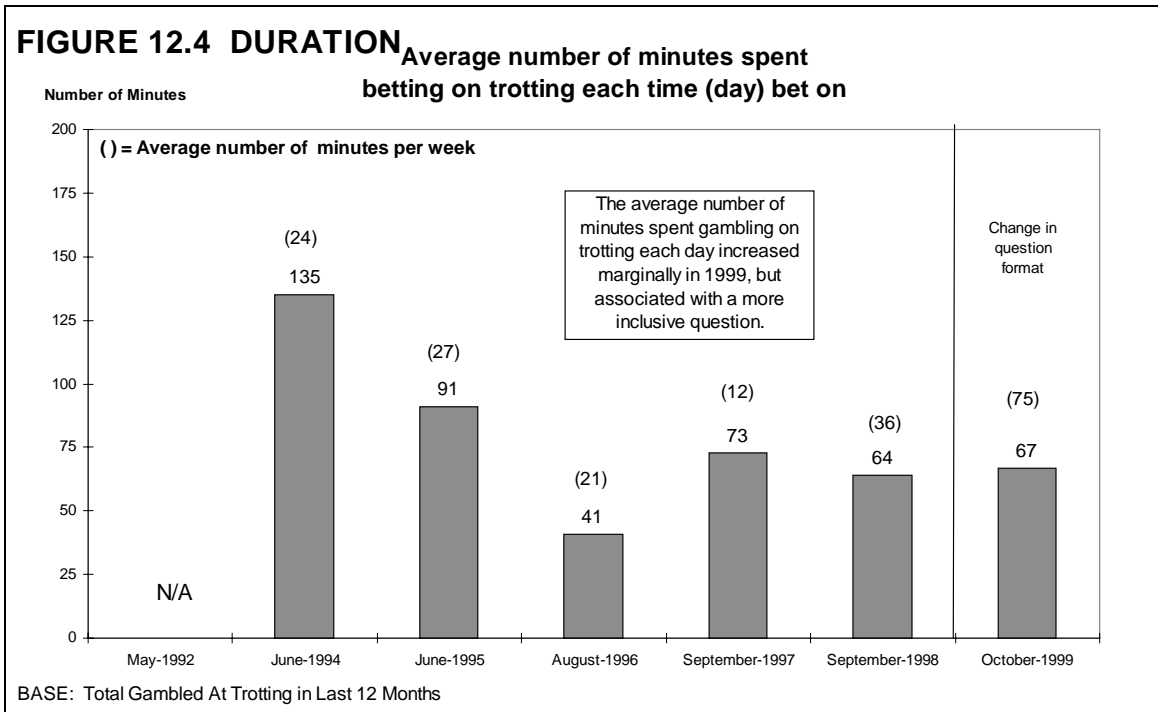
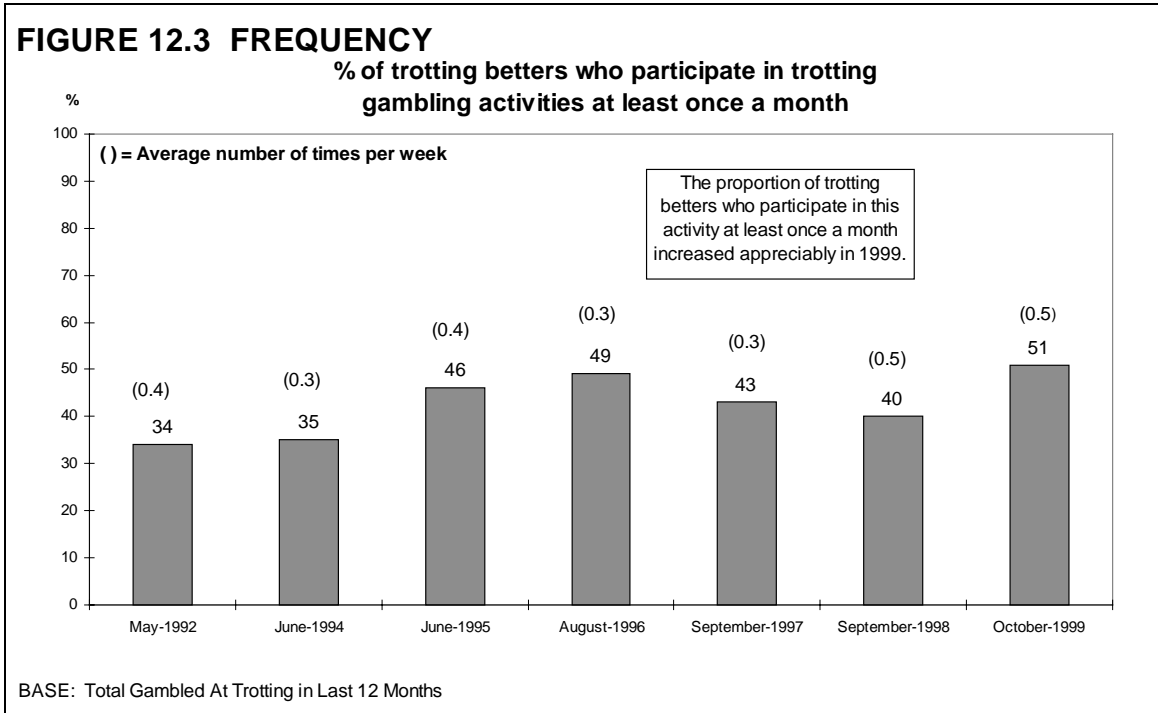
**TABLE 12.1**

	<b>Total Population</b>	<b>Trotting Gamblers (Last 12 mths)</b> 3% of total pop	<b>Reg. Trotting Gamblers (Once a mth+)</b> 2% of total pop
<b>GENDER</b>			
Male	49%	69%	76%
Female	51%	31%	24%
<b>AGE</b>			
Average Age	44 yrs	42 yrs	43 yrs
<b>RESPONDENT'S OCCUPATION</b>			
<b>TOTAL FULL-TIME</b>	<b>44%</b>	<b>52%</b>	<b>60%</b>
Managers/(Senior) Administrators	11%	3%	-
Professional	19%	3%	2%
Associate Professional	7%	3%	-
Tradesperson	12%	25%	26%
Clerks	10%	16%	22%
Sales/Personal Service Workers	12%	14%	16%
Plant/Machine Operators/Drivers	4%	5%	3%
Labourers/Related Workers	9%	29%	25%
<b>TOTAL PART-TIME</b>	<b>15%</b>	<b>19%</b>	<b>14%</b>
<b>TOTAL NOT IN PAID WORKFORCE</b>	<b>41%</b>	<b>29%</b>	<b>26%</b>
Household duties	8%	3%	5%
Student	8%	5%	-
Self-supporting Retiree	8%	6%	4%
Pensioner	14%	11%	15%
Unemployed	2%	5%	2%
<b>LOCATION</b>			
Melbourne Metropolitan	73%	52%	48%
Other Victoria non-metropolitan	27%	48%	52%
<b>SOGS SCORE</b>			
(0-4)	99.2%	97.4%	100%
(5-20)	0.8%	2.6%	0%
<b>SEGMENT</b>			
Disinterested Gambler	22%	14%	15%
Occasional Gambler	38%	23%	10%
Social Gambler	9%	11%	8%
Acknowledged Heavy Gambler	5%	1%	-
Committed Heavy Gambler	8%	51%	68%

 Significantly higher than average compared to the general population

 Significantly lower than average compared to the general population

**TROTTLING GAMBLING PATTERNS**



<sup>95</sup> Question 3G “How often do you bet on Trotting or Harness Racing?”

<sup>96</sup> Question 4G “On each day you bet on Trotting or Harness Racing, on average, how much time do you spend studying the form, placing your bets, and listening to and/or watching the races?”

## TROTTING GAMBLING PATTERNS

### 12.5 Expenditure

In 1999, trotting betterers reported finishing with \$8 less, on average, than they started with each time (day) they bet on trotting. When considered on a weekly basis, this represents \$5 expenditure per week.

Please note that in 1999 the question was changed to ask respondents how much money they usually start with each day they participate, and then how much money they finish with each day they participate (in previous years, the question asked respondents the dollar value they were prepared to or would outlay each time they participated). Due to these changes, results from 1999 are no longer directly comparable with previous years. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999. A summary graphic of expenditure for all gambling activities in 1999 is available at Figure 3.11.

### 12.6 Proportion of Outlay Reported as Won Back

In 1999, trotting betterers reported winning back 68% of their outlay, on average, on this activity in the previous 12 months.

Changes in question format resulted in responses being based upon breaking even meaning winning 100% of outlay back. Due to these changes, results from 1999 are no longer directly comparable with previous years. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999. A summary graphic of proportion of outlay won back for all gambling activities in 1999 is available at Figure 3.13.

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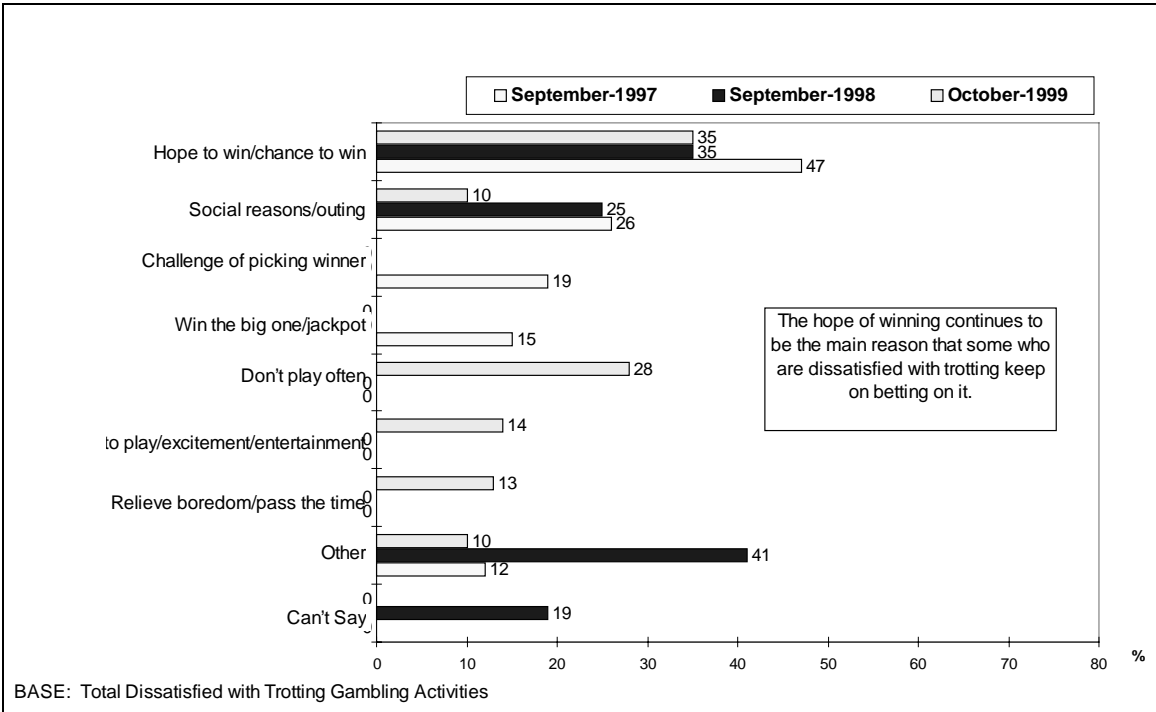
<sup>97</sup> Question 5G1-5G2 "Q5G1 On each day you bet on Trotting or Harness Racing, on average, how much money do you usually set aside to bet with?"

Q5G2 "On each day you bet on Trotting or Harness Racing, on average how much money do you usually have left at the end of the day's betting?"

<sup>98</sup> Question 6G1 "Thinking about all your betting on Trotting or Harness Racing over the last 12 months, do you think that you won back more than you outlaid, less than you outlaid, or about the same as you outlaid?"

Question 6G2 "If breaking even means winning back 100% of your outlay, what percentage of your outlay over the past 12 months do you think you won back on Trotting or Harness Racing?"

**TROTTING GAMBLING PATTERNS**

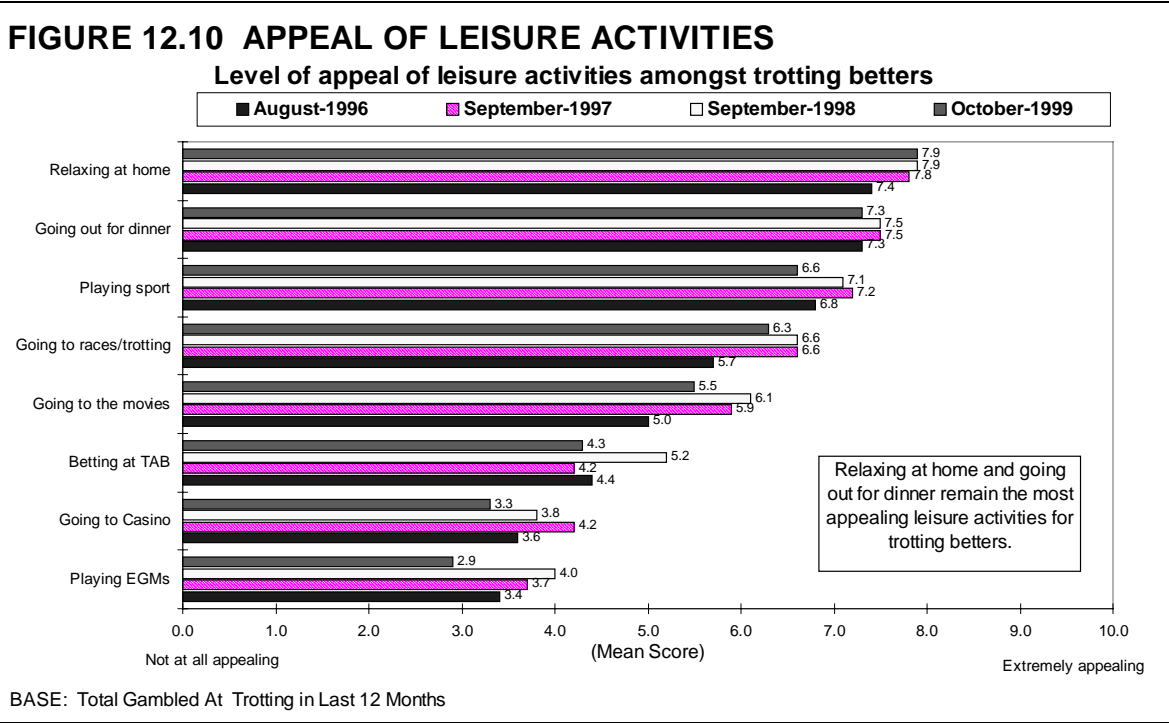
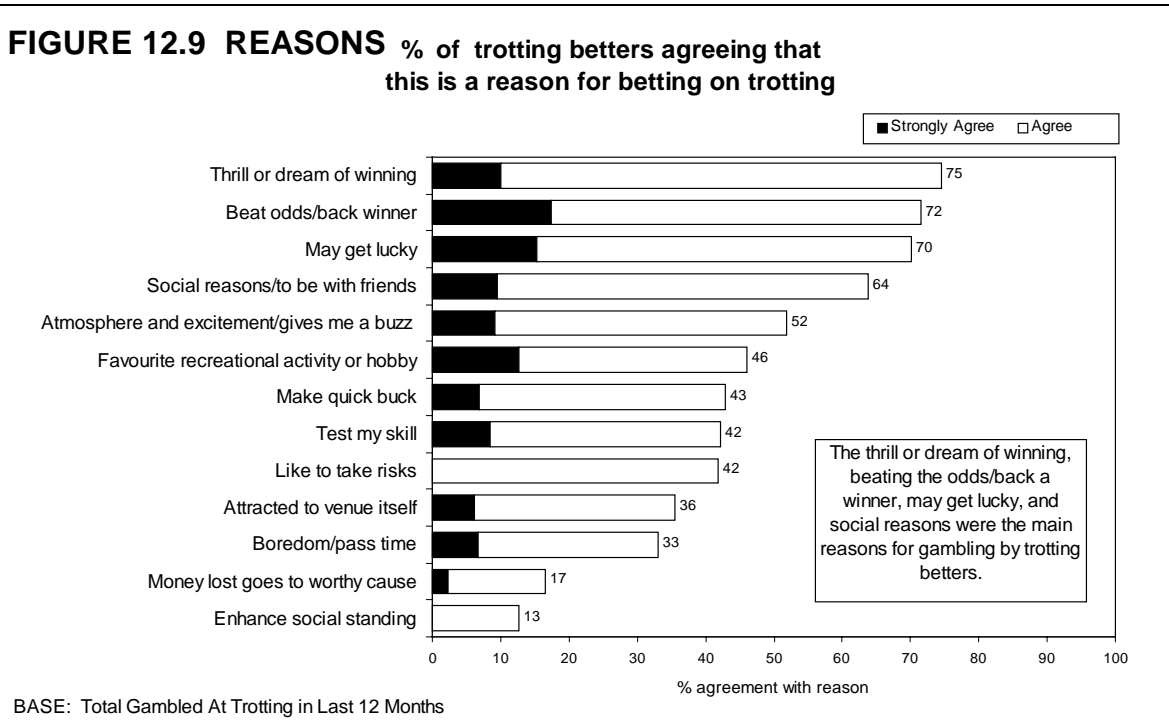


<sup>99</sup> Question 8G "Would you say that you are satisfied or dissatisfied with your experience of betting on Trotting or Harness Racing?"

<sup>100</sup> Question 9G "Why do you keep betting on Trotting or Harness Racing if you are dissatisfied?"



## TROTTING GAMBLING PATTERNS



<sup>101</sup> Question 7GA-L “I’m now going to read out a series of reasons for betting on Trotting or Harness Racing. I want you to tell me how strongly you agree or disagree that each is a reason you bet on Trotting or Harness Racing?”

<sup>102</sup> Questions 23A-H: “We would now like you to rate a number of spare time or leisure activities on a scale of 1 to 10 where a 1 is not at all appealing and 10 is extremely appealing. So on a scale of 1 to 10, how appealing is (betting at the TAB/Playing sport/Going to the movies/Going to the races or trots/Going out for dinner/Relaxing at home eg. Watching TV/Playing the Electronic Gaming Machines/Going to the casino)?”

**SECTION 13**

**FOOTYBET  
GAMBLING PATTERNS**



### **13. FOOTYBET GAMBLING PATTERNS – SUMMARY**

Section 13 contains a brief summary of Footybet gambling patterns. The main findings on Footybet gambling activities are outlined below.

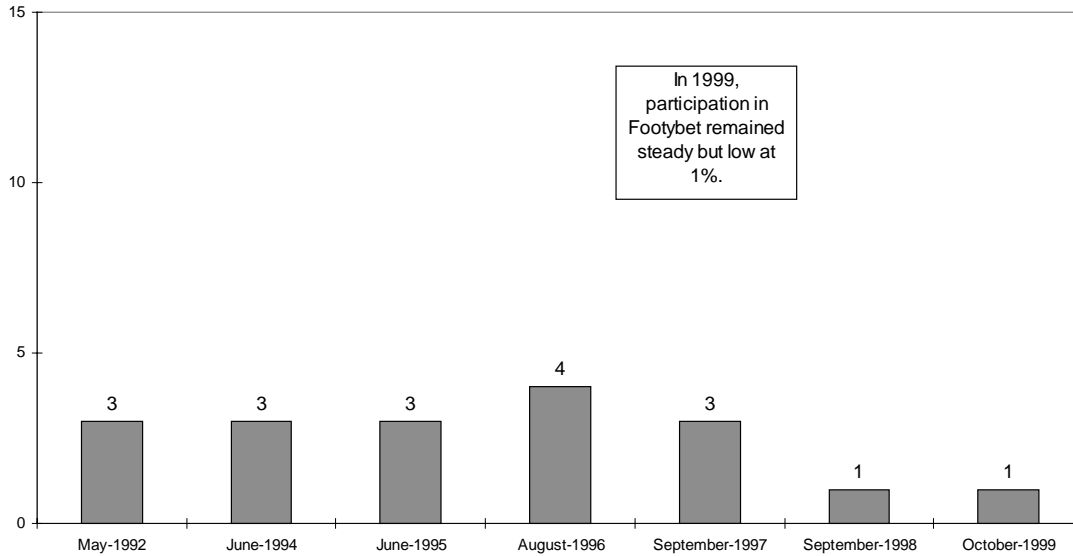
- ✓ In 1999, only 1% of Victorians participated in Footybet—the same as in 1998, and still the lowest level of participation recorded for this activity in this survey;
  - ✓ As in 1998, fewer than 1% of those reporting gambling activity considered Footybet their favourite gambling activity;
  - ✓ Regular participation (at least once a month) in Footybet gambling decreased to 40% of Footybet gamblers in 1999—down 16 points from 1998;
  - ✓ Footybet betters were more likely to be male, plant/machine operators/drivers, and Committed Heavy Gamblers. Those betting regularly on this activity were more likely to be male and to reside in non-metropolitan areas;
  - ✓ Footybet gamblers spent approximately \$23 each time they played Footybet in 1999—an increase of \$8 from 1998 (\$15), and the highest level yet recorded in this survey for Footybet;
  - ✓ Footybet gamblers spent an average of 15 minutes per time (week) betting on this activity in 1999—up 3 minutes from 1998, but associated with a change in question format to specifically include studying the form, placing bets and listening to and/or watching the games in respondents' estimates;
  - ✓ Participants showed a decrease in satisfaction with Footybet gambling activities in 1999 (CSI = 68.1, compared with 80.6 in 1998);
  - ✓ Main reasons for gambling on Footybet were “beat the odds/back a winner” (70%), “adds interest to listening to or watching the game” (63%), “make a quick buck” (60%) and “may get lucky” (58%); and
  - ✓ Activities rated more highly appealing by Footybet betters included “relaxing at home”, “going to the movies” and “playing sport”.
-



**FOOTYBET GAMBLING PATTERNS**

**FIGURE 13.1 PARTICIPATION RATES**

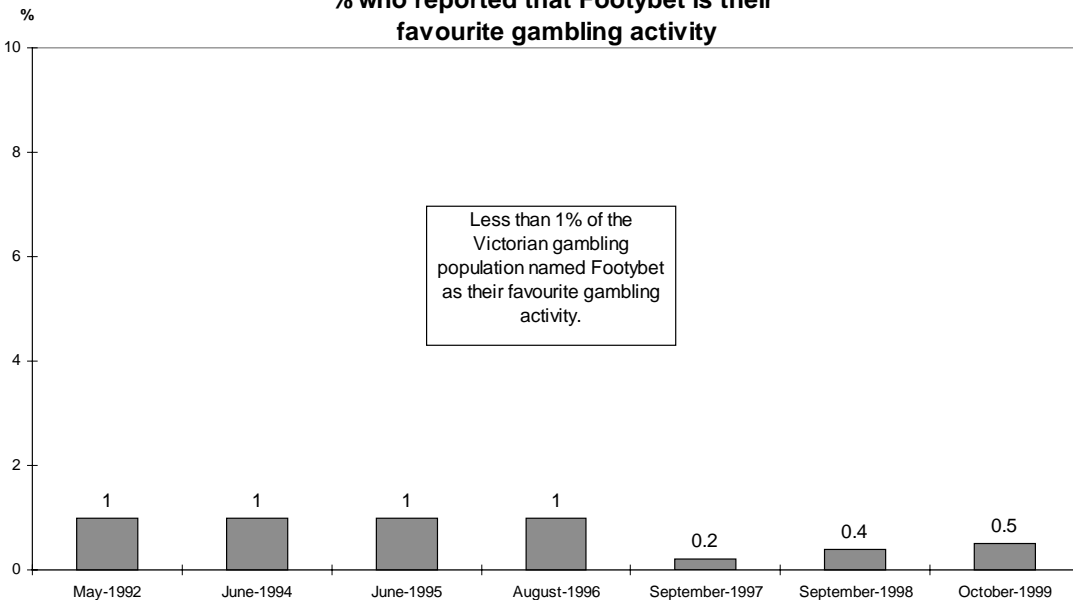
**% who have participated in Footybet gambling activities in the past 12 months**



BASE: Total Respondents

**FIGURE 13.2 FAVOURITE GAMBLING ACTIVITY**

**% who reported that Footybet is their favourite gambling activity**



BASE: Total Gambled in Last 12 Months


<sup>132</sup> Question 1. "Which of the following activities or games have you played, entered or bet on in the past 12 months"

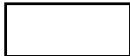
<sup>133</sup> Question 2 "Which one of these is your favourite game or activity?" (unprompted)

**PROFILE OF FOOTYBET GAMBLERS**

**TABLE 13.1**

	<b>Total Population</b>	<b>Footybet Gamblers (Last 12 mths)</b> <b>1.4 % of total pop</b>	<b>Reg. Footybet Gamblers (Once a mth+)</b> <b>0.6% of total pop</b>
<b>GENDER</b>			
Male	49%	84%	79%
Female	51%	16%	21%
<b>AGE</b>			
Average Age	44 yrs	34 yrs	35 yrs
<b>RESPONDENT'S OCCUPATION</b>			
<b>TOTAL FULL-TIME</b>	<b>44%</b>	<b>71%</b>	<b>65%</b>
Mangers/(Seniors) Administrators	11%	7%	18%
Professionals	19%	13%	22%
Associate Professionals	7%	3%	0%
Tradespersons	12%	16%	14%
Clerks	10%	20%	11%
Sales/Personal Service Workers	12%	6%	0%
Plant/Machine Operators/Drivers	4%	18%	12%
Labourers/Related Workers	9%	7%	8%
<b>TOTAL PART-TIME</b>	<b>15%</b>	<b>9%</b>	<b>8%</b>
<b>TOTAL NOT IN PAID WORKFORCE</b>	<b>41%</b>	<b>20%</b>	<b>26%</b>
Household duties	8%	0%	0%
Student	8%	11%	14%
Self-supporting Retiree	8%	5%	12%
Pensioner	14%	4%	0%
Unemployed	2%	0%	0%
<b>LOCATION</b>			
Melbourne Metropolitan	73%	60%	37%
Other Victoria non-metropolitan	27%	40%	63%
<b>SOGS SCORE</b>			
(0-4)	99.2%	100%	100%
(5-20)	0.8%	0%	0%
<b>SEGMENT</b>			
Disinterested Gambler	22%	16%	29%
Occasional Gambler	38%	33%	33%
Social Gambler	9%	4%	0%
Acknowledged Heavy Gambler	5%	10%	14%
Committed Heavy Gambler	8%	37%	23%

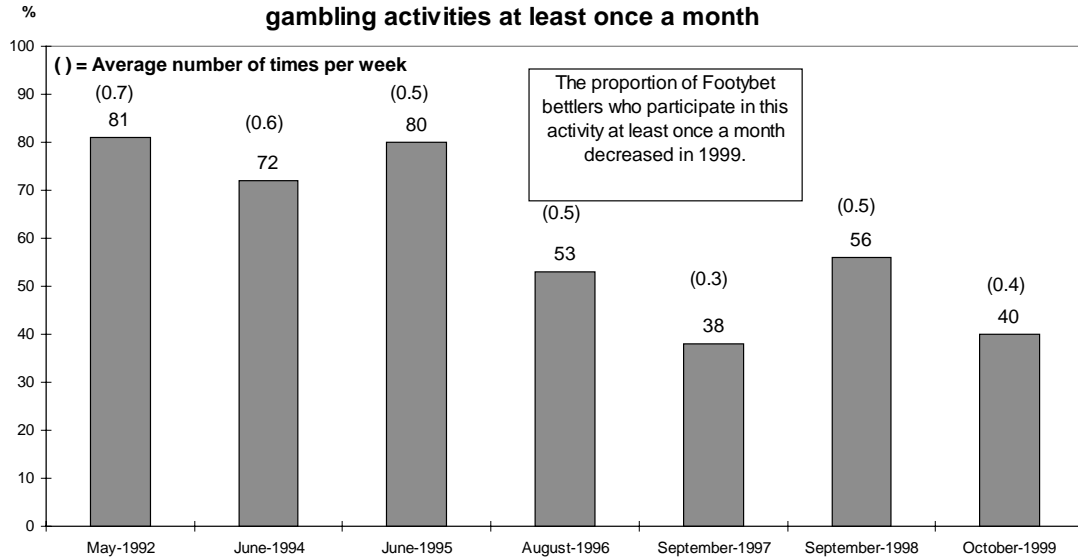
 Significantly higher than average compared to the general population

 Significantly lower than average compared to the general population

**FOOTYBET GAMBLING PATTERNS**

**FIGURE 13.3 FREQUENCY**

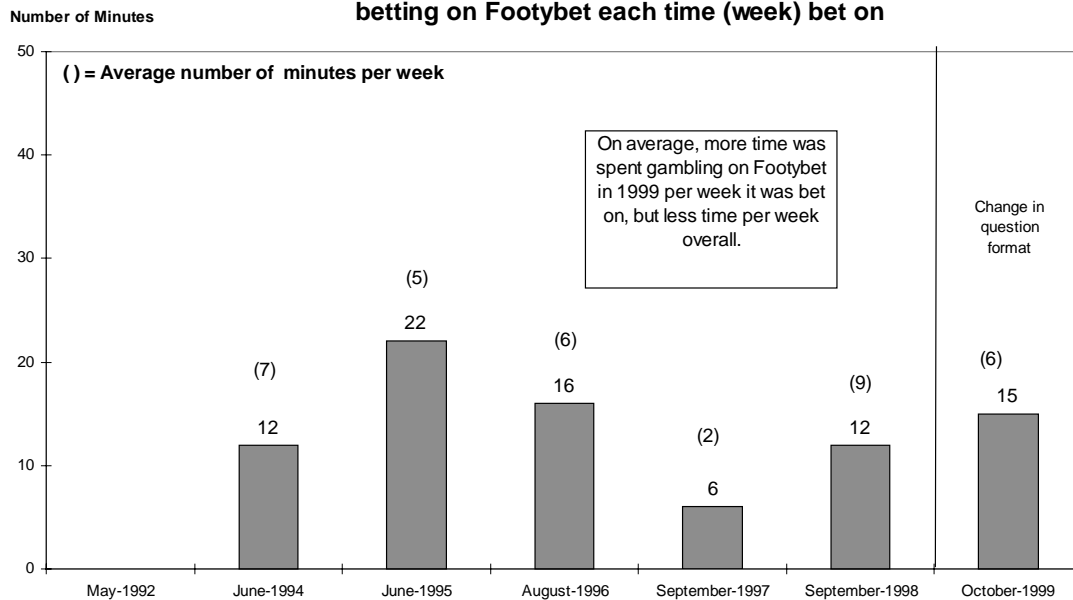
**% of Footybet betters who participate in Footybet gambling activities at least once a month**



BASE: Total Gambled At Footybet in Last 12 Months

**FIGURE 13.4 DURATION**

**Average number of minutes spent betting on Footybet each time (week) bet on**



BASE: Total Gambled At Footybet in Last 12 Months

<sup>134</sup> Question 3L "How often do you bet on Footybet?"

<sup>135</sup> Question 4L1 "In each week you bet on Footybet, on average, how much time do you spend studying the form and placing your bets?"  
Question 4L2 "And how much time do you spend listening to and/or watching the games?"



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<b>FOOTYBET GAMBLING PATTERNS</b>
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**13.5 Expenditure**

In 1999, Footybet betters estimated that they spend an average of \$23 each time (week) they participate in this activity. When considered on a weekly basis, this represents \$5 expenditure per week.

Please note that in 1999 the question was changed to ask respondents how much money they do spend or outlay each week they participated (in previous years, the question asked respondents the dollar value they were prepared to or would outlay each time they participated). Due to these changes, results from 1999 are no longer directly comparable with previous years. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999. A summary graphic of expenditure for all gambling activities in 1999 is available at Figure 3.11.

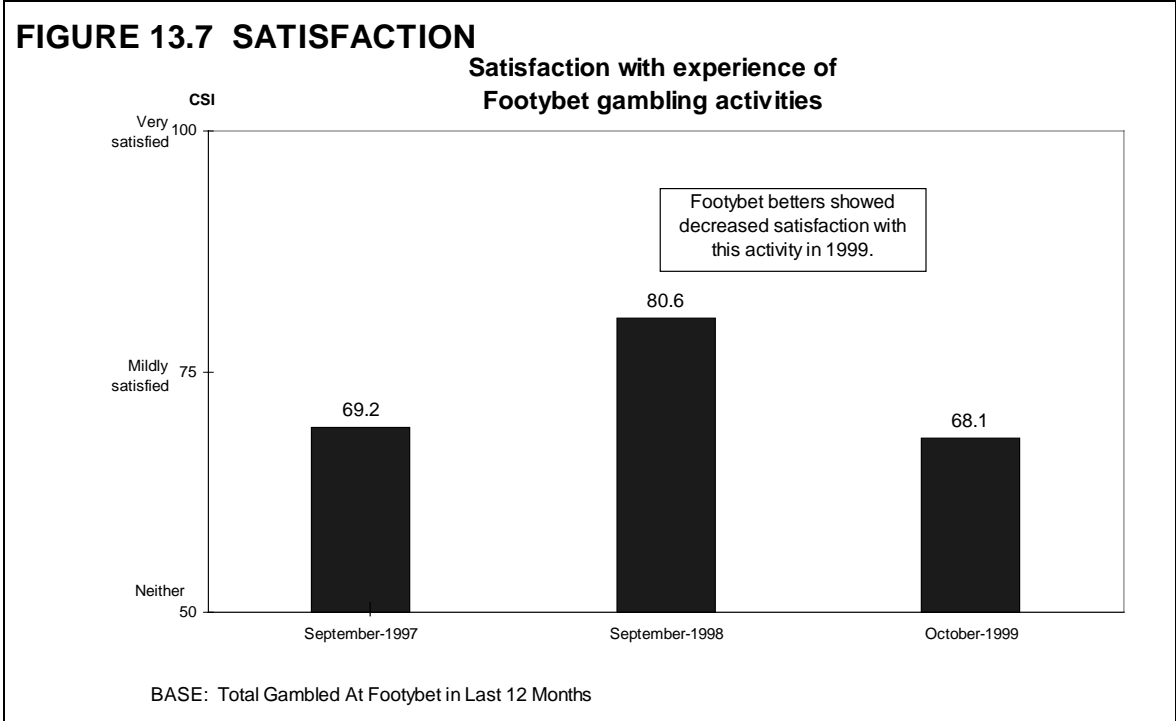
**13.6 Proportion of Outlay Reported as Won Back**

Footybet betters reported winning back an average of 72% of their outlay on this activity in the previous 12 months in 1999.

Changes in question format resulted in responses being based upon breaking even meaning winning 100% of outlay back. Due to these changes, results from 1999 are no longer directly comparable with previous years. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999. A summary graphic of proportion of outlay won back for all gambling activities in 1999 is available at Figure 3.13.

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**FOOTYBET GAMBLING PATTERNS**

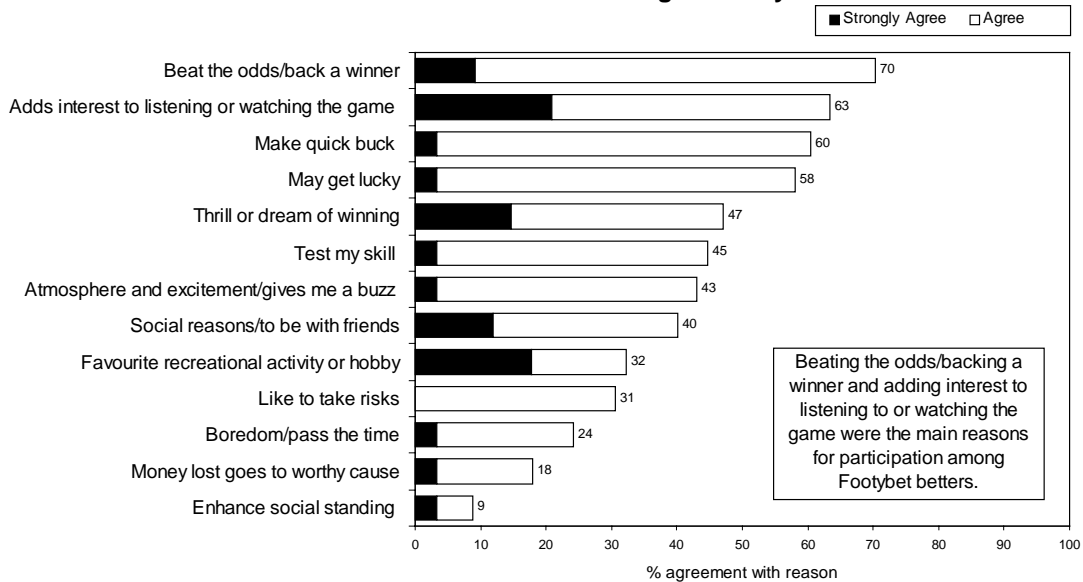


<sup>136</sup> Question 8L "Would you say that you are satisfied or dissatisfied with your experience of entering Footybet?"

**FOOTYBET GAMBLING PATTERNS**

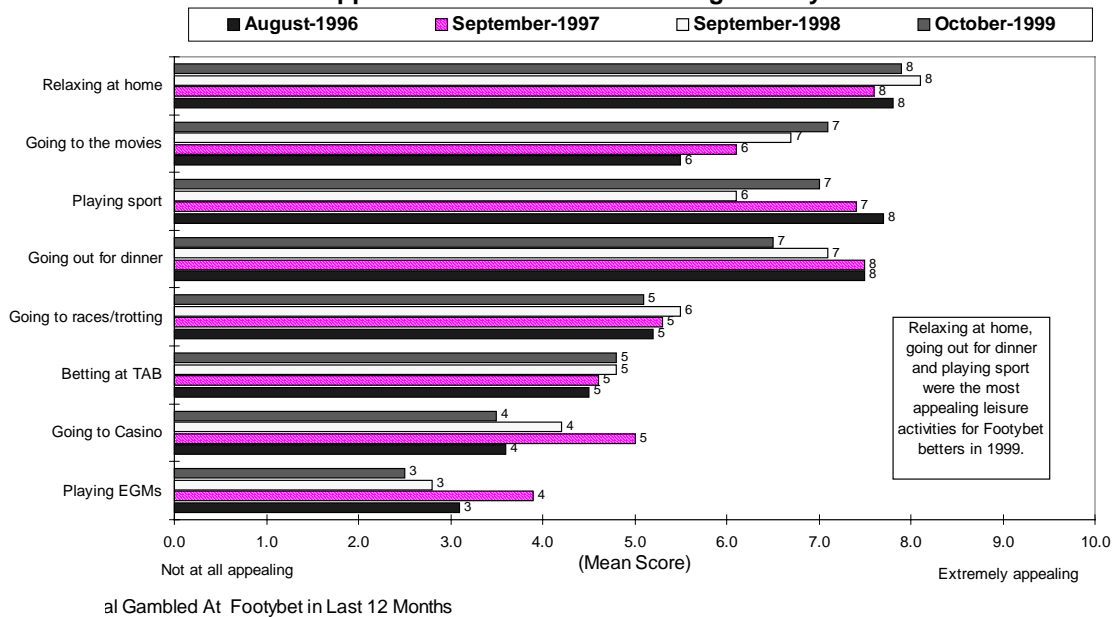
**FIGURE 13.8 REASONS**

% of Footybet betters agreeing that this is a reason for betting on Footybet



Beating the odds/backing a winner and adding interest to listening to or watching the game were the main reasons for participation among Footybet betters.

**FIGURE 13.9 APPEAL OF LEISURE ACTIVITIES**



Relaxing at home, going out for dinner and playing sport were the most appealing leisure activities for Footybet betters in 1999.

**SECTION 14**

**CLUB KENO  
GAMBLING PATTERNS**



## **14. CLUB KENO GAMBLING PATTERNS – SUMMARY**

Section 14 provides an overview of Club Keno gambling patterns. The key findings to emerge were:

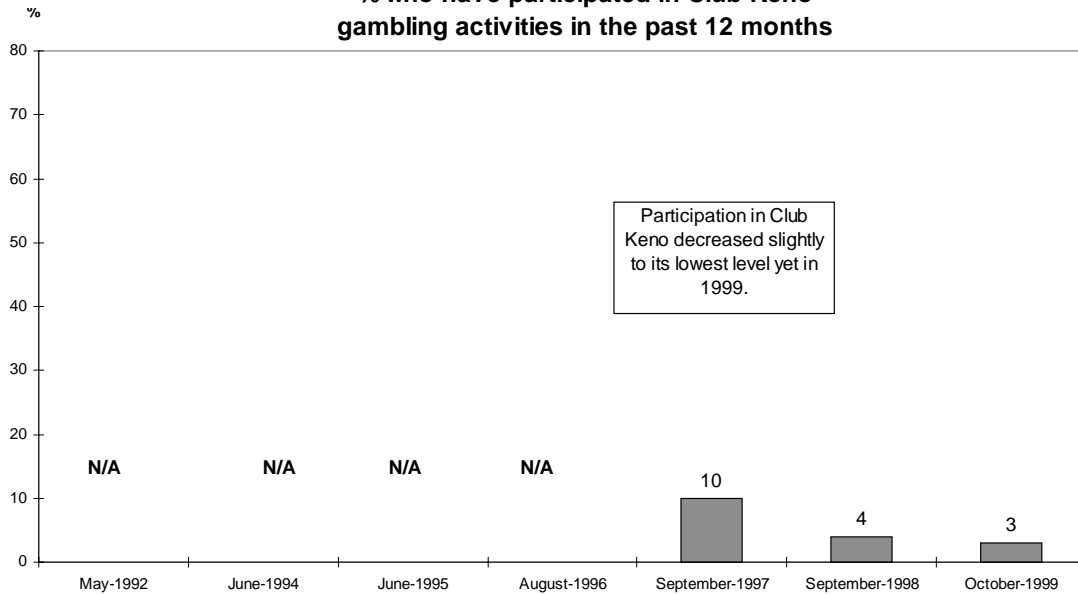
- ✓ In 1999, Club Keno participation rates continued to decrease—at 3%, down 1 point from 1998 and 7 points from 1997);
  - ✓ As in 1998, only 1% of those having participated in gambling activities regarded Club Keno as their favourite gambling activity;
  - ✓ Club Keno entrants were significantly more likely to be rural residents, Social Gamblers or Committed Heavy Gamblers, and those participating regularly were significantly more likely to be plant/machine operators/drivers;
  - ✓ One in five Club Keno entrants (20%) participated in this activity at least once a month;
  - ✓ Club Keno participants spent approximately 44 minutes per time (day) when engaged in this activity—an increase of 17 minutes from 1998;
  - ✓ Club Keno entrants reported spending an average of \$11 each time they participated in this activity in 1999;
  - ✓ Those participating in Club Keno gamblers were moderately satisfied with the activity (CSI = 61);
  - ✓ The most frequent reasons for continuing to enter Club Keno despite dissatisfaction were “to relieve boredom” (28%), “only gamble with family/friends” (24%) and “the hope of winning” (20%);
  - ✓ Major reasons for participating in Club Keno were “may get lucky” (82%), “for social reasons/to be with friends” (72%), “the thrill or dream of winning” (71%) and “to make a quick buck” (64%);
  - ✓ Club Keno gamblers rated “relaxing at home” and “going out for dinner” as highly appealing leisure activities.
-



**CLUB KENO GAMBLING PATTERNS**

**FIGURE 14.1 PARTICIPATION RATES**

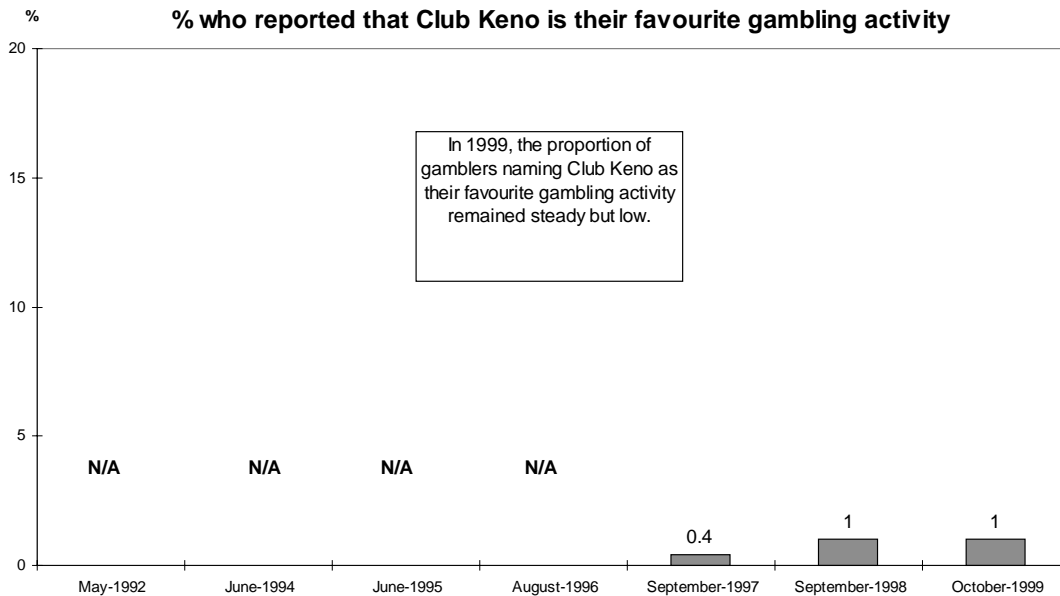
**% who have participated in Club Keno gambling activities in the past 12 months**



BASE: Total Respondents

**FIGURE 14.2 FAVOURITE GAMBLING ACTIVITY**

**% who reported that Club Keno is their favourite gambling activity**



BASE: Total Gambled in Last 12 Months

<sup>132</sup> Question 1. "Which of the following activities or games have you played, entered or bet on in the past 12 months?"


<sup>133</sup> Question 2 "Which one of these is your favourite game or activity?" (unprompted)




**PROFILE OF CLUB KENO GAMBLERS**

**TABLE 14.1**

	<b>Total Population</b>	<b>Club Keno Gamblers (Last 12 mths)</b> <b>3% of total pop</b>	<b>Reg. Club Keno Gamblers (Once a mth+)</b> <b>1% of total pop</b>
<i><b>GENDER</b></i>			
Male	49%	50%	73%
Female	51%	50%	27%
<i><b>AGE</b></i>			
Average Age	44 yrs	45 yrs	45 yrs
<i><b>RESPONDENT'S OCCUPATION</b></i>			
<b>TOTAL FULL-TIME</b>	<b>44%</b>	<b>50%</b>	<b>65%</b>
Managers/(Senior) Administrators	11%	11%	-
Professionals	19%	19%	19%
Associate Professionals	7%	3%	6%
Tradesperson	12%	13%	11%
Clerks	10%	17%	18%
Sales/Personal Services Workers	12%	15%	-
Plant/Machine Operators/Drivers	4%	8%	30%
Labourer/ Related Workers	9%	5%	6%
<b>TOTAL PART-TIME</b>	<b>15%</b>	<b>17%</b>	<b>13%</b>
<b>TOTAL NOT IN PAID WORKFORCE</b>	<b>41%</b>	<b>33%</b>	<b>22%</b>
Household duties	8%	6%	-
Student	8%	-	-
Self-supporting Retiree	8%	11%	11%
Pensioner	14%	14%	-
Unemployed	2%	2%	11%
<i><b>LOCATION</b></i>			
Melbourne Metropolitan	73%	57%	59%
Other Victoria non-metropolitan	27%	43%	41%
<i><b>SOGS SCORE</b></i>			
(0-4)	99.2%	100%	100%
(5-20)	0.8%	-	-
<i><b>SEGMENT</b></i>			
Disinterested Gambler	22%	20%	17%
Occasional Gambler	38%	32%	18%
Social Gambler	9%	22%	30%
Acknowledged Heavy Gambler	5%	10%	6%
Committed Heavy Gambler	8%	17%	30%

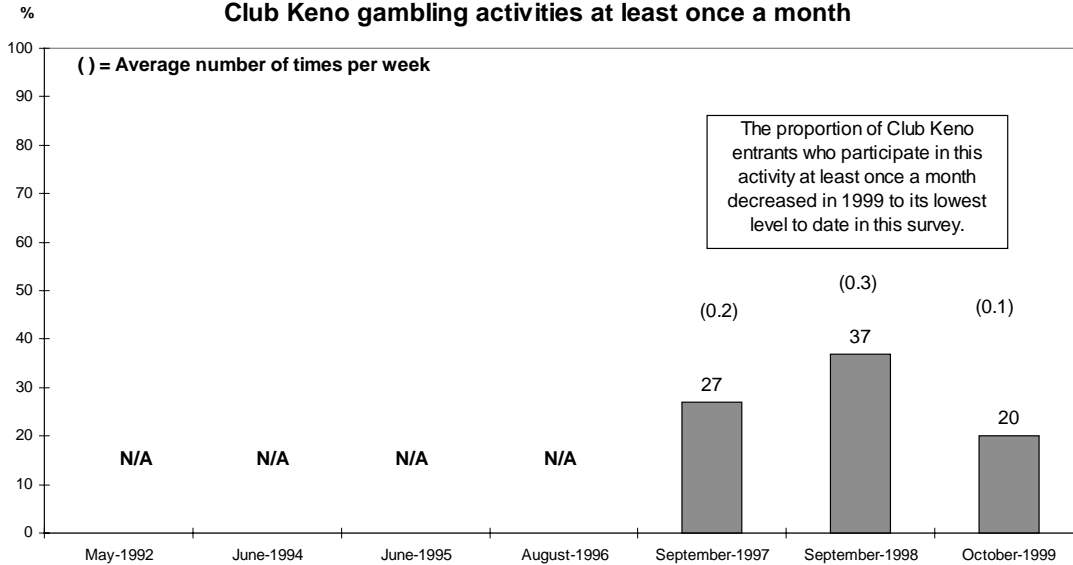
 Significantly higher than average compared to the general population

 Significantly lower than average compared to the general population

**CLUB KENO GAMBLING PATTERNS**

**FIGURE 14.3 FREQUENCY**

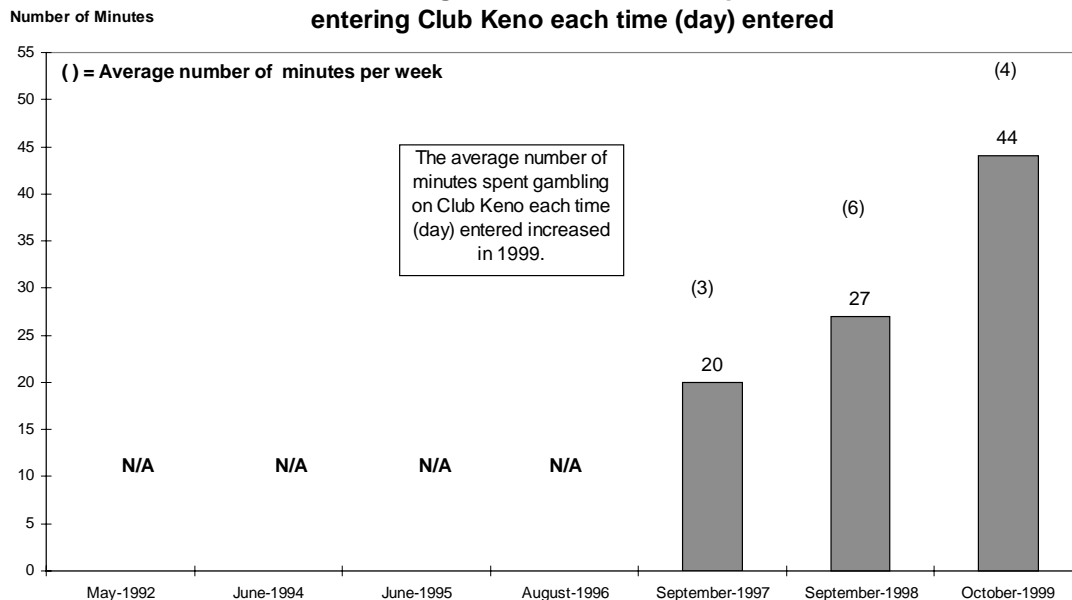
**% of Club Keno entrants who participate in Club Keno gambling activities at least once a month**



BASE: Total Gambled At Club Keno in Last 12 Months

**FIGURE 14.4 DURATION**

**Average number of minutes spent entering Club Keno each time (day) entered**



BASE: Total Gambled At Club Keno in Last 12 Months

<sup>134</sup> Question 30 "How often do you play Keno at a club or hotel?"

<sup>135</sup> Question 40 "On each day you play Keno at a club or hotel, on average, how much time do you spend on this activity?"

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<b>CLUB KENO GAMBLING PATTERNS</b>
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**14.5 Expenditure**

In 1999, Club Keno entrants reported spending an average of \$11 each time (day) they participate in this activity. When considered on a weekly basis, this represents \$1 expenditure per week.

Please note that in 1999 the question was changed to ask respondents how much money they do spend or outlay each day they participated (in previous years, the question asked respondents the dollar value they were prepared to or would outlay each time they participated). Due to these changes, results from 1999 are no longer directly comparable with previous years. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999. A summary graphic of expenditure for all gambling activities in 1999 is available at Figure 3.11.

**14.6 Proportion of Outlay Reported as Won Back**

Club Keno entrants reported winning back 57%, on average, of their outlay on this activity in the previous 12 months in 1999.

Changes in question format resulted in responses being based upon breaking even meaning winning 100% of outlay back. Due to these changes, results from 1999 are no longer directly comparable with previous years. The previous data are available from the Sixth Survey of Community and Gambling Patterns and Perceptions published by the VCGA in April 1999. A summary graphic of proportion of outlay won back for all gambling activities in 1999 is available at Figure 3.13.

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<sup>136</sup> Question 5O: "On each day you play Keno at a club or hotel, on average, how much money do you spend or outlay on this activity?"

<sup>144</sup> Question 6O1: "Thinking about all your playing Keno at a club or hotel over the last 12 months, do you think that you won back more than you outlaid, less than you outlaid, or about the same as you outlaid?"

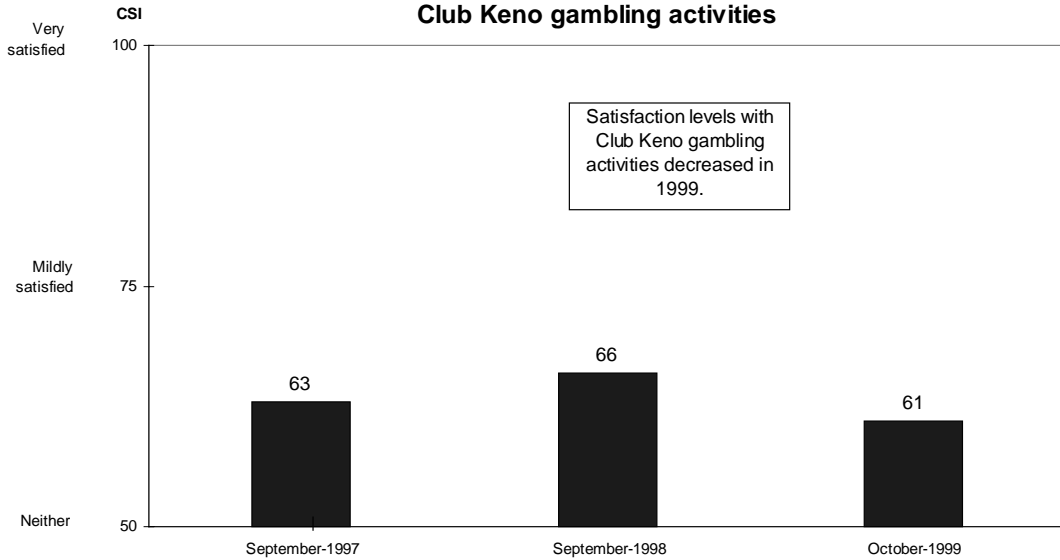
Question 6O2: "If breaking even means winning back 100% of your outlay, what percentage of your outlay over the past 12 months do you think you won back on Keno at a club or hotel?"

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**CLUB KENO GAMBLING PATTERNS**

**FIGURE 14.7 SATISFACTION**

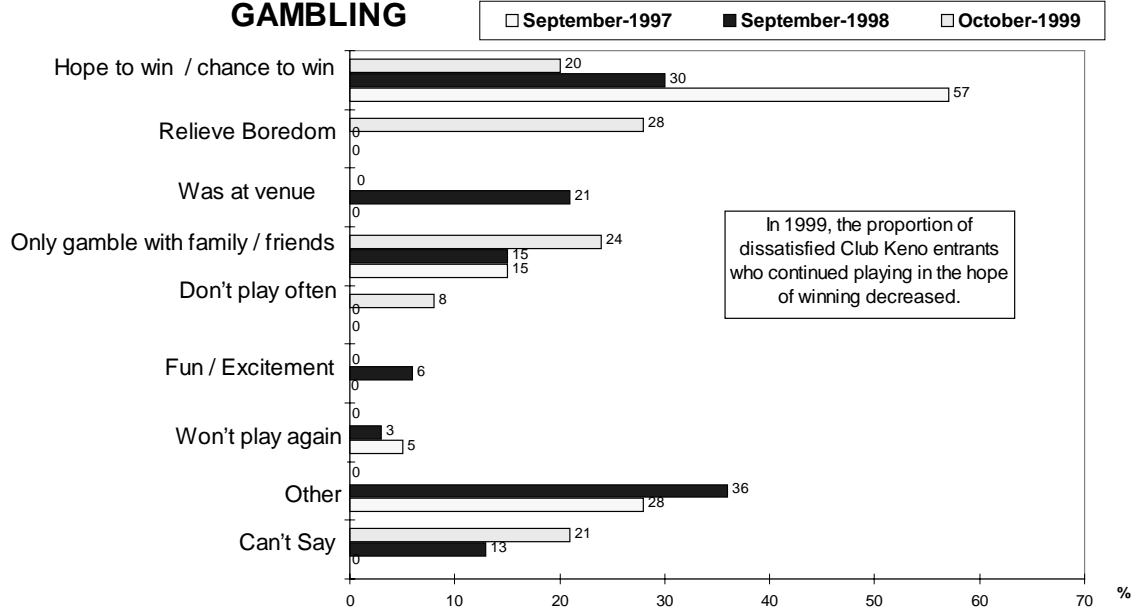
Satisfaction with experience of Club Keno gambling activities



Satisfaction levels with Club Keno gambling activities decreased in 1999.

BASE: Total Gambled At Club Keno in Last 12 Months

**FIGURE 14.8 IF DISSATISFIED, WHY CONTINUE CLUB KENO GAMBLING**



In 1999, the proportion of dissatisfied Club Keno entrants who continued playing in the hope of winning decreased.

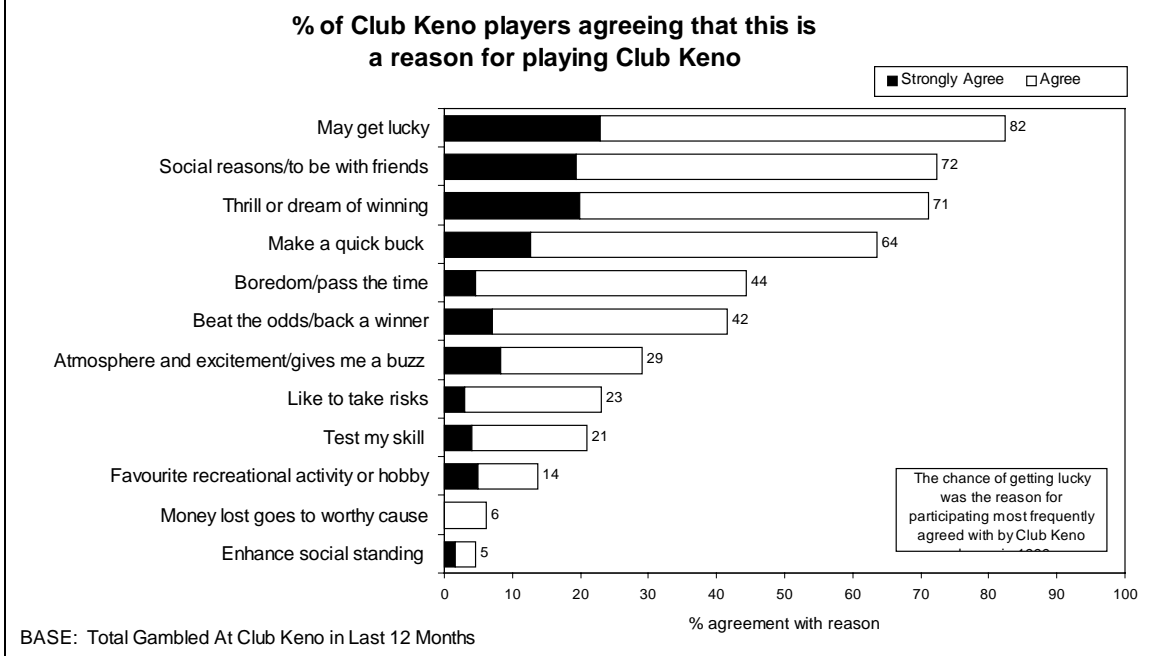
BASE: Total Dissatisfied with Club Keno Gambling Activities

<sup>138</sup> Question 80 "Would you say that you are satisfied or dissatisfied with your experience of entering Keno at a club or hotel?"

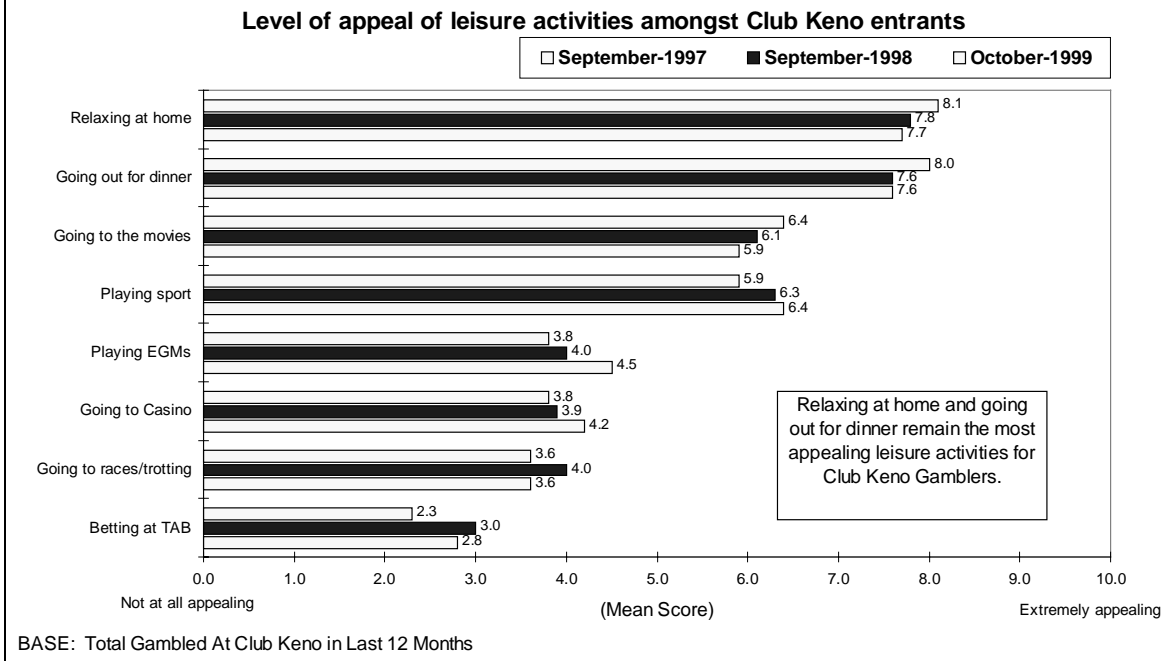
<sup>139</sup> Question 90 "Why do you keep entering Keno at a club or hotel if you are dissatisfied?"

## CLUB KENO GAMBLING PATTERNS

**FIGURE 14.9 REASONS**



**FIGURE 14.10 APPEAL OF LEISURE ACTIVITIES**



<sup>140</sup> Question 70A-70N "I'm now going to read out a series of reasons for playing Keno at a club or hotel. I want you to tell me how strongly you agree or disagree that each is a reason you play Keno at a club or hotel."

<sup>141</sup> Questions 23A-H: "We would now like you to rate a number of spare time or leisure activities on a scale of 1 to 10 where a 1 is not at all appealing and 10 is extremely appealing. So on a scale of 1 to 10, how appealing is (betting at the TAB/Playing sport/Going to the movies/Going to the races or trots/Going out for dinner/Relaxing at home eg. Watching TV/Playing the Electronic Gaming Machines/Going to the casino)?"

**SECTION 15**

**OTHER  
GAMBLING PATTERNS**

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## **15. OTHER GAMBLING PATTERNS**

Section 15.2 of this report provides a graphical summary of participation rates for Greyhound Racing, Soccer Pools, sports betting and casino games for money on the Internet (previously known as Internet gambling) activities. Participation rates were determined by the first question on the survey, which asked “Which of the following activities or games have you played, entered or bet on in the past 12 months?”

An overview of participation rates in footy tipping competitions, Melbourne Cup sweeps and telephone dial-in competitions (where participants dial 0055 or 1900 numbers, including “Millionaire”-type quiz games) is also provided in Section 15.1.

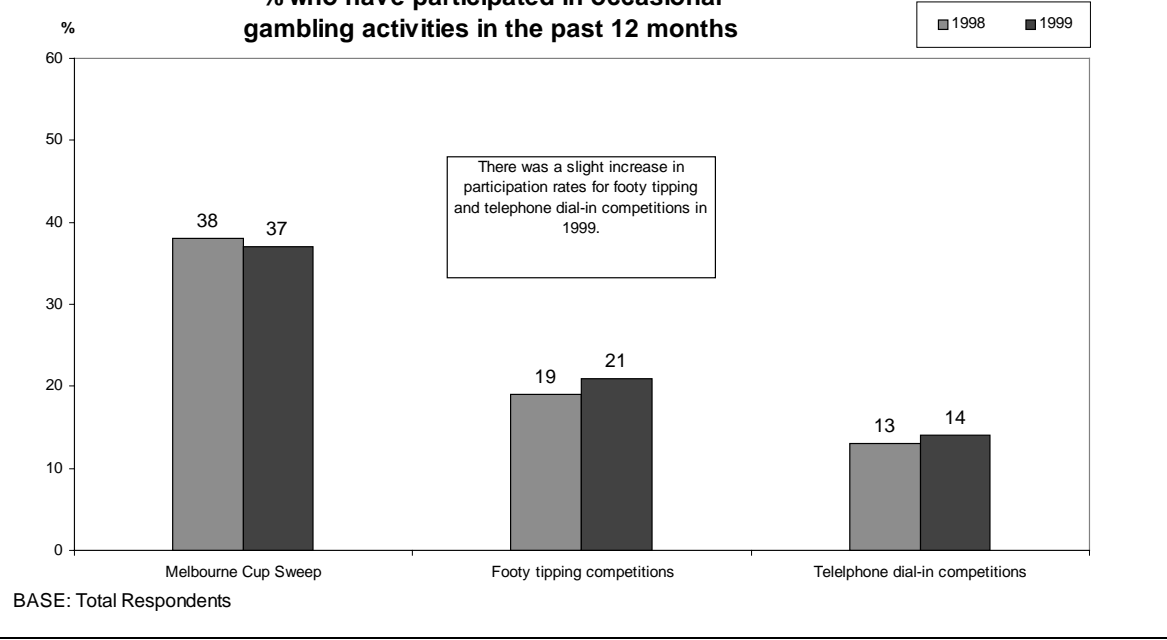
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OCCASIONAL GAMBLING PATTERNS

FIGURE 15.1 PARTICIPATION RATES

% who have participated in occasional gambling activities in the past 12 months



## 15.1 Occasional/Annual Gambling Activities

Figure 15.1<sup>132</sup> opposite shows the participation rates in occasional and annual gambling activities (footy tipping competitions, Melbourne Cup sweeps and telephone dial-in competitions).

In 1999, participation in Melbourne Cup sweeps decreased slightly to 37%—down 1 point from 1998. However, participation increased slightly in both footy tipping competitions (21%) and telephone dial-in competitions (14%)—up 2 points and 1 point respectively.

In 1999, the average yearly expenditure by people who participated in Melbourne Cup sweeps was \$12.73—a slight increase from the 1998 figure of \$12.41. The average reported yearly expenditure on footy tipping competitions in 1999 was \$32—a decrease of \$6 from 1998.

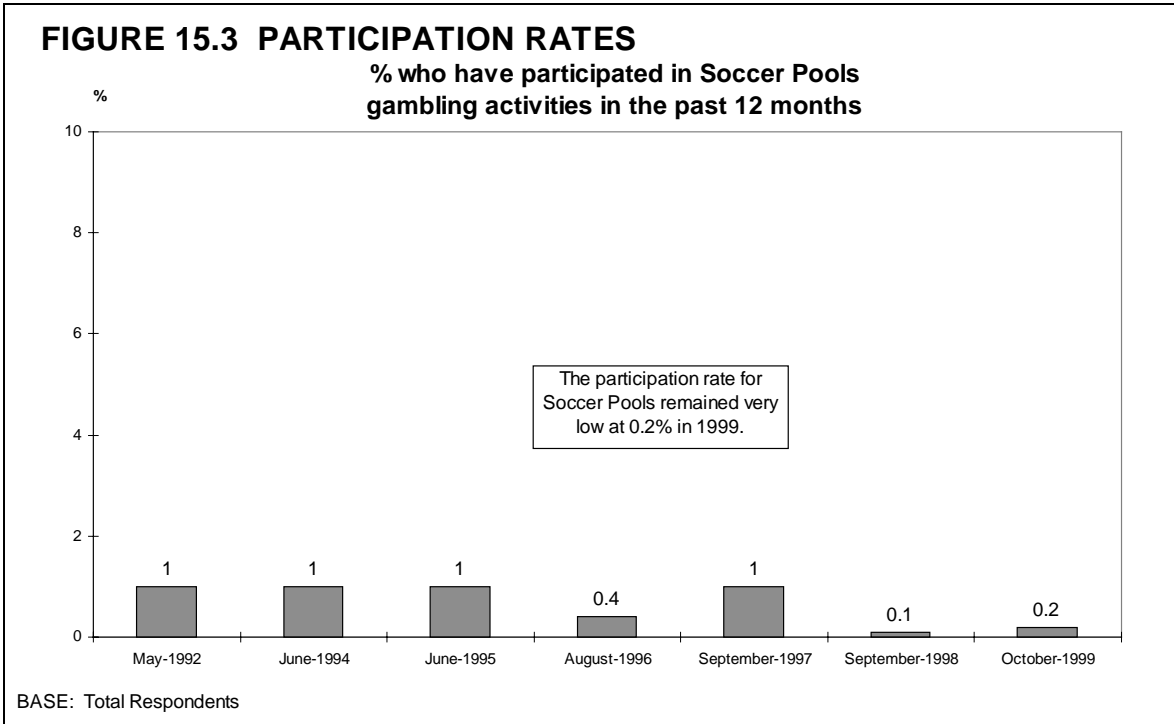
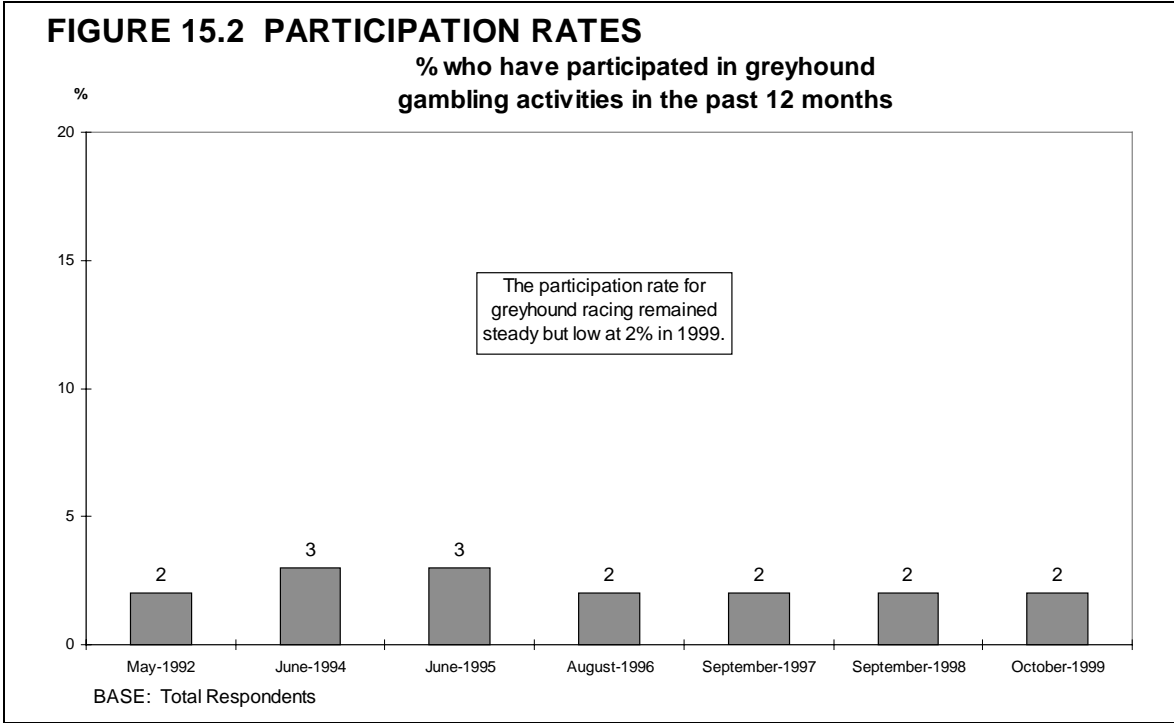
One quarter of people who participated in telephone dial-in competitions did so once a month or more often, another quarter participated once every 2–3 months, and approximately one third participated once every 6 months.

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<sup>132</sup> Question 24A1A/24A1B/24A1C “In the last 12 months have you participated in a footy-tipping competition/Melbourne Cup sweep/any telephone dial-in competition where you dial numbers such as 0055 or 1900 numbers, including “Millionaire”-type quiz games?”

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**OTHER GAMBLING PATTERNS**



<sup>133</sup> Question 1. "Which of the following activities or games have you played or gambled on in the past 12 months?"

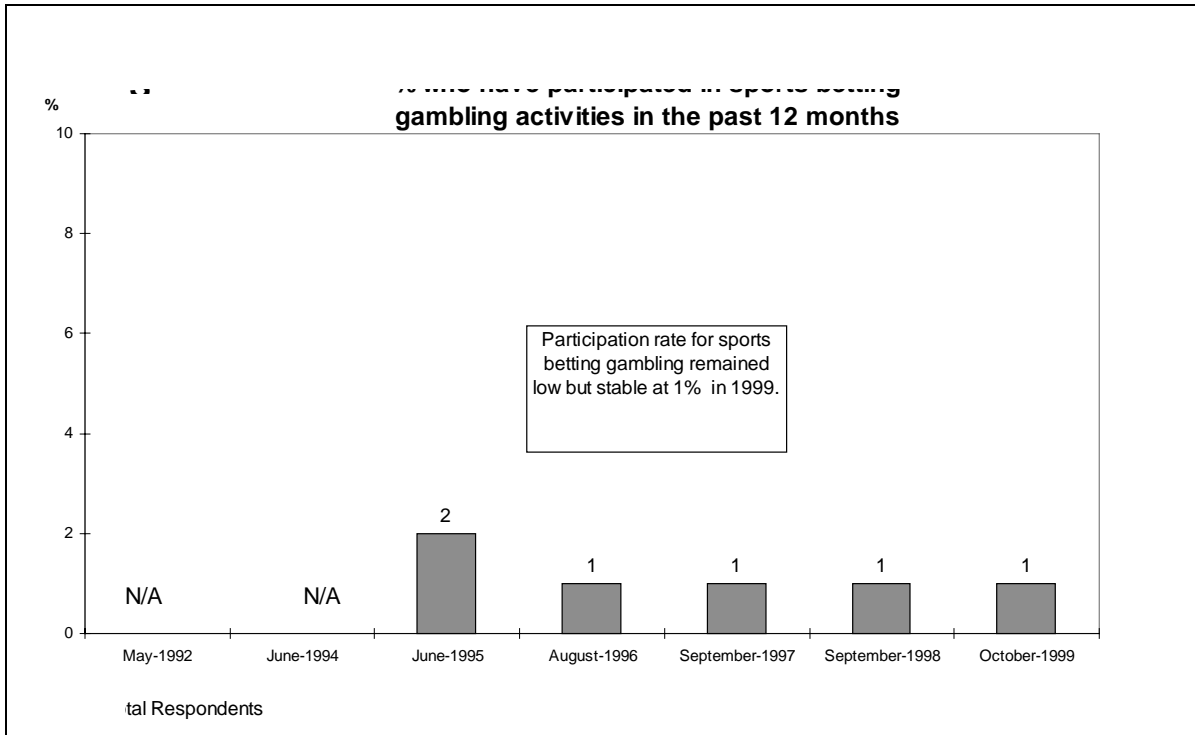
## **15.2 Other Gambling Activities**

Section 15.2 provides a graphical summary of participation rates for greyhound racing, Soccer Pools, sports betting and casino games for money on the Internet (previously referred to as Internet gambling). Because the participation levels for these activities were very low, detailed interpretation of results in these instances would not be meaningful.

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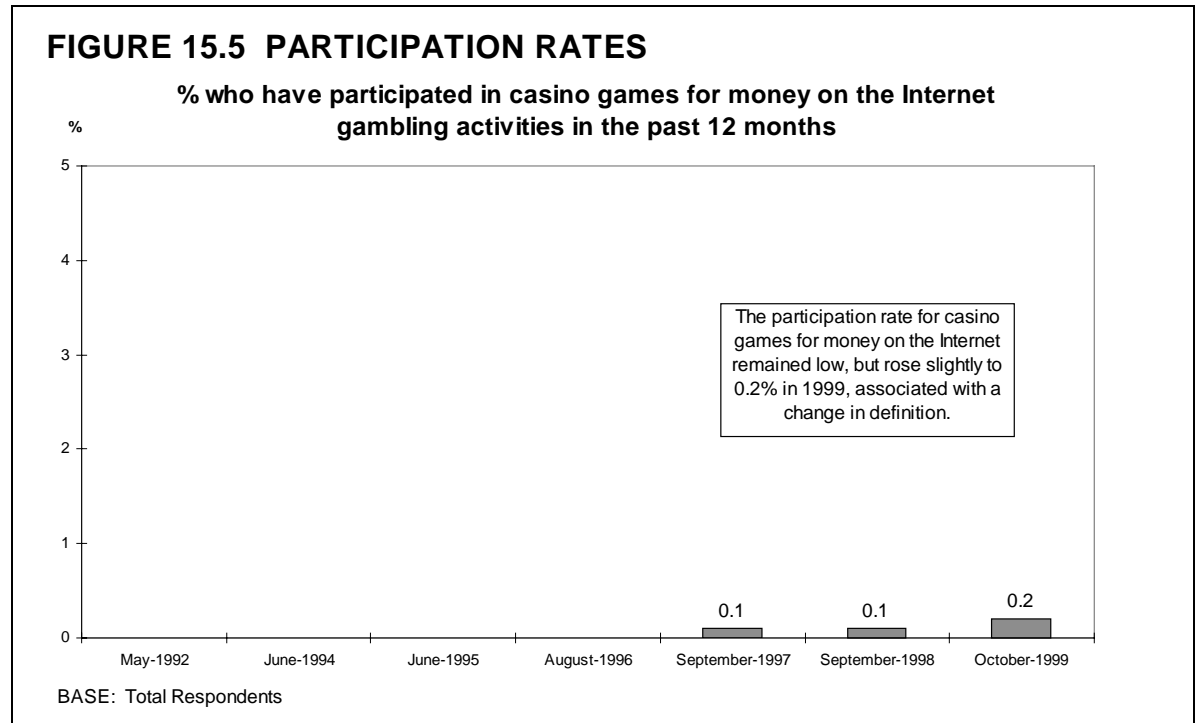


**OTHER GAMBLING PATTERNS**



**FIGURE 15.5 PARTICIPATION RATES**

**% who have participated in casino games for money on the Internet gambling activities in the past 12 months**



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<sup>134</sup> Question 1. "Which of the following activities or games have you played or gambled on in the past 12 months?"

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**APPENDIX 1**

**THE QUESTIONNAIRE**

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Seventh Survey of Community Gambling Patterns and Perceptions (1999)

INTRODUCTION

Good morning/afternoon/evening. My name is (SAY NAME) from Roy Morgan Research, the people who conduct the Morgan Gallup Poll. Today we're conducting an important research study on behalf of a Victorian Government Authority about what people do in their spare time. Could I please speak to the person in the household aged 18 or over whose birthday is the closest to today's date?

IF NEW RESPONDENT, REPEAT INTRODUCTION

IF NECESSARY EXPLAIN

- ✓ This is not a sales call. It's only a market research study and it will take about 25 minutes of your time.
✓ 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.

QA Do you or anyone else in your household work in...? (READ OUT)

Table with 2 columns: Industry and Number. Rows include: The building industry (1), A TAB agency or Tabcorp (2), Tattersalls agency or corporation (3), A venue where there are poker machines ("pokies") (4), The Crown Casino (5), The retail motor industry (6), A market research company (7), Victorian Casino & Gaming Authority (Terminate) (8), None of these (9).

IF VICTORIAN CASINO & GAMING AUTHORITY, TERMINATE, SAYING:

Thank you for your time, but we need to speak with people in specific industries.

Q.1 Which of the following activities or games have you played, entered or bet on in the past 12 months?  
(READ OUT)

	Yes	No
a) Raffles.....	1	2
b) Bingo.....		1 2
c) Lotto, Tattslotto, Oz Lotto, Tatts Keno, or Powerball.....	1	2
d) Scratch ticket, Instant lotto or Scratch 'n' win.....	1	2
e) Playing cards for money privately (at home or any other place).....	1	2
f) Thoroughbred horse racing (the gallops).....	1	2
g) Trotting or harness racing (the trots).....	1	2
h) Greyhound racing (the dogs).....	1	2
i) Poker machines ("pokies") at a club or hotel.....	1	2
j) Poker machines ("pokies") at the Melbourne Crown Casino or casinos outside Victoria.....	1	2
k) Any other game at the Melbourne Crown Casino or casinos outside Victoria.....	1	2
l) Footy betting on the TAB (Footybet).....	1	2
m) Betting on sports with Sportsbet or other bookmakers.....	1	2
n) Soccer Pools.....	1	2
o) Keno at a club or hotel.....	1	2
p) Casino games for money on the Internet.....	1	2
q) None of these (Go to Q.24a1).....	1	2

Q.2 Which ONE of these is your FAVOURITE game or activity? (ONE ONLY)

Raffles.....	1
Bingo.....	2
Lotto, Tattslotto, Oz Lotto, Tatts Keno, or Powerball.....	3
Scratch ticket, Instant lotto or Scratch 'n' win.....	4
Playing cards for money privately (at home or any other place)	5
Thoroughbred horse racing (the gallops).....	6
Trotting or harness racing (the trots).....	7
Greyhound racing (the dogs).....	8
Poker machines ("pokies") at a club or hotel.....	9
Poker machines ("pokies") at the Melbourne Crown Casino or casinos outside Victoria.....	10
Any other game at the Melbourne Crown Casino or casinos outside Victoria.....	11
Footy betting on the TAB (Footy Bet).....	12
Betting on sports with Sportsbet or other bookmakers.....	13
Soccer Pools.....	14
Keno at a club or hotel.....	15
Casino games for money on the Internet.....	16

Q.3a) FOR EACH ACTIVITY UNDERTAKEN IN Q.1, ASK Q.3 TO Q.9  
 How often do you play/enter/bet on (...say name of activity in Q.1...) ? (READ OUT SCALE)

SCALE FOR ALL ACTIVITIES EXCEPT LOTTO, FOOTYBET AND SOCCER POOLS

- More than 3 days a week ..... 1
- 2 to 3 days a week ..... 2
- One day a week ..... 3
- One day a fortnight..... 4
- One day a month..... 5
- One day every 2 to 3 months..... 6
- One day every 6 months ..... 7
- One day every year ..... 8
- Less often than one day a year..... 9

SCALE FOR LOTTO, FOOTYBET AND SOCCER POOLS

- Every week or nearly every week..... 3
- About two weeks a month/twice a month..... 4
- About one week a month/once a month ..... 5
- About once every 2 to 3 months..... 6
- About once every 6 months ..... 7
- About once a year..... 8
- Less often than once a year ..... 9

Q.4b, o or p) IF MENTIONED BINGO (b), KENO (o) OR CASINO GAMES FOR MONEY ON THE INTERNET (p) IN Q.1, ASK:

On each day you play (...say activity in Q.1...), on average, how much time do you spend on this activity?

Q.4e IF MENTIONED PLAYING CARDS FOR MONEY PRIVATELY (e), ASK:

On each day you play cards for money privately (at home or any other place), on average, how much time do you spend on this activity?

Q.4f, g or h) IF MENTIONED THOROUGHBRED HORSE RACING (f), TROTTING OR HARNESS RACING (g) OR GREYHOUND RACING (h) IN Q.1, ASK:

On each day you bet on (...say activity in Q.1...), on average, how much time do you spend studying the form, placing your bets, and listening to and/or watching the races?

Q.4i or j) IF MENTIONED POKER MACHINES AT A CLUB OR HOTEL (i) OR AT A CASINO (j), ASK:

On each day you play (...say activity in Q.1...), on average, how much time do you spend playing the machines?

Q.4k) IF MENTIONED OTHER GAMES AT A CASINO, ASK:

On each day you play card, table or any game other than poker machines (“pokies”) at the Melbourne Crown Casino or at casinos outside Victoria, on average, how much time do you spend at the gaming tables?

Q.4l1) IF MENTIONED FOOTYBET (l), ASK:

In each week you bet on Footybet, on average, how much time do you spend studying the form and placing your bets?

Q.4l2) IF MENTIONED FOOTYBET (l), ASK:

And how much time do you spend listening to and/or watching the games?

Q.4m1) IF MENTIONED BETTING ON SPORTS (m) IN Q.1, ASK:  
 On each day you bet on sports with Sportsbet or other bookmakers, on average, how much time do you spend studying the form and placing your bets?

Q.4m2) IF MENTIONED BETTING ON SPORTS (m) IN Q.1, ASK:  
 And how much time do you spend listening to and/or watching the events?

RECORD TIME SPENT IN MINUTES .....|\_|\_|\_|\_|

Q.5a, b, d, i, j, k, m, o or p) IF MENTIONED RAFFLES (a), BINGO (b), SCRATCH TICKETS (d), POKER MACHINES (“POKIES”) AT A CLUB OR HOTEL (i), POKER MACHINES (“POKIES”) AT A CASINO (j), ANY OTHER GAMES AT A CASINO (k), BETTING ON SPORTS WITH SPORTSBET OR OTHER BOOKMAKERS (m), KENO (o) OR CASINO GAMES FOR MONEY ON THE INTERNET (p) IN Q.1, ASK:

On each day you play/enter/bet on (...say activity in Q.1...), on average, how much money do you spend or outlay on this activity?

Q.5c, l or n) IF MENTIONED LOTTO (c), FOOTY BETTING ON THE TAB (FOOTYBET) (l) OR SOCCER POOLS (n) IN Q.1, ASK:

In each week you play/enter/bet on (...say activity in Q.1...), on average, how much money do you spend or outlay on this activity?

Q.5e1) IF MENTIONED PLAYING CARDS FOR MONEY PRIVATELY (AT HOME OR ANYWHERE ELSE) (e) IN Q.1, ASK:

On each day you play cards for money privately, on average, how much money do you usually start with?

Q.5e2) IF MENTIONED PLAYING CARDS FOR MONEY PRIVATELY (AT HOME OR ANYWHERE ELSE) (e) IN Q.1, ASK:

And on each day you play cards for money privately, on average, how much money do you usually finish with?

Q.5f1) IF MENTIONED THOROUGHBRED HORSE RACING (f) IN Q.1, ASK:

On each day you bet on thoroughbred horse racing (the gallops)—not including Melbourne Cup sweeps—on average, how much money do you usually set aside to bet with?

Q.5f2) IF MENTIONED THOROUGHBRED HORSE RACING (f) IN Q.1, ASK:

And on each day you bet on thoroughbred horse racing, on average, how much money do you usually have left at the end of the day’s betting?

Q.5g1 or h1) IF MENTIONED TROTTHING OR HARNESS RACING (g) or GREYHOUND RACING (h) IN Q.1, ASK:

On each day you bet on (...say activity in Q.1...), on average, how much money do you usually set aside to bet with?

Q.5g2 or h2) IF MENTIONED TROTTHING OR HARNESS RACING (g) or GREYHOUND RACING (h) IN Q.1, ASK:

And on each day you bet on (...say activity in Q.1...), on average, how much money do you usually have left at the end of the day's betting?

RECORD AMOUNT SPENT IN DOLLARS.....|\_|\_|\_|\_|

- None..... 0
- No limit..... 9997
- Don't know/not sure ..... 9998
- Refused ..... 9999

Q.5r) IF MENTIONED THOROUGHBRED HORSE RACING (f), TROTTHING OR HARNESS RACING (g), GREYHOUND RACING (h) or SPORTS WITH SPORTSBET OR OTHER BOOKMAKERS (m) IN Q.1, ASK:

With regard to your betting on (...say activity in Q.1...), in which of the following ways do you mainly place your bets? (READ OUT)

- At a racetrack/at the sporting venue..... 1
- At an off-course TAB outlet/at a TAB outlet 2
- By phone ..... 3
- Via the Internet ..... 4
- Or some other way (specify)..... 5

Q.6 FOR EACH ACTIVITY MENTIONED IN Q.1, ASK Q.6

Thinking about all your playing/entering/betting on (...say activity in Q.1...) over the last 12 months, do you think that you won back more than you outlaid, less than you outlaid, or about the same as you outlaid? (ROTATE ORDER OF RESPONSE OPTIONS)

- More than outlaid..... 1
- Less than outlaid ..... 2
- About the same as outlaid ..... 3

Q.6a) FOR EACH ACTIVITY MENTIONED IN Q.1 AND ANSWERED 1 OR 2 IN Q.6, ASK Q.6a)

If breaking even means winning back 100% of your outlay, what percentage of your outlay over the past 12 months do you think you won back on (...say activity in Q.1...)? (READ OUT RELEVANT PART OF SCALE—<100% FOR WINNING BACK LESS THAN OUTLAID; ≥100% FOR WINNING BACK MORE THAN OUTLAID) (PROBE FOR ESTIMATE)

- Under 10% ..... 1
- 10% to less than 25% ..... 2
- 25% to less than 50% ..... 3
- 50% to less than 75% ..... 4
- 75% to less than 100% ..... 5
- 100% to less than 150% ..... 6
- 150% to less than 200% ..... 7
- 200% or more..... 8
- None..... 9
- (Don't know)..... 10
- (Refused)..... 11

Q.7 FOR EACH ACTIVITY MENTIONED IN Q.1, ASK Q.7

I am now going to read out a series of reasons for playing/entering/betting on (...say activity in Q.1...). I want you to tell me how strongly you agree or disagree that each is a reason you play/enter/bet on (...say activity in Q.1...). (READ OUT EACH STATEMENT) (ROTATE STATEMENTS) Do you agree or disagree? Is that strongly (agree/disagree) or just (agree/disagree)?

CATEGORIES

Strongly agree.....	1
Agree .....	2
Neither agree nor disagree.....	3
Disagree.....	4
Strongly disagree.....	5
(Don't know/can't say).....	6

REASONS

- a) For the thrill or dream of winning
- b) Because it's a favourite recreational activity or hobby
- c) Out of boredom to pass the time
- d) Because I like to beat the odds and back a winner
- e) Because I believe I may get lucky
- f) To test my skill
- g) To make a quick buck
- h) Because I like to take risks
- i) To enhance my social standing
- j) Because money lost goes to a worthy cause
- k) For social reasons or to be with friends
- l) Because of the atmosphere and excitement—it gives me a buzz

IF MENTIONED BINGO (b), THOROUGHBRED HORSE RACING (f), TROTTING OR HARNESS RACING (g), GREYHOUND RACING (h), POKER MACHINES (“POKIES”) AT A CLUB OR HOTEL (i), POKER MACHINES (“POKIES”) AT A CASINO (j), OR ANY OTHER GAMES AT A CASINO (k) AT Q.1:

- m) Because I am attracted to the venue itself

IF MENTIONED FOOTY BETTING ON THE TAB (FOOTYBET) (l) OR BETTING ON SPORTS WITH SPORTSBET OR OTHER BOOKMAKERS (m) AT Q.1:

- n) Because it adds interest to listening to or watching the game



Q.8 FOR EACH ACTIVITY MENTIONED IN Q.1, ASK Q.8

Would you say that you are satisfied or dissatisfied with your experience of playing/entering/betting on (...say activity in Q.1...)? Is that very (satisfied/dissatisfied) or mildly (satisfied/dissatisfied)?

- Very satisfied ..... 1
- Mildly satisfied ..... 2
- Neither satisfied nor dissatisfied ..... 3
- Mildly dissatisfied..... 4
- Very dissatisfied..... 5
- (Don't know)..... 6

Q.9 (ASK IF DISSATISFIED ON Q8, OTHERWISE GO TO Q10)

FOR EACH ACTIVITY MENTIONED IN Q.1, ASK Q.9

Why do you keep playing/entering/betting on (...say activity in Q.1...) if you are dissatisfied? (PROBE FULLY)

RECORD ANSWER VERBATIM

ALL GAMBLERS

Q.10 Thinking about all your gambling activities over the last 12 months, on average, how much did you spend or outlay each week?

RECORD AMOUNT SPENT IN DOLLARS.....|\_|\_|\_|\_|\_|

- None..... 0
- No limit..... 9997
- Don't know/not sure ..... 9998
- Refused ..... 9999

Q.11 Thinking about all the money you spent or outlaid on gambling activities over the last 12 months, from which one of the following sources did it mostly come? (READ OUT)

- Pocket money ..... 1
- Specific budget for entertainment or recreation ..... 2
- Money for basic living expenses (e.g. food, bills, accommodation, transport) ..... 3
- Specific gambling budget ..... 4
- Part of an amount set aside for major purchases like a car, holiday or furniture ..... 5
- Savings ..... 6
- Loan/borrowed ..... 7
- (Don't read) Other (specify) ..... 8
- (Don't read) Can't say ..... 9

If source of income mentioned (e.g. pension, wage, job), ask:  
**AND WHAT WOULD YOU HAVE SPENT THE MONEY ON, IF YOU HADN'T SPENT IT ON GAMBLING?**

Q.12 Now I'd like you to think of the last 7 days. Did you gamble on any activity at all during this last week?

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

Q.13 IF YES ON Q12 ASK Q13, OTHERWISE GO TO Q15a)

Thinking of all the gambling activities you participated in during the past week, overall, did you win or lose in total on gambling activities this week?

- Win ..... 1
- Lose..... 2
- Broke even ..... 3
- (Can't remember)..... 4

Q.14a) (ASK IF WON ON Q.13)

How much more money did you have at the end of the week, due to gambling, than you had at the start?

RECORD AMOUNT IN DOLLARS.....|\_|\_|\_|\_|

Don't know/not sure ..... 9998

Refused ..... 9999

Q.14b) (ASK IF LOST ON Q.13)

How much less money did you have at the end of the week, due to gambling, than you had at the start?

RECORD AMOUNT IN DOLLARS.....|\_|\_|\_|\_|

Don't know/not sure ..... 9998

Refused ..... 9999

Q.15a) IF USED POKER MACHINES AT THE CASINO OR ANYWHERE ELSE IN LAST 12 MONTHS, ASK Q.15a), OTHERWISE GO TO Q.23

Which types of venues do you play poker machines ("pokies") at? (READ OUT) ACCEPT MULTIPLES)

- Pub or hotel ..... 1
- Licensed sports club (golf, football, bowls, etc.)..... 2
- RSL Club..... 3
- Some other sort of licensed club..... 4
- Melbourne Crown Casino..... 5
- Or somewhere else (*Specify*) ..... 6
- (Don't read) Can't say ..... 7

Q.15b) And to which type of venue do you mostly go to play poker machines ("pokies")? (ONE ONLY)

- Pub or hotel ..... 1
- Licensed sports club (golf, football, bowls, etc.)..... 2
- RSL Club..... 3
- Some other sort of licensed club..... 4
- Melbourne Crown Casino..... 5
- Or somewhere else (*Specify*) ..... 6
- (Don't read) Can't say ..... 7

Q.16 IF PLAY POKER MACHINES AT CLUBS OR HOTELS, ASK Q.16-Q.21

Some hotel and club venues have machines with linked jackpots. Do you specifically go to these venues so you can play poker machines (“pokies”) which have linked jackpots?

- All the time ..... 1
- Sometimes ..... 2
- Every now and then..... 3
- Never ..... 4
- (Don’t read) Can’t say/don’t know what linked jackpots are.... 5

Q.16A IF YES ON Q.16, ASK Q.16A

Are the linked machines you play linked to other venues statewide or just linked to other machines at the same venue?

- Statewide ..... 1
- Same venue..... 2
- Both ..... 3
- (Don’t know) ..... 4

Q.17 Do you visit poker machine (“pokie”) venues specifically to play the machines or as part of a social outing? (IF NECESSARY, READ OUT)

- Specifically to gamble ..... 1
- For a social outing ..... 2
- Both ..... 3
- Varies..... 4

THERE IS NO QUESTION 18a)

Q.18b) I’d like you to think about the last time you went to a club or hotel to play poker machine (“pokies”) in Victoria. How far did you travel to get to this venue?

- Less than 5 kilometres ..... 1
- 5 to less than 10 kilometres ..... 2
- 10 to less than 15 kilometres ..... 3
- 15 to less than 20 kilometres ..... 4
- 20 or more kilometres..... 5
- (Don’t know) ..... 6

Q.18c) Did you travel to this venue directly from... (READ OUT)?

- Home ..... 1
- Work..... 2
- Or somewhere else (*Specify*) ..... 3
- (Don't know) ..... 4

Q.19 How long ago was this last time you played poker machines ("pokies") at a club or hotel in Victoria? Was it...? (READ OUT)

- Within the last week..... 1
- Within the last month..... 2
- Within the last 3 months ..... 3
- Within the last year ..... 4
- (Don't read) Can't say ..... 5

Q.20 Thinking of this last time you played poker machines ("pokies") at a club or hotel in Victoria, did you win or lose on this occasion?

- Win ..... 1
- Lose..... 2
- Broke even ..... 3
- (Can't remember)..... 4

Q.21a) (ASK IF WON ON Q.20)

How much more money did you have when you finished playing than when you started?

RECORD AMOUNT IN DOLLARS ..... | | | | |

- Don't know/not sure ..... 9998
- Refused ..... 9999

Q.21b) (ASK IF LOST ON Q.20)

How much less money did you have when you finished playing than when you started?

RECORD AMOUNT IN DOLLARS ..... | | | | |

- Don't know/not sure ..... 9998
- Refused ..... 9999

Q.22 Still thinking of this last time you went to a club or hotel to play poker machine (“pokies”) in Victoria, what other activities did you undertake on that occasion? (READ OUT) (ACCEPT MULTIPLES)

Dining out.....	1
Attending the theatre .....	2
Attending the movies.....	3
Attending a concert.....	4
Shopping.....	5
Live entertainment (e.g. a band).....	6
Attending a regular sporting event (e.g. footy) .....	7
Attending a special event (e.g. Grand Prix, Melbourne Cup) ...	8
Using the ATMs (automatic teller machines).....	9
Or something else ( <i>Specify</i> ).....	97
(Don’t read) Can’t say .....	98
(Don’t read) Nothing else – gambling only.....	99

ASK EVERYONE

Q.23 We would now like you to rate a number of spare time or leisure activities on a scale of 1 to 10 where a 1 is not at all appealing and 10 is extremely appealing. So on a scale of 1 to 10, how appealing is...? (READ OUT)

- a) Betting at the TAB
- b) Playing sport
- c) Going to the movies
- d) Going to the races or trots
- e) Going out for dinner
- f) Relaxing at home e.g. watching TV
- g) Playing the poker machines (“pokies”)
- h) Going to the Casino

Q.24a1 In the last 12 months, have you participated in...? (READ OUT)

a) Footy tipping competitions.....	1
b) Melbourne Cup sweeps .....	2
c) Telephone dial-in competitions where you dial numbers such as 0055 or 1900 numbers, including “Millionaire”-type quiz games .....	3

IF YES ON Q.24a1a), ASK Q.24a2a)

Q.24a2a) In the last 12 months, how much did you outlay or spend in total on footy tipping competitions?

(IF NECESSARY, PROMPT FOR BEST GUESS)

RECORD AMOUNT SPENT IN DOLLARS.....|\_|\_|\_|\_|

None .....0

Don't know/not sure.....9998

Refused.....9999

IF YES ON Q24a1b), ASK Q24a2b)

Q.24a2b) In the last Melbourne Cup, how much did you outlay or spend in total on Melbourne Cup sweeps?

(IF NECESSARY, PROMPT FOR BEST GUESS)

RECORD AMOUNT SPENT IN DOLLARS.....|\_|\_|\_|\_|

None .....0

Don't know/not sure.....9998

Refused.....9999

IF YES ON Q24a1c), ASK Q24a3

Q24a3 How often do you participate in telephone dial-in competitions where you dial numbers such as 0055 or 1900 numbers?

(READ OUT SCALE)

- More than 3 days a week ..... 1
- 2 to 3 days a week ..... 2
- One day a week ..... 3
- One day a fortnight..... 4
- One day a month..... 5
- One day every 2 to 3 months..... 6
- One day every 6 months ..... 7
- One day every year..... 8
- Less often than one day a year..... 9
- (Don't read) Can't say ..... 10

Q.24b) Have you visited the Crown Entertainment Complex in Melbourne? (Opened May 8<sup>th</sup> 1997)

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

IF VISITED CROWN ENTERTAINMENT COMPLEX, ASK Q.24c)–Q.26b)

Q.24c) Did you enter the gaming area at this complex?

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

Q.25 When was your last visit to the Crown Entertainment Complex in Melbourne?

ENTER MONTH AND YEAR



Q.26a) What activities did you undertake at the Casino on your last visit?

(READ OUT) (ACCEPT MULTIPLES)

Played poker machines (“pokies”) .....	1
Played other gambling games .....	2
Shopped .....	3
Went to the movies .....	4
Dined .....	5
Went to a show .....	6
Attended a function .....	7
Attended a conference .....	8
Went to a nightclub .....	9
Just looked/saw what it was like.....	10
Stayed at the hotel (Crown Towers) .....	11
Used the ATMs.....	12
Or some other activity ( <i>Specify</i> ) .....	97
(Don’t read) Can’t say .....	98

Q.26b) And which one of these activities would you say is the main thing you went to the Casino to do?

(RECORD AUTOMATICALLY IF ONLY ONE MENTIONED IN Q.26a) (ONE ONLY)

Played poker machines (“pokies”) .....	1
Played other gambling games .....	2
Shopped .....	3
Went to the movies .....	4
Dined .....	5
Went to a show .....	6
Attended a function .....	7
Attended a conference .....	8
Went to a night club .....	9
Just looked/saw what it was like.....	10
Stayed at Crown Towers (the hotel) .....	11
Used the ATMs.....	12
Or some other activity ( <i>Specify</i> ) .....	97
Can’t say .....	98

Q.27 IF GAMBLED AT THE CASINO, ASK Q.27, OTHERWISE GO TO Q.28

Which games did you play at the Casino? (READ OUT) (ACCEPT MULTIPLES)

Poker machines (“pokies”) .....	1
Roulette .....	2
Keno .....	3
Poker played against other players – in the poker room.....	4
Blackjack or other card games played against the house.....	5
Two up.....	6
Dice games .....	7
Big wheel.....	8
Pai gow .....	9
(Don’t read) Can’t say .....	10
(Don’t read) Other ( <i>Specify</i> ).....	11

Q.28 IF HAVE NEVER BEEN TO CROWN ENTERTAINMENT COMPLEX, ASK Q.28, OTHERWISE GO TO Q.29

Why haven’t you visited the Crown Entertainment Complex? (DO NOT READ OUT) (ACCEPT MULTIPLES)

No interest in the Casino .....	1
Prefer other activities.....	2
Don’t like the games/machines.....	3
Heard from others that it is boring/no fun .....	4
Don’t like to gamble .....	5
Religious beliefs .....	6
Too far to travel.....	7
Too crowded.....	8
Haven’t got around to it yet.....	9
Other ( <i>Specify</i> ).....	10
Can’t say.....	11

Q.29 ASK EVERYONE

Which one of the following statements best describes you personally? Are you someone who...?  
(READ OUT) (ONE ONLY)

- Does not like to gamble or have a bet ..... 1
- Enjoys a bet or flutter ..... 2
- Gambles for social interaction or leisure ..... 3
- Gambles, but only an amount which can be afforded ..... 4
- Gambles for a living ..... 5
- Has a problem in controlling the level of gambling ..... 6
- Is addicted or hooked on gambling ..... 7
- None of the above..... 8

Q.30 ASK THOSE WHO HAVE GAMBLED IN THE LAST 12 MONTHS, OTHERWISE GO TO Q.31

I am now going to read out a series of statements. I want you to tell me how strongly you agree or disagree with each statement. (READ OUT EACH STATEMENT) (ROTATE STATEMENTS) Do you agree or disagree? Is that strongly (*agree/disagree*) or just (*agree/disagree*)?

CATEGORIES

- Strongly agree..... 1
- Agree ..... 2
- Neither agree nor disagree ..... 3
- Disagree..... 4
- Strongly disagree..... 5
- (Don't know/can't say)..... 6

STATEMENTS

- a) After losing money when having a bet or gambling, I have another bet to try and win it back
- b) After losing money when having a bet or gambling, I have told others that I have lost a smaller amount
- c) After losing when having a bet or gambling, I have bragged about winning
- d) I am prepared to bet or gamble more money if I think there is a good chance of winning a lot more
- e) My family or friends have criticised my gambling
- f) I don't tell my family or friends the full extent of how much I bet or gamble
- g) I go without something that is important to me when I bet or gamble
- h) I have borrowed money or sold assets to pay a betting or gambling debt
- i) I gamble secretly so that my friends, family and acquaintances will not know

Q.30j) ASK EVERYONE

Have you, yourself, or any of your family members ever experienced difficulties with excessive gambling?

- Yes..... 1
- No ..... 2
- Can't say..... 3

Q.30k) IF YES ON Q30j), ASK:

Was that during the last 6 months or more than 6 months ago?

- In the last 6 months..... 1
- More than 6 months ago ..... 2
- Can't say..... 3

Q.31 ASK EVERYONE

I am now going to read out some statements. I want you to tell me how strongly you agree or disagree with each statement. (READ OUT EACH STATEMENT) (NOTE NEW SCALE)

Do you agree or disagree? Is that strongly (*agree/disagree*) or slightly (*agree/disagree*)?

CATEGORIES

- Strongly agree..... 1
- Slightly agree..... 2
- Neither agree nor disagree..... 3
- Slightly disagree ..... 4
- Strongly disagree ..... 5
- (Don't know/can't say)..... 6

- a) On the whole, gambling is an acceptable activity in our community
- b) Gambling is too widely accessible in Victoria
- c) Gambling and gambling facilities should not be allowed to be advertised
- d) The current level of gambling activity in Victoria is sustainable
- e) Gambling-related problems have got worse in the last four years
- f) There are not enough hotels and clubs with poker machines ("pokies")
- g) The number of poker machines ("pokies") operating within Victoria should be reduced
- h) The Crown Entertainment Complex is good for the community
- i) Gambling at home either over the Internet or via pay TV should be permitted

Q.32 With regard to the effects of gambling, and using the same scale as before, please tell me how strongly you agree or disagree with the following statements.

CATEGORIES

Strongly agree.....	1
Slightly agree.....	2
Neither agree nor disagree.....	3
Slightly disagree .....	4
Strongly disagree .....	5
(Don't know/can't say).....	6

- a) Gambling does more good for the Community than harm
- b) Victoria's Casino provides a big boost to our state economy
- c) Victoria needs gambling activities to attract tourists
- d) Now that Victoria has a greater variety of gambling available there are more opportunities for recreational enjoyment
- e) The introduction of poker machines ("pokies") in Victoria has resulted in more jobs
- f) Victoria should have more casinos
- g) Country Victorians should have access to local casinos
- h) Revenue from poker machines ("pokies") and the Casino has helped the State Government balance the books
- i) Gambling revenue has enabled better social and recreational facilities to be provided for Victorians
- j) The onus is on the individual to control themselves when gambling by knowing what he or she can afford
- k) The increased availability of gambling opportunities has not significantly increased the numbers of problem gamblers
- l) Gambling is a serious social problem
- m) Funding of support services for people with gambling addiction is about right to meet current problems

Q.33a) The Victorian Government takes a percentage of the gambling revenues and spends this on community projects. Do you know what any of these community projects are?

No .....	1
Yes ( <i>Specify</i> ).....	2

Q.33b) Do you believe that you, personally, have benefited from these initiatives?

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

IF GAMBLED IN LAST 12 MONTHS, ASK Q34, OTHERWISE GO TO Q.36

Q.34 Have you participated in any gambling activities in the past 6 months?

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

IF GAMBLED IN LAST 6 MONTHS, ASK Q35, OTHERWISE GO TO Q.36

Q.35 I am now going to read out a series of statements that relate to some of the more general aspects of peoples' gambling behaviour. Please tell me the degree to which any of these statements applied to you personally in the last 6 months.

a) When you gamble, how often do you go back another day to win back money you lost? Would you say...? (READ OUT)

- Never ..... 1
- Sometimes or less than half the time ..... 2
- Most of the time I lost..... 3
- Every time I lost..... 4
- (Can't say) ..... 5
- (Refused) ..... 6

b) Have you ever claimed to be winning money when you really had lost? Would you say...? (READ OUT)

- Never ..... 1
- Sometimes or less than half the time ..... 2
- Most of the time I lost..... 3
- Every time I lost..... 4
- (Can't say) ..... 5
- (Refused) ..... 6

c) Do you feel you have had a problem with gambling or that your gambling was out of control? Would you say...? (READ OUT)

- Yes, in the past, but not now ..... 1
- Yes, I feel this way now ..... 2
- No I haven't..... 3
- (Can't say) ..... 4
- (Refused) ..... 5

d) The following questions still relate to the last 6 months and only require yes or no answers. Did you gamble more than you intended to (in the last 6 months)?

- Yes ..... 1
- No ..... 2
- (Can't say) ..... 3
- (Refused) ..... 4

- e) Have people criticised your gambling (in the last 6 months)?
  - Yes..... 1
  - No ..... 2
  - (Can't say) ..... 3
  - (Refused) ..... 4
  
- f) Have you felt guilty about the way you gamble or what happens when you gamble (in the last 6 months)?
  - Yes..... 1
  - No ..... 2
  - (Can't say) ..... 3
  - (Refused) ..... 4
  
- g) Have you felt that you would like to stop gambling but didn't think you could (in the last 6 months)?
  - Yes..... 1
  - No ..... 2
  - (Can't say) ..... 3
  - (Refused) ..... 4
  
- h) Have you hidden betting slips, gambling money or any other sign of gambling from your partner, children or other important people in your life (in the last 6 months)?
  - Yes..... 1
  - No ..... 2
  - (Can't say) ..... 3
  - (Refused) ..... 4
  
- i) Have you ever argued with people you live with about how you generally handle money (in the last 6 months)?
  - Yes..... 1
  - No ..... 2
  - (Can't say) ..... 3
  - (Refused) ..... 4
  
- j) IF CODE 1 IN Q.35i): Have money arguments ever centred on your gambling (in the last 6 months)?
  - Yes..... 1
  - No ..... 2
  - (Can't say) ..... 3
  - (Refused) ..... 4
  
- k) Have you borrowed money from someone and not paid them back because of your gambling (in the last 6 months)?
  - Yes..... 1
  - No ..... 2
  - (Can't say) ..... 3
  - (Refused) ..... 4

l) Have you lost time from work or study because of gambling (in the last 6 months)?

- Yes..... 1
- No ..... 2
- (Can't say) ..... 3
- (Refused) ..... 4

m) Have you borrowed money to gamble or pay off gambling debts (in the last 6 months)?

- Yes..... 1
- No ..... 2
- (Can't say) ..... 3
- (Refused) ..... 4

IF BORROWED MONEY TO GAMBLE OR PAY OFF GAMBLING DEBTS OR CAN'T SAY ON Q.35m), ASK Q35n)–Q35w)

n) Have you borrowed money to gamble or to pay gambling debts from household money (in the last 6 months)?

- Yes..... 1
- No ..... 2
- (Can't say) ..... 3
- (Refused) ..... 4

o) Have you borrowed money to gamble or to pay gambling debts from your spouse or partner (in the last 6 months)?

- Yes..... 1
- No ..... 2
- (Can't say) ..... 3
- (Refused) ..... 4

p) (Have you borrowed money to gamble or to pay gambling debts) from other relatives or in-laws (in the last 6 months)?

- Yes..... 1
- No ..... 2
- (Can't say) ..... 3
- (Refused) ..... 4

q) (Have you borrowed money to gamble or to pay gambling debts) from banks, finance companies or credit unions (in the last 6 months)?

- Yes..... 1
- No ..... 2
- (Can't say) ..... 3
- (Refused) ..... 4



r) (Have you borrowed money to gamble or to pay gambling debts) from credit cards (in the last 6 months)?

Yes..... 1  
 No ..... 2  
 (Can't say) ..... 3  
 (Refused) ..... 4

s) (Have you borrowed money to gamble or to pay gambling debts) from high interest rate finance companies (in the last 6 months)?

Yes..... 1  
 No ..... 2  
 (Can't say) ..... 3  
 (Refused) ..... 4

t) (Have you borrowed money to gamble or to pay gambling debts) from cashing in stocks, bonds or other securities (in the last 6 months)?

Yes..... 1  
 No ..... 2  
 (Can't say) ..... 3  
 (Refused) ..... 4

u) (Have you borrowed money to gamble or to pay gambling debts) from selling personal or company property (in the last 6 months)?

Yes..... 1  
 No ..... 2  
 (Can't say) ..... 3  
 (Refused) ..... 4

v) (Have you borrowed money to gamble or to pay gambling debts) by writing cheques knowing there was no money in the account (in the last 6 months)?

Yes..... 1  
 No ..... 2  
 (Can't say) ..... 3  
 (Refused) ..... 4

w) (Have you borrowed money to gamble or to pay gambling debts) by obtaining money illegally (in the last 6 months)?

Yes..... 1  
 No ..... 2  
 (Can't say) ..... 3  
 (Refused) ..... 4

Q.36 ASK EVERYONE

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

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

Q.37 In which of the following age groups do you belong?

18 years.....	1
19 years.....	2
20-24 years.....	3
25-29 years.....	4
30-34 years.....	5
35-39 years.....	6
40-44 years.....	7
45-49 years.....	8
50-54 years.....	9
55-59 years.....	10
60-64 years.....	11
65-69 years.....	12
70 years and over.....	13

Q.38 Which one of the following best describes your household? (READ OUT)

Single person .....	1
Group household (not related).....	2
Couple with no children .....	3
One parent family with dependent children.....	4
One parent family with children not at home .....	5
Two parent family with dependent children.....	6
Two parent family with children not at home .....	7
Other related individuals .....	8
Other ( <i>Specify</i> ).....	97
(Can't say) .....	98
(Refused) .....	99

Q.39 IF DEPENDENT CHILDREN IN HOUSEHOLD, ASK Q.39

How many dependent children live in the household?

One .....	1
Two.....	2
Three.....	3
Four or more.....	4

Q.40 Which of these describes you best? Do you...?

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

Q.40a IF RETIRED (5), PENSIONER (6), UNEMPLOYED (7) OR DON'T KNOW/CAN'T SAY (8) AT Q.40, ASK Q.40a)

Have you been in employment at any time before now?

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

Q.41 IF WORK AT PRESENT OR WORKED IN PAST, ASK Q.41, OTHERWISE GO TO Q.42

What is/was your occupation?

- Manager/(senior) administrator ..... 1
- Professional ..... 2
- Para-professional ..... 3
- Tradesperson ..... 4
- Clerk ..... 5
- Salesperson/personal service worker ..... 6
- Plant/machine operator/driver ..... 7
- Labourer or related worker ..... 8

Q.41a) IF WORK AT PRESENT OR WORKED IN PAST, ASK Q.41a), OTHERWISE GO TO Q.42

What industry do/did you work in?

Agriculture/forestry/fishing .....	1
Mining .....	2
Manufacturing .....	3
Electricity/gas/water supply .....	4
Construction .....	5
Wholesale trade .....	6
Retail trade.....	7
Accommodation/cafés/restaurants .....	8
Transport/storage.....	9
Communication services.....	10
Finance/insurance .....	11
Property/business services.....	12
Government administration/defence.....	13
Education.....	14
Health/community services .....	15
Cultural/recreational services .....	16
Personal/other services .....	17

Q.42 IF PART OF A COUPLE, ASK Q.42, OTHERWISE GO TO Q.44

Are you the main income earner?

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

Q.43 IF NOT MAIN INCOME EARNER, ASK Q.43, OTHERWISE GO TO Q.44

What is the occupation of the main income earner?

Manager/(senior) administrator .....	1
Professional .....	2
Para-professional .....	3
Tradesperson .....	4
Clerk .....	5
Salesperson/personal service worker.....	6
Plant/machine operator/driver .....	7
Labourer or related worker .....	8

Q.43a) IF NOT MAIN INCOME EARNER ASK Q.43a), OTHERWISE GO TO Q.44

What industry does the main income earner work in?

Agriculture/forestry/fishing .....	1
Mining .....	2
Manufacturing .....	3
Electricity/gas/water supply .....	4
Construction .....	5
Wholesale trade .....	6
Retail trade.....	7
Accommodation/cafés/restaurants.....	8
Transport/storage.....	9
Communication services.....	10
Finance/insurance .....	11
Property/business services.....	12
Government administration/defence.....	13
Education.....	14
Health/community services .....	15
Cultural/recreational services .....	16
Personal/other services .....	17

Q.44 What is your country of birth? (DO NOT READ OUT) (CODE AS APPROPRIATE)

Australia .....	1
United Kingdom/Scotland/Ireland/Wales.....	2
New Zealand.....	3
North America (USA/Canada) .....	4
Greece.....	5
Italy.....	6
Other West Europe (e.g. Germany/France/Holland) .....	7
Eastern Europe (e.g. Russia/Georgia/Bulgaria, etc.) .....	8
Middle East (e.g. Israel/Iraq/Egypt) .....	9
Vietnam .....	10
Malaysia .....	11
Philippines .....	12
Hong Kong .....	13
Other Asia/Pacific .....	14
Africa.....	15
Other ( <i>Specify</i> ).....	97
(Refused/Don't know/Unsure) .....	98

Q.45 Were your parents born in Australia?

Yes – Father.....	1
Yes – Mother .....	2
Yes – Both .....	3
No – Neither .....	4

Q.46 What was the main language spoken at home when you were growing up?

English.....	1
Mandarin .....	2
Cantonese .....	3
Vietnamese .....	4
Spanish .....	5
Italian.....	6
Greek .....	7
Other ( <i>specify</i> ) .....	97
(Can't say) .....	98

Q.47 Would you mind telling me your approximate annual income from all sources before tax?  
(DO NOT READ OUT)

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

Q.48 IF PART OF A COUPLE, ASK Q.48, OTHERWISE GO TO Q.49

Would you mind telling me you and your partner's total approximate annual income from all sources, before tax?

(DO NOT READ OUT)

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

ASK EVERYONE

Q.49 Would you please tell me your religion? (DO NOT READ OUT)

Anglican/Church of England.....	1
Catholic .....	2
Baptist/Church of Christ.....	3
Presbyterian/Methodist/Uniting Church.....	4
Salvation Army.....	5
Lutheran.....	6
Greek orthodox.....	15
Other Christian .....	7
Jewish/Judaism.....	8
Islam.....	9
Buddhism.....	10
Other Non Christian .....	11
Other (Specify).....	12
No religion.....	13
Don't know/can't say .....	14

Q.49a) Could you please tell me your highest level of education?

No school or primary school only .....	1
Attended high school but no certificate.....	2
Completed Year 10 or Year 11 (Intermediate or Leaving).....	3
Completed Year 12 (VCE/HSC or Matric) .....	4
Trade certificate or diploma .....	5
Bachelors degree .....	6
Post-graduate degree .....	7
Other ( <i>specify</i> ) .....	97
Can't say.....	98

Q.49b) Do you own your current residence—or are you paying it off—or are you renting it?

Own .....	1
Paying off .....	2
Renting – public .....	3
Renting – private .....	4
Other ( <i>specify</i> ).....	97
Can't say.....	98

Q.51 And may I have your postcode please? RECORD POSTCODE

**THANK RESPONDENT, MENTION VCGA AND CLOSE INTERVIEW**

Q.52 TO THE INTERVIEWER: Please rate the level of the respondent's interest in the survey. How involved did the respondent appear to be?

High.....	1
Medium .....	2
Low .....	3

Q.53 TO THE INTERVIEWER: Please code the quality of the communication with the respondent (how well did the respondent appear to understand the questions)?

High.....	1
Medium .....	2
Low .....	3





**APPENDIX 2**

**SAMPLING ERROR  
ALLOWANCES**

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**RECOMMENDED PERCENTAGE ALLOWANCE FOR SAMPLING VARIANCE OF A PERCENTAGE (95% CONFIDENCE LEVEL)**

		Percentages near								
		10%	20%	30%	40%	50%	60%	70%	80%	90%
<b>Total population</b>	1760	1.4%	1.9%	2.2%	2.3%	2.4%	2.3%	2.2%	1.9%	1.4%
Gamblers	1433	1.6%	2.1%	2.4%	2.6%	2.6%	2.6%	2.4%	2.1%	1.6%
Lotto	905	2.0%	2.7%	3.0%	3.3%	3.3%	3.3%	3.0%	2.7%	2.0%
Raffles	716	2.2%	3.0%	3.4%	3.7%	3.7%	3.7%	3.4%	3.0%	2.2%
Total EGMs	534	2.6%	3.5%	4.0%	4.2%	4.3%	4.2%	4.0%	3.5%	2.6%
EGMs at club or hotel	427	2.9%	3.9%	4.4%	4.7%	4.8%	4.7%	4.4%	3.9%	2.9%
Scratch tickets	353	3.2%	4.3%	4.9%	5.2%	5.3%	5.2%	4.9%	4.3%	3.2%
Total Casino	267	3.7%	4.9%	5.6%	6.0%	6.1%	6.0%	5.6%	4.9%	3.7%
EGMs at Casino	215	4.1%	5.5%	6.3%	6.7%	6.8%	6.7%	6.3%	5.5%	4.1%
Thoroughbred	244	3.8%	5.1%	5.9%	6.3%	6.4%	6.3%	5.9%	5.1%	3.8%
Cards/table games	92	6.3%	8.3%	9.6%	10.2%	10.4%	10.2%	9.6%	8.3%	6.3%
Bingo	63	7.6%	10.1%	11.5%	12.3%	12.6%	12.3%	11.5%	10.1%	7.6%
Club Keno	58	7.9%	10.5%	12.0%	12.9%	13.1%	12.9%	12.0%	10.5%	7.9%
Trotting/harness	52	8.3%	11.1%	12.7%	13.6%	13.9%	13.6%	12.7%	11.1%	8.3%
Greyhounds	25	12.0%	16.0%	18.3%	19.6%	20.0%	19.6%	18.3%	16.0%	12.0%
Private cards	32	10.6%	14.1%	16.2%	17.3%	17.7%	17.3%	16.2%	14.1%	10.6%
Footybet	20	13.4%	17.9%	20.5%	21.9%	22.4%	21.9%	20.5%	17.9%	13.4%
Sports betting	18	14.1%	18.9%	21.6%	23.1%	23.6%	23.1%	21.6%	18.9%	14.1%
Soccer Pools	4	30.0%	40.0%	45.8%	49.0%	50.0%	49.0%	45.8%	40.0%	30.0%
Internet	2	42.4%	56.6%	64.8%	69.3%	70.7%	69.3%	64.8%	56.6%	42.4%
None of these	327	3.3%	4.4%	5.1%	5.4%	5.5%	5.4%	5.1%	4.4%	3.3%