SIXTH SURVEY OF COMMUNITY GAMBLING PATTERNS AND PERCEPTIONS

Project Report

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CONTENTS

EXECUTIVE SUMMARY

This report presents the results from the Sixth 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 1998 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 September-October 1998 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 32 sampling quotas were applied to represent unique geo-demographic segments of the Victorian population. A total of 1,737 interviews were conducted, covering both metropolitan (1,268) and rural (469) areas.

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 too accessible in Victoria, and that the number of EGMs in Victoria should be reduced.

Gambling Segments

The gambling community was segmented according to gambling behaviour and attitudes in 1995 and 5 segments were identified and replicated in the 1996, 1997 and 1998 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, 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 secretively, 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 twice 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 outlay 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. Peoples' opinions on the impacts and role of gambling are also tending to be less polarised. The overall participation rate in gambling activities has declined over the last two years back to 1995 levels. There are fewer people participating in EGM and in casino gambling, but those that do, tend to play more often and outlay more money each time they play. Actual gambling expenditure (the amount lost) increased overall by 15.9% with most of this attributable to increased expenditure on casino and 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 second year in succession, the mean number of gambling activities undertaken by people reporting gambling activity decreased, returning to levels last recorded in 1994;

- There was a substantial decrease in gambling participation rates overall in 1998. An increase in gambling participation was observed in 1996, when the level of participation in gambling activities was 87%. Similar levels were recorded in 1997, when 86% of Victorians had participated in gambling activities. In 1998 however, participation in gambling activities decreased, with just over three quarters (76%) of Victorians participating in at least one form of gambling in the last 12 months;

- Participation in EGM gambling has declined over the past year, falling slightly to 31% in 1998 from 39% in 1997;

- Actual expenditure on regulated forms of gambling in Victoria for the financial year ending June 1998 was 3,195 million dollars, which is a 15% increase over the previous year. This expenditure amounts to an average loss per week of $17.55 for each adult Victorian;

- There is no evidence of a substantial change in frequency of participating in gambling activities since 1992. On average, people reporting gambling activity participated in some form of gambling activity once a week (1.0 times per week);

- There was a decrease in the amount of time gamblers spent gambling in 1998, with people reporting gambling activity spending an average of 30 minutes per week on gambling activities (down from 38 minutes per week in 1997);

- People reporting gambling activity were prepared to outlay $31 on average each time they participated in EGM gambling in 1998, a 10% increase since 1997, when the average outlay on this activity was $27;

- People reporting gambling activity were prepared to outlay $53 on average each time they participated in casino gambling in 1998, a substantial increase since 1997 ($41) but similar to 1995 levels ($58);

- For 38% of people reporting gambling activity, the source of expenditure on gambling originated from their pension, wage or job. Very few (2%) have a special gambling budget;

- While people reporting gambling activity appear prepared to outlay more money each week on gambling activities, the perceived proportion won back on gambling showed a slight decrease in 1998, to 19% overall, representing a marginal change since 1997, when the perceived proportion won back on gambling activities was 20%;

- Just under a third (31%) of Victorians claim to have gambled in the last 7 days. Of these, 60% claim to have lost money ($41 on average), whilst 20% reported they won money ($129 on average). Seven percent claimed to have broken even on gambling activities in the past 7 days;

- The appeal of participating in activities such as playing EGMs and going to the casino remained similar to 1997 levels for people reporting gambling activity in 1998;

- The main motivation for gambling was the thrill or dream, of winning particularly for low involvement activities such as lotto, scratch tickets and Club Keno. The secondary motivator was social reasons, particularly for high involvement activities such as casino, EGMs, bingo and informal card gambling. In 1998, gambling was the favourite recreational activity for 19% of regular EGM/Casino gamblers;

- Self perceptions of gambling behaviour revealed that overall, people consider they gambled primarily for social/leisure reasons (22%) or because they enjoyed a bet/flutter (19%). Eighteen percent said they gambled only an amount they could afford. Only 1% of regular EGM/Casino gamblers said they were addicted to, or hooked on gambling;

- Generally, there was strong agreement that gambling problems were worsening, and that it was a serious social problem. People also agreed that the onus is on the individual to control themselves when gambling;

- There was also the belief that gambling was too widely accessible in Victoria;

- However, it was also strongly held that the introduction of EGMs in Victoria resulted in more jobs and that the Casino provided a big boost to our state economy;

- There was strong disagreement that welfare groups are coping with the social impact of gambling and that increased availability of gambling opportunities has not significantly increased the number of problem gamblers. There was also strong disagreement that gambling does more good for the community than harm, and that Victoria should have more casinos;

- The level of awareness of community projects funded by gambling revenue was very low amongst the Victorian population (12%). Additionally, the Victorian public did not generally believe that they had benefited from community projects funded by gambling revenue - 81% believed they had not personally benefited from such projects;

- Use of the South Oaks Gambling Screen for problem gamblers showed that some 1.5% of Victorian adults scored in the "At Risk" category.

- Three percent of the total population considered that there have been gambling difficulties in their family during the preceding 6 months. A further 4% considered that there had been gambling difficulties in their family more than 6 months ago;

- The demographic profile of people reporting gambling activity in general closely reflected that of the general population overall; and

- The demographic profile of the "At Risk" group showed a higher than average proportion of males, a younger age profile, a higher than average proportion of skilled workers, and those in the Acknowledged Heavy Gamblers and Committed Heavy Gamblers segments.

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. In 1998, for the first time since the Crown Casino opened in Melbourne, participation in casino gambling activities decreased. While there are less people playing, those that do tend to play more often, for longer times and to outlay more money when they do so. Actual gambling expenditure (the amount lost) at the Casino by Victorians and visitors increased by 28.2%. Two thirds of Victorian casino gamblers play only EGMs and no other card or table games. The proportion of gambling on EGMs and other casino games was similar to that recorded in previous years.

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

- The reported level of participation in casino gambling fell in 1998. In 1998, 18% of adult Victorians said they had gambled at the Casino in the last 12 months compared to 25% in 1997 and 22% in both 1995 and 1996. This possibly indicates that the novelty of casino gambling has begun to wear off;

- The proportion of casino gamblers who play at least once per month increased slightly to 18% compared to 15% in 1997;

- Of the 18% who gambled at the Casino, two thirds (67%) said they played only the EGMs there, 17% played only other (card/table) games and 16% played both EGMs and other games;

- People were spending slightly more time gambling at the Casino when they did so. The duration of casino gambling increased in 1998, the average length of time being 87 minutes per session (up from 85 minutes per session in 1997);

- Accordingly, the amount people reporting gambling activity were prepared to outlay on casino gambling activities also increased in 1998, with the average outlay rising to $53 (up from $41 in 1997). Outlay on card and table games was substantially higher then outlay on EGMs ($76 cf $46);

- People reporting casino gambling activity perceived the return on their outlay to be around 37% when gambling at the Casino, a decrease from 1997 when perceived proportion won back on casino gambling was 46%. This decrease in perceived return on outlay may explain why gambling at the Casino was the favourite gambling activity of fewer people reporting gambling activity in 1998;

- The percentage of money perceived as won back on card and table games at the Casino was substantially higher than expected returns on EGM gambling at the Casino (58% cf 33%);

- People reporting casino gambling activity showed moderate satisfaction with casino gambling activities (Customer Satisfaction Index (CSI) =64). People reporting casino gambling activity showed a higher level of satisfaction with card and table games than with EGMs at the Casino (CSI=73 cf CSI=60);

- Most who were dissatisfied with casino gambling said they continue to gamble at the Casino in the hope of winning;

- The main reasons for gambling at the Casino were social reasons (48%) and the thrill / reward of winning (22%);

- Leisure activities most appealing to people reporting casino gambling activity were relaxing at home and going out for dinner. The leisure activities least appealing to casino gamblers were betting at the TAB and going to the races or trots;

- Almost two thirds (63%) of Victorians have ever visited the Crown Entertainment Complex, compared with 45% in September 1997. Eighty three percent of visitors to the Complex had entered the gaming area;

- Three quarters (76%) of Victorians who have visited the Crown Entertainment Complex last did so in 1998;

- Some 23% of Victorians have never visited the Crown Entertainment Complex and are not interested in doing so, while some 4% said they intended to visit, but haven't got around to it yet. In 1997 the corresponding figures were 42% and 13%, suggesting that even amongst those who said in 1997 that they were not interested in visiting the Casino, a significant proportion have, in fact, done so.

- Over one third (35%) of visitors to the Casino played EGMs on their last visit. Nine percent played roulette, and 6% participated in blackjack or other card games played against the house.

EGM Gambling

Electronic Gaming Machines (EGMs) were introduced in Victoria in 1992, thus increasing the number and range of gambling opportunities available in this State. Since that time, EGMs have remained a popular gambling activity amongst Victorians. People are more likely to participate in EGM gambling at venues other than the Casino. The majority of them say that they go to the venues as part of a social outing rather than to specifically play the machines. Actual gambling expenditure (the amount lost) on EGMs not at the Casino increased by 17.6%. People who play EGMs at the Casino play for longer periods of time, spend more money and perceive a greater return on their outlay.

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

- Participation in EGM gambling declined in 1998, falling to 31% overall, from 39% in 1997. EGMs were more likely to be played at venues other than the casino;

- EGM gambling as a favourite activity has remained stable since 1995. In 1998, 17% of people reporting gambling activity named EGMs as their favourite gambling activity;

- People reporting EGM gambling activity closely resemble the Victorian population, although a higher proportion of Social Gamblers, Acknowledged Heavy Gamblers, Committed Heavy Gamblers and those identified as being "At Risk" was observed;

- The proportion of all those who participated in EGM gambling who are regular (those who play at least once a month) EGM gamblers has increased in 1998 to 39% (from 26% in 1997);

- The amount of time people spent playing EGMs each time that they played decreased to 68 minutes in 1998 from 74 minutes in 1997. When playing EGMs at the Casino people played for an average time of 78 minutes compared to 67 minutes when playing EGMs not at the Casino;

- In 1998, the average outlay on EGMs each time played increased to $31 (up from $27 per time in 1997). However, the average outlay per week on this activity remained relatively stable at $12. The average outlay on EGMs at the Casino each time played was $48, whilst the average outlay for EGMs not at the Casino each time played was $28;

- In 1998 people reporting EGM gambling activity believed they won back a lower proportion of their outlay on EGM gambling activities than in 1997 (29% cf 35% of outlay won back). People who reported gambling on EGMs at the Casino perceived a higher return on outlay than those who played EGMs at other venues (33% cf 28%);

- People who had gambled on EGMs reported low to mild satisfaction with EGM gambling activities. There were no real differences in the level of satisfaction with gambling on EGMs at the Casino and gambling on EGMs not at the Casino (59.8 Customer Satisfaction Index (CSI) cf 60.1 CSI);

- People reporting dissatisfaction with EGM gambling activity continued to participate in this activity as it was a social outing, and because they hope to win;

- The main motivations for EGM gambling included social reasons, the thrill or dream of winning and the atmosphere. In 1998, there was a decrease in the number of people participating in EGM gambling activities because it is their favourite activity or hobby;

- People reporting EGM gambling activity found relaxing at home, going out for dinner, playing sport and going to the movies appealing leisure activities. Significantly, there was a low level of appeal for playing EGMs amongst those who have played EGMs in the last 12 months. Those who played EGMs at the Casino gave this activity a slightly higher appeal rating than did those who played EGMs at venues other than the Casino;

- Pubs/hotels experienced the highest levels of visitation amongst EGM venues, although visitation to such places to play EGMs decreased to 48% (from 57% in 1997). Visitation to RSL clubs and licensed sports clubs as venues at which to play EGMs has remained relatively stable since 1996. Visitation to the Casino to play EGMs decreased to 33% in 1998 (from 43% in 1997);

- When people reporting EGM gambling activity at EGM venues other than the Casino were asked whether they visited the venue specifically to play the machines or as part of a social outing, 72% said they visited as part of a social outing. Thirteen percent said both reasons were a factor and only 11% said that they visited EGM venues specifically to gamble;

- The main activity combined with EGM gambling was dining out;

- 63% of people reporting EGM gambling activity reported a loss on EGM gambling the last time they played EGMs (not at the Casino), ($32 on average). Some 14% reported they broke even the last time they played EGMs (not at the Casino) and 21% claimed they won money ($144 on average);

- A small proportion of people reporting EGM gambling activity (16%) visited EGM venues specifically to play linked jackpots. While 3% of people reporting EGM gambling activity said they play linked jackpots "all the time", 8% did not know what linked jackpots were;

- The majority (63%) of people reporting EGM gambling activity travelled less than 5km to get to an EGM venue (not the Casino) the last time they gambled on EGMs; and

- The last time people reporting EGM gambling activity played EGMs (not at the Casino) the majority (84%) travelled from home to their EGM venue.

Other Gambling Activities

Lotteries and wagering are also quite popular gambling activities amongst Victorian adults. 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. However, in 1998 participation in lotto decreased to 52%. The lower level of participation in lotto gambling in 1998 has resulted in a larger core of regulars – the proportion of regular players increased to 76% in 1998, up from 73% in 1997;

- Scratch ticket gambling participation declined from 36% in 1997 to 20% in 1998 – the lowest recorded rate in this series of surveys. However, the proportion of regular scratch ticket players increased to 47% in 1998, up from 40% in 1997;

- One third (33%) of Victorians participated in raffles in 1998. Although this was the second most popular gambling activity surveyed, participation in raffles has declined by 28% since 1997, when 61% of Victorians participated in raffles;

- Five percent of Victorians participated in bingo in 1998. There was an increase in the frequency of regular participation in this activity in 1998, with 50% of people who participated in bingo doing so once a month or more regularly (up from 45% in 1997);

- The participation rate for informal cards was relatively low (2%) and has decreased since 1997 (4%). People who gamble on informal cards spend around three and a half hours on this activity each time they participate in it;

- In 1998, 14% of Victorians gambled on horse racing (down from 15% in 1997). Of those who had gambled on horse racing activities, 49% did so at least once a month. This level of regular participation was the same as in 1996 and 10% higher than in 1997;

- Gambling on trotting activities was low, with only 3% of Victorians participating in this activity in 1998, a decrease from 5% in 1997. People who reported gambling on the trots outlaid approximately $26 per session on trotting activities, an increase of $3 since 1997;

- Participation in footybet gambling decreased in 1998, with only 1% of Victorians participating in this activity in the last 12 months (down from 3% in 1997);

- In 1998 club keno participation rates decreased to 4% (down from 10% in 1997);

- Thirty eight percent of Victorians participated in Melbourne Cup sweeps in 1998;

- Almost one fifth (19%) of Victorians participated in footy tipping competitions in 1998; and

- Thirteen percent of Victorians participated in telephone dial-in competitions in 1998. On average, people participated in this type of competition once or twice a year.

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 and to advise the Minister on policy issues with respect to gambling. The Authority 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 six 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 a 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 to monitor the gambling patterns of Victorians; and
- ✓ 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" whose aim is to design a replacement instrument for SOGS better suited as a general population screen. It is intended to use the newly developed screen once it has been developed and validated.

The Authority wishes to continue to monitor the gambling patterns and the perceptions of gambling amongst Victorians, and has commissioned the current 1998 study which follows very closely the survey instrument used in the 1997 study.

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 1998 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 6th wave of the Community Gambling Patterns and Perceptions Survey was conducted to provide insight into the following:

- ✓ the gambling patterns of adult Victorians, in particular the frequency and duration of visits to licensed gaming venues and to the permanent Melbourne 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 motivational factors for visits to gambling outlets, specifically gaming venues and the casino, and if the visit is combined with some other activity.

A copy of the questionnaire *"Sixth Survey of Community Gambling Patterns & Perceptions* (1998)" is included in Appendix 1.

SECTION 2

RESEARCH METHODOLOGY

2. RESEARCH METHODOLOGY

2.1 Methodology

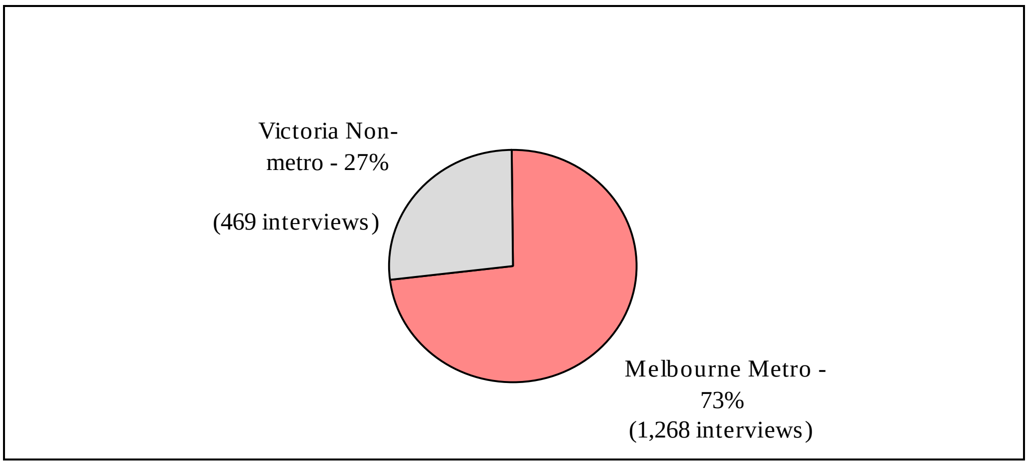
The Sixth Survey of Community Gambling Patterns & Perceptions was a random sample telephone survey conducted using Roy Morgan Research's in-house Computer Assisted Telephone Interviewing (CATI) facilities.

Interviews were conducted between September 18th and October 14th, 1998.

A total of 1737 interviews were conducted amongst Victorians aged 18 and over, with the following area distribution:

- ✓ Melbourne metropolitan...................................... 1268
- ✓ Victoria-non metropolitan.................................... 469

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



As in recent previous waves of the Community Gambling 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 40 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.

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.

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 each time the activity is undertaken. This is then added together to form the calculated gambling outlay.

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:

- Overall in an average week, how much would you outlay or spend in total on the gambling activities you play?

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 thus week?

- How much did you win/lose in total?

ACTUAL EXPENDITURE FIGURES

On Page 54 the actual expenditure (ie the amount lost) on regulated forms of gambling in Victoria for the financial year ending June 1998 are 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/session or average duration of session are calculated as a simple mean, ie 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 was first derived by weighting the amounts per time 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.

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 every one 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 (...) 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.

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.
- ✓ SOGS describes the proportion of the population who are "At Risk" of experiencing gambling related problems.

SCORING

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

FIGURE 2.2

SCORE	RISK LEVEL
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

2.2 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 more accurately fitted the Australian context and was 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 to use it 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 have 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 2.2 opposite shows an interpretation of the scores for SOGS. As in the 1997 survey, SOGS results have been reported throughout this document as a *"No Risk"* group (0-4 score) and an *"At Risk"* group (5 or more score).

2.3 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 and 1998 as follows:

✓ **Disinterested Gamblers**	**20%**
✓ **Occasional Gamblers**	**33%**
✓ **Social Gamblers**	**9%**
✓ **Committed Heavy Gamblers**	**8%**
✓ **Acknowledged Heavy Gamblers**	**5%**
✓ **Non Gamblers**[1]	**24%**

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.

[1] The profile figures given above represent the distribution into the five segments in the 1998 survey. The remaining 24% of the adult population (aged 18 and over) are non gamblers.

Disinterested Gambler (20%) **Level of Gambling Activity: Low**

Disinterested Gamblers tend to be older people: most of those who fall into this category are aged over 50 years. These people are more likely to be older singles or part of an older couple. The majority are female and most are pensioners or self supporting retirees. 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 the 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 17 minutes per week participating in gambling activities.

DEMOGRAPHICS

- ✓ Female bias;
- ✓ Older age profile with a large proportion aged over 50 years (average age 53 years) ;
- ✓ 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 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 2.07 different types of gambling per year compared with the Victorian average of 2.42);
- ✓ Gamble approximately once per week (0.9 times per week);
- ✓ Spend approximately 17 minutes per week on gambling activities;
- ✓ Have below average expectations of returns on gambling outlay (expect around 12% 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 admit they have another bet if they lose and less inclined to admit their losses.

Occasional Gambler (33%) **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 2.09 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.

DEMOGRAPHICS

- ✓ No gender bias;
- ✓ Predominantly aged 30-49 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 2.09 different types of gambling compared with the Victorian average of 2.42 activities per year);
- ✓ Gamble approximately once per week (0.8 times per week);
- ✓ Spend approximately 12 minutes per week on gambling activities;
- ✓ Have average expectations of returns on gambling outlay (expect 17% 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: Medium**

Social Gamblers show no gender bias, most are relatively young, with a predominance of people aged 20-39 years. Most are in paid 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, 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.

DEMOGRAPHICS

- ✓ No gender bias;
- ✓ Tend to be younger, most aged 20-39 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 allowed to be advertised.

BEHAVIOUR

- ✓ Moderate participation in gambling activities over the course of a year (involved in 2.88 different types of gambling compared with the Victorian average of 2.42 activities per year);
- ✓ Gamble once per week;
- ✓ Spend approximately 40 minutes per week on gambling activities;
- ✓ Have higher than average expectations of returns on gambling outlay (expect 27% 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;
- ✓ Most are in full time employment;
- ✓ High proportion of skilled workers;
- ✓ Mostly families; and
- ✓ Average income.

TTITUDES

- ✓ 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 3.78 different activities compared with the Victorian average of 2.42);
- ✓ Gamble often - about twice per week (1.7 times per week);
- ✓ Spend around an hour and a half per week on gambling activities;
- ✓ Have highest expectations of returns on gambling outlay (expecting 28% 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 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 secretively, and to conceal the true amount of money they wager. On average they gamble 1.5 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; and
- ✓ Represented across all occupation and income categories.

TTITUDES

- ✓ Average appeal of most activities with particularly high level of appeal for playing EGMs or going to the casino, and particularly low appeal of playing sport;
- ✓ Perception that they only gamble what they can afford, or for social reasons;
- ✓ 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

- ✓ High participation in different types of gambling over the course of a year (involved in 2.93 different activities compared with the Victorian average of 2.42);
- ✓ Gamble about 1.5 times per week;
- ✓ Spend over one hour each week on gambling activities;
- ✓ Have above average expectations of returns on gambling outlay (expecting 27% 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 (24%) **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 45 years (population average: 44 years);
- ✓ Includes all occupation categories, but are more likely to be students or self supporting retirees;
- ✓ Mostly singles; 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

2.4 This Report

This report outlines the findings of the Community Gambling Patterns & Perceptions - Wave 6 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.

SECTION 3

TOTAL VICTORIAN GAMBLING PATTERNS

3. TOTAL VICTORIAN GAMBLING PATTERNS

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

- ✓ Participation;
- ✓ Frequency;
- ✓ Duration;
- ✓ Outlay;
- ✓ Proportion won back;
- ✓ Motivations;
- ✓ 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.

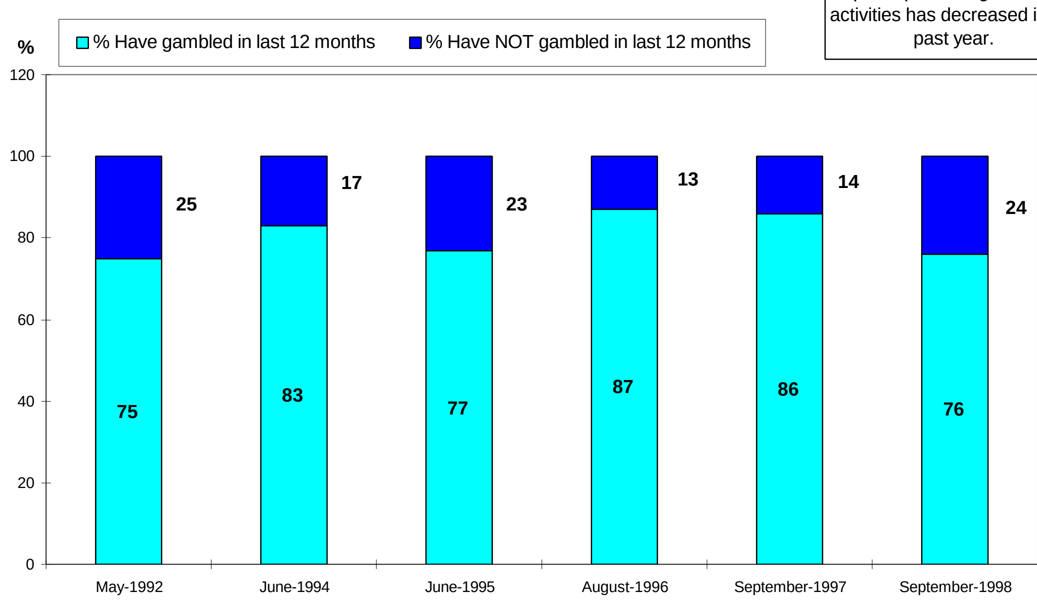
3.1 NUMBER OF ACTIVITIES

The number of gambling activities undertaken by gamblers has fallen back to 1994 levels.

BASE: Total Gambled in Last 12 Months

3.2 PARTICIPATION RATES

Overall, the level of participation in gambling activities has decreased in the past year.



BASE: Total Respondents

3.1 Number of Activities

The mean number of gambling activities undertaken in a 12 month period was calculated for all gamblers. For the second year in succession, the number of gambling activities undertaken by gamblers decreased, falling to 2.4 in 1998, down from 2.6 in 1997. During the period from May 1992 to August 1996, a clear pattern of steadily increasing volume of gambling activities emerged. It now appears that in 1998 this trend has reversed, with levels falling back to those recorded in 1994.

Figure 3.1[2] provides a time series analysis of the average number of activities undertaken by gamblers in a 12 month period. When evaluating emerging trends it is important to note that the number of activities measured on the survey increased in 1995, 1996, and again in 1997. The number of gambling activities measured on the 1998 survey were the same as for the 1997 survey.

There was a *higher* than average volume of activities undertaken by:

- ✓ Committed Heavy Gamblers (3.7);
- ✓ Social Gamblers (2.9);
- ✓ Acknowledged Heavy Gamblers (2.9);
- ✓ Those aged 18-19 years (2.9);
- ✓ Semi skilled workers (3.0); and
- ✓ Those identified as being "At Risk" (3.6).

There was a *lower* than average volume of activities undertaken by:

- ✓ Those aged 70 years or over (2.1);
- ✓ Those born in Africa/Middle East, or born in New Zealand (both 1.8);
- ✓ Those with annual incomes of $125,001 - $150,000 (1.3);
- ✓ Non-English speakers (1.8);
- ✓ Occasional Gamblers (2.1); and
- ✓ Disinterested Gamblers (2.0).

3.2 Participation Rates

Participation in gambling activities fell in 1998, with just over three quarters (76%, down 10% from 1997) of Victorians having participated in at least one of the gambling activities surveyed in the last 12 months. Figure 3.2 illustrates that participation in gambling continues to decline in Victoria. 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 twelve months.

There was a *higher* than average participation rate in gambling activities amongst:

- ✓ Those identified as being "At Risk" (100%);
- ✓ Mid-high income earners ($40,000 - $60,000 per annum) (83%);
- ✓ People who lived in the country (80%); and
- ✓ People employed full-time (79%).

There is a *lower* than average participation rate in gambling activities amongst:

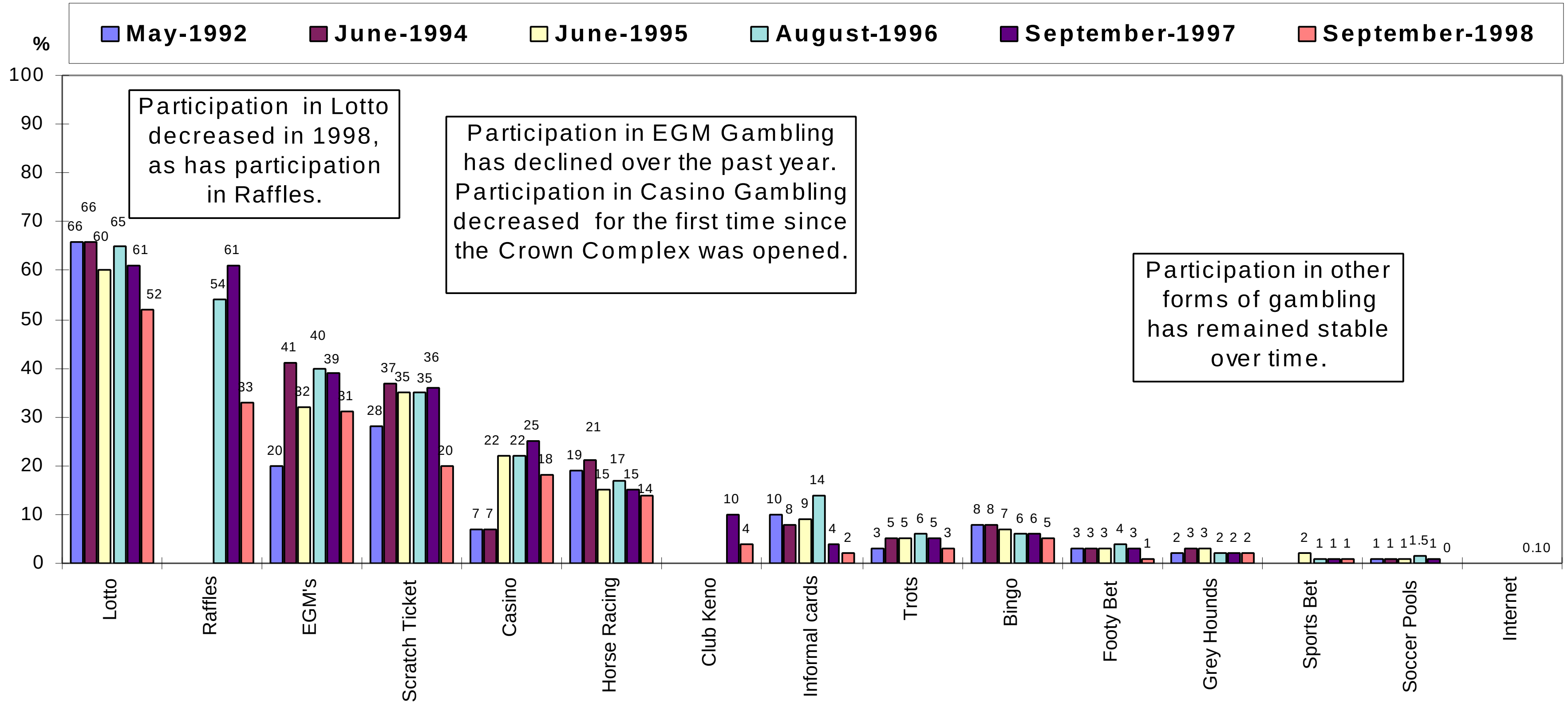
- ✓ Single Persons (70%);
- ✓ Those aged over 70 yrs (66%);
- ✓ Self supporting retirees (66%); and
- ✓ Students (66%).

[2] Question 1. Which of the following activities or games have you played or gambled on in the past 12 months?

TOTAL VICTORIAN GAMBLING PATTERNS

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

3.3 PARTICIPATION BY ACTIVITY



BASE: Total Respondents

*Note: Definition of Informal Cards changed in 1997 to "Informal Cards played for money"

3.3 Participation in Activities

Victorians undertook a range of gambling activities in the past 12 months, as illustrated in Figure 3.3[3] opposite. Similar to the results for overall gambling participation, the participation rates for many of the gambling activities measured fell considerably. The main points of interest have been outlined below:

- ✓ Participation in *lotto* activities decreased significantly in 1998 (52%, down from 61% in 1997). Despite this, in 1998 more Victorians participated in lotto than in any other gambling activity measured;
- ✓ Participation in *EGM gambling* declined in 1998, falling to 31% (down from 39% in 1997). An historical analysis of gambling data showed that gambling increased substantially (20% up to 41%) following the introduction of EGMs to Victoria in 1992. In 1996, there was another substantial increase in EGM gambling (40% up from 32%), returning to previous high levels. In 1998 EGM gambling had the third highest participation rate of any gambling activity after lotto and raffles;
- ✓ In 1998, a substantial decrease in *raffle* participation was recorded (33%, down from 61%, in 1997).
- ✓ Participation in *scratch ticket* gambling also fell in 1998. One in five Victorians (20%) participated in scratch ticket gambling, down from 36% in 1997;
- ✓ *Casino gambling* participation increased substantially in 1995 coinciding with the introduction of Melbourne's temporary Crown Casino in June 1994 (22% up from 7%). This level has been relatively stable since, but declined in 1998, down to 18% (from 25% in 1997);
- ✓ *Thoroughbred horse racing* gambling has remained relatively stable since 1995 and was participated in by 14% of Victorians in 1998;
- ✓ Participation in *Club Keno* gambling also fell in 1998, down to 4% (from 10% in 1997);
- ✓ Only 2% of Victorians participated *in informal cards* in 1998 (down 2% from 1997). The definition of Informal cards remained the same as the 1997 survey, where 'Informal Cards' was defined as 'informal cards played for money not at the casino'. A definition change may account for the large drop in participation in this activity recorded between 1996 and 1997;
- ✓ Low level participation was recorded for other forms of gambling such as *trotting, bingo, footybet, greyhounds, sportsbet and soccer pools*. These results have remained relatively stable since 1992.
- ✓ As yet, there has been negligible reported participation in *Internet gambling*.

[3] Question 1. Which of the following activities or games have you played or gambled on in the past 12 months?

PROFILE OF GAMBLERS

TABLE 3.3A

	Total Population	Gamblers (Last 12 months)	Reg. Gamblers (Once a mth+)
GENDER			
Male	49%	48%	50%
Female	51%	52%	50%
AGE			
Average Age	44 yrs	44 yrs	46 yrs
RESPONDENT'S OCCUPATION			
TOTAL FULL TIME	**44%**	**45%**	**46%**
Professionals / Executives	10%	10%	10%
Owners/White Collar Worker	18%	19%	18%
Farm Owner	1%	1%	1%
Skilled Workers	10%	10%	12%
Semi-skilled workers	3%	3%	3%
Unskilled workers / Other	2%	2%	2%
TOTAL PART TIME	**15%**	**16%**	**15%**
TOTAL NOT IN PAID WORK FORCE	**41%**	**39%**	**38%**
Household duties	10%	9%	9%
Student	6%	5%	4%
Self Supporting Retiree	5%	4%	4%
Pensioner	18%	18%	20%
Unemployed	3%	3%	2%
LOCATION			
Melbourne Metropolitan	73%	72%	70%
Other Victoria non metropolitan	27%	28%	30%
SOGS SCORE			
(0-4)	98.5%	98%	93%
(5-20)	1.5%	2%	7%
SEGMENT			
Disinterested Gambler	20%	27%	26%
Occasional Gambler	33%	44%	41%
Social Gambler	9%	12%	13%
Acknowledged Heavy Gambler	5%	6%	7%
Committed Heavy Gambler	8%	11%	13%

Higher than average compared to the total population

Lower than average compared to the total population

Table 3.3A opposite provides a profile of all Victorian gamblers and regular gamblers compared with the total population[4].

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 gamblers' demographic profile, compared to that of the general population, we see very little difference to the general population, other than the inevitable over-representation of people in the five gambling segments. In particular:

- ✓ There was an even distribution of males and females in the gambling population;
- ✓ Gamblers had an average age of 44 years, with a slight bias towards older age groups;
- ✓ No bias according to occupation;
- ✓ No bias according to metropolitan or country areas; and
- ✓ Those who have gambled in the last twelve months were more likely to be Disinterested Gamblers, Occasional Gamblers, Social Gamblers and Committed Heavy Gamblers.

REGULAR GAMBLERS

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

When analysing those who were regular gamblers who gambled once a month or more often, in comparison to the general population, we see:

- ✓ An even distribution of males and females amongst regular gamblers;
- ✓ The mean age of regular gamblers was 46 years;
- ✓ A significantly lower proportion of students amongst regular gamblers;
- ✓ No bias according to metropolitan or country areas; and
- ✓ Significantly higher proportions of all Gambling segments, as would be inevitable.

[4] Question 1. Which of the following activities, or games have you played or gambled on in the past 12 months?

PROFILE OF VICTORIAN GAMBLING ACTIVITIES

TABLE 3.3B

	Total Pop (1737)	Total Gamblers (1326)	Casino (314)	EGMs (544)	Lotto (907)	Scratch Ticket (360)	Raffles (594)	Bingo (97)	Inf. Cards (33)	Horse Racing (232)	Trotting (49)	Footy Bet (21)	Club Keno (72)
GENDER													
Male	49%	48%	50%	47%	48%	43%	42%	26%	71%	60%	73%	79%	51%
Female	51%	52%	50%	53%	52%	57%	58%	74%	29%	40%	27%	21%	49%
AGE													
Av. Age (yrs)	44 yrs	44 yrs	40 yrs	44 yrs	45 yrs	41 yrs	44 yrs	53 yrs	38 yrs	41 yrs	39 yrs	37 yrs	42 yrs
SEGMENT													
Disint. Gambler	20%	27%	14%	21%	28%	25%	27%	25%	15%	15%	9%	5%	15%
Occ. Gambler	31%	44%	29%	33%	44%	40%	46%	38%	36%	36%	25%	27%	28%
Ack. Gambler	5%	6%	10%	16%	6%	7%	5%	14%	10%	10%	10%	15%	11%
Commit. Gambler	8%	11%	19%	16%	10%	13%	12%	8%	34%	34%	59%	44%	26%
Social Gambler	9%	12%	28%	24%	11%	15%	10%	15%	6%	12%	8%	10%	20%

Higher than average compared to the total population

Lower than average compared to the total population

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

3.3B Profile of Victorian Gambling Activities

Table 3.3B[5] provides a profile of gamblers participation in various gambling activities in the past twelve months. The main points of consideration include:

- ✓ *Casino gamblers* - did not have a gender bias but had a younger age profile than 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;

- ✓ *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 and Acknowledged Heavy Gamblers;

- ✓ *Lotto gamblers* - were very similar to the general gambling population in terms of age and gender, but 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 were a higher than average proportion of Social Gamblers, Disinterested Gamblers, Occasional Gamblers and Committed Heavy Gamblers;

- ✓ *Raffles gamblers* - had a strong female bias. In terms of gambling segment profiles, Raffles gamblers were more likely to be Disinterested Gamblers, Occasional Gamblers or Committed Heavy 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;

- ✓ *Informal cards gamblers* - tended to be male and younger than the average age of all gamblers. They were also more likely to be Committed Heavy 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 younger than average age profile. This group contained a higher than average proportion of Acknowledged Heavy Gamblers and Committed Heavy Gamblers; and

- ✓ *Club Keno gamblers* - tended to have a slightly younger than average age profile and a higher proportion of Committed Heavy Gamblers, Acknowledged Heavy Gamblers and Social Gamblers.

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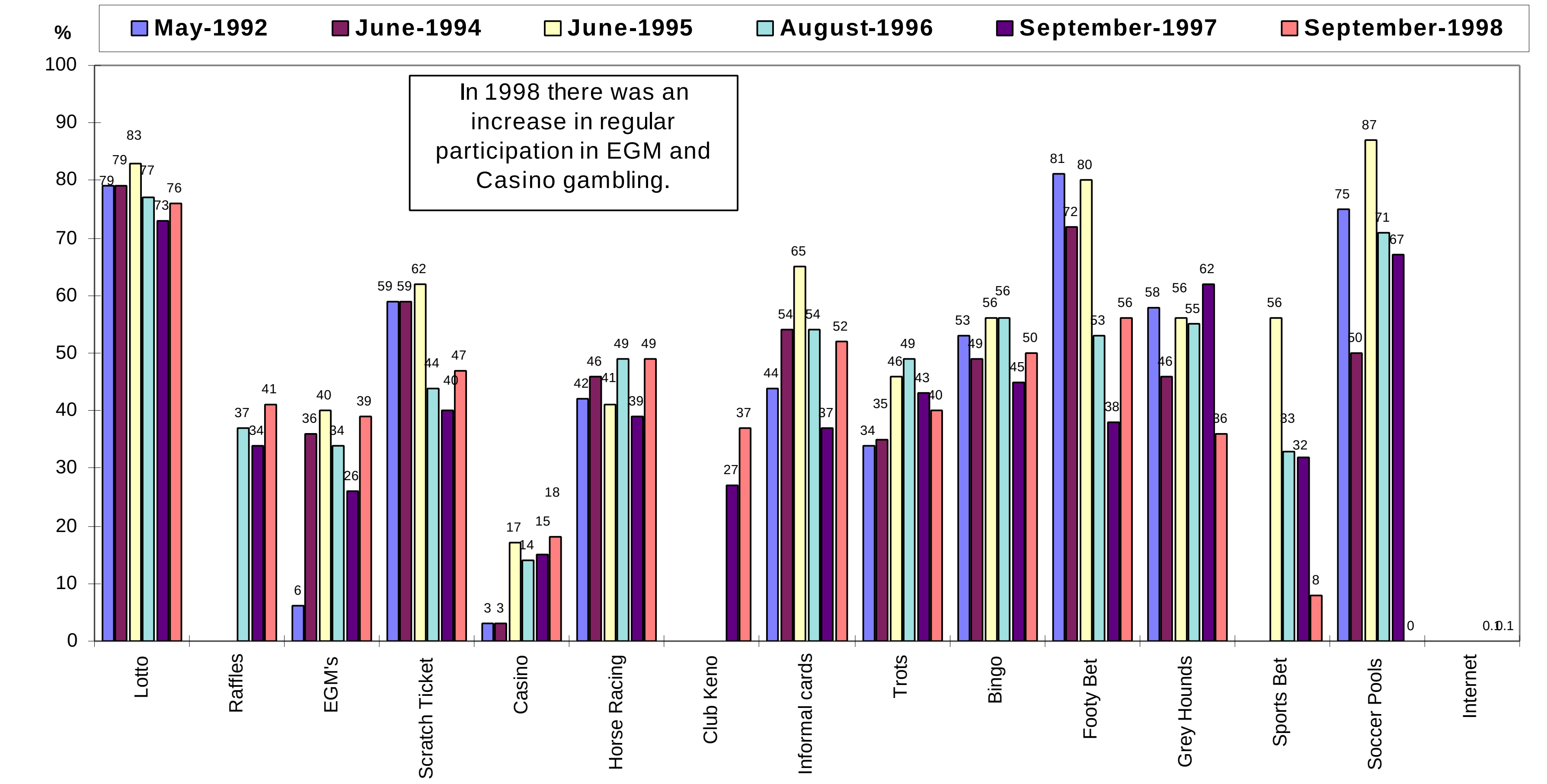
[5] Question 1. Which of the following activities, or games have you played or gambled on in the past 12 months?

TOTAL VICTORIAN GAMBLING PATTERNS

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

3.4 REGULAR PARTICIPATION (at least once per month) BY ACTIVITY



BASE: Participants Of Each Gambling Activity In Last 12 Months

3.4 Regular Participation in Activities

Figure 3.4[6] opposite shows the level of regular participation in gambling by types of gambling activity done 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, Sports Betting and Internet gambling were very small, and results presented for these activities should be interpreted as indicative only.

Regular participants of an activity are defined as anyone who has participated in that activity at least once per month. The main findings regarding regular participation in activities were:

- ✓ *Lotto* had the highest level of regular participants in 1998, as was the case in 1997. There was a slight increase in regular participation in lotto in 1998 (76%, up 3%);
- ✓ Regular *greyhounds* gambling activity decreased significantly in 1998, falling to 36% (from 62% in 1997);
- ✓ Regular b*ingo* gambling participation remained fairly stable in 1998, increasing slightly to 50% (up 5%), showing that there was still a large core of regular bingo gamblers;
- ✓ *Informal cards* had a solid core of regulars in 1998 (52%, up from 38% in 1997). As the definition of Informal cards remained the same between 1997 and 1998, an upward trend for this activity can be validly claimed;
- ✓ Regular participation in *footybet* and *horse racing* increased in 1998 (56% and 49% respectively) returning to similar levels as recorded in 1996;
- ✓ The level of regular participation in s*cratch ticket* gambling activities increased in 1998 (47%, up 7%);
- ✓ In 1998 41% of Victorian gamblers were found to be regular participants in r*affles*;
- ✓ *Club Keno* had an increase in the level of regular participants in 1998 (37%, up from 27% in 1997);
- ✓ Regular participation in *EGM* gambling increased in 1998 rising to 39% (up from 26%, in 1997), halting the downward trend from 1995; and
- ✓ Regular participation in *casino* gambling activities increased to 18% in 1998 (up from 15% in 1997).
- ✓ Sample size for soccer pools, sportsbetting & Internet gambling too small to validly report.

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[6] Question 3A-P: How often do you play.....(Gambling activity)

PROFILE OF REGULAR GAMBLERS (1998) BY GAMBLING ACTIVITY (at least once per month)

Table 3.4B

	Total Pop (1737)	Total Casino/ EGM (215)	Casino (56)	EGMs (210)	Lotto (682)	Scratch Ticket (166)	Raffles (241)	Bingo (49)	Inf. Cards (17)	Horse Racing (108)	Trotting (19)	Footy Bet (12)	Club Keno (24)
GENDER													
Male	49%	56%	60%	55%	51%	49%	45%	21%	64%	72%	75%	85%	59%
Female	51%	44%	40%	45%	49%	51%	55%	79%	36%	28%	25%	15%	41%
AGE													
Av. Age (yrs)	44 yrs	45 yrs	43 yrs	45 yrs	46 yrs	40 yrs	46 yrs	60 yrs	39 yrs	45 yrs	37 yrs	32 yrs	42 yrs
SEGMENT													
Disint. Gambler	20%	16%	11%	17%	28%	23%	21%	29%	5%	11%	-	9%	9%
Occ. Gambler	33%	28%	15%	28%	43%	35%	44%	35%	35%	10%	-	31%	37%
Ack. Gambler	5%	16%	9%	16%	7%	10%	6%	11%	13%	9%	5%	8%	12%
Commit. Gambler	8%	16%	19%	16%	11%	14%	16%	6%	35%	64%	89%	43%	25%
Social. Gambler	9%	25%	45%	24%	12%	19%	12%	19%	12%	6%	6%	10%	18%

Higher than average compared to the total population

Lower than average compared to the total population

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

Table 3.4B opposite outlines a profile of regular gamblers (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 gamblers* were slightly younger (average age of 43 years) than regular casino/EGM gamblers (average age of 45 years). A higher than average proportion of casino gamblers were segmented into the Social Gamblers and Committed Heavy Gamblers segments. Occasional Gamblers were underrepresented amongst regular casino gamblers;

- ✓ *Regular EGM gamblers* were evenly distributed throughout all age groups and were more likely to be Social Gamblers, Committed Heavy Gamblers and Acknowledged Heavy Gamblers;

- ✓ *Regular lotto gamblers* were slightly older than the general population. In terms of Gambling Segments, regular lotto gamblers tended to be Disinterested Gamblers, Social Gamblers and Committed Heavy Gamblers;

- ✓ *Regular scratch ticket gamblers* were similar to the overall population in terms of gender and gambling segment profile, but tended to be younger than average (average age of 40 years);

- ✓ *Regular raffles gamblers* constituted a higher than average proportion of Committed Heavy Gamblers and Occasional Gamblers;

- ✓ *Regular bingo gamblers* were more likely to be older females, and tended to be Social Gamblers;

- ✓ *Regular informal cards gamblers* were more likely to be Committed Heavy Gamblers;

- ✓ *Regular thoroughbred horse racing gamblers* were more likely to be male. *Regular trotting gamblers* were also more likely to be male, but had a younger age bias. Both regular thoroughbred horse racing gamblers and regular trotting gamblers were more likely to be to be Committed Heavy Gamblers with a much higher than average proportion of this segment being represented in these activities;

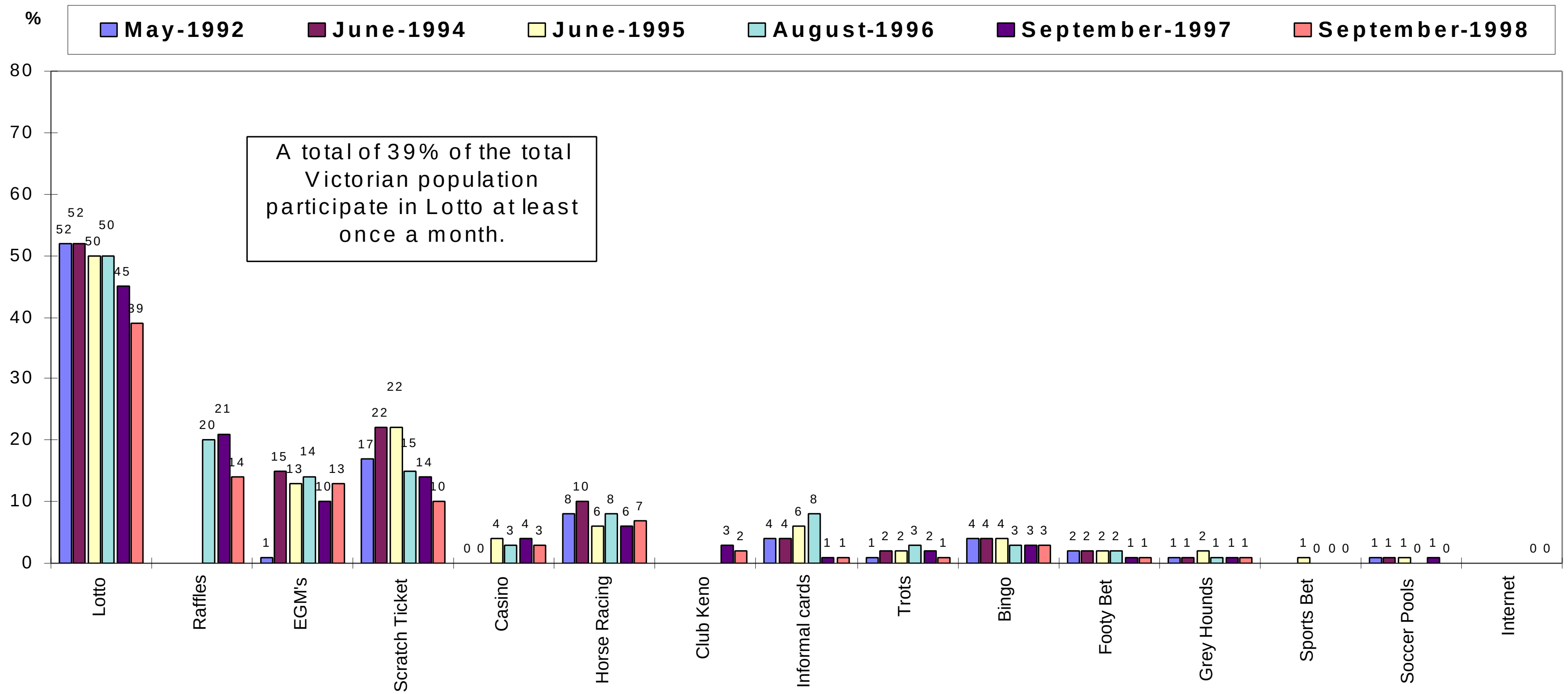
- ✓ *Regular footybet gamblers* were more likely to be younger males and Committed Heavy Gamblers; and

- ✓ *Regular Club Keno gamblers* were slightly younger than the general population and were more likely to be Committed Heavy Gamblers.

TOTAL VICTORIAN GAMBLING PATTERNS

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

3.5 REGULAR PARTICIPATION (at least once per month) BY ACTIVITY - TOTAL



BASE: Total Respondents

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 population.

Figure 3.5[7] 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 (39%) of the total Victorian population participated in *lotto* at least once a month in the last year;
- ✓ Regular participation in *raffles* decreased to 14% in 1998 (down from 21% in 1997);
- ✓ *EGM activities* followed, with 13% of Victorians participating regularly in the last 12 months;
- ✓ Regular participation in *scratch ticket* activities declined slightly in 1998, with 10% of Victorians participating regularly;
- ✓ A total of 7% of the Victorian population regularly participated in *horse racing* gambling;
- ✓ The percentage of regular Victorian *casino* gambling participants was 3%;
- ✓ Regular participation in *bingo* activities remained stable (3% of Victorians);
- ✓ Regular participation in *Club Keno* was undertaken by 2% of the total population;
- ✓ *Trotting* gambling was regularly participated in by 1% of the Victorian population; and
- ✓ Regular participation in *footybet, informal cards, soccer pools, greyhounds and sportsbet* was very low (each 1% or lower).

[7] Question 3A-P: How often do you play.....(Gambling activity)

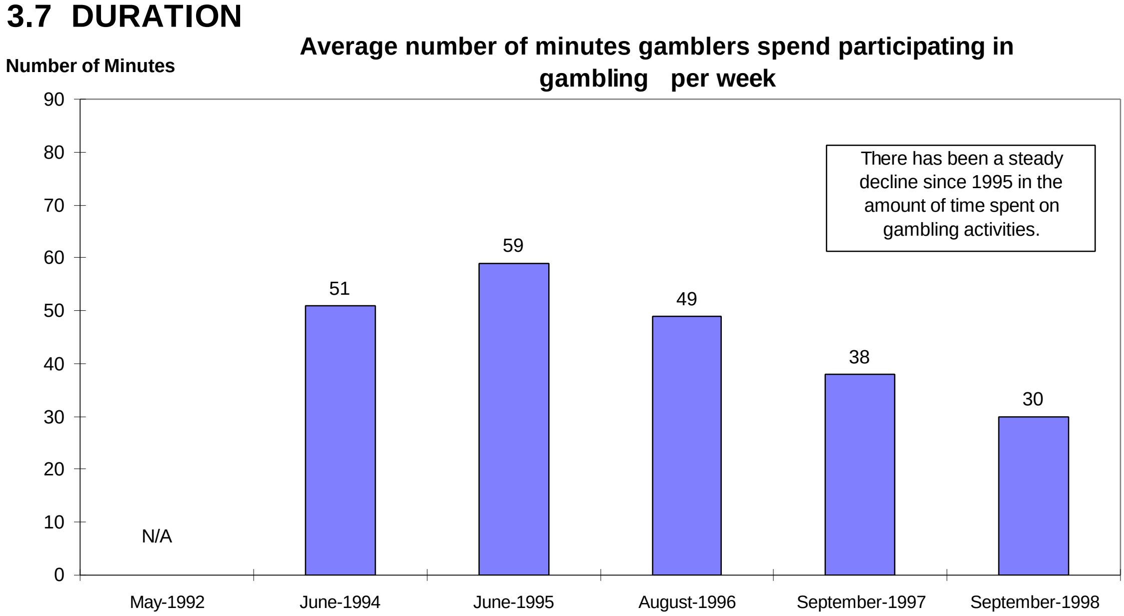
TOTAL VICTORIAN GAMBLING PATTERNS

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

3.6 FREQUENCY

BASE: Total Gambled in Last 12 Months

3.7 DURATION



BASE: Total Gambled in Last 12 Months

3.6 Frequency of Participation

Figure 3.6[8] opposite shows the average frequency with which gamblers have undertaken gambling activities by time series (May 1992 to October 1998). There was no evidence of a significant change in the frequency of participation in gambling activities since 1992. In 1998, on average, gamblers participated in gambling activities once a week (i.e. 1.0 times per week).

In 1998, there was a higher than average frequency of participation undertaken by:

- ✓ Committed Heavy Gamblers (1.7); and
- ✓ Acknowledged Heavy Gamblers (1.5).

In 1998, there was a lower than average frequency of participation undertaken by:

- ✓ Disinterested Gamblers (0.9); and
- ✓ Occasional gamblers (0.8).

3.7 Duration of Activities

Figure 3.7[9] opposite provides a time series analysis of duration of gambling activities each time played. Figures from the 1998 survey continue the steady decline in the amount of time reported spent on gambling activities since 1995. The amount of time spent on average per week has steadily declined from 59 minutes in 1995 to just 30 minutes in 1998.

In 1998, the *highest* amount of time spent gambling on average per week, was by the following groups:

- ✓ Those identified as being "At Risk" (201 mins);
- ✓ 18-19 years (123 mins);
- ✓ Owners/White collar workers (45 mins);
- ✓ Committed Heavy Gamblers (101 mins);
- ✓ Acknowledged Heavy Gamblers (78 mins);
- ✓ Skilled workers (38 mins); and
- ✓ Pensioners (40 mins).

In 1998, the *lowest* amount of time spent gambling on average per week, was by the following groups:

- ✓ Unemployed (11 mins);
- ✓ Single Parent (20 mins);
- ✓ Occasional Gamblers (11 mins);
- ✓ Disinterested Gamblers (12 mins); and
- ✓ Professionals/executives (18 mins).

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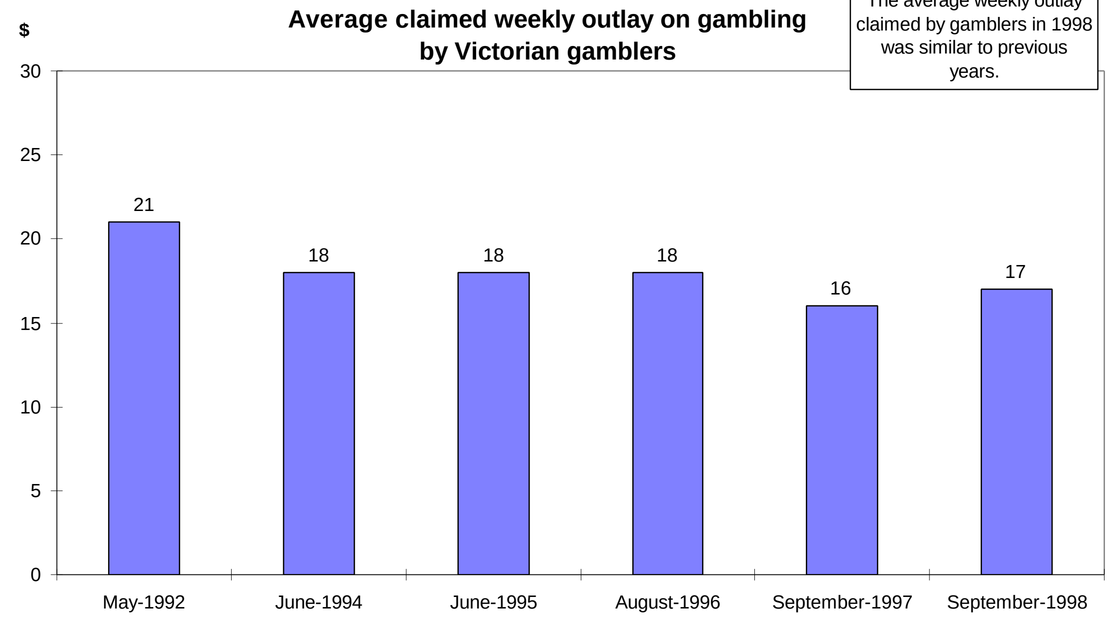
[8] Question 3A-P: How often do you play.....(Gambling activity)
[9] *Question 4A-4P: And each time you play....(Gambling activity)...how much time do you spend playing this activity?*

TOTAL VICTORIAN GAMBLING PATTERNS

3.8 PERCEIVED WEEKLY OUTLAY

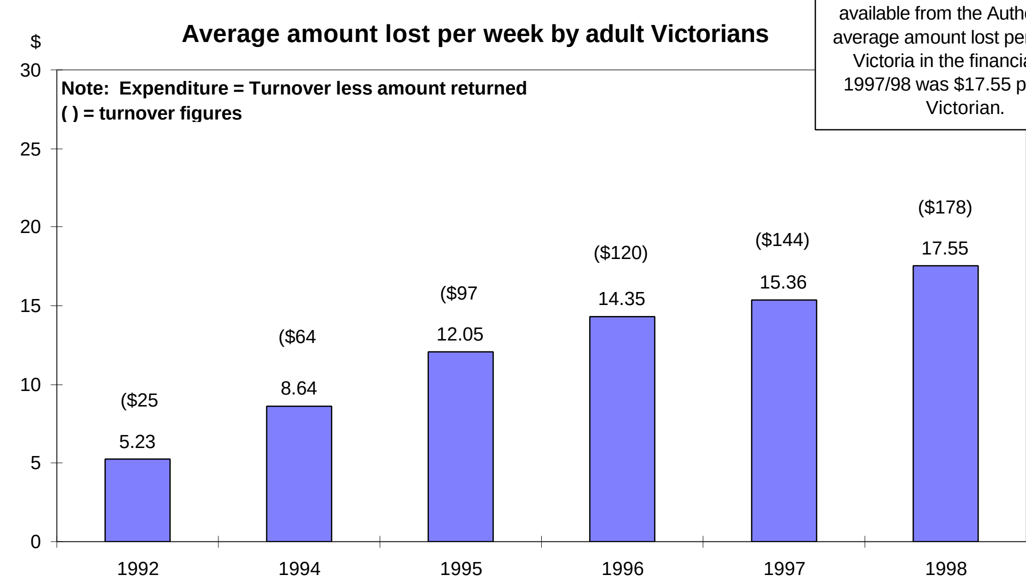
The average weekly outlay claimed by gamblers in 1998 was similar to previous years.



BASE: Total Gambled in Last 12 Months

3.9 ACTUAL WEEKLY EXPENDITURE

According to expenditure figures available from the Authority, the average amount lost per week in Victoria in the financial year 1997/98 was $17.55 per adult Victorian.



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 Outlay

Figure 3.8[10] opposite provides a time series analysis of the overall perceived average weekly outlay by Victorian gamblers. Respondents were asked to estimate their total weekly outlay on gambling activities. In 1998, Victorian gamblers estimated that they spent, on average, $17 per week ($16 in 1997). The estimated weekly outlay on gambling activities in 1998 was similar to previous years.

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

- ✓ Those identified as being “At Risk” ($84);
- ✓ Group households who are not related ($54);
- ✓ Committed Heavy Gamblers ($52);
- ✓ Acknowledged Heavy Gamblers ($38);
- ✓ Owners/white collar workers ($25);
- ✓ Males ($25); and
- ✓ Social Gamblers ($22).

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

- ✓ Single parent households with children not at home ($6);
- ✓ Females ($9);
- ✓ Disinterested Gamblers ($15);
- ✓ Low income earners ($10,000-$20,000 pa) ($10);
- ✓ Professionals / executives ($8); and
- ✓ Students ($5).

[10] *Question 10: Overall, in an average week, how much would you outlay or spend IN TOTAL on the gambling activities you play?*

TABLE 3.9

Regulated Forms of Gambling in Victoria by Expenditure for the Financial Years Ending June 30 1997 and June 30 1998

Category	Financial Year		Change
	1996-97 $million	**1997-98** $million	**%**
Racing			
Bookmakers[1]	21.905	17.338	-20.85%
Totalisators	402.566	415.426	3.19%
Total Racing	424.471	432.764	1.95%
Gaming			
Tattersall's Gaming Products[2]	287.981	298.942	3.81%
Electronic Gaming Machines	1,455.797	1,711.290	17.55%
Casino	578.966	742.292	28.21%
Club Keno[3]	7.159	7.084	-1.05%
Sportsbetting[3]	2.363	2.783	17.77%
Total Gaming	2,332.266	2,762.391	18.44%
Total Gambling	**2,756.737**	**3,195.155**	**15.90%**

Notes:

[1]The turnover for bookmakers from which the expenditure figure is derived is an estimate and not an actual figure.
[2]Tattersall's gaming products include Tattslotto, Oz Lotto, Powerball, Super 66, Instant Tatts, Tatts 2, Tatts Keno, Soccer Pools and Consultations
[3]The retention rates used to estimate Club Keno, Sports Bookmaking and Sportsbook have been reviewed.
Due to administrative changes, expenditure 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 (ie the amount lost per week) on gambling in Victoria for the financial years ending June 30 of the years indicated. The figures for turnover (ie 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 1996-97 and 1997-98. 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).

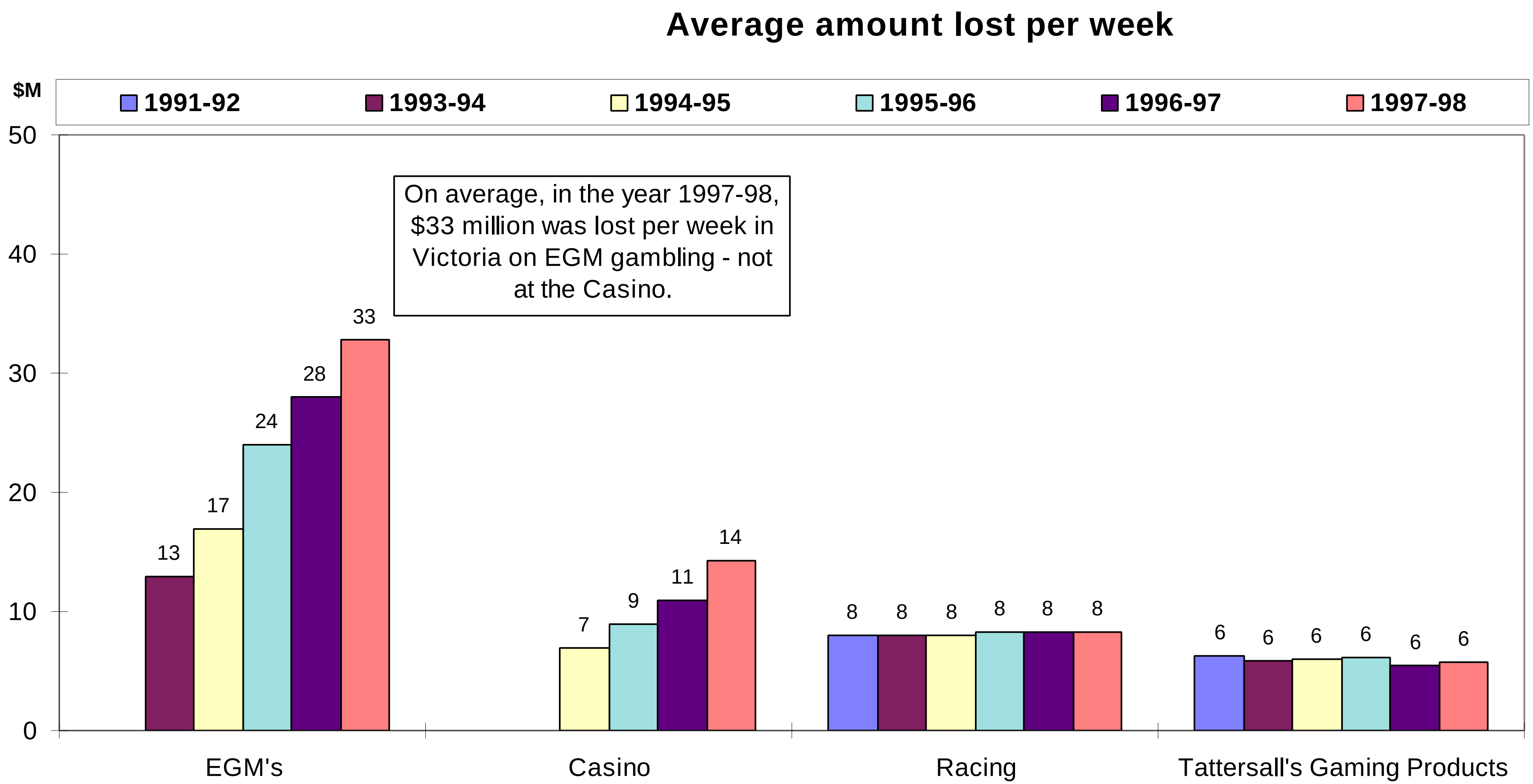
Note that the concepts of turnover, outlay and expenditure are difficult and the terms are interpreted and reported in different ways by different survey respondents.

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.

Hence care should 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.

TOTAL VICTORIAN GAMBLING PATTERNS

3.10 ACTUAL WEEKLY EXPENDITURE



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

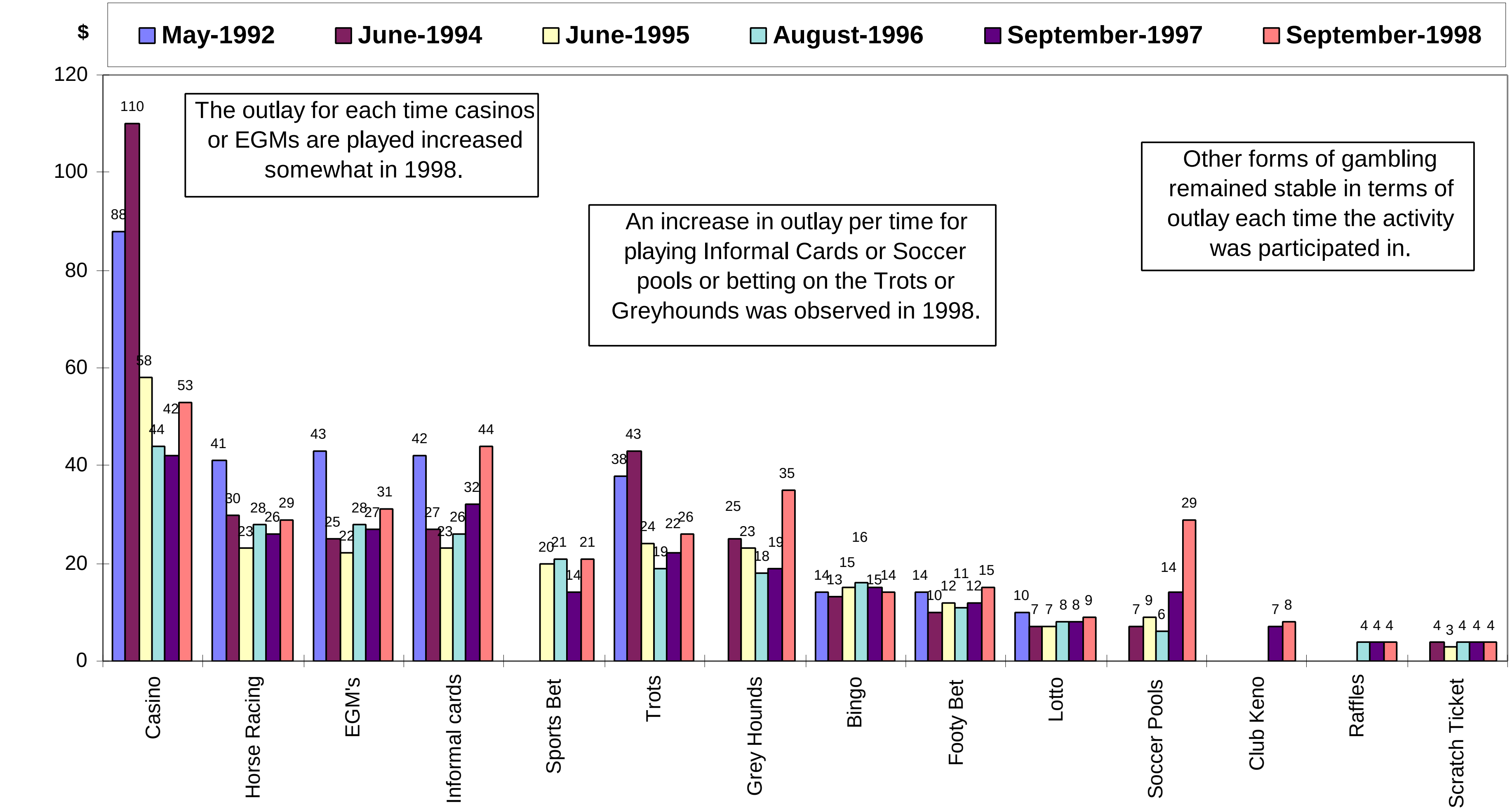
Figure 3.10 opposite provides a time series analysis of the *overall actual* weekly expenditure (i.e. amount lost) on gambling in Victoria for each of the main legal forms of gambling.

The average weekly expenditure[11] on EGMs not at the casino, in the financial year 1997-98, was around $33 million, in Victoria. This was followed by casino activities ($14 million), racing ($8 million) and Tattersall's Gaming Products (Tattslotto, Oz Lotto, Powerball, Super 66, Instant Tatts, Tatts 2, Tatts Keno, Soccer Pools and Consultations) ($6 million).

[11] Amount invested less than the amount returned

TOTAL VICTORIAN GAMBLING PATTERNS

3.11 OUTLAY EACH TIME PLAY ACTIVITIES



BASE: Participants In Each Gambling Activity In Last 12 Months

3.11 Outlay Each Time Played

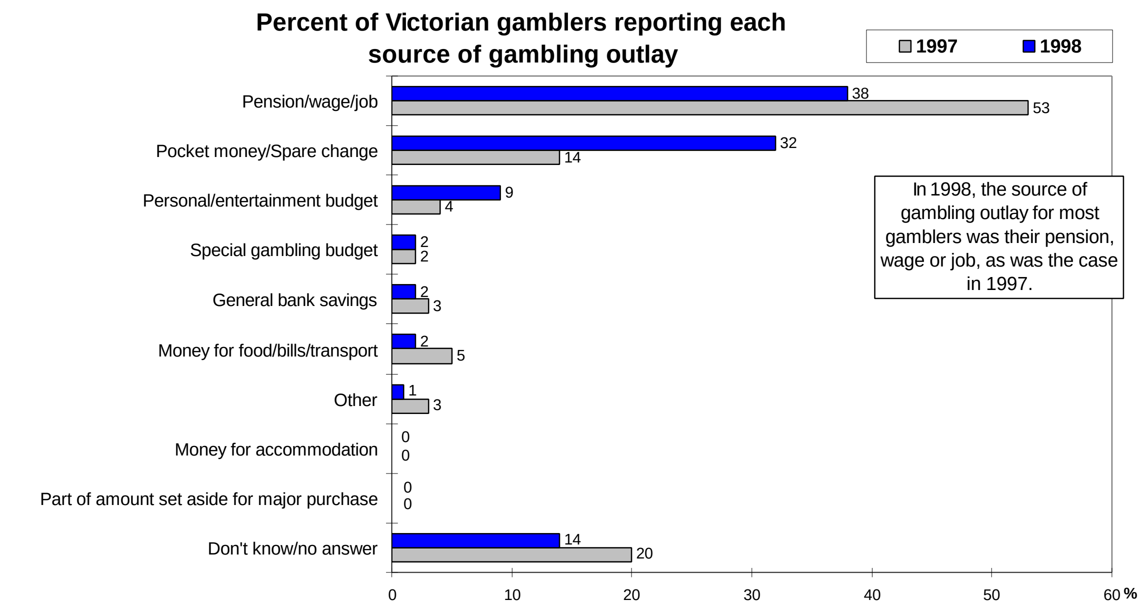
Figure 3.11[12] opposite displays a time series analysis of the amount that gamblers were prepared to outlay each time they gambled[13]. Respondents were asked to indicate, on average, how much they were prepared to outlay on a gambling activity each time they participated in it. Although casino gambling was participated in infrequently, casino gamblers were prepared to outlay the highest amount of money of all gambling activities measured in 1998. Furthermore, the level of outlay increased from an average of $42 each time in 1997 to $53 each time in 1998. Other findings to emerge were:

- ✓ Gamblers were prepared to outlay $31 each time they played *electronic gaming machines*. This amount has increased moderately in the last 12 months (up $4);
- ✓ Gamblers were prepared to outlay, on average, $29 each time they participated in *horse race* gambling, an increase of $3 from 1997;
- ✓ The amount of money gamblers were prepared to outlay each time they played i*nformal cards* was $44, a substantial increase from 1997 ($32);
- ✓ People who gambled on *trotting* were prepared to spend $26 on each occasion they participated in this activity, (up from $22 per session in 1997). The amount outlaid on g*reyhound racing* each time the activity was participated in, also increased in 1998 ($35, up from $19);
- ✓ The amount gamblers were prepared to outlay each time on *bingo* ($14), f*ootybet* ($15), *lotto* ($9), *raffles* ($4) and *scratch tickets* ($4) activities has remained relatively stable since 1992; and
- ✓ Gamblers were prepared to outlay $8 each time they gambled on *Club Keno*.

[12] Q5. And each time you play (…say name of activity…) on average, what is the dollar value you are prepared to or would outlay on this activity?
[13] 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

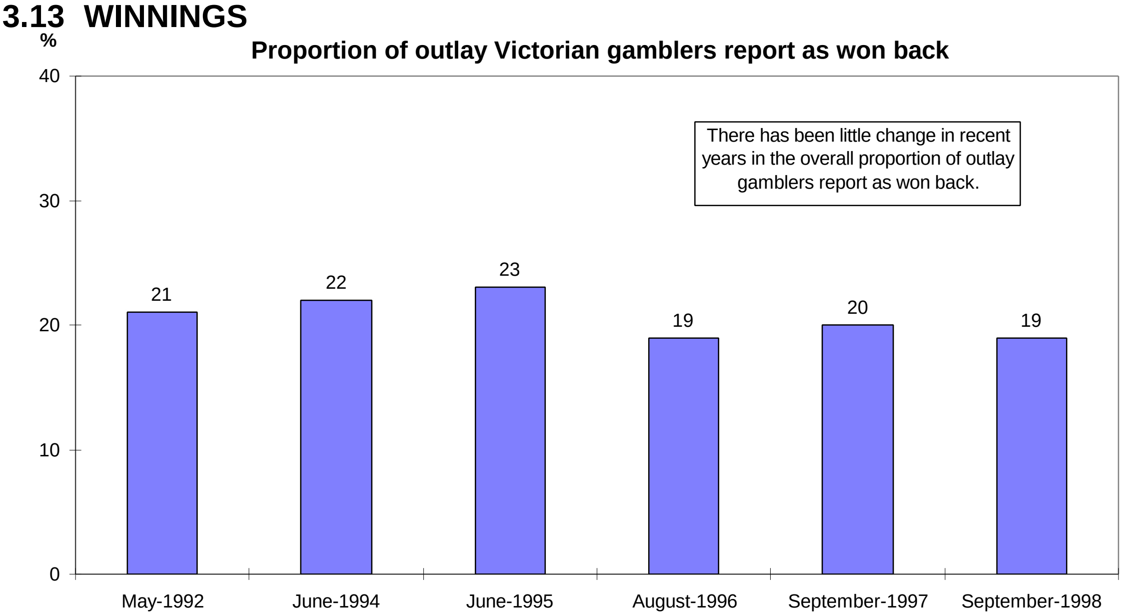
3.12 SOURCE OF GAMBLING OUTLAY



BASE: Total Gambled in Last 12 Months

NOTE: Multiple responses allowed

3.13 WINNINGS



BASE: Total Gambled in Last 12 Months

3.12 Source of Gambling Outlay

Respondents were also asked where the money they used to gamble with came from. Most (38%) said they used money from their wage/job or pension. While 32% of respondents used ‘pocket money’ to gamble with, 9% said they took money from their entertainment budget. Money for transport, food or other bills, from general savings or from a special gambling budget were each the source of gambling outlay for 2% of gamblers, as can be seen from Figure 3.12[14], opposite.

3.13 Proportion of Outlay Reported as Won Back

Figure 3.13[15] opposite provides a time series analysis of the proportion of outlay Victorian gamblers, on average, report as won back. Overall, there has been little change in perceptions of the proportion of outlay reported as won back since 1996 (19% of outlay won back up from 20% in 1997). The actual return to gamblers from figures provided by the Authority is substantially higher with nearly 90% of turnover being returned to gamblers.

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

- ✓ Unskilled workers (38% of outlay won back);
- ✓ 18-19 year olds (30% of outlay won back);
- ✓ Committed Heavy Gamblers (28% of outlay won back);
- ✓ Social Gamblers (27% of outlay won back);
- ✓ Acknowledged Heavy Gamblers (27% of outlay won back);
- ✓ Full-time workers (22% of outlay won back); and
- ✓ Males (22% of outlay won back);

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

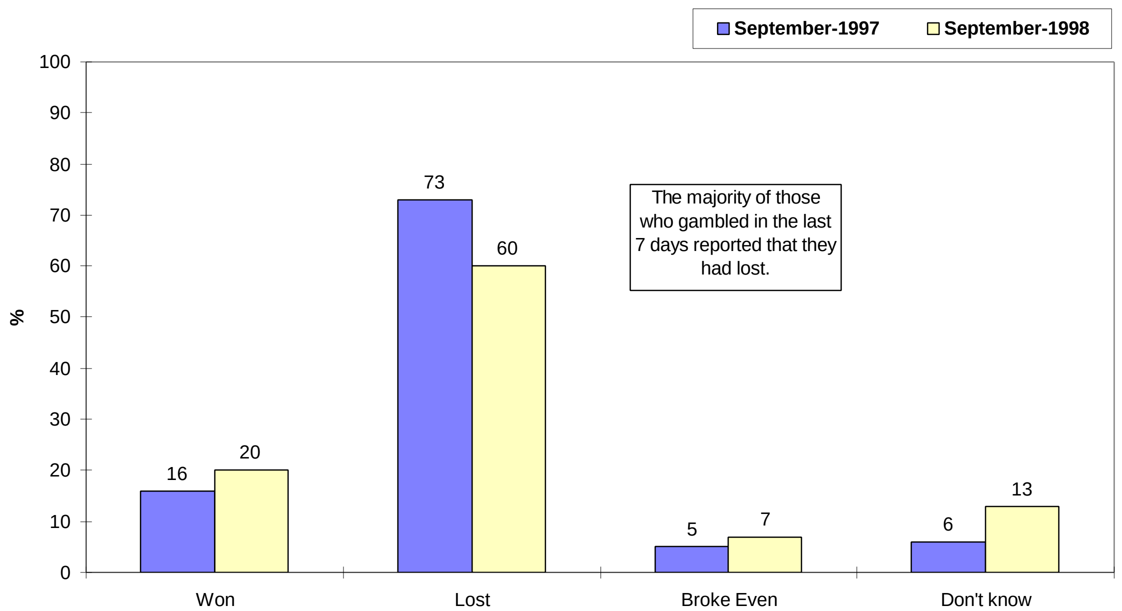
- ✓ Disinterested Gamblers (12% of outlay won back);
- ✓ Those aged 50 and over (14% of outlay won back);
- ✓ Those not employed (15% of outlay won back);
- ✓ Females (16% of outlay won back);
- ✓ Those with a combined respondent / partner annual of $50,000 or less (16% of outlay won back);

Respondent’s perceptions of the proportion won back appeared to decline as age increases: 18-19 year olds on average reported a 30% return, those aged 20-39 reported a 22% return, those aged 40-49 reported an 18% return, while those aged 50 and over reported return of around 14% on average.

[14] Question 11: Where does this weekly outlay (the money you spend) come out of? (Unprompted)
[15] Question 6A-6P: On average, what percentage of your overall outlay do you think you win back on..... (Gambling activity)?

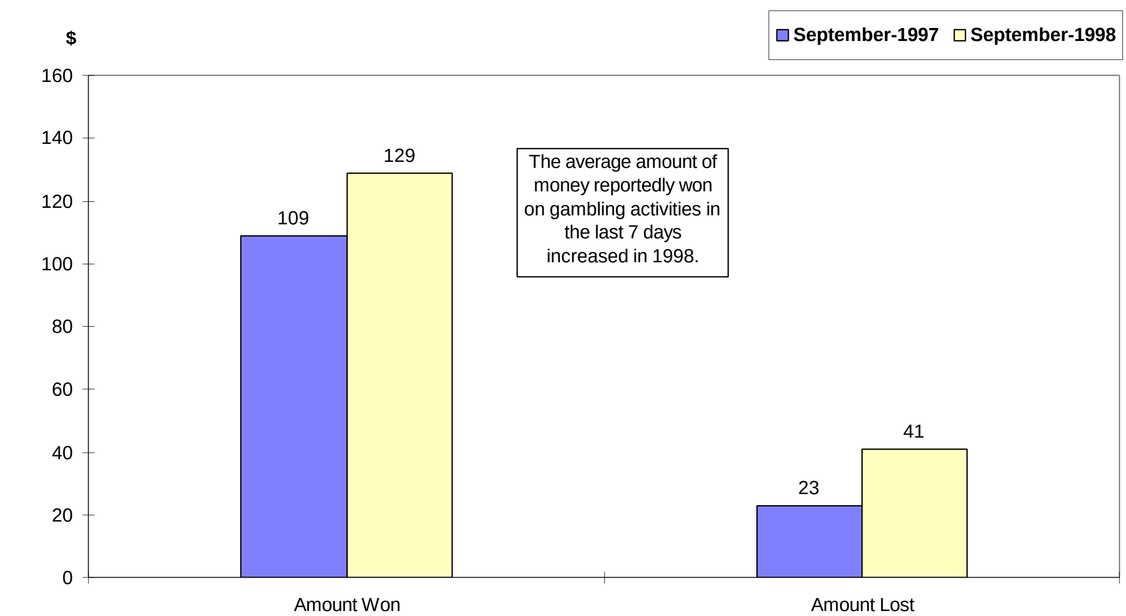
TOTAL VICTORIAN GAMBLING PATTERNS

3.14 WON OR LOST ON GAMBLING ACTIVITIES - LAST 7 DAYS



BASE: Total Gambled in Last 7 Days

3.15 AMOUNT WON OR LOST GAMBLING - LAST 7 DAYS



BASE: Total Gambled in Last 7 Days

3.14 Won or Lost on Gambling Activities - Last 7 Days

Figure 3.14[16] opposite provides an analysis of whether gamblers reported they had won or lost on gambling activities in the last 7 days. Of the 31% of Victorians who had gambled in the last 7 days, the majority (60%) said they had lost. Only 20% of those who had gambled in the last 7 days thought they had won in total, while 7% said they broke even.

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

- ✓ High income earners ($60,000-$75,000 pa) (86%); and
- ✓ Those born outside Australia (68%).

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

- ✓ Committed Heavy Gamblers (36%); and
- ✓ Those with a combined respondent / partner annual income of over $50,000 (29%).

3.15 Amount Won or Lost Gambling - Last 7 Days

Figure 3.15[17] opposite illustrates the average amount of money claimed as won or lost on gambling in the last 7 days. The average amount winning gamblers claimed they had won in the last 7 days was found to be $129. For those who had lost money on gambling activities in the last 7 days, the average amount lost was reported to be $41.

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

- ✓ Owners/white collar workers ($271);
- ✓ Acknowledged Heavy Gamblers ($166); and
- ✓ Committed Heavy Gamblers ($273).

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

- ✓ 18-19 year olds ($12);
- ✓ Unskilled workers ($12);
- ✓ Those performing home duties ($12);
- ✓ Occasional Gamblers ($57); and
- ✓ Disinterested Gamblers ($53).

The following groups reported *higher* average amounts lost:

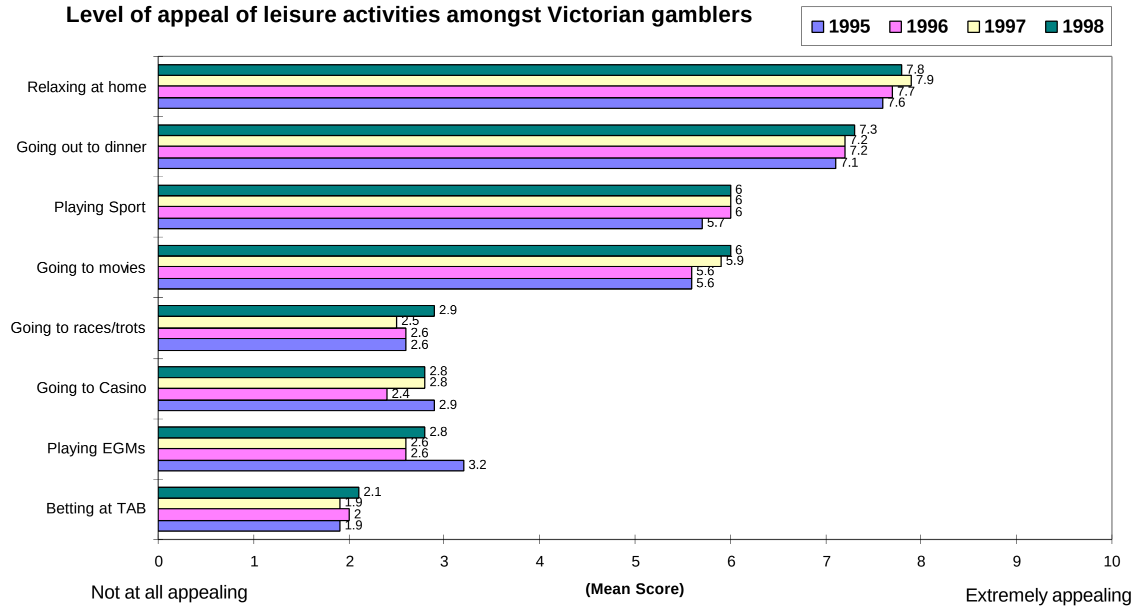
- ✓ Those “At Risk” ($187);
- ✓ Committed Heavy Gamblers ($148).
- ✓ Single people (including Engaged, Planning to marry) ($111);
- ✓ Those employed full-time ($69);
- ✓ Males ($66);
- ✓ Acknowledged Heavy Gamblers ($63);

[16] 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?
[17] Question 14: How much did you win/lose in total?

TOTAL VICTORIAN GAMBLING PATTERNS

3.16 APPEAL OF LEISURE ACTIVITIES - GAMBLERS

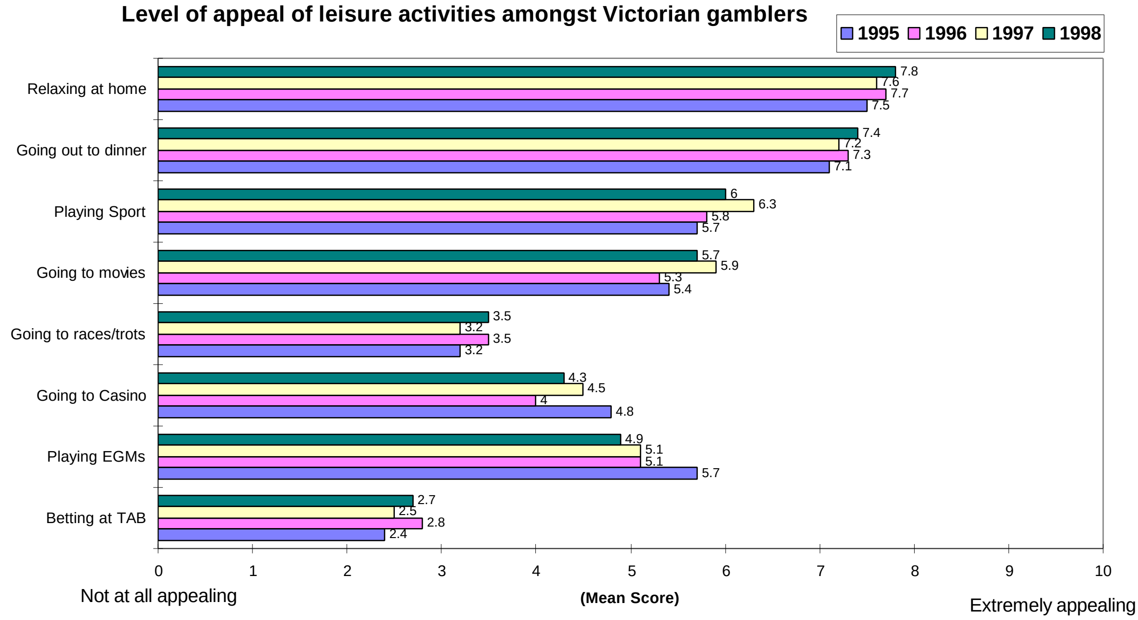
Level of appeal of leisure activities amongst Victorian gamblers



BASE: Total Gambled in Last 12 Months

3.17 APPEAL OF LEISURE ACTIVITIES - REGULAR EGM/CASINO GAMBLERS

Level of appeal of leisure activities amongst Victorian gamblers



BASE: 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 the appeal of were as follows:

- ✓ Betting at the TAB;
- ✓ Playing sport;
- ✓ Going to the movies;
- ✓ Going to the races/trots;
- ✓ Going out to dinner;
- ✓ Relaxing at home eg. watching TV;
- ✓ Playing electronic gaming machines; and
- ✓ Going to the casino.

Figure 3.16[18] opposite provides an analysis of the mean scores in relation to the ratings of appeal of various leisure activities amongst those who had gambled in the last 12 months.

There was a high level of appeal for activities such as *relaxing at home* (mean rating of 7.8) and *going out for dinner* (mean rating of 7.3). However, there was a low level of appeal for activities such as *betting at the TAB* (mean rating of 2.1), *going to the casino* (mean rating of 2.8) and *going to the races* (mean rating of 2.9).

Activities such as *playing sport* (mean rating of 6.0) and *going to the movies* (mean rating of 6.0) were moderately appealing to gamblers.

3.17 Appeal of Leisure Activities - Regular EGM/Casino Gamblers

Figure 3.17 provides an analysis of the mean scores in relations 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 4.3), *going to the races/trots* (3.5), *playing EGMs* (4.9) and *betting at the TAB* (2.7) was higher for regular EGM/Casino gamblers than for gamblers in general. These nonetheless did not appeal as much to them as did the non-gambling activities.

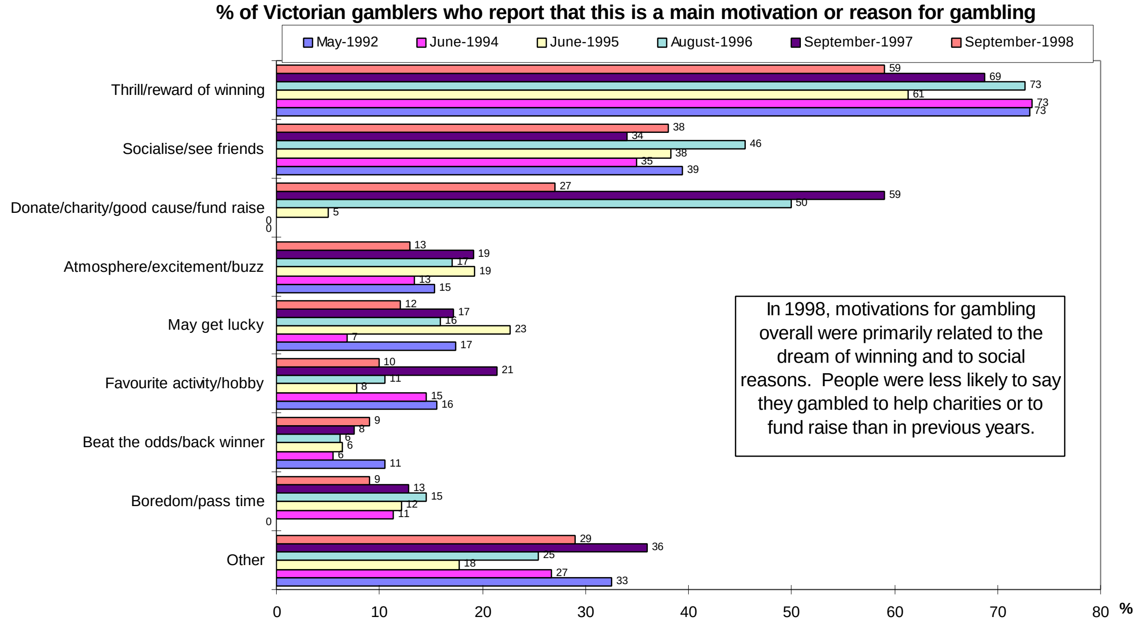
The appeal of non-gambling activities for these regular EGM/Casino gamblers was similar to that for gamblers in general.

[18] 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)?"

TOTAL VICTORIAN GAMBLING PATTERNS

3.18 MOTIVATIONS - GAMBLERS

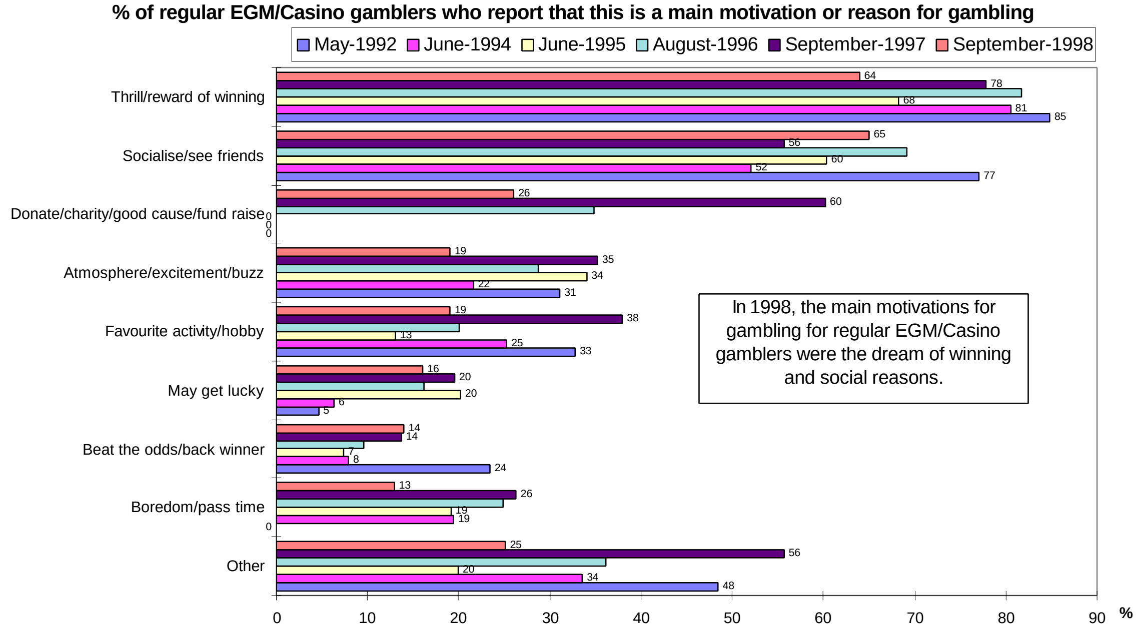
% of Victorian gamblers who report that this is a main motivation or reason for gambling



BASE: Total Gambled in Last 12 Months

3.19 MOTIVATIONS - REGULAR EGM/CASINO GAMBLERS (once a month or more)

% of regular EGM/Casino gamblers who report that this is a main motivation or reason for gambling



BASE: Regular EGM/Casino Gamblers

3.18 Motivations - Gamblers

For each gambling activity played in the last 12 months, gamblers were asked their main motivations, attractions or reasons for participating in said gambling activities. Figure 3.18[19] opposite illustrates the motivations for gambling amongst Victorian gamblers.

The primary motivator for gambling was found to be:

- ✓ The thrill or dream of winning (59%), particularly for low involvement activities such as lotto, scratch tickets, footy betting, other casino games (eg roulette) and Club Keno.

The secondary motivator for gambling was:

- ✓ Social reasons (38%), particularly for high involvement activities such as casino gambling, EGMs, bingo and informal cards.

Other motivators given moderate ratings by gamblers included:

- ✓ For charity, to support a cause or organisation (27%);
- ✓ Beating the odds (9%);
- ✓ Favourite activity or hobby (10%);
- ✓ Atmosphere/excitement/buzz (13%);
- ✓ Belief in luck/may get lucky (12%); and
- ✓ Boredom/pass the time (9%).

Other motivators were found to be relatively minor in comparison to those mentioned above.

3.19 Motivations - Regular EGM/Casino Gamblers

Figure 3.19[19] opposite illustrates the motivations for gambling amongst regular EGM/Casino gamblers. Similar to gamblers overall, the primary and secondary motivators for regular EGM/Casino gamblers were:

- ✓ Social reasons (65%), particularly for gambling activities such as raffles, bingo, horse racing, harness racing and EGMs (not at the casino); and
- ✓ The thrill or dream of winning (66%).

Other motivators given moderate ratings included:

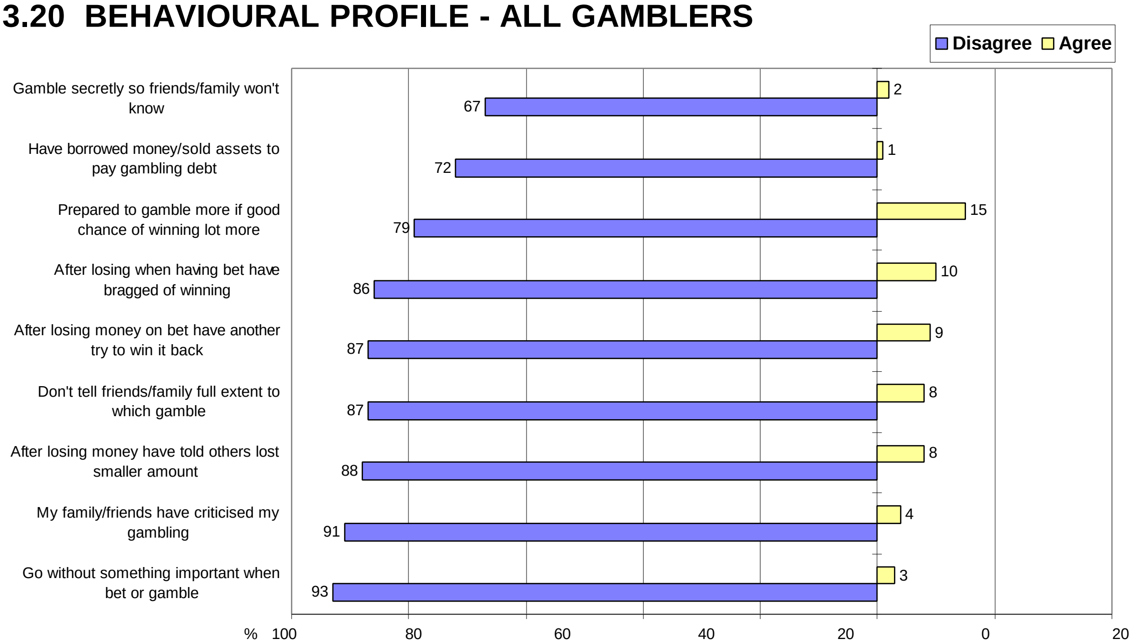
- ✓ For charity. to support a cause or organisation (26%);
- ✓ Favourite activity or hobby (19%);
- ✓ Atmosphere/excitement/buzz (19%);
- ✓ Belief in luck/may get lucky (16%);
- ✓ Beating the odds (14%); and
- ✓ Boredom/pass the time (13%).

Other motivators were found to be relatively minor in comparison to those mentioned above.

[19] Question 7A-7P: What are the main motivations, attractions or reasons that you enter, (Gambling activity)? Why else? Anything else? (Unprompted)

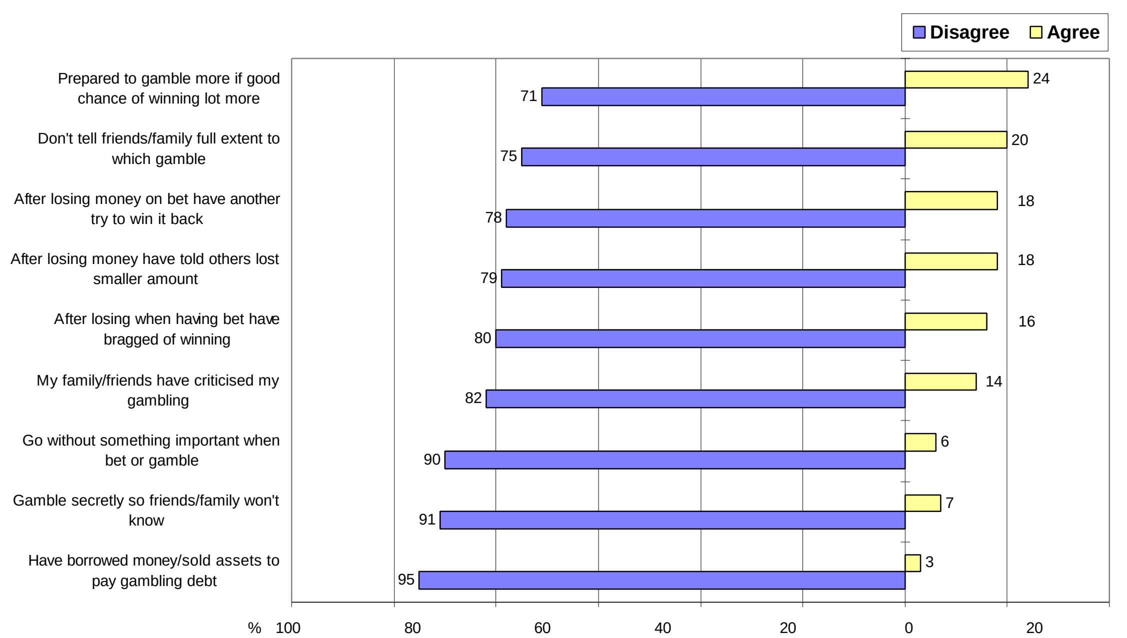
TOTAL VICTORIAN GAMBLING PATTERNS

3.20 BEHAVIOURAL PROFILE - ALL GAMBLERS



BASE: Total Gambled in Last 12 Months

3.21 BEHAVIOURAL PROFILE - REGULAR EGM/CASINO GAMBLERS



BASE: Regular EGM/Casino Gamblers

3.20 Behavioural Profile - Gambling Population

Figure 3.20[20] illustrates the behavioural profile 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 disagreement with all of the statements read to respondents. Almost all of respondents (93%) disagreed with the statement "Go without something important when bet or gamble".

Furthermore, it was evident that most gamblers *disagreed* that:

- ✓ They were prepared to bet more if a chance to win more (79%);
- ✓ After losing told others lost a smaller amount (88%);
- ✓ After losing have another bet (87%);
- ✓ Don't tell others the full extent of gambling (87%);
- ✓ After losing bragged about winning (86%);
- ✓ Family friends have criticised gambling (91%);
- ✓ They gambled secretly (67%); and
- ✓ They have borrowed money or sold assets to pay a gambling debt (72%).

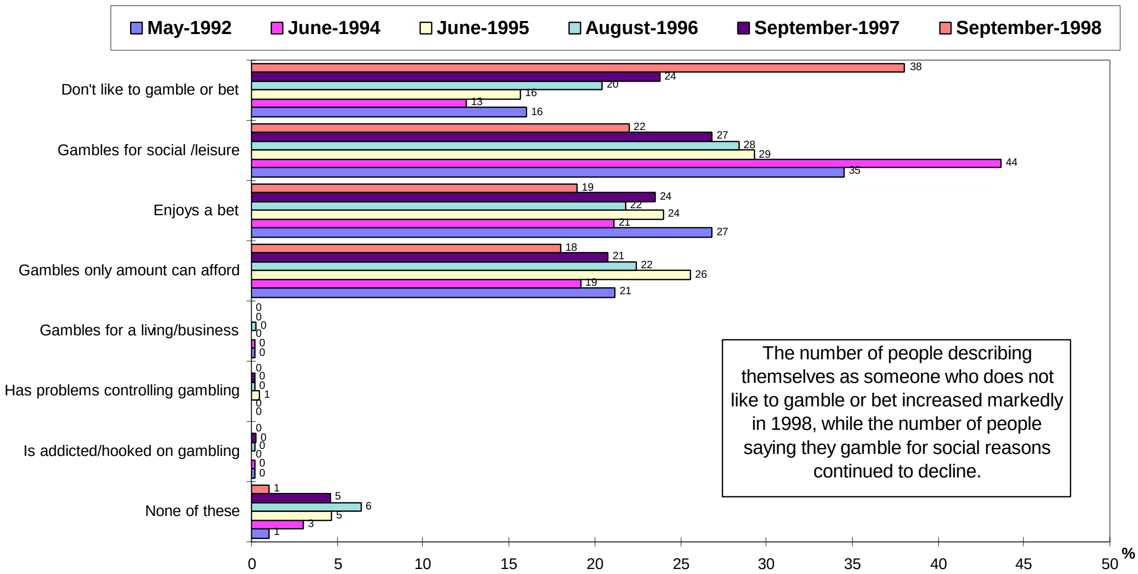
3.21 Behavioural Profile - Regular EGM/Casino Gamblers

Figure 3.21 displays the behavioural profile of regular EGM/Casino gamblers. There was a higher level of agreement with all statements amongst regular EGM and casino gamblers compared to the general gambling population. Almost a quarter (24%) of these respondents said they were prepared to bet more if there was a chance to win more. Furthermore, 20% of regular EGM & casino gamblers agreed that they "don't tell others the full extent of gambling", 18% agreed that after losing they told others they lost a smaller amount and 18% agreed that after losing they have another bet to try to win back their money.

[20] 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 secretively 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)?)

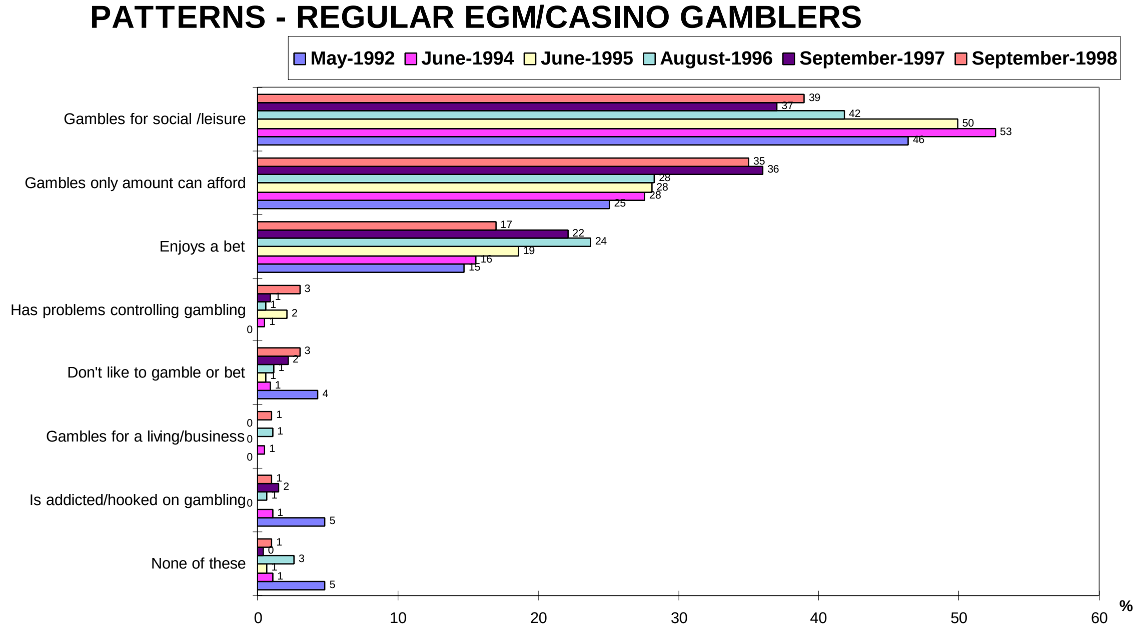
TOTAL VICTORIAN GAMBLING PATTERNS

3.22 SELF PERCEPTIONS RELATING TO GAMBLING PATTERNS - TOTAL POPULATION



BASE: Total Respondents

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



BASE: Regular EGM/Casino Gamblers

3.22 Self Perceptions - Total Population

Figure 3.22[21] highlights the self perception of gambling behaviour of the total population. All respondents were read a series of statements and asked which best describes them personally in terms of gambling behaviour. Overall, 38% of people said the statement "I am someone who does not like to gamble or have a bet" best described them.

People also tend to perceive the following about their gambling behaviour:

- ✓ Gamble for social/leisure (22%);
- ✓ Enjoys a bet/flutter (19%); and
- ✓ Gambles only an amount can afford (18%).

Less than 1% of people said the statements "I gamble for a living", "I have a problem controlling my level of gambling" or "I am addicted to/hooked on gambling" best described themselves.

Those who described themselves as someone who doesn't like to bet or gamble were most likely to be:

- ✓ Not in paid employment (42%);
- ✓ Singles (45%);
- ✓ Students (51%);
- ✓ Those born in the Asia/Pacific region (49%); and
- ✓ People who haven't gambled in the last 12 months (84%).

3.23 Self Perceptions - Regular EGM/Casino Gamblers

Figure 3.23 opposite displays the self perceptions relating to gambling patterns by regular EGM/Casino gamblers.

A very different pattern emerged when regular EGM/Casino gamblers were asked how they perceived themselves. Only 3.2% said they would describe themselves as someone who does not like to gamble or bet. However, 39% said they gamble for social reasons, while 35% said they gamble only an amount which can be afforded.

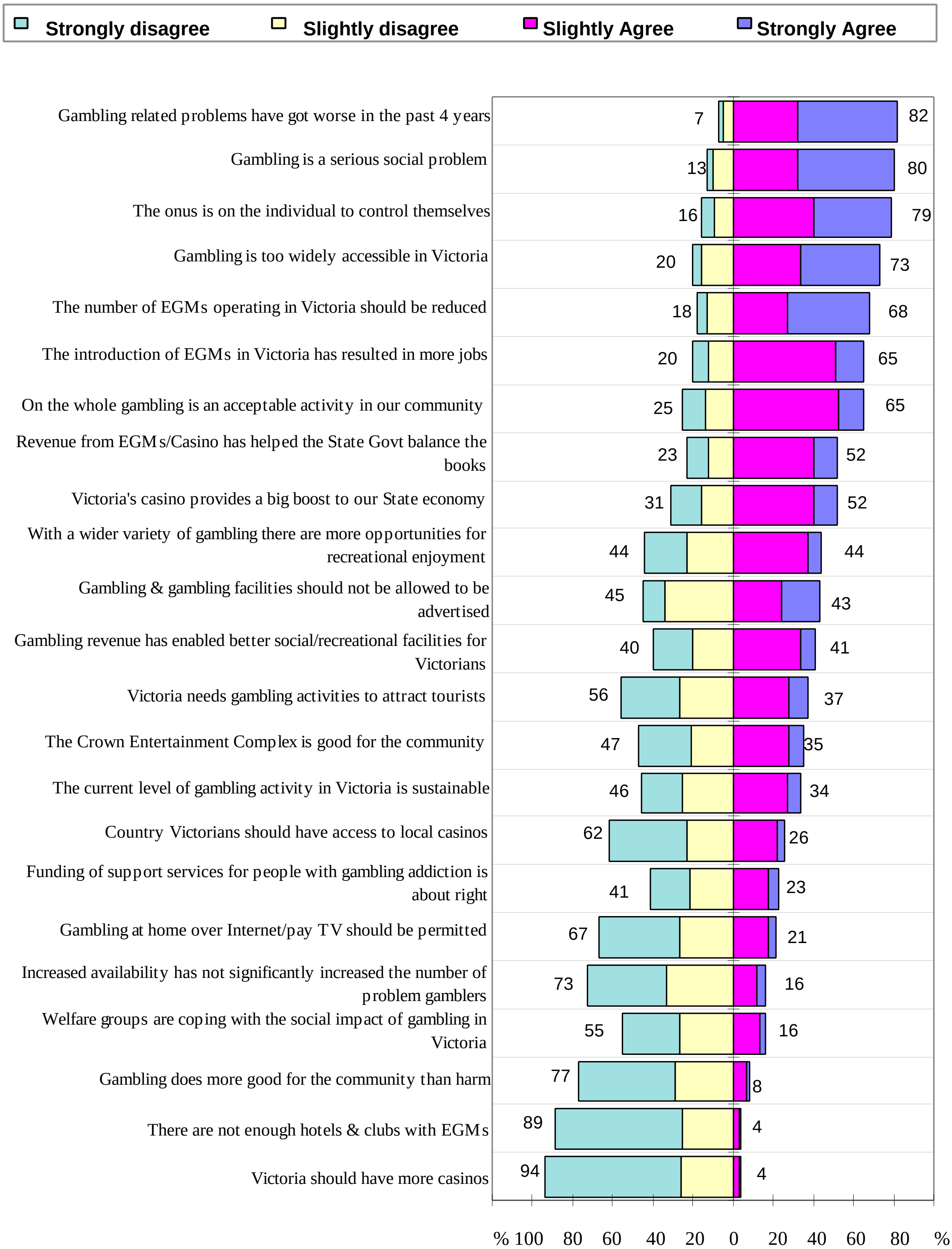
Regular EGM/Casino gamblers who said they gamble for social reasons were more likely to be:

- ✓ Males (45%);
- ✓ Singles (58%); and
- ✓ Full time workers (47%).

[21] Question 29: Which ONE of the following statements BEST describes you personally? Are you someone who....(statement list)?

TOTAL VICTORIAN GAMBLING PATTERNS

3.24 ATTITUDES TO GAMBLING



BASE: Total Respondents

3.24 Attitudes to Gambling

Figure 3.24 provides a summary of Victorians' attitudes to gambling[22]. Respondents were read a series of statements relating to attitudes to gambling and were asked to indicate the extent of their agreement with each statement[23].

Generally, there was strong agreement that:

- ✓ Gambling related problems have become worse in the past 4 years;
- ✓ Gambling is a serious social problem;
- ✓ The onus is on the individual to control themselves when gambling; and
- ✓ Gambling is too widely accessible in Victoria.

And there was moderate agreement that:

- ✓ The number of EGMs operating in Victoria should be reduced;
- ✓ The introduction of EGMs in Victoria has resulted in more jobs;
- ✓ On the whole gambling is an acceptable activity in our community;
- ✓ Revenue from EGMs/Casino has helped the State Government balance the books; and
- ✓ Victoria's casino provides a big boost to our state economy.

And a divided stance on:

- ✓ With a wider variety of gambling there are more opportunities for recreational enjoyment;
- ✓ Gambling revenue has enabled better social and recreational facilities for Victorians; and
- ✓ Gambling and gaming facilities should not be allowed to be advertised.

There was moderate disagreement that:

- ✓ The Crown Entertainment Complex is good for the community;
- ✓ Victorians needs gambling activities to attract tourists;
- ✓ The current level of gambling activity in Victoria is sustainable; and
- ✓ Funding of support services for people with gambling addiction is about right.

There was strong disagreement that:

- ✓ Gambling at home over Internet/pay TV should be permitted;
- ✓ Country Victorians should have access to local casino;
- ✓ Welfare groups are coping with the social impact of gambling in Victoria;
- ✓ Increased availability of gambling opportunities has not significantly increased the number of problem gamblers;
- ✓ Gambling does more good for the community than harm;
- ✓ There are not enough hotels and clubs with EGMs; and
- ✓ Victoria should have more casinos.

[22] 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 theses 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".
[23] See Q 31a- Q32n

TABLE 3.24 ATTITUDES TO GAMBLING - TIME SERIES[24]

	Total %	Strongly Disagree	Slightly Disagree	Neither	Slightly Agree	Strongly Agree	Can't Say
Gambling related problems have got worse in the last 4 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
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
The onus is on the individual to control themselves when gambling by knowing what he/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
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
The introduction of EGMS 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
The number of EGMs 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
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
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

[24] See *Questions 31A-N to 32A-N*

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

As a general statement, the 1998 survey found fewer respondents who *strongly* agreed or disagreed with these attitudinal statements than had been reported by the 1997 and 1996 surveys. This may suggest that Victorians are adopting slightly less polarised positions on gambling as time goes on. In particular there was a shift from "strongly agree" to "slightly agree" for the statements:

- ✓ "Gambling is a serious social problem";
- ✓ "Gambling is too widely accessible in Victoria"; and
- ✓ "Victoria's casino provides a big boost to our state economy".

There was a shift from "strongly disagree" to "slightly disagree" for the statements:

- ✓ "Gambling at home over the Internet/pay TV should be permitted";
- ✓ "Welfare groups are coping with the social impact of gambling in Victoria"; and
- ✓ "Victoria should have more casinos".

Generally, there is increasing agreement that:

- ✓ The number of EGMs operating in Victoria should be reduced;
- ✓ A wider range of gambling activities has provided more opportunities for recreational enjoyment; and
- ✓ On the whole gambling is an acceptable activity in our community.

Generally, the level of agreement and disagreement remained relatively constant for the following statements:

- ✓ Gambling is a serious social problem;
- ✓ Country Victorians should have access to local casinos
- ✓ The current level of gambling activity in Victoria is sustainable;
- ✓ Gambling related problems have got worse in the last 4 years;
- ✓ The onus is on the individual to control themselves when gambling;
- ✓ Gambling is too widely accessible in Victoria;
- ✓ Gambling and gambling facilities should not be allowed to be advertised;
- ✓ Increased availability has not significantly increased the number of problem gamblers;
- ✓ Gambling revenue has enabled better social and recreational facilities for Victorians;
- ✓ There are not enough hotels and clubs with EGMs.
- ✓ Gambling at home over Internet/pay TV should be permitted; and
- ✓ Victoria should have more casinos.

There was decreasing agreement that:

- ✓ Gambling does more good for the community than harm;
- ✓ The Crown Entertainment Complex is good for the community;
- ✓ The introduction of EGMs in Victoria has resulted in more jobs;
- ✓ Victoria needs gambling activities to attract tourists;
- ✓ Revenue from EGMs/Casino has helped the State Government balance the books;
- ✓ Victoria's casino provides a big boost to our state economy;
- ✓ Welfare groups are coping with the social impact of gambling in Victoria; and
- ✓ Funding of support services for people with gambling addictions is about right.

TABLE 3.24 ATTITUDES TO GAMBLING - TIME SERIES Continued

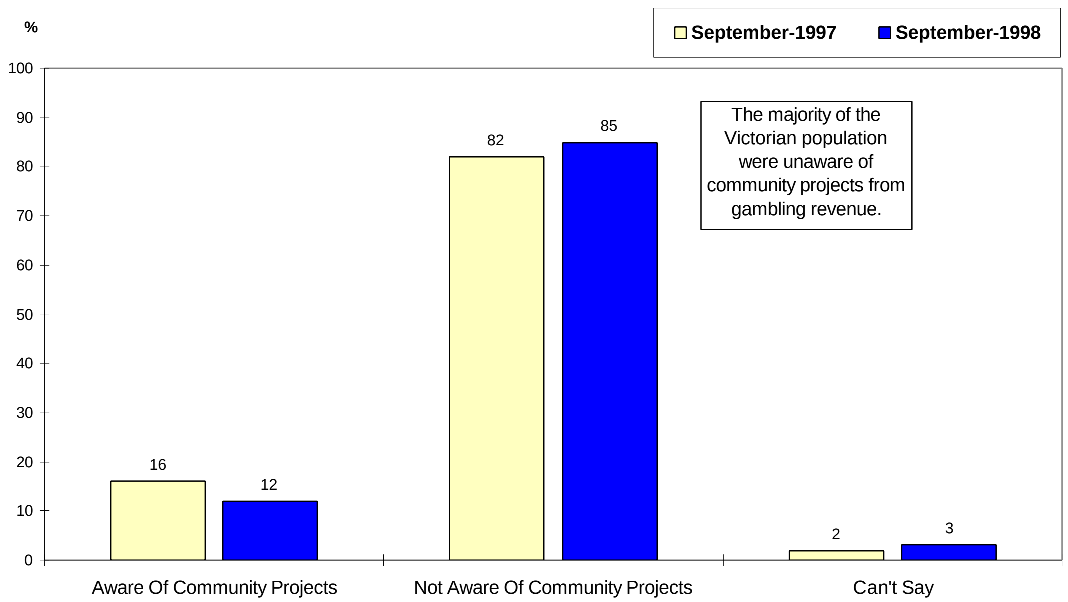
	Total %	Strongly Disagree	Slightly Disagree	Neither	Slightly Agree	Strongly Agree	Can't Say
Revenue from EGMs/casino has helped the State Govt balance the books							
1996..	100	16	6	9	32	31	5
1997..	100	12	8	5	36	21	19
1998..	100	11	12	9	40	12	17
Gambling revenue has enabled better social/ recreational facilities 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
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	54	8	30	14	6
1998..	100	26	21	13	28	7	6
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
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
With a wider variety of gambling 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
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

TABLE 3.24 ATTITUDES TO GAMBLING - TIME SERIES Continued

	Total %	Strongly Disagree	Slightly Disagree	Neither	Slightly Agree	Strongly Agree	Can't Say
Funding of support services for people with gambling addictions is about right							
1996...	100	27	16	21	12	6	18
1997...	100	27	16	4	19	12	23
1998...	100	19	22	12	18	5	24
Country Victorians should have access to local casinos							
1996...	100	54	15	9	14	5	2
1997...	100	46	20	4	22	5	4
1998...	100	39	23	8	22	4	4
Gambling at home over the Internet/pay TV should be permitted.							
1996...	100	70	8	8	7	5	2
1997...	100	52	17	4	17	5	6
1998...	100	40	27	8	18	3	5
Welfare groups are coping with the social impact of gambling in Victoria							
1996...	100	41	17	14	8	4	15
1997...	100	38	20	4	14	5	20
1998...	100	28	27	10	13	3	20
Increased availability has not significantly increased the number of problem gamblers							
1996...	100	44	24	7	10	10	4
1997...	100	56	20	1	10	5	7
1998...	100	40	33	5	12	4	7
Gambling does more good for the community than harm							
1996...	100	33	44	13	7	0	3
1997...	100	57	23	5	9	3	3
1998...	100	48	29	8	7	1	5
There are not enough hotels and clubs with EGMs							
1996...	100	75	11	7	2	3	2
1997...	100	75	17	1	2	3	3
1998...	100	64	25	3	3	1	4
Victoria should have more casinos							
1996...	100	89	6	1	2	1	0
1997...	100	80	14	1	3	2	1
1998...	100	68	26	2	3	1	1

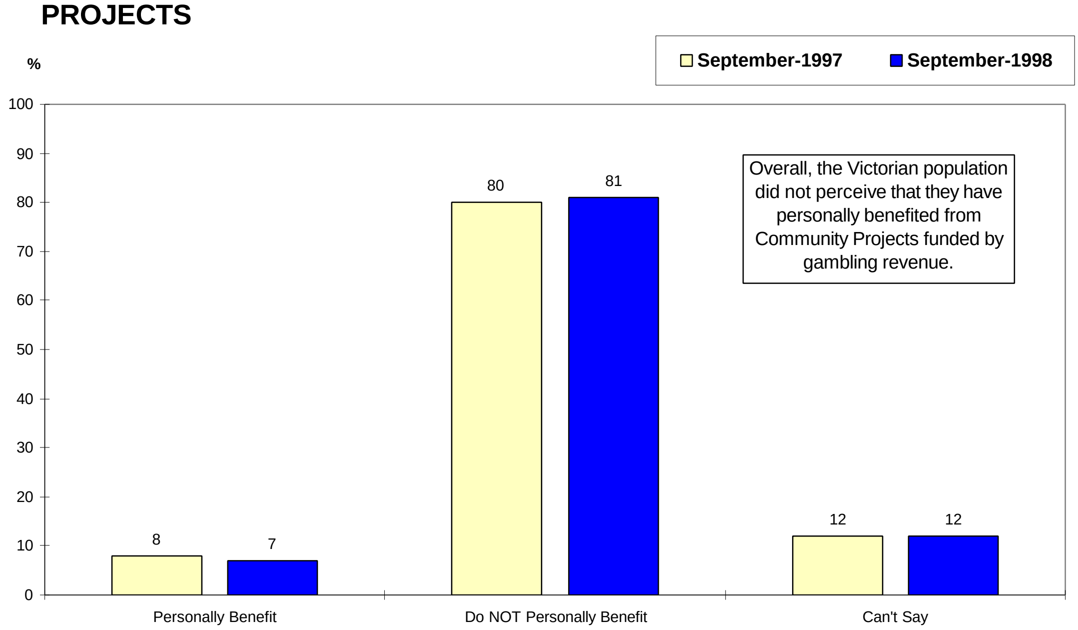
TOTAL VICTORIAN GAMBLING PATTERNS

3.25 AWARE OF COMMUNITY PROJECTS FROM GAMBLING



BASE: Total Respondents

3.26 PERCEPTIONS OF PERSONALLY BENEFITING FROM COMMUNITY PROJECTS



BASE: Total Respondents

3.25 Awareness of Community Projects From Gambling Revenue

Figure 3.25[25] 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 they were aware of.

Respondents were able to name Gambler's Anonymous / Gamblers Helpline (4%), Hospitals (2%), the Albert Park Sports & Aquatic Centre (2%). Most (85%) of respondents were unable to name any community projects funded by gambling revenue.

3.26 Personally Benefit From Community Projects

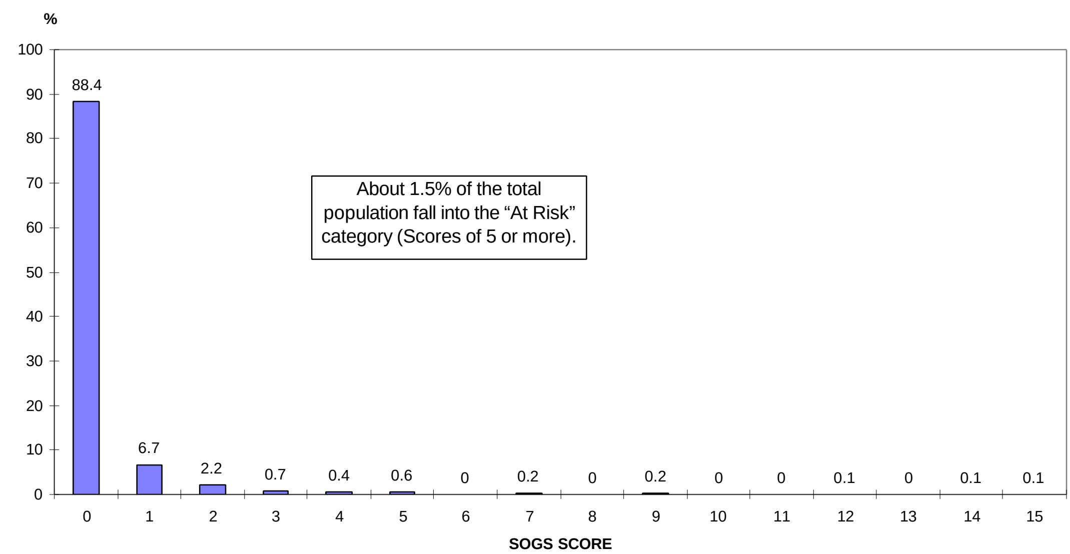
Figure 3.26[26] opposite displays the level of perceptions of personal benefits from community projects funded by gambling revenue.

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 (7% benefited, 81% not benefited). Twelve percent were unable to say whether or not they had personally benefited from any of these projects.

[25] 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?
[26] Question 33B: Do you believe that you personally benefited from these initiatives?

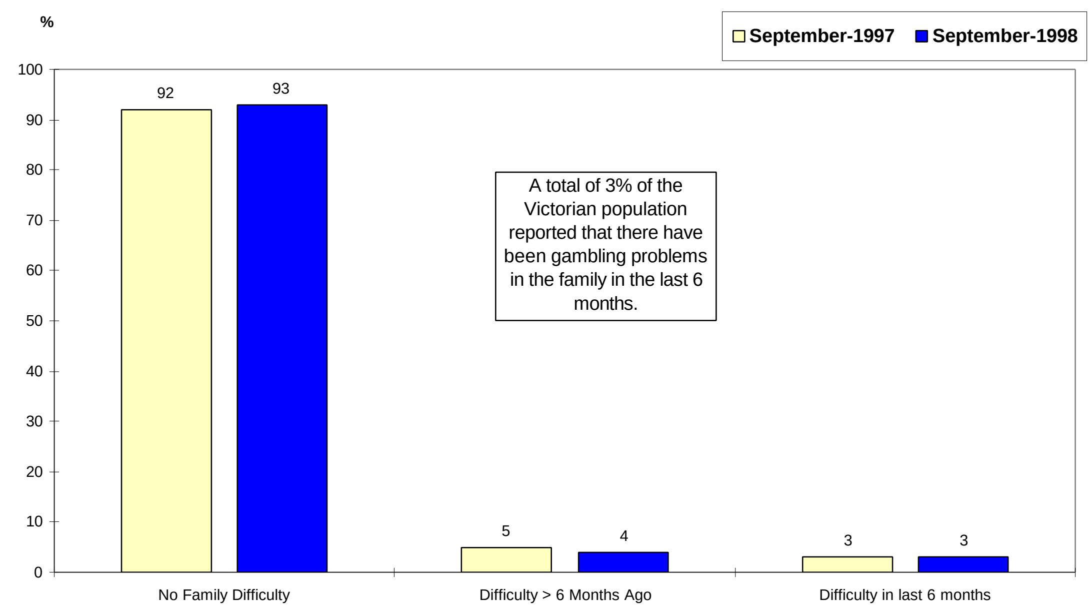
TOTAL VICTORIAN GAMBLING PATTERNS

3.27 PROBLEM GAMBLING (SOGS DISTRIBUTION)



BASE: Total Respondents

3.28 GAMBLING PROBLEMS IN THE FAMILY



BASE: Total Respondents

3.27 Problem Gambling

As mentioned in Section 2.3, the South Oaks Gambling Screen (SOGS) which has been adapted for Australia, was used to identify the gambling risk levels amongst the total Victoria population. 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 the total population score with that for people who have gambled in the last 6 months:

TABLE 3.27

SOGS Score		Total Population	Gambled in Last 6 Months
Zero	....	88.4%	72.6%
One	....	6.7%	15.9%
Two	....	2.2%	5.3%
Three	....	0.7%	1.7%
Four	....	0.4%	0.9%
Five	....	0.6%	1.3%
Seven	....	0.2%	0.6%
Nine	....	0.2%	0.6%
Eleven	....	*	0.1%
Twelve	....	0.1%	0.1%
Fourteen		0.1%	0.2%
Fifteen plus	....	0.1%	0.2%
Total	**..........**	***100%***	***100%***

* Less than 0.1%

The results show that some 1.5% of the total population in Victoria score in the "At Risk" category on the SOGS. This compares with recent results in other states in Australia:

- ✓ WA 1994 (0.56% at risk);
- ✓ Tasmania 1994 (1.14% at risk);
- ✓ NSW 1995/1996 (2.59% at risk, revised 1998);
- ✓ South Australia 1996 (1.21% at risk);
- ✓ Tasmania 1996 (2.84% at risk); and
- ✓ NSW 1997/1998 (2.89% at risk).

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).

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.

In order to understand the 1.7% rise in the prevalence estimate in Tasmania from 1994 to 1996 (in the context of stable per capita spending over the period and no increased availability of EGM venues other than the two casinos) it was suggested that the change reflected the increased community concern in advance of the introduction of EGMs for the clubs and hotels about to take place in the following month.

The present estimate of prevalence for Victoria can be considered in the context of the NSW figures. In NSW the per capita spend on gambling has in the past been higher than in Victoria and the total number of EGMs (a form of gambling that together with betting and casino gaming shows the strongest association with at risk scores on the SOGS) in NSW is over three times higher (totalling almost 90,000). A case can therefore be made that one would expect the prevalence to be lower in Victoria than the 2.89% found in NSW. In the same way it can be argued that one would expect the Victorian prevalence to be higher than that found in South Australia, (1.21%). In the context of the results in other States in Australia and given a similar result in Victoria in 1997, the 1998 estimate that about 1.5% of the Victorian population are at risk of significant gambling related problems appears to be reliable and valid.

3.28 Gambling Problems in the Family

Tables 3.28A and 3.28B below show the proportion of the adult Victorian population (inferred from the weighted survey response) and NSW/Tasmanian populations respectively who would respond "yes" to the question "Have you, yourself or any of your family members ever experienced difficulties with excessive gambling?"[27] The survey respondents were also asked whether the difficulties were experienced "within the last 6 months or more than 6 months ago?"[28]

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 4% would consider that there had been gambling difficulties in the family more than six months ago.

TABLE 3.28A

	1997	**1998**
Family member ever experiencing difficulties with excessive gambling	7%	7%
Family member experiencing difficulties with excessive gambling in the past 6 months	2%	3%

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

- ✓ Those aged 40-49 years (11%);
- ✓ Acknowledged Heavy Gamblers (16%);
- ✓ Those with combined respondent/partner income of $20,000 - $40,000 (12%);
- ✓ Skilled Workers (12%); and
- ✓ From households classified as one parent households with dependent children (18%).

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%

[27] Q.30j Have you, yourself or any of your family members ever experienced difficulties with excessive gambling?
[28] Q. 30k Was that during the last 6 months or more than 6 months ago?

PROFILE OF "AT RISK" GAMBLERS

TABLE 3.29

	Total Population	**NO RISK (Score 0 to 4) (n=1711)**	**AT RISK (Score 5+) (n=26)**
GENDER			
Male	49%	48%	72%
Female	51%	52%	28%
AGE			
Average Age	44 yrs	44 yrs	38 yrs
RESPONDENT'S OCCUPATION			
TOTAL FULL TIME	**44%**	**44%**	**57%**
Professionals / Executives	10%	10%	6%
Owners/White Collar Worker	18%	18%	19%
Farm Owner	1%	1%	-
Skilled Workers	10%	10%	33%
Semi-skilled workers	3%	3%	-
Unskilled workers / Other	2%	2%	-
TOTAL PART TIME	**15%**	**15%**	**17%**
TOTAL NOT IN PAID WORKFORCE	**41%**	**41%**	**26%**
Household duties	10%	10%	-
Student	6%	6%	4%
Self Supporting Retiree	5%	5%	3%
Pensioner	18%	18%	16%
Unemployed	3%	3%	4%
LOCATION			
Melbourne Metropolitan	73%	73%	79%
Other Victoria non metropolitan	27%	27%	21%
SOGS SCORE			
(0-4)	98.5%	100%	-
(5-20)	1.5%	-	100%
SEGMENT			
Disinterested Gambler	20%	20%	8%
Occasional Gambler	33%	34%	8%
Social Gambler	9%	9%	-
Acknowledged Heavy Gambler	5%	4%	61%
Committed Heavy Gambler	8%	8%	23%

Higher than average compared to the total population

Lower than average compared to the total population

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
(0-4 SOGS Score)

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

At Risk
(5 or more SOGS Score)

- ✓ A higher than average proportion of males;
- ✓ A younger than average age profile (average age of 38 years)
- ✓ A higher proportion of skilled workers; and
- ✓ More likely to be an Acknowledged Heavy Gambler or Committed Heavy Gambler.

3.30 Victorian Gambling Patterns - Summary

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

- ✓ For the second year in succession, the mean number of gambling activities undertaken by gamblers decreased, returning to levels last recorded in 1994;
- ✓ There was a substantial decrease in gambling participation rates overall in 1998. An increase in gambling participation was observed in 1996, when the level of participation in gambling activities was 87%. Similar levels were recorded in 1997, when 86% of Victorians had participated in gambling activities. In 1998 however, participation in gambling activities decreased, with just over three quarters (76%) of Victorians participating in at least one form of gambling in the last 12 months;
- ✓ Participation in EGM gambling has declined over the past year, falling slightly to 31% in 1998 from 39% in 1997;
- ✓ Actual expenditure on regulated forms of gambling in Victoria for the financial year ending June 1998 was 3,195 million dollars, which is a 15% increase over the previous year. This expenditure amounts to an average loss per week of $17.55 for each adult Victorian;
- ✓ There is no evidence of a substantial change in frequency of participating in gambling activities since 1992. On average, gamblers participated in some form of gambling activity once a week (1.0 times per week);
- ✓ There was a decrease in the amount of time gamblers spent gambling in 1998, with gamblers spending an average of 30 minutes per week on gambling activities (down from 38 minutes per week in 1997);
- ✓ There was a slight increase in the amount gamblers were prepared to outlay on gambling activities between 1997 and 1998, with average weekly outlay on gambling rising to $18 in 1998;
- ✓ Gamblers were prepared to outlay $31 on average each time they participated in EGM gambling in 1998, a 10% increase since 1997 when the average outlay on this activity was $27;
- ✓ Gamblers were prepared to outlay $53 on average each time they participated in casino gambling in 1998, a substantial increase since 1997 ($41) but similar to 1995 levels ($58);
- ✓ For 38% of gamblers, the source of expenditure on gambling originated from their pension, wage or job. Very few (2%) have a special gambling budget;
- ✓ While gamblers appear prepared to outlay more money each week on gambling activities, the perceived proportion won back on gambling showed a slight decrease in 1998, to 19% overall, representing a marginal change since 1997, when the perceived proportion won back on gambling activities was 20%;
- ✓ Just under a third (31%) of Victorians claim to have gambled in the last 7 days. Of these, 60% claim to have lost money ($41 on average), whilst 20% reported they won money ($129 on average). Seven percent claimed to have broken even on gambling activities in the past 7 days;
- ✓ The appeal of participating in activities such as playing EGMs and going to the casino remained similar to 1997 levels for gamblers in 1998;

- ✓ The main motivation for gambling was the thrill or dream, of winning particularly for low involvement activities such as lotto, scratch tickets and Club Keno. The secondary motivator was social reasons, particularly for high involvement activities such as casino, EGMs, bingo and informal card gambling. In 1998, gambling was the favourite recreational activity for 19% of regular EGM/Casino gamblers;

- ✓ Self perceptions of gambling behaviour revealed that overall, people consider they gambled primarily for social/leisure reasons (22%) or because they enjoyed a bet/flutter (19%). Eighteen percent said they gambled only an amount they could afford. Only 1% of regular EGM/Casino gamblers said they were addicted to, or hooked on gambling;

- ✓ Generally, there was strong agreement that gambling problems were worsening, and that it was a serious social problem. People also agreed that the onus is on the individual to control themselves when gambling;

- ✓ There was also the belief that gambling was too widely accessible in Victoria;

- ✓ However, it was also strongly held that the introduction of EGMs in Victoria resulted in more jobs and that the Casino provided a big boost to our state economy;

- ✓ There was strong disagreement that welfare groups are coping with the social impact of gambling and that increased availability of gambling opportunities has not significantly increased the number of problem gamblers. There was also strong disagreement that gambling does more good for the community than harm, and that Victoria should have more casinos;

- ✓ The level of awareness of community projects funded by gambling revenue was very low amongst the Victorian population (12%). Additionally, the Victorian public did not generally believe that they had benefited from community projects funded by gambling revenue - 81% believed they had not personally benefited from such projects;

- ✓ Use of the South Oaks Gambling Screen for problem gamblers showed that some 1.5% of Victorian adults scored in the “At Risk” category.

- ✓ Three percent of the total population considered that there have been gambling difficulties in their family during the preceding 6 months. A further 4% considered that there had been gambling difficulties in their family more than 6 months ago;

- ✓ The demographic profile of gamblers closely reflected that of the general population overall; and

- ✓ The demographic profile of the “At Risk” group showed a higher than average proportion of males, a younger age profile, a higher than average proportion of skilled workers, and those in the Acknowledged Heavy Gamblers and Committed Heavy Gamblers segments.

SECTION 4

CASINO GAMBLING PATTERNS

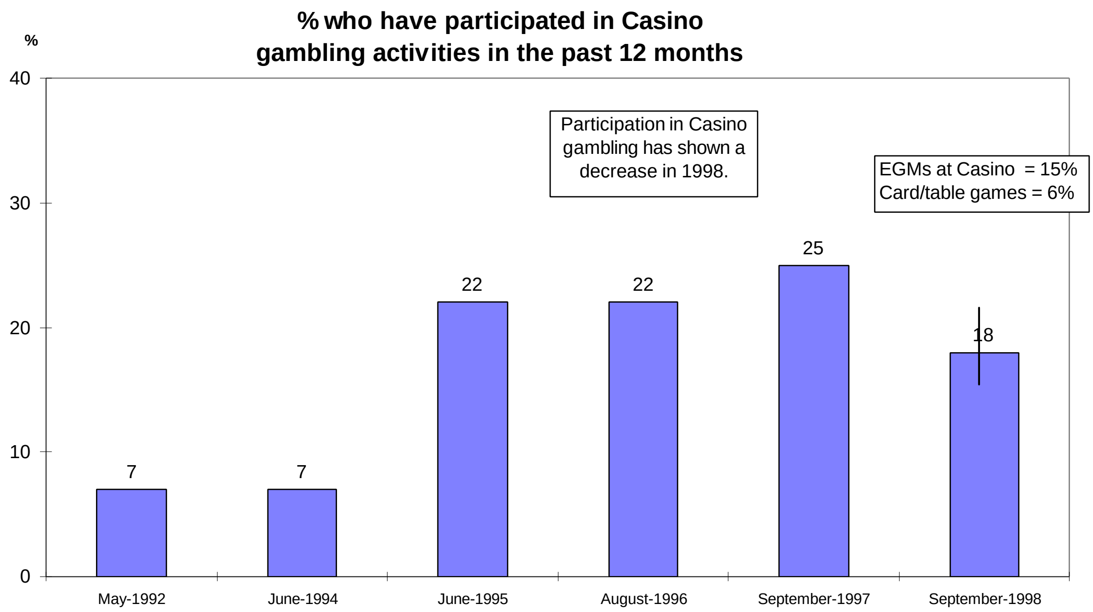
4. CASINO GAMBLING PATTERNS

Section 4 provides an analysis of casino gambling Patterns, including:

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

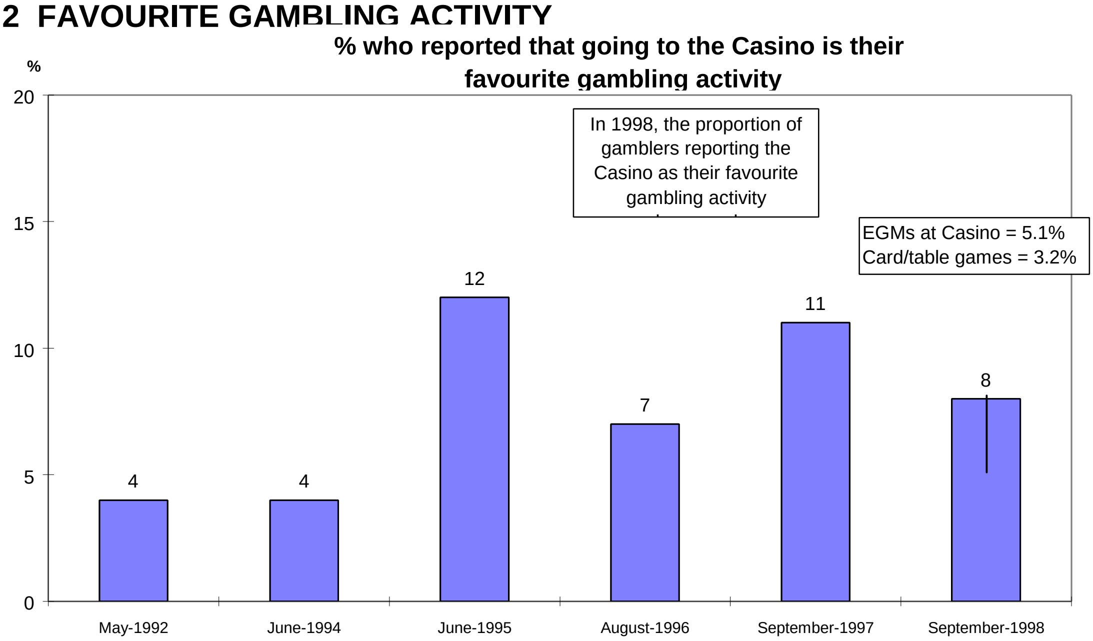
CASINO GAMBLING PATTERNS

4.1 PARTICIPATION RATES



BASE: Total Respondents

4.2 FAVOURITE GAMBLING ACTIVITY



BASE: Total Gambled in Last 12 Months

4.1 Participation Rates

Figure 4.1[29] opposite highlights the participation rates in casino gambling activities over the last 12 months.

For the first time since the Crown Casino opened in Melbourne, participation in casino gambling activities decreased, falling to 18%. Fifteen percent of this activity was accounted for by EGM gambling at the Casino, 6% on other gambling activities at the Casino. The proportion of gambling on EGMs and other casino games was similar to that recorded in previous years, where EGM gambling was also the most popular activity undertaken at the Casino. Of those who gambled at the Casino, two thirds (67%) said they played only the EGMs there, 17% played only other (card/table) games and 16% played both EGMs and other games.

Amongst the total population of Victoria, those most *likely* to participate in casino gambling activities were found to be:

- ✓ Social Gamblers (55%);
- ✓ Committed Heavy Gamblers (41%);
- ✓ Acknowledged Heavy Gamblers (38%);
- ✓ Those born in Asia/Pacific region (33%);
- ✓ Those identified as being "At Risk" (28%);
- ✓ Those aged between 20-29 years of age (26%);
- ✓ Owners/White Collar workers (25%);
- ✓ Full time workers (21%); and
- ✓ Those who live in the metropolitan region (20%).

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

- ✓ Disinterested Gamblers (13%);
- ✓ Those who live in Country Victoria (13%);
- ✓ Pensioners (13%); and
- ✓ Those aged 70 years & over (10%).

4.2 Favourite Gambling Activity

Figure 4.2[30] provides the proportion of gamblers for whom casino gambling is their favourite gambling activity.

In 1998, 8% of gamblers said that gambling at the Casino was their favourite gambling activity. This was a decrease from 1997, when this activity was the favourite for 11% of gamblers. In 1996, only 7% of gamblers said gambling at the Casino was their favourite activity.

As was the case in previous years, playing EGMs at the Casino was more popular as a favourite gambling activity than playing other games at the Casino (5% cf 3%).

[29] Question 1. Which of the following activities or games have you played or gambled on in the past 12 months?

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

PROFILE OF CASINO GAMBLERS

TABLE 4.1A

	Total Population	**Casino Gamblers (Last 12 mths)** **18% of total pop**	**Reg. Casino Gamblers (Once a mth+)** **3% of total pop**
GENDER			
Male	49%	50%	60%
Female	51%	50%	40%
AGE			
Average Age	44 yrs	40 yrs	43 yrs
RESPONDENT'S OCCUPATION			
TOTAL FULL TIME	**44%**	**50%**	**49%**
Professionals / Executives	10%	9%	6%
Owners/White Collar Worker	18%	24%	26%
Farm Owner	1%	0.4%	1%
Skilled Workers	10%	10%	12%
Semi-skilled workers	3%	4%	4%
Unskilled workers / Other	2%	3%	4%
TOTAL PART TIME	**15%**	**14%**	**12%**
TOTAL NOT IN PAID WORK FORCE	**41%**	**36%**	**38%**
Household duties	10%	9%	5%
Student	6%	7%	10%
Self Supporting Retiree	5%	6%	13%
Pensioner	18%	13%	16%
Unemployed	3%	2%	-
LOCATION			
Melbourne Metropolitan	73%	80%	85%
Other Victoria non metropolitan	27%	20%	15%
SOGS SCORE			
(0-4)	98.5%	97.6%	98.3%
(5-20)	1.5%	2.4%	1.7%
SEGMENT			
Disinterested Gambler	20%	14%	11%
Occasional Gambler	33%	29%	15%
Social Gambler	9%	28%	45%
Acknowledged Heavy Gambler	5%	10%	9%
Committed Heavy Gambler	8%	19%	19%

Higher than average compared to the Total Population

Lower than Average compared to the Total Population

Table 4.1A opposite provides a profile of casino gamblers and regular casino gamblers (who participate in this activity once a month or more) compared with the total population. A description follows:

Casino Gamblers

When analysing those who gambled at the Casino in the last 12 months, casino gamblers were likely to consist primarily of the following groups:

- ✓ Even distribution of males and females;
- ✓ Younger age profile;
- ✓ More likely to be Owner/White collar worker; and
- ✓ More likely to be from the Social Gamblers, Acknowledged Heavy Gamblers and Committed Heavy Gamblers segments.

Regular Casino Gamblers

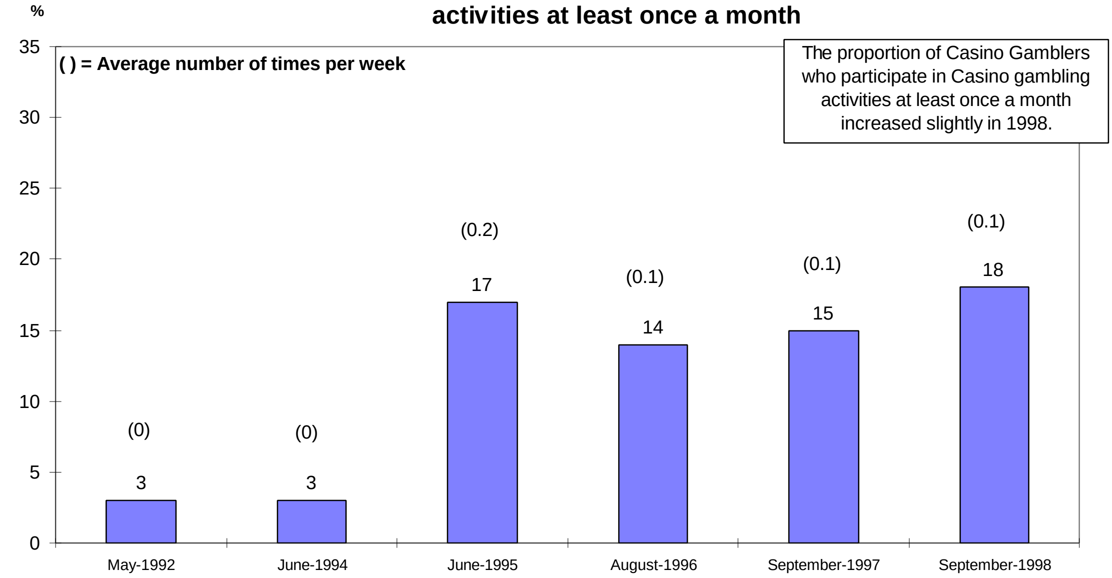
Regular casino gamblers (those who gambled at least once a month) were most likely to be:

- ✓ Self supporting retirees;
- ✓ Living in metropolitan areas;
- ✓ Those identified as being "At Risk";
- ✓ Committed Heavy Gamblers; and
- ✓ Social Gamblers.

CASINO GAMBLING PATTERNS

4.3 FREQUENCY

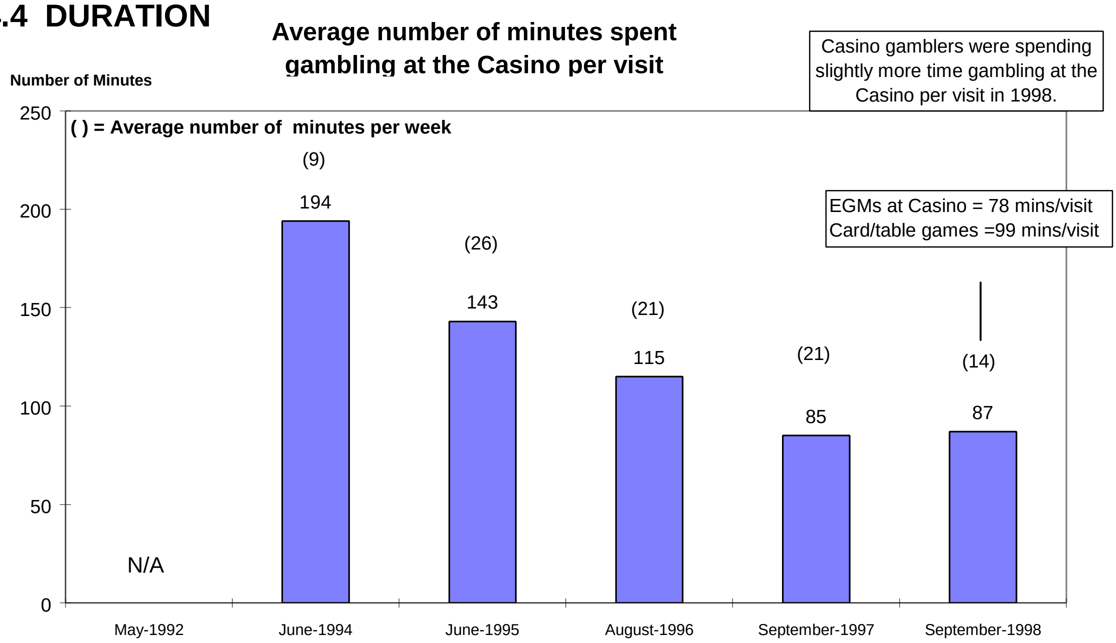
% of Casino Gamblers who participate in Casino gambling activities at least once a month



BASE: Total Gambled At Casino in Last 12 Months

4.4 DURATION

Average number of minutes spent gambling at the Casino per visit



BASE: Total Gambled At Casino in Last 12 Months

4.3 Frequency

Figure 4.3[29] opposite shows the percentage of casino gamblers who participate in casino gambling activities at least once a month (May 1992 to September 1998). In 1998, the frequency of regular participation in casino gambling activities increased slightly with 18% of casino gamblers participating in this activity once a month or more. In 1998, on average, casino gamblers participated in this activity 0.14 times per week.

4.4 Duration

Figure 4.4[30] highlights the average number of minutes casino gamblers spent gambling on casino activities each time they participate in such activities. The amount of time dedicated to casino gambling activities fell in 1998, down to an average of 14 minutes per week for all casino gamblers (down from 21 minutes in 1997). Casino gamblers who played EGMs spent slightly less time per session playing EGMs at the Casino than casino gamblers who played other casino games spent playing those other games (78 minutes cf 99 minutes). The average amount of time spent gambling at the Casino each visit rose slightly in 1998, to 87 minutes per time (up from 85 minutes per time in 1997).

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

- ✓ Those identified as being "At Risk" (115 mins);
- ✓ Pensioners (108 mins);
- ✓ Couples with no children (109 minutes);
- ✓ Skilled workers (107 mins);
- ✓ Social Gamblers (107 mins);
- ✓ Those who live in the country (97 mins); and
- ✓ Acknowledged Heavy Gamblers (96 mins).

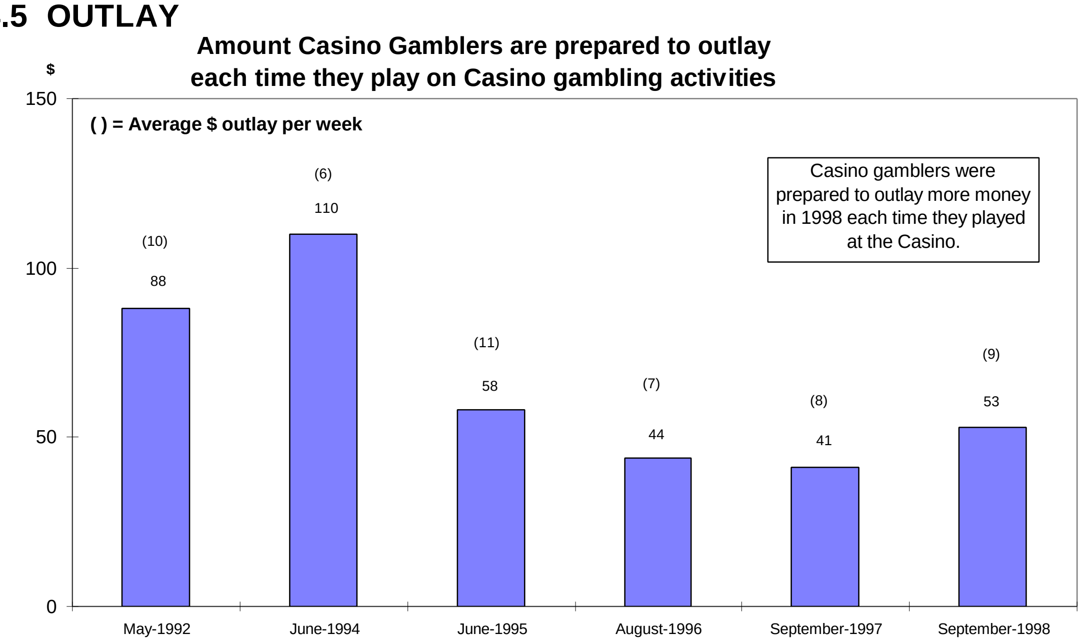
In 1998, the *lowest* amount of time spent gambling at the Casino on each visit was by the following groups:

- ✓ Part time workers (62 mins);
- ✓ Occasional Gamblers (64 mins);
- ✓ Students (59 minutes); and
- ✓ Those who are unemployed (24 mins).

[29] Question 3J/3K "How often do you play casino gambling activities?"
[30] Question 4I/4J: And each time you play. casino gambling activities. how much time do you spend playing this activity?

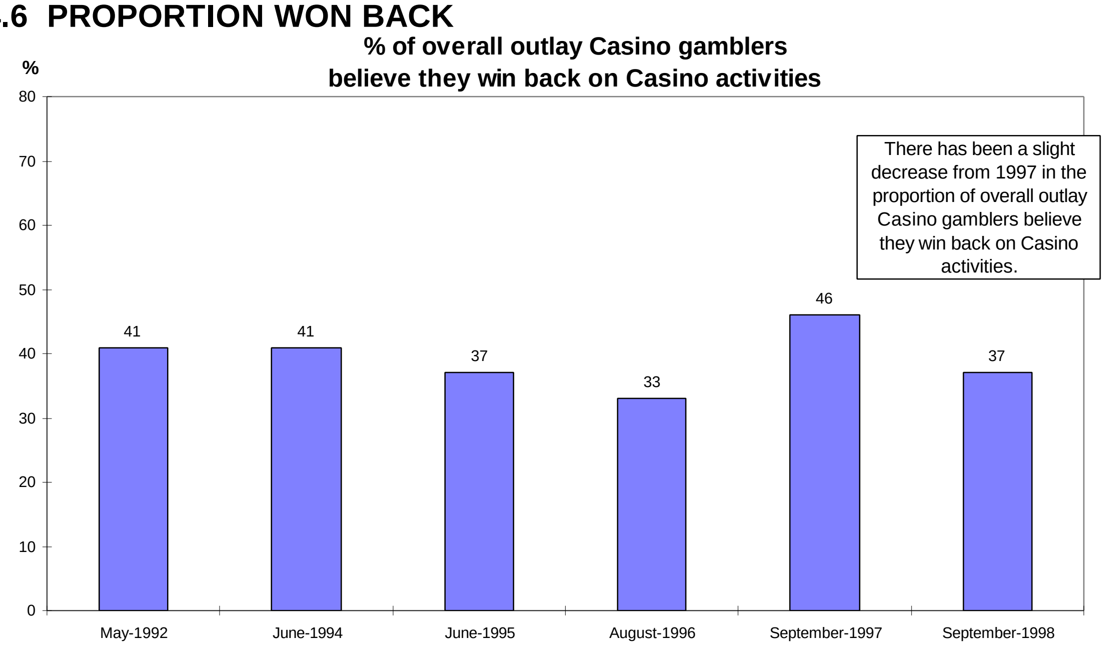
CASINO GAMBLING PATTERNS

4.5 OUTLAY



BASE: Total Gambled At Casino in Last 12 Months

4.6 PROPORTION WON BACK



BASE: Total Gambled At Casino in Last 12 Months

4.5 Outlay

Figure 4.5[31] provides a time series analysis of how much casino gamblers are prepared to outlay each time they participate in casino gambling activities. As mentioned previously, both the frequency and duration of casino gambling increased slightly in 1998. Also, the amount gamblers are prepared to outlay on casino gambling activities increased in 1998, with the average outlay per session per gambler rising to $53 (up from $41 in 1997). Outlay on card/table games was substantially higher than outlay on EGMs ($76 cf $46).

In 1998, there was *higher* than average outlay per session by casino gamblers who were:

- ✓ Those identified as being "At Risk" ($242);
- ✓ Skilled workers ($117);
- ✓ Respondent Income greater than $50,000 per annum ($107);
- ✓ Acknowledged Heavy Gamblers ($91);
- ✓ Couples with no children ($83).
- ✓ Aged 30-39 years ($75);
- ✓ Males ($71); and
- ✓ Full time workers ($71).

4.6 Proportion of Outlay Reported as Won Back

Figure 4.6[32] provides a time series analysis of the proportion of outlay casino gamblers report as won back. Overall the perceived return on the money outlaid on casino gambling has decreased in the last 12 months.

In 1998, Casino gamblers perceived the return on their outlay to be around 37% when gambling at the Casino. This decrease in perceived return on casino gambling may help to explain why gambling at the Casino was the favourite gambling activity for fewer gamblers in the 1998 survey.

The expected proportion won back on card/table games (58%) was substantially higher than expected returns on EGM gambling at the Casino (33%).

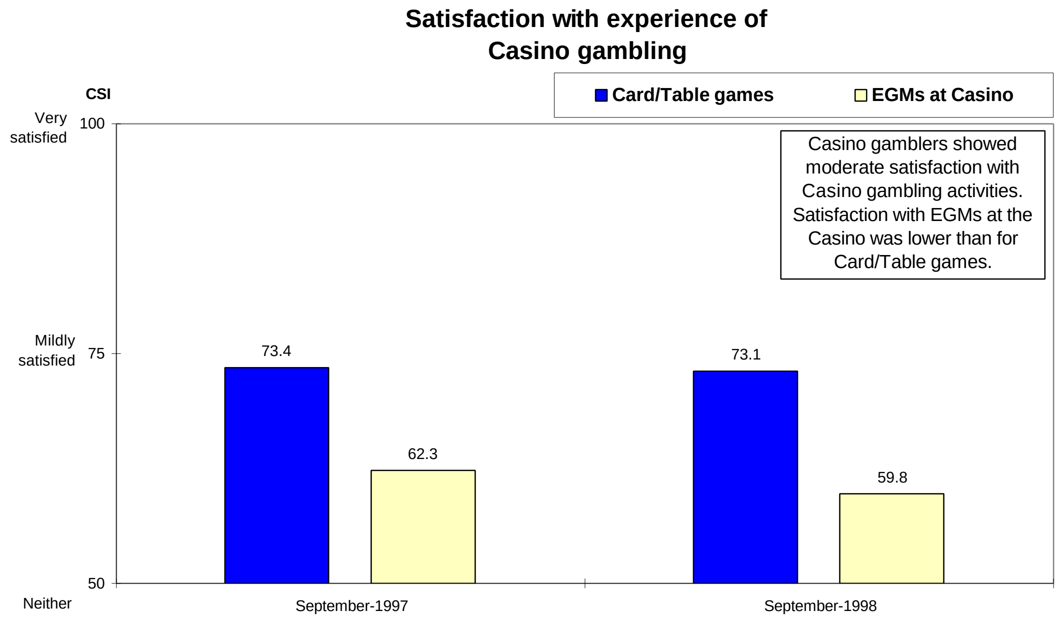
There was a perception of *higher* proportions won back on casino activities amongst the following groups:

- ✓ 30-39 years (51% proportion won back); and
- ✓ Skilled workers (48% proportion won back);
- ✓ Social Gamblers (47% proportion won back); and
- ✓ Acknowledged Heavy Gamblers (42% proportion won back).

[31] Question 5J/5K And each time you gamble at the Casino, on average, what is the total dollar value you are prepared to outlay or would outlay on these activities?
[32] Question 6C "On average, what percentage of your overall outlay do you win back on Casino Games?"

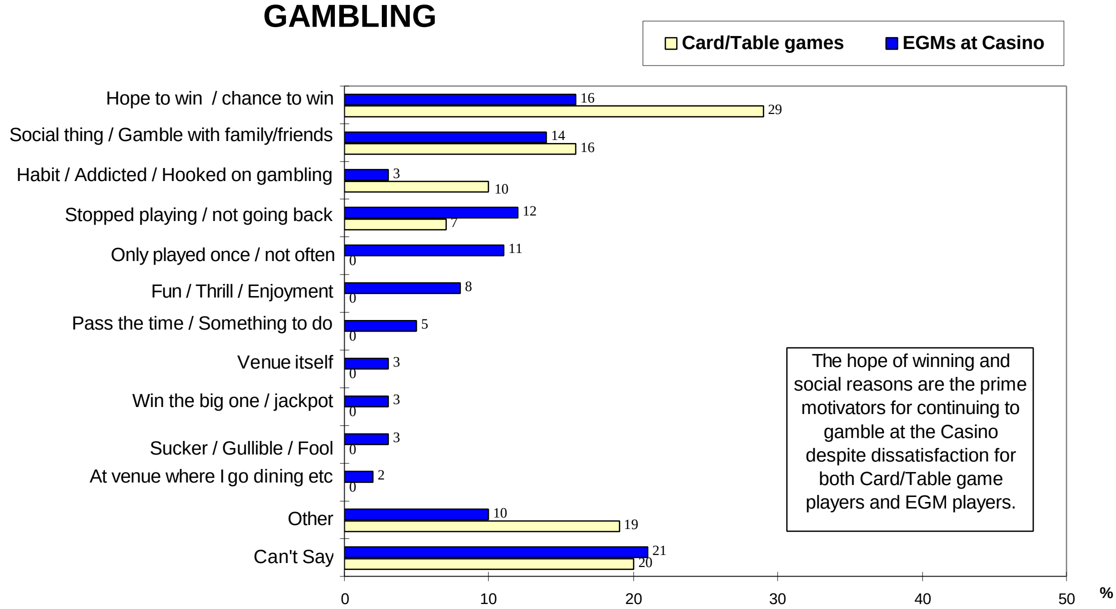
CASINO GAMBLING PATTERNS

4.7 SATISFACTION



BASE: Total Gambled At Casino in Last 12 Months

4.8 IF DISSATISFIED, WHY CONTINUE CASINO GAMBLING



BASE: Total Dissatisfied with Casino Gambling Activities

4.7 Satisfaction

Figure 4.7[33] shows the level of satisfaction with the experience of casino gambling activities. Overall, casino gamblers showed moderate satisfaction with casino gambling activities (CSI=64). Casino gamblers showed a higher level of satisfaction with card or table games (CSI=73) played at the Casino than with EGMs played at the Casino (CSI=60).

The level of satisfaction with EGM gambling at the Casino was much lower amongst those identified as being At Risk (CSI=45).

4.8 If Dissatisfied - Why Continue

Figure 4.8[34] shows the reasons why casino gamblers continue the activity despite being dissatisfied with it. The main reasons for continuing *EGM casino* gambling when dissatisfied were:

- ✓ In the hope of winning (16%);
- ✓ Social reasons (14%); and
- ✓ Only play occasionally (11%).

The main reasons for continuing *Card/Table casino* gambling when dissatisfied were:

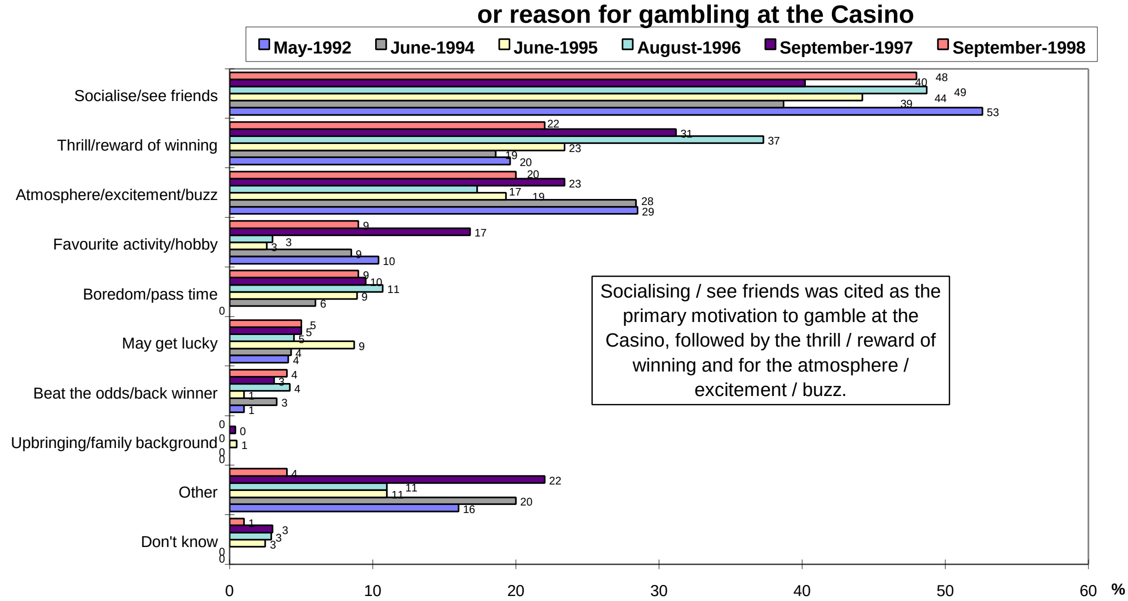
- ✓ In the hope of winning (29%);
- ✓ Social reasons (16%); and
- ✓ Addicted/hooked on it (10%).

[33] Question 8C "Would you say that you are satisfied or dissatisfied with your experience of gambling at the Casino"
[34] Question 9J / 9k "Why do you keep playing casino gambling activities if you are dissatisfied?"

CASINO GAMBLING PATTERNS

4.9 MOTIVATIONS

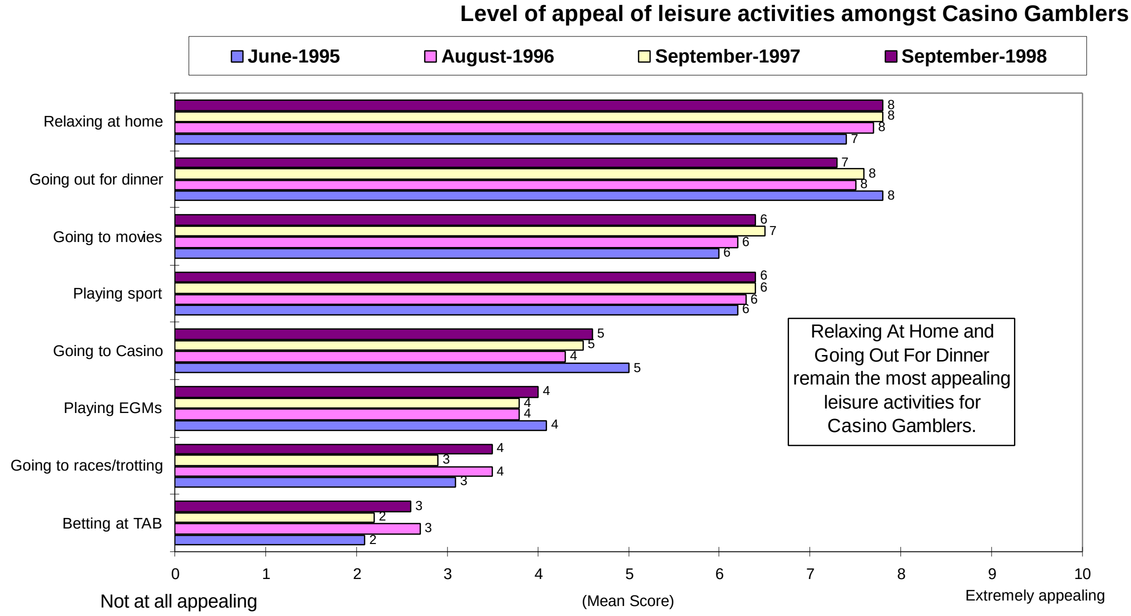
% of Casino Gamblers who report that this is a main motivation or reason for gambling at the Casino



BASE: Total Gambled At Casino in Last 12 Months

4.10 APPEAL OF LEISURE ACTIVITIES

Level of appeal of leisure activities amongst Casino Gamblers



BASE: Total Gambled At Casino in Last 12 Months

4.9 Motivations

Figure 4.9 provides an analysis of the motivations for gambling amongst casino gamblers. Motivations for gambling were determined using an unprompted, multiple response question[35].

The main motivations for gambling on card or table games at the Casino were found to be:

- ✓ Social reasons (48%);
- ✓ The thrill or dream of winning (22%); and
- ✓ The atmosphere and excitement (20%).

4.10 Appeal of Leisure Activities

Figure 4.10[36] provides an analysis of the mean scores in relations to the ratings of appeal of various leisure activities amongst all casino Gamblers. Respondents were asked to rate the appeal of eight leisure activities using a scale of 1 to 10 where a 1 meant “not at all appealing” and 10 meant “extremely appealing”. In comparison with 1997, these results have remained virtually unchanged.

There was a *high* level of appeal amongst casino gamblers for the following activities:

- ✓ Relaxing at home (8.0);
- ✓ Going out for dinner (7.3); and
- ✓ Going to the movies (6.4).

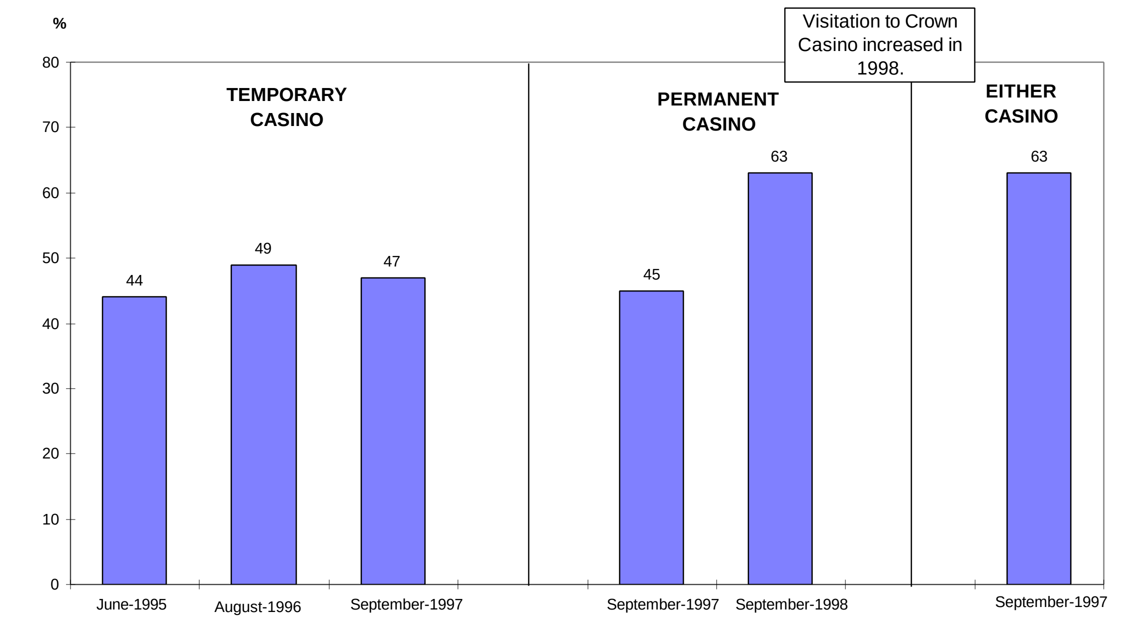
There was a *low* level of appeal amongst casino gamblers for the following activities:

- ✓ Betting at the TAB (2.6);
- ✓ Going to the races or trots (3.5); and
- ✓ Playing EGMs (4.0).

[35] Questions7J/K “What are the main motivations, attractions or reasons that you gamble (on electronic gaming machines/card table or other games) at the Casino?”
[36] 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)?”

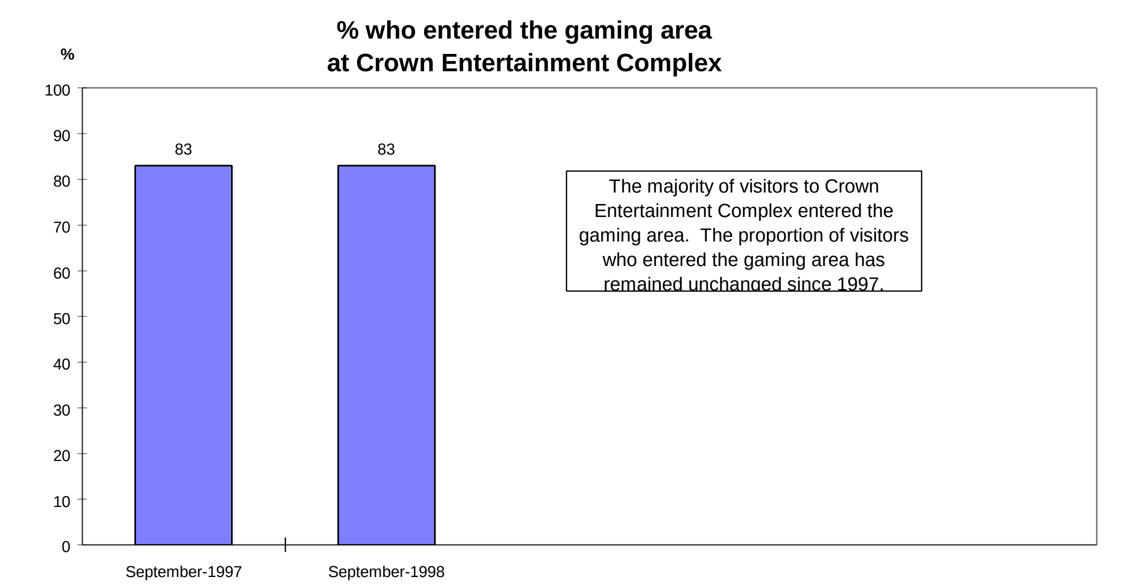
CASINO GAMBLING PATTERNS

4.11 EVER VISITED MELBOURNE'S CROWN CASINO



BASE: Total Respondents

4.12 ENTERED GAMING AREA AT CROWN ENTERTAINMENT COMPLEX



BASE: Total Visited Crown Entertainment Complex

4.11 Ever Visited Crown Casino

Figure 4.11[37] provides a time series analysis showing overall Crown Casino visitation. By September 1998, 63% of Victorians had visited the permanent Crown Casino Complex (which opened in May 1997). This compares with the 45% of Victorians who had visited by September 1997. It should be noted however that by September 1997, 63% of Victorians had visited either the temporary Casino (opened in June 1994) or the permanent Crown Casino Complex.

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

- ✓ Social Gamblers (90%);
- ✓ Students (78%);
- ✓ 20-29 year olds (77%);
- ✓ Committed Heavy Gamblers (77%);
- ✓ 18-19 year olds (76%);
- ✓ Acknowledged Heavy Gamblers (75%)
- ✓ Respondent Income of more than $50,000 per year (73%);
- ✓ Owners/White collar workers (73%);
- ✓ Employed full time (71%); and
- ✓ Those who reside in the metropolitan area (69%).

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

- ✓ Disinterested gamblers (51%);
- ✓ Self supporting retirees (51%);
- ✓ Non gamblers (50%);
- ✓ 60-69 years old (48%);
- ✓ Unskilled workers (47%),and
- ✓ Pensioners (46%);
- ✓ Those who live in the country (45%); and,
- ✓ Those who are unemployed (43%).

4.12 Entered Gaming Area at the Crown Casino

Figure 4.12[38] 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. Most (83%) had entered the gaming areas, as was the case in 1997.

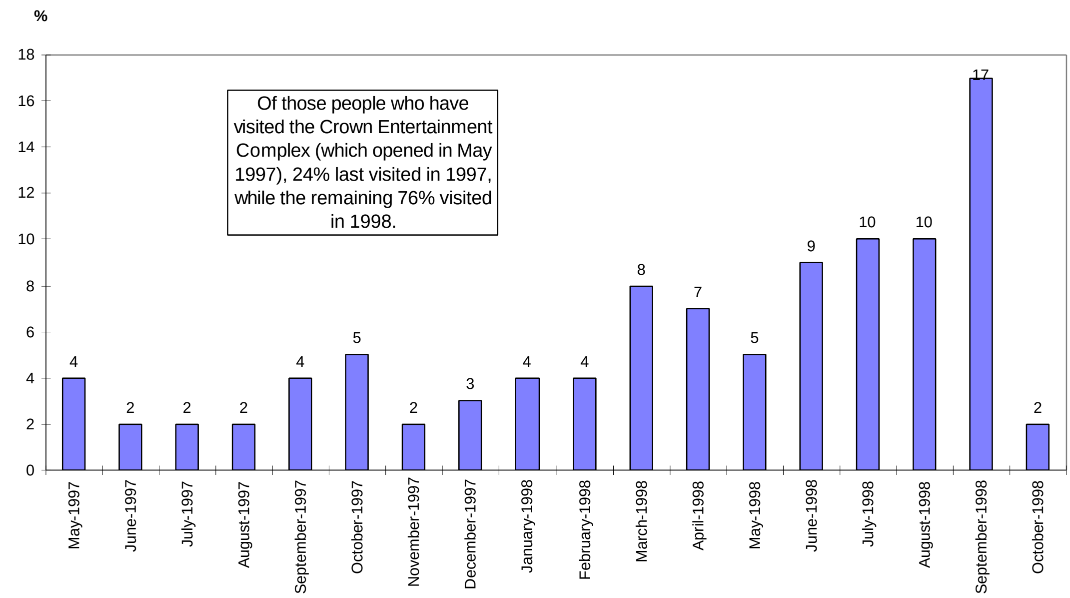
Those *more likely* to enter the gaming area were:

- ✓ Those who had gambled in the last 6 months (91%);
- ✓ Social Gamblers (96%); and
- ✓ Committed Heavy Gamblers (94%).

[37] Question. 24B: "Have you visited the new Crown Entertainment complex in Melbourne?"
[38] Question 24C: "Did you enter the gaming area at this complex?"

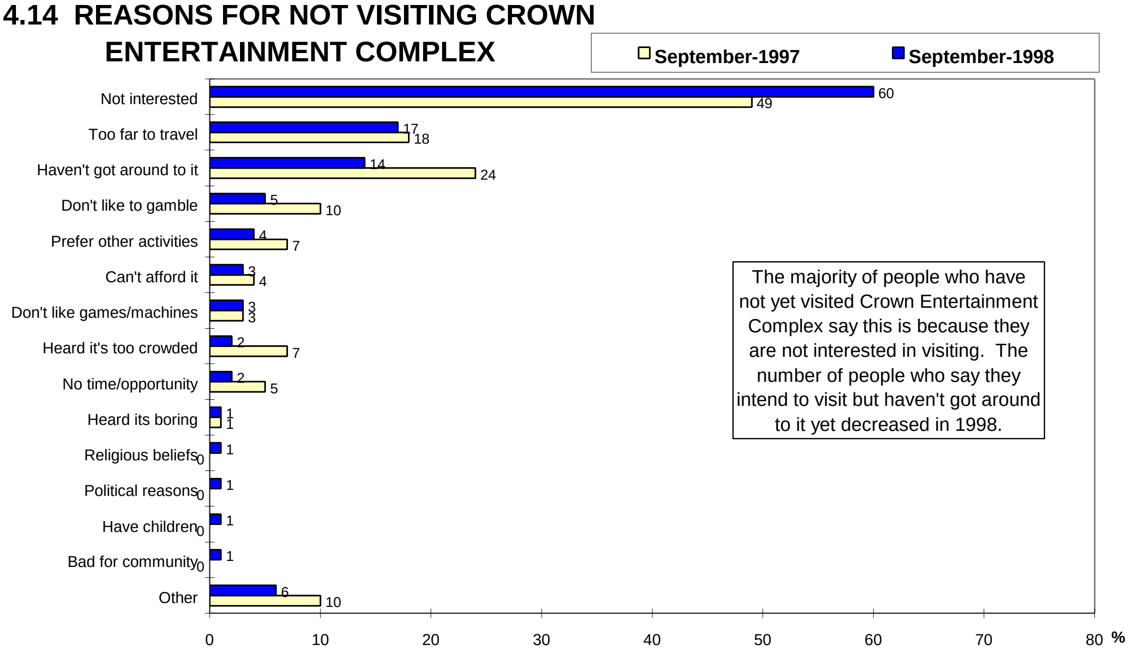
CASINO GAMBLING PATTERNS

4.13 WHEN LAST VISITED CROWN ENTERTAINMENT COMPLEX



BASE: Total Ever Visited Crown Entertainment Complex

4.14 REASONS FOR NOT VISITING CROWN ENTERTAINMENT COMPLEX



BASE: Total Not Visited Crown Entertainment Complex

4.13 When Last Visited Crown Entertainment Complex

Figure 4.13[39] provides an analysis of the length of time since the last visit to Crown Entertainment Complex. Three quarters (76%) of Crown visitors visited in 1998, 17% having done so in September. Of these, just over a quarter are active (have visited between August and October 1998 - 29%). Almost one quarter (24%) of visitors to the Crown Casino did so last in 1997.

Those *most likely* to have last visited the Crown Entertainment Complex in 1998 were:

- ✓ Unskilled workers (95%);
- ✓ Social Gamblers (91%);
- ✓ Acknowledged Heavy Gamblers (88%);
- ✓ Students (87%);
- ✓ 20-29 year olds (86%); and
- ✓ Single, Engaged or Planning to Marry (84%);
- ✓ Committed Heavy Gamblers (83%);
- ✓ Those residing in City (78%).

Those groups *more likely* than other groups to have last visited the Crown Entertainment Complex in 1997 were:

- ✓ One parent households with children no longer at home (54%);
- ✓ Those aged 70+ (38%);
- ✓ Pensioners (35%);
- ✓ 50-59 year olds (34%);
- ✓ Those residing in the country (33%); and
- ✓ UK born (32%).

4.14 Reasons For Not Visiting Crown Entertainment Complex

Figure 4.14[40] provides an analysis for the reasons given for not visiting Crown Entertainment Complex since it opened. Those who had not visited the Crown Entertainment Complex were asked why they had not done so. The majority (60%) said they had no interest in the Crown Entertainment Complex. Other commonly given reasons for not visiting the Casino were as follows:

- ✓ Too far to travel (17%);
- ✓ Don't like to gamble (5%); and
- ✓ Prefer other activities (4%).

Some 23% of Victorians have never visited the Crown Casino Complex and reported that they are not interested in doing so, while some 4% said they intended to visit, but haven't got around to it yet. In 1997 the corresponding figures were 42% and 13%, suggesting that even amongst those who said in 1997 that they were not interested in visiting the Casino, a significant proportion have, in fact, done so, as illustrated below:

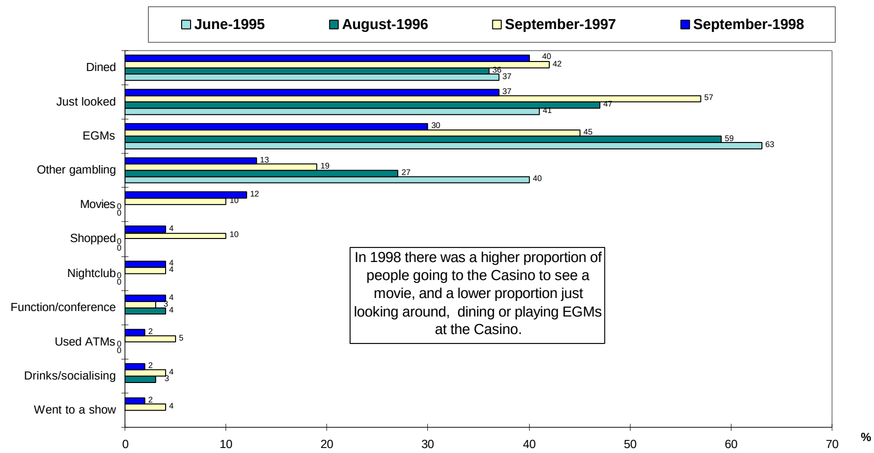
TABLE 4.14

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

[39] Question 25: "When was your last visit to the new Crown Entertainment Complex in Melbourne?"
[40] Question 28: "Why haven't you visited the new Crown Entertainment Complex?"

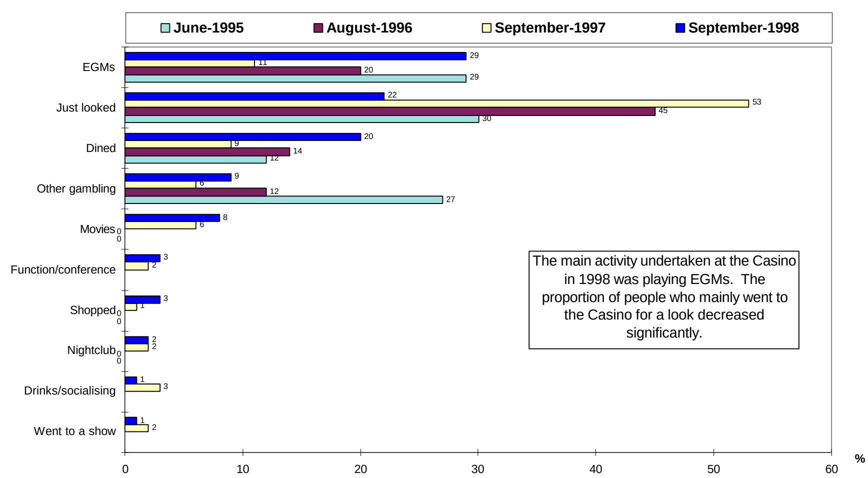
CASINO GAMBLING PATTERNS

4.15 ACTIVITIES UNDERTAKEN ON LAST CASINO VISIT



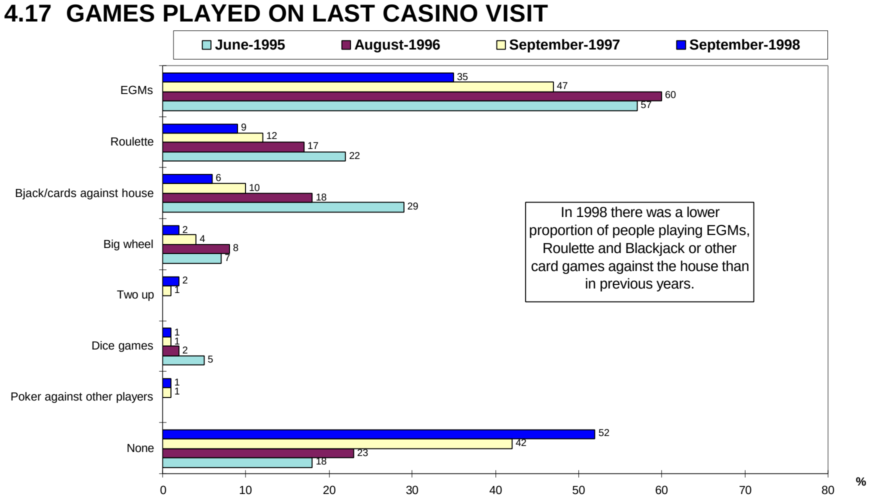
BASE: Total Visited Crown Casino

4.16 MAIN ACTIVITY UNDERTAKEN ON LAST CASINO VISIT



BASE: Total Visited Crown Casino

4.17 GAMES PLAYED ON LAST CASINO VISIT



BASE: Total Visited Crown Casino

4.15 Activities Undertaken on Last Casino Visit

Figure 4.15[41] 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.

Dining was the most popular activity to undertake on a trip to the Casino, with 40% of visitors undertaking that activity when visiting the Casino. A high proportion of visitors (37%) said they went to the Casino just to have a look or see what it was like.

Other activities undertaken at the new Casino were:

- ✓ Playing EGMs (30%);
- ✓ Playing other gambling games (13%); and
- ✓ Going to the movies (12%).

4.16 Main Activity Undertaken on Last Casino Visit

Figure 4.16[42] provides a time series analysis of the main activity undertaken by visitors to Crown Casino on their last visit. After respondents had been asked which other activities they had undertaken on their visit to the Casino, they were asked which of these activities was the main thing they did at the Casino. Playing EGMs was the main activity for 29% of visitors to the Casino, while 20% said the main activity they went to the Casino for, was to dine. Almost one quarter (22%) of visitors to the Casino said their main reason for doing so was to see what it was like.

Other activities considered to be the main activity undertaken at the Crown Entertainment Complex were:

- ✓ Playing other gambling games (9%);
- ✓ Going to the movies (8%); and
- ✓ Shopping (3%).

4.17 Games Played on Last Casino Visit

Figure 4.17 [43] illustrates which games were played by visitors to Crown Casino on their last visit. Electronic Gaming Machines remain the most popular game to play at the Casino. In 1998, 35% of visitors to the Casino played EGMs, 9% played roulette and 6% participated in blackjack (or another card game played against the house).

Big wheel, Two Up, Poker and Dice games were each played by 2% or less of visitors to the Casino. Over half (52%) of those who visited the Casino did not play any games while they were there.

[41] Question 26A: "What activities did you undertake at the Casino on your last visit?"
[42] Question 26B: "And which one of these activities would you say is the main thing you went to the Casino for?"
[43] 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 fell in 1998. In 1998, 18% of adult Victorians said they had gambled at the Casino in the last 12 months compared to 25% in 1997 and 22% in both 1995 and 1996. This possibly indicates that the novelty of casino gambling has begun to wear off;
- ✓ The proportion of casino gamblers who play at least once per month increased slightly to 18% compared to 15% in 1997;
- ✓ Of the 18% who gambled at the Casino, two thirds (67%) said they played only the EGMs there, 17% played only other (card/table) games and 16% played both EGMs and other games;
- ✓ People were spending slightly more time gambling at the Casino when they did so. The duration of casino gambling increased in 1998, the average length of time being 87 minutes per session (up from 85 minutes per session in 1997);
- ✓ Accordingly, the amount gamblers were prepared to outlay on casino gambling activities also increased in 1998, with the average outlay rising to $53 (up from $41 in 1997). Outlay on card and table games was substantially higher then outlay on EGMs ($76 cf $46);
- ✓ Casino gamblers perceived the return on their outlay to be around 37% when gambling at the Casino, a decrease from 1997 when perceived proportion won back on casino gambling was 46%. This decrease in perceived return on outlay may explain why gambling at the Casino was the favourite gambling activity of fewer gamblers in 1998;
- ✓ The percentage of money perceived as won back on card and table games at the Casino was substantially higher than expected returns on EGM gambling at the Casino (58% cf 33%);
- ✓ Casino gamblers showed moderate satisfaction with casino gambling activities (CSI=64). Casino gamblers showed a higher level of satisfaction with card and table games than with EGMs at the Casino (CSI=73 cf CSI=60);
- ✓ Most who were dissatisfied with casino gambling said they continue to gamble at the Casino in the hope of winning;
- ✓ The main reasons for gambling at the Casino were social reasons (48%) and the thrill / reward of winning (22%);
- ✓ Leisure activities most appealing to casino gamblers were relaxing at home and going out for dinner. The leisure activities least appealing to casino gamblers were betting at the TAB and going to the races or trots;
- ✓ Almost two thirds (63%) of Victorians have ever visited the Crown Entertainment Complex, compared with 45% in September 1997. Eighty three percent of visitors to the Complex had entered the gaming area;
- ✓ Three quarters (76%) of Victorians who have visited the Crown Entertainment Complex last did so in 1998;

- ✓ Some 23% of Victorians have never visited the Crown Entertainment Complex and are not interested in doing so, while some 4% said they intended to visit, but haven't got around to it yet. In 1997 the corresponding figures were 42% and 13%, suggesting that even amongst those who said in 1997 that they were not interested in visiting the Casino, a significant proportion have, in fact, done so.

- ✓ Over one third (35%) of visitors to the Casino played EGMs on their last visit. Nine percent played roulette, and 6% participated in blackjack or other card games played against the house.

SECTION 5

EGM
GAMBLING PATTERNS

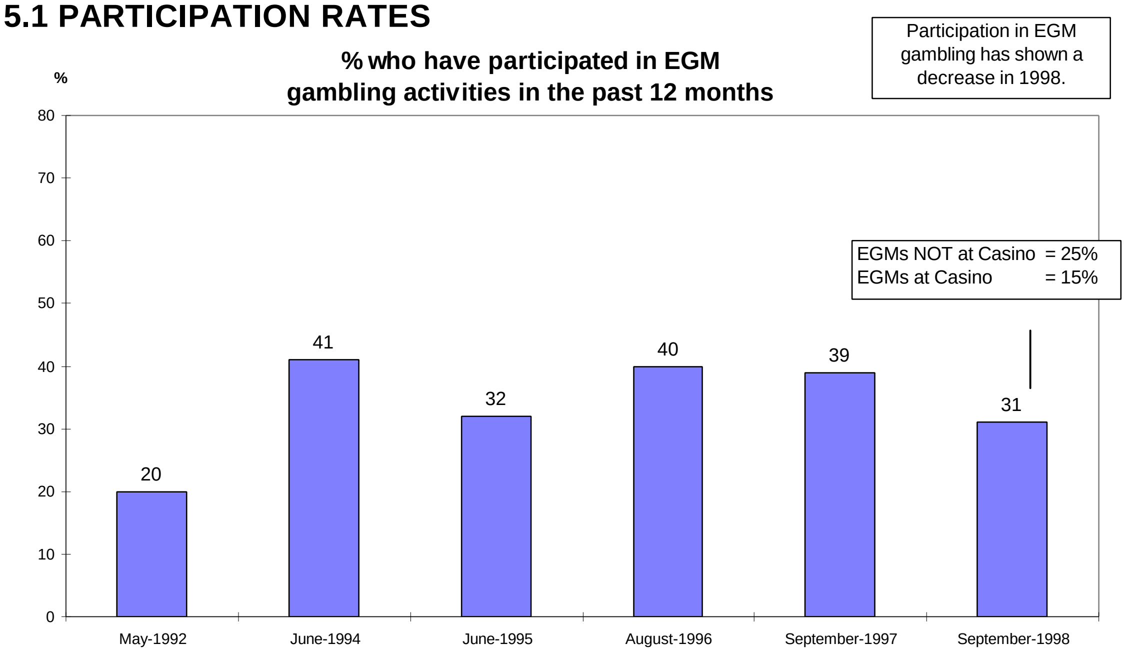
5. 5. EGM GAMBLING PATTERNS

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

- ✓ Participation;
- ✓ Favourite Gambling Activity;
- ✓ Frequency;
- ✓ Duration;
- ✓ Outlay;
- ✓ Proportion of Outlay Won Back;
- ✓ Satisfaction;
- ✓ Motivations;
- ✓ 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.

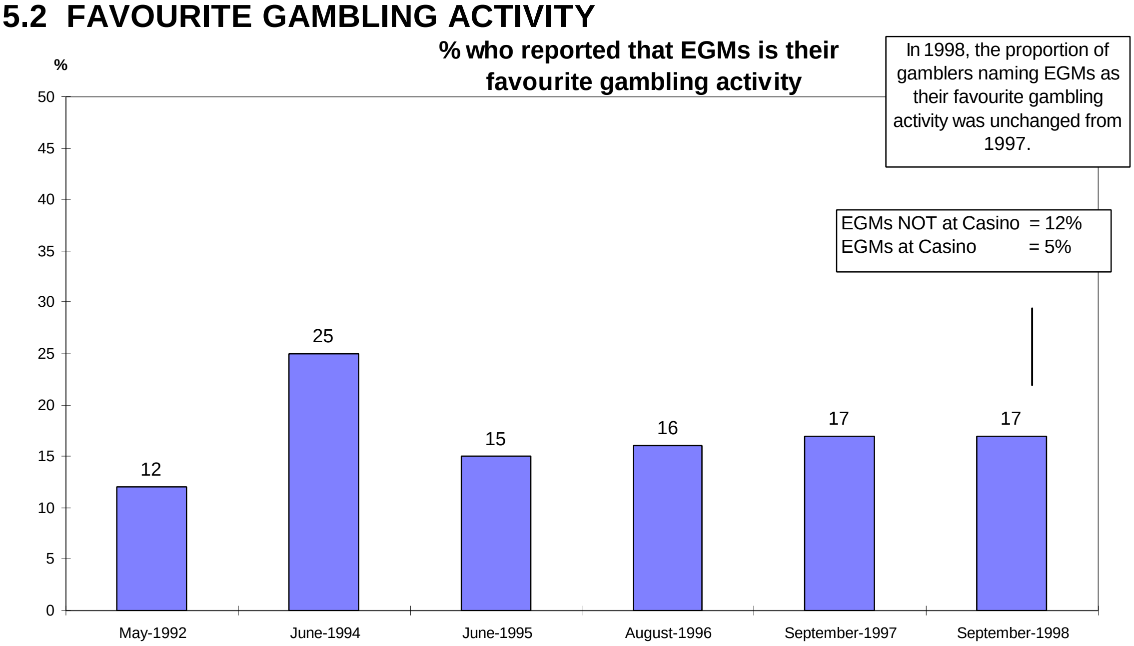
EGM GAMBLING PATTERNS

5.1 PARTICIPATION RATES



BASE: Total Respondents

5.2 FAVOURITE GAMBLING ACTIVITY



BASE: Total Gambled in Last 12 Months

5.1 Participation Rates

Figure 5.1[46] opposite outlines the participation rates in Electronic Gaming Machine (EGM) gambling activities since EGMs were introduced into Victoria in 1992. Since that time there has been an increase in the participation rates of EGM gambling. Participation rates in 1998 have declined to 1995 levels with 31% of Victorians having participated in EGM gambling in the last 12 months. Twenty-five percent of Victorians played EGMs not at the Casino, whilst 15% of Victorians played EGMs at the Casino. Both participation rates have decreased from 1997.

The *highest* participation rates for EGM gambling occur amongst:

- ✓ Those identified as being "At Risk" (79%);
- ✓ Social Gamblers (68%);
- ✓ Acknowledged Heavy Gamblers (68%);
- ✓ Committed Heavy Gamblers (56%);
- ✓ Those who have gambled in the last 6 months (54%);
- ✓ Visitors to Crown Casino (39%); and
- ✓ Those with annual incomes of less than $40,000 (35%).

The *lowest* participation rates for EGM gambling occur amongst:

- ✓ Singles (26%)
- ✓ Unemployed (18%); and
- ✓ Those who have not visited Crown Casino (18%).

5.2 Favourite Gambling Activity

Figure 5.2[47] 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 has remained at 1997 levels (17%). EGM gambling was the third most popular gambling activity for Victorians (after Lotto and casino gambling). The stabilisation of these results supports the possibility of the "honeymoon effect" suggested in the 1997 report. Again, as in 1997, playing EGMs not at the Casino was more likely to be cited as gamblers' favourite gambling activity (12%) than was playing EGMs at the Casino (5%).

[46] Question 1. Which of the following activities or games have you played or gambled on in the past 12 months?

[47] 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**
GENDER			
Male	49%	47%	55%
Female	51%	53%	45%
AGE			
Average Age	44 yrs	44 yrs	45 yrs
RESPONDENT'S OCCUPATION			
TOTAL FULL TIME	**44%**	**45%**	**47%**
Professionals / Executives	10%	9%	5%
Owners/White Collar Worker	18%	20%	23%
Farm Owner	1%	1%	1%
Skilled Workers	10%	10%	13%
Semi-skilled workers	3%	3%	3%
Unskilled workers / Other	2%	2%	3%
TOTAL PART TIME	**15%**	**16%**	**16%**
TOTAL NOT IN PAID WORKFORCE	**41%**	**39%**	**37%**
Household duties	10%	9%	4%
Student	6%	5%	4%
Self Supporting Retiree	5%	5%	6%
Pensioner	18%	18%	21%
Unemployed	3%	4%	2%
LOCATION			
Melbourne Metropolitan	73%	73%	74%
Other Victoria non metropolitan	27%	27%	26%
SOGS SCORE			
(0-4)	98.5%	96.1%	93.4%
(5-20)	1.5%	3.9%	6.6%
SEGMENT			
Disinterested Gambler	20%	21%	17%
Occasional Gambler	33%	33%	28%
Social Gambler	9%	20%	24%
Acknowledged Heavy Gambler	5%	11%	16%
Committed Heavy Gambler	8%	15%	16%

Significantly Higher than average compared to the general population

Significantly Lower than average compared to the general population

5.1A Profile of EGM Gamblers

Table 5.1A opposite displays a profile of EGM gamblers (gambled on EGMs in past 12 months) and regular EGM gamblers (at least once a month) as compared to the total Victorian population. A brief description of EGM gamblers and regular EGM gamblers follows.

EGM Gamblers
(Have participated in EGM gambling in the last 12 months)

The demographic profile of EGM gamblers reflected the general population of Victorians, and revealed:

- ✓ An approximately even distribution of males and females, with a slight bias towards females;
- ✓ No bias according to age (average age 44 years);
- ✓ No bias according to occupation;
- ✓ No bias according to metropolitan or country areas;
- ✓ A higher proportion of those identified as being "At Risk"; and
- ✓ EGM gamblers were more likely to be Social Gamblers, Acknowledged Heavy Gamblers, and Committed Heavy Gamblers.

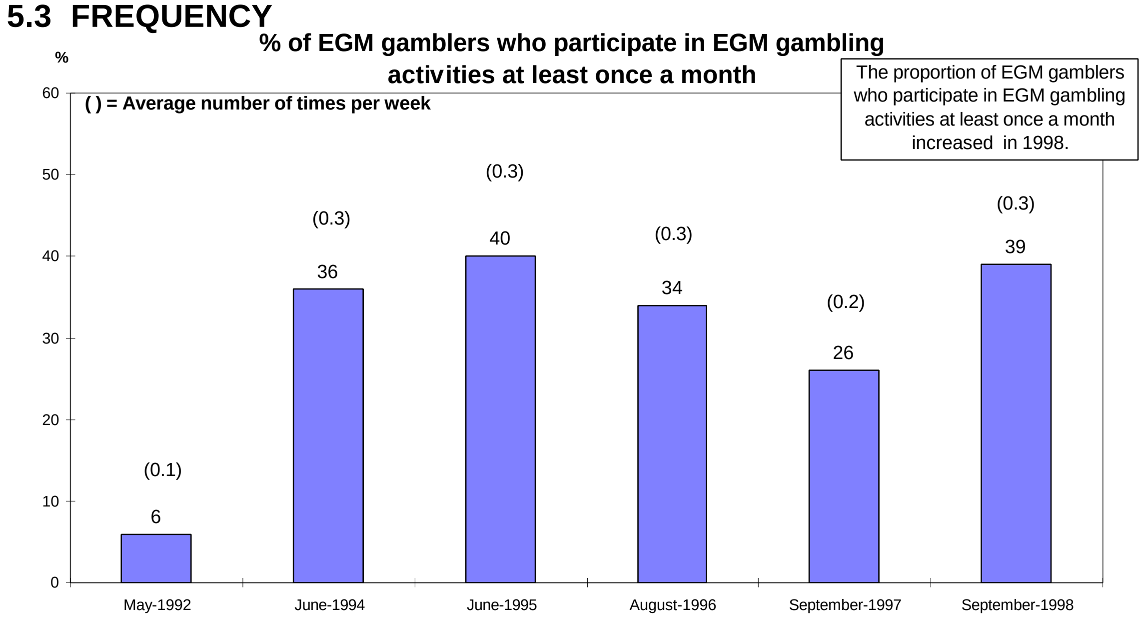
Regular EGM Gamblers
(Gamble on EGMs at least once a month)

The demographic profile of regular EGM gamblers (who gamble at this activity once a month or more) revealed:

- ✓ An approximately even distribution of males and females, with a slight bias towards males;
- ✓ No bias according to age (average age 45 years);
- ✓ A lower proportion of professionals/executives and those performing household duties;
- ✓ No bias according to metropolitan or country areas;
- ✓ A higher proportion of those identified as being "At Risk"; and
- ✓ EGM gamblers were more likely to be Social Gamblers, Acknowledged Heavy Gamblers or Committed Heavy Gamblers.

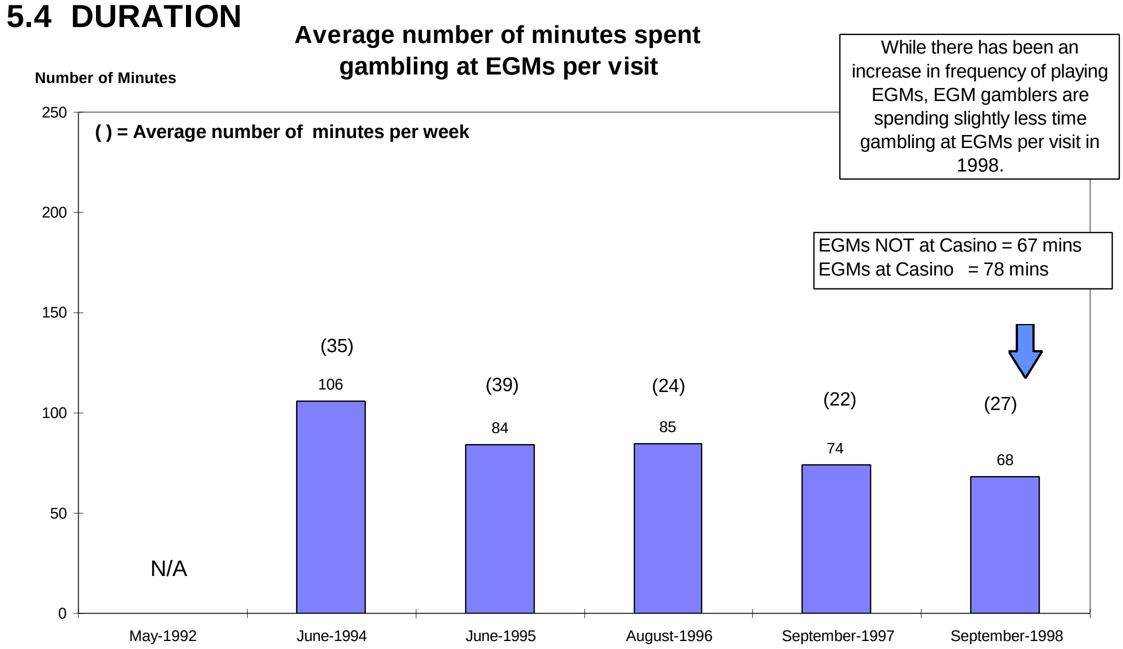
EGM GAMBLING PATTERNS

5.3 FREQUENCY



BASE: Total Gambled At EGMs in Last 12 Months

5.4 DURATION



BASE: Total Gambled At EGMs in Last 12 Months

5.3 Frequency

Figure 5.3[44] opposite provides a time series analysis of EGM gambling behaviour and shows the proportion of EGM gamblers who undertook EGM gambling at least once per month. The figures in brackets represent the number of times per week all EGM gamblers participate in this activity.

Participation in regular EGM gambling had been steadily decreasing since 1995. In 1998 however, the core of regular EGM gamblers increased, rising to 39% (up from 26% in 1997).

On average, EGM gamblers participated in EGM gambling activities approximately once a month (0.3 times a week).

5.4 Duration

Figure 5.4[45] opposite shows the average number of minutes spent gambling on EGMs per visit. The figures provided in brackets give the average number of minutes spent gambling on EGMs per week.

There was evidence of a slight net overall increase in the duration of EGM gambling activities per week over the last 12 months, 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 , on average, 27 minutes per week were spent on EGM gambling activities. On average, EGM gamblers spent approximately 68 minutes participating in this activity each time they did so (compared with 74 minutes in 1997). Those who gambled on EGMs at the Casino spent slightly longer than average, some 78 minutes per session,

In 1998, the following groups of EGM gamblers spent the *highest* amount of time per week on their EGM gambling activities.

- ✓ Those identified as being "At Risk" (174 minutes per week);
- ✓ Acknowledged Heavy Gamblers (78 minutes per week);
- ✓ Skilled workers (58 minutes per week);
- ✓ Those born outside Australia (46 minutes per week); and
- ✓ Those who refused to answer questions about their income (42 minutes per week);
- ✓ Couples without children (40 minutes per week).

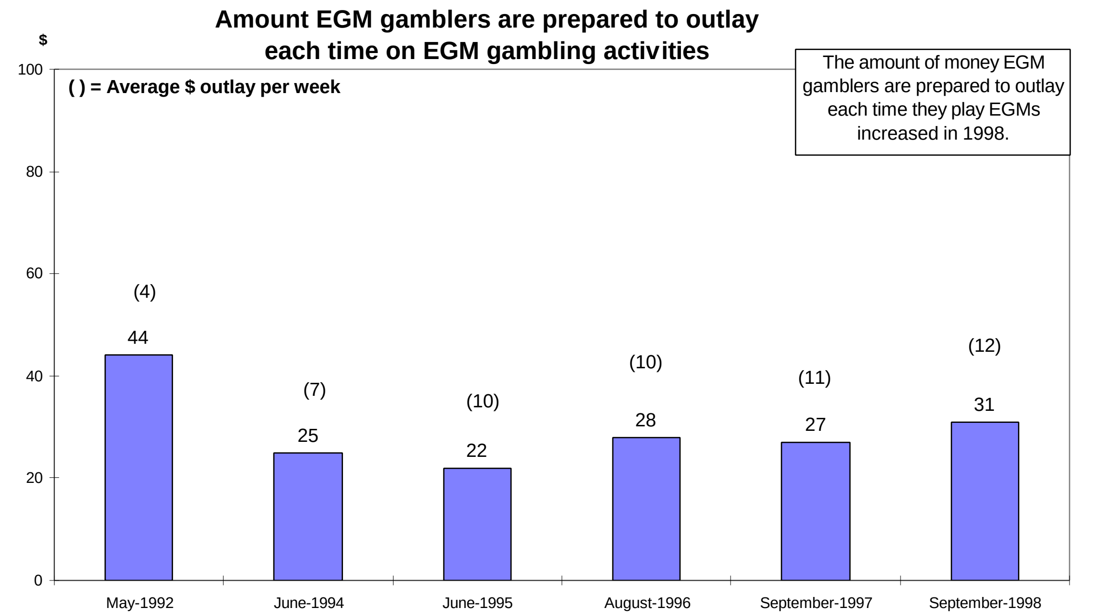
In 1998, the following groups of EGM gamblers spent the *lowest* amount of time per week on their EGM gambling activities.

- ✓ Students (6 minutes per week);
- ✓ Disinterested Gamblers (13 minutes per week);
- ✓ Household duties (14 minutes per week);
- ✓ Income $20,000 or less (16 minutes per week);
- ✓ 18-19 year olds (17 minutes per week);
- ✓ 50-59 year olds (17 minutes per week);
- ✓ Those with a respondent income of more than $50,000 (20 minutes per week); and
- ✓ Those living in the country (20 minutes per week).

[44] Question 3_2 "How often do you play EGM gambling?"
[45] Question 4I/J "And each time you play (EGMs not at the Casino/EGMs at the Casino), how much time do you spend playing these games?"

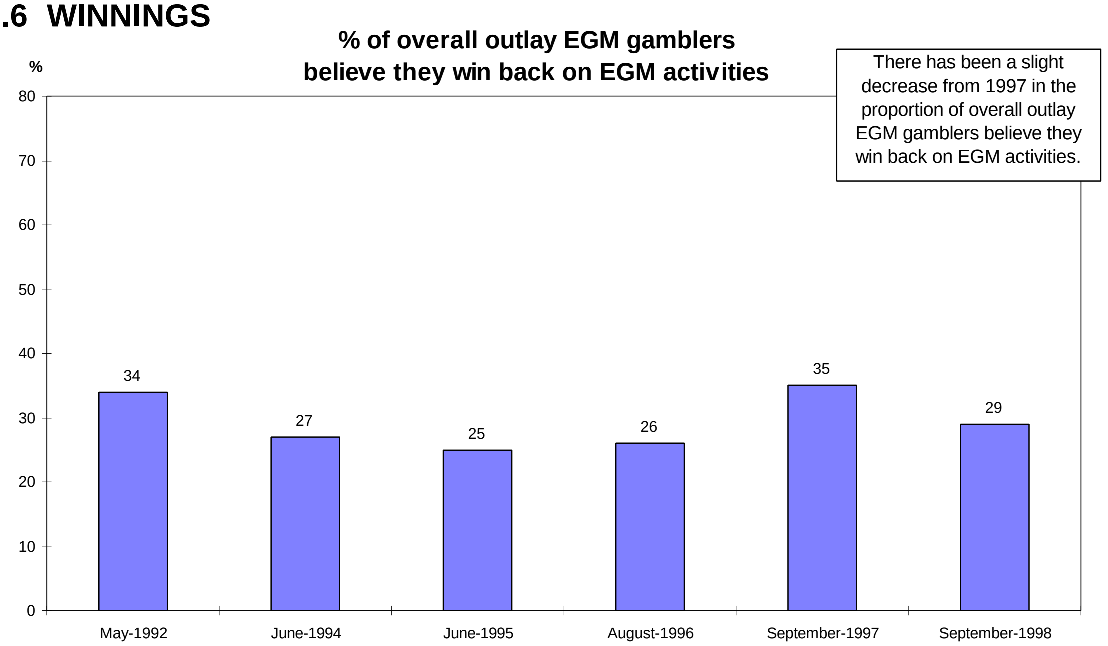
EGM GAMBLING PATTERNS

5.5 OUTLAY



BASE: Total Gambled At EGMs in Last 12 Months

5.6 WINNINGS



BASE: Total Gambled At EGMs in Last 12 Months

5.5 Outlay

Figure 5.5[46] opposite provides a time series analysis of the average amount EGM gamblers are prepared to outlay on EGM gambling activities each time they participate in them. In 1998, the average amount outlaid by EGM gamblers on this activity was found to be $31, an increase of some 10% on the level of outlay reported in 1997.

In 1998, EGM gamblers estimated that they spent, on average, just under $12 per week on EGM gambling activities (up from $11 in 1997). The average weekly outlay on EGMs not at the Casino by those playing EGMs not at the Casino was substantially higher than the average weekly outlay on EGMs at the Casino by those playing EGMs at the Casino (just over $12 per week cf just over $5 per week).

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

- ✓ Those identified as being "At Risk" ($65);
- ✓ Acknowledged Heavy Gamblers ($37);
- ✓ Skilled workers ($23); and
- ✓ Employed Full time ($17)

5.6 Proportion of Outlay Reported as Won Back

Figure 5.6[47] opposite provides a time series analysis of the proportion of outlay Victorian gamblers report as won back on EGM gambling activities. Perceptions of the amount of money won back on EGM gambling activities have remained relatively stable over time. In 1997, EGM gamblers perceived they won back 35% of their outlay when gambling on EGMs. In 1998, EGM gamblers believed that they won back a lower proportion of their outlay on EGM activities, with the average proportion of outlay perceived as won back being 29%.

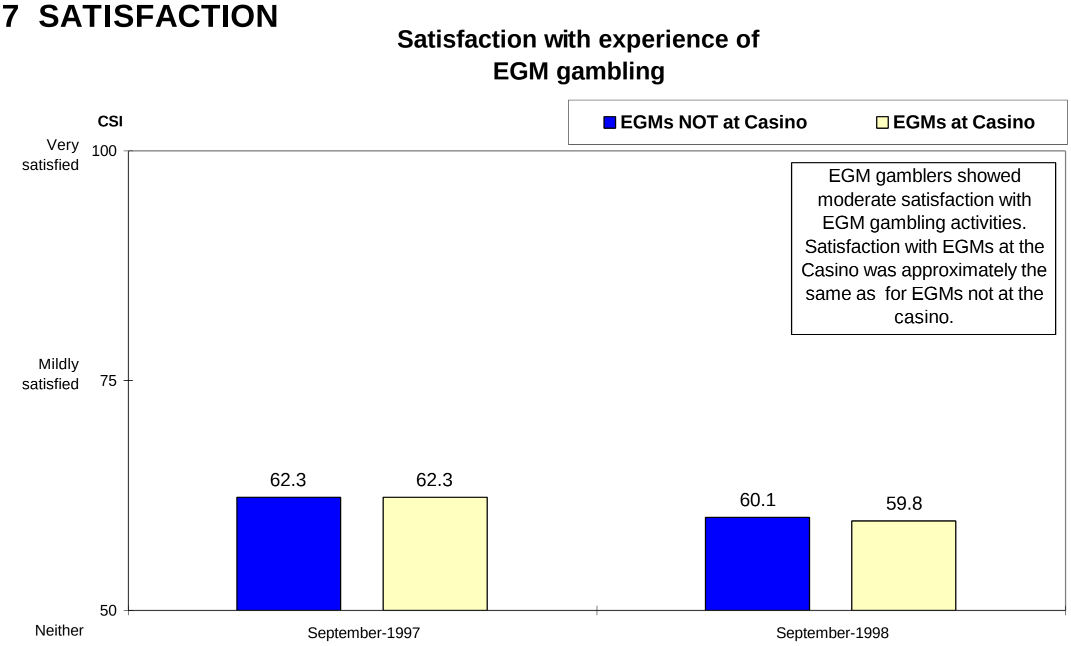
EGM gamblers who played EGMs at venues other than the Casino reported lower returns on their outlay on this activity compared to EGM gamblers who played EGMs at the Casino (28% cf 33% of outlay perceived as won back).

.

[46] Question 5I/J "And each time you play (EGMs mot at the Casino/EGMs at the Casino), what is the dollar value you are prepared to or would outlay on this activity?"
[47] Question 6I/J "On average, what percentage of your overall outlay do you win back on (EGMs not at the Casino/EGMs at the Casino) gambling?"

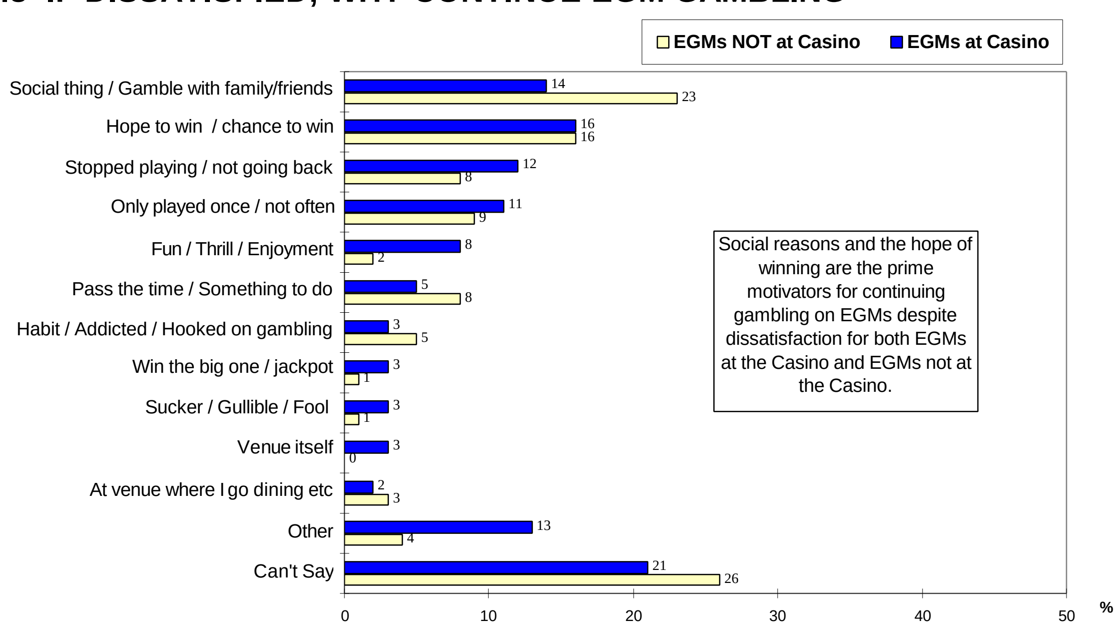
EGM GAMBLING PATTERNS

5.7 SATISFACTION



BASE: Total Gambled At EGMs in Last 12 Months

5.8 IF DISSATISFIED, WHY CONTINUE EGM GAMBLING



BASE: Total Dissatisfied with EGM Gambling Activities

5.7 Satisfaction

Figure 5.7[48] opposite shows the level of satisfaction with the experience of EGM gambling activities.

Overall, Victorians who participated in EGM activities not at the Casino reported moderate levels of satisfaction (60.1 CSI) as did Victorians who participated in EGM gambling activities at the Casino (59.8 CSI).

EGM Casino gamblers with the *highest* satisfaction levels include:

- ✓ Social Gamblers (71.7 CSI);
- ✓ Household Duties (66.2 CSI); and
- ✓ Pensioners (64.2 CSI).

EGM gamblers NOT at the Casino with the *highest* satisfaction levels include:

- ✓ Social Gamblers (70.0 CSI);
- ✓ 60-69 year olds (66.4 CSI); and
- ✓ Self-supporting retirees (69.1 CSI).

5.8 If Dissatisfied - Why Continue

Figure 5.8[49] opposite shows EGM gamblers' reasons for continuing the activity despite being dissatisfied with EGM gambling.

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

Dissatisfied EGM Casino gamblers continued to gamble due to the following reasons:

- ✓ Hope to win (16%);
- ✓ For social reasons or an outing (14%); and
- ✓ Fun/enjoyment (8%).

Dissatisfied EGMs not at the Casino gamblers continued to gamble because of the following reasons:

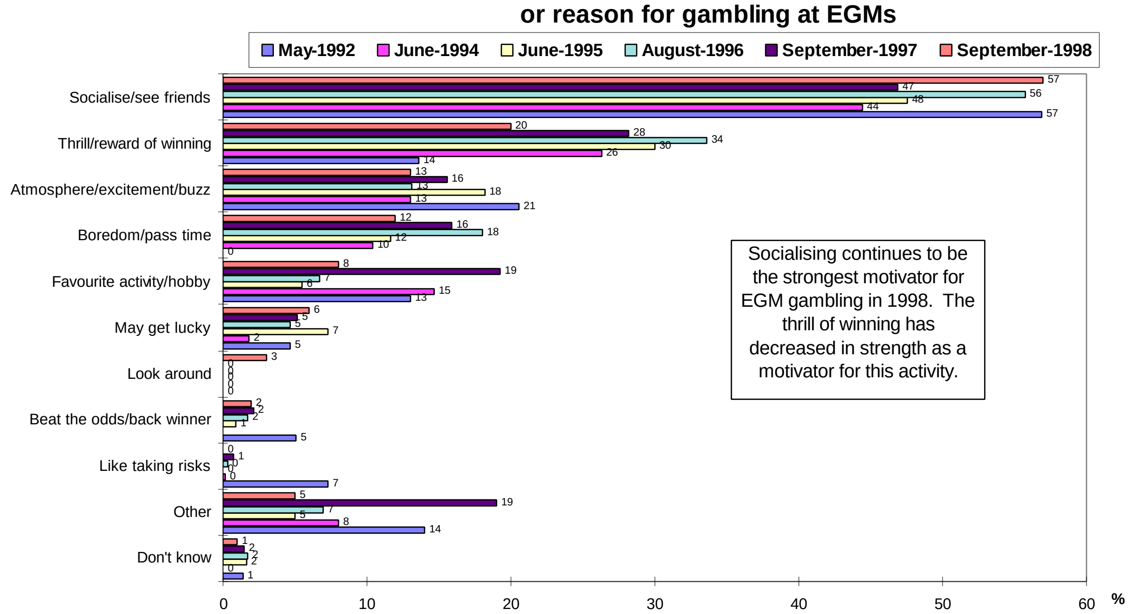
- ✓ For social reasons or an outing (23%);
- ✓ Hope to win (16%); and
- ✓ To pass the time/for something to do (8%).

[48] Question 8IJ "Would you say that you are satisfied or dissatisfied with your experience of playing EGM gambling?"
[49] Q9I/J. Why do you keep gambling on (EGMs not at the Casino/EGMs at the Casino) if you are dissatisfied?

EGM GAMBLING PATTERNS

5.9 MOTIVATIONS

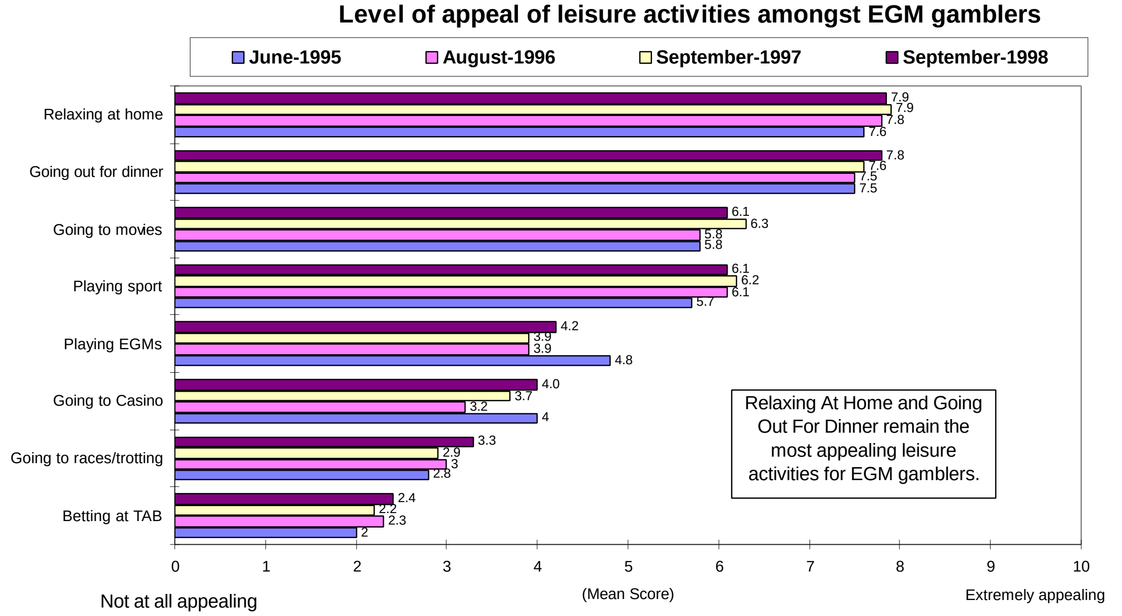
% of EGM gamblers who report that this is a main motivation or reason for gambling at EGMs



BASE: Total Gambled At EGMs in Last 12 Months

5.10 APPEAL OF LEISURE ACTIVITIES

Level of appeal of leisure activities amongst EGM gamblers



BASE: Total Gambled At EGMs in Last 12 Months

5.9 Motivations

Figure 5.9[50] opposite provides a time series analysis of the motivations for gambling amongst EGM gamblers.

Motivations for EGM Casino gamblers included:

- ✓ Social reasons (42%);
- ✓ The thrill or dream of winning (14%);
- ✓ Atmosphere/excitement/buzz (10%); and
- ✓ Boredom (9%).

Motivations for EGM not at Casino gamblers included:

- ✓ Social reasons (56%);
- ✓ The thrill or dream of winning (19%);
- ✓ Boredom/pass time (10%); and
- ✓ Atmosphere/excitement/buzz (9%).

5.10 Appeal of Leisure Activities

Figure 5.10[51] opposite provides an analysis of the appeal of various leisure activities amongst EGM gamblers. Respondents were asked to rate each of the 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, similar to other gamblers, EGM gamblers found relaxing at home to be a highly appealing leisure activity.

There was a *high mean level* of *appeal* for the following activities by EGM Gamblers:

- ✓ Relaxing at home (7.9); and
- ✓ Going out for dinner (7.8).

There was a *moderate mean level* of *appeal* for the following activities:

- ✓ Playing sport (6.1);
- ✓ Going to the movies (6.1); and
- ✓ Playing EGMs (4.2).

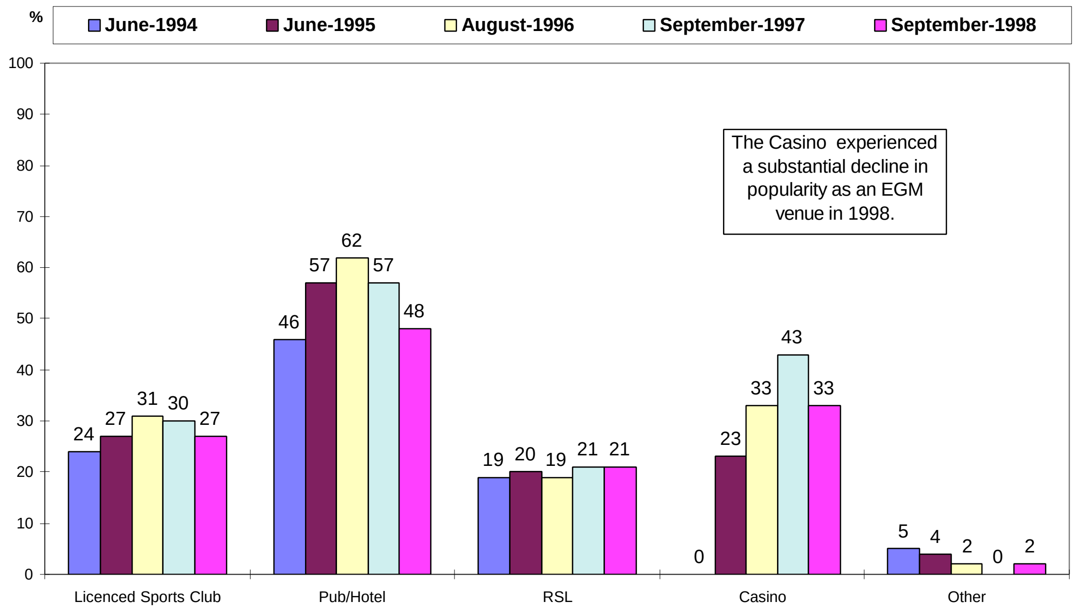
There was a *low mean level* of *appeal* for the following activities:

- ✓ Going to the Casino (4.0);
- ✓ Going to the races or trots (3.3); and
- ✓ Betting at the TAB (2.4).

[50] Question 7J "What are the main motivations, attractions or reasons that you play EGMs not at the Casino?"
[51] Please refer to Appendix 1 - The questionnaire : see Q.23 a)-h).

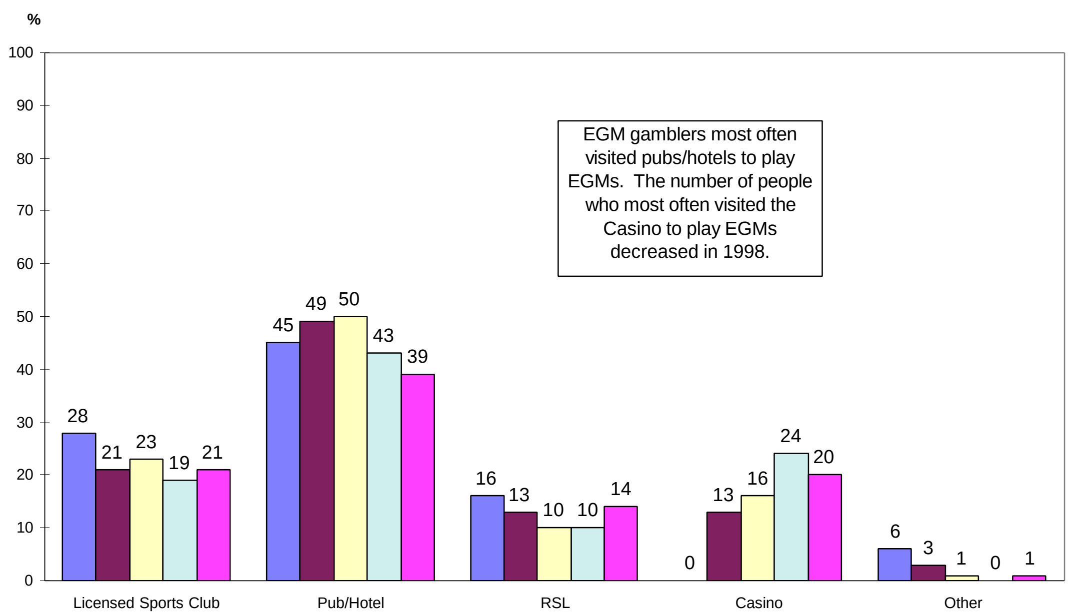
EGM GAMBLING PATTERNS

5.11 EGM VENUES VISITED



BASE: Total Gambled At EGMs in Last 12 Months

5.12 EGM VENUES VISITED MOST OFTEN



BASE: Total Gambled At EGMs in Last 12 Months

5.11 EGM Venues Visited

Figure 5.11[52] opposite provides a time series analysis of the types of EGM venues visited. Similar to 1997, overall, pubs/hotels were the most popular venues at which to participate in EGM gambling activities. However, visitation to such venues to play EGMs decreased noticeably in 1998, with 48% (down from 57% in 1997) of EGM gamblers 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 declined in 1998 (33%, down from 43% in 1997).

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

- ✓ Those "At Risk" (69%);
- ✓ Single Parents (69%);
- ✓ Acknowledged Heavy Gamblers (66%);
- ✓ 40-49 year olds (64%);
- ✓ Those employed full time (54%);
- ✓ Those with annual incomes of less than $50,000 (52%); and
- ✓ Those born in Australia (51%).

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

- ✓ Country Victorians (43%); and
- ✓ 60 - 69 year olds (42%).

5.12 EGM Venues Visited Most Often

Figure 5.12[53] opposite shows the EGM venues visited most often. Similar to figures in 5.11, Casino visitation declined in 1998 to 20% (down from 24% in 1997). The EGM Venues visited most often by EGM gamblers were:

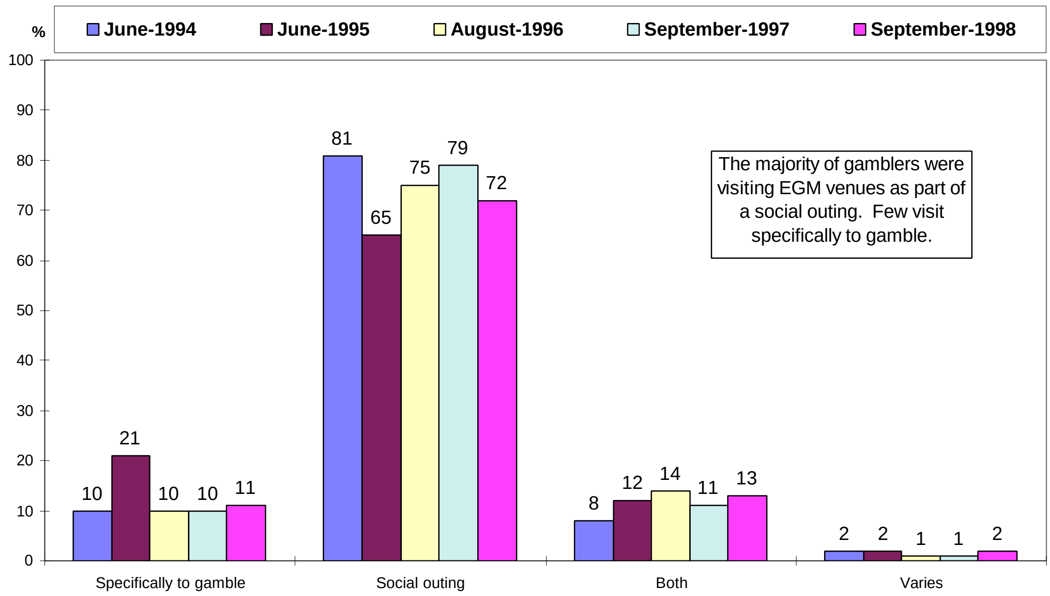
- ✓ Pub/hotels (39%);
- ✓ Licensed sports clubs (21%);
- ✓ Casino (20%); and
- ✓ RSL Clubs (14%).

A further 1% reported mostly visiting other venues, while 5% could not say which venue they most often visited to play EGMs.

[52] Question 15a "Which type of venues do you play electronic gaming machines at?"
[53] Question 15b: "And which of these venues do you go to the MOST to play electronic gaming machines? (one only)"

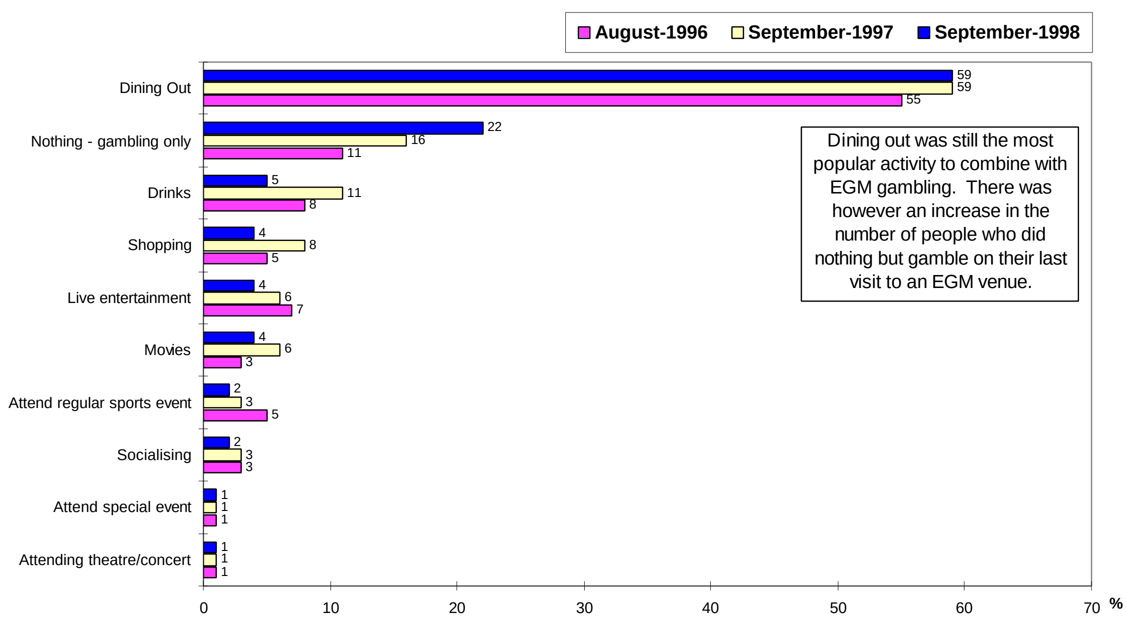
EGM GAMBLING PATTERNS

5.13 REASON FOR ATTENDING EGM VENUES



BASE: Total Gambled At EGMs (Not at the Casino) in Last 12 Months

5.14 ACTIVITIES COMBINED WITH EGMs ON LAST VISIT



BASE: Total Gambled At EGMs in Last 12 Months

5.13 Reasons for Attending EGM Venue

EGM gamblers (who gamble at EGM 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 response as illustrated in Figure 5.13[54] opposite was:

- ✓ Social outing (72%);
- ✓ Both to gamble & for a social outing (13%); and
- ✓ Specifically for gambling (11%).

In 1998, 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[55] opposite provides a time series analysis of the activities most likely to be combined with EGM gambling.

In 1998, the main leisure activity to be combined with EGM gambling (on last visit) was *dining out* (59%). The proportion of gamblers combining these two activities was unchanged from 1997. There was an increase in the proportion of people who did not combine any other activities with EGM gambling activities on the last occasion they visited an EGM venue (22%, up from 16% in 1997).

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

- ✓ Those with annual incomes of $40,000 to $60,000 (72%);
- ✓ Older couples (71%);
- ✓ Employed full time (65%); and
- ✓ Married/de facto (64%).

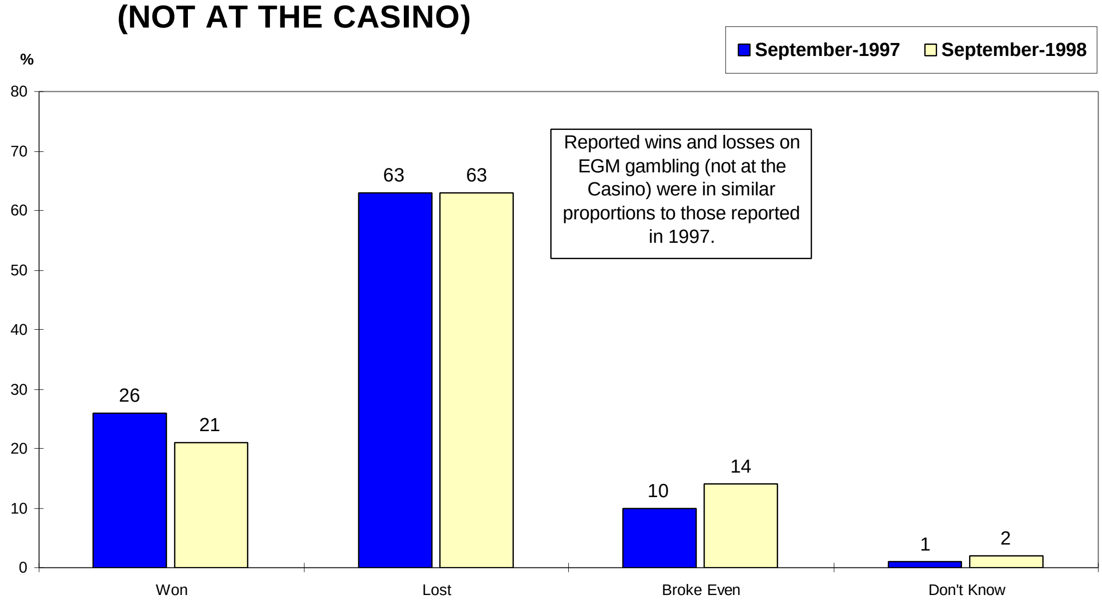
Those *least likely* to combine EGM gambling and *dining out* were::

- ✓ Singles (47%);
- ✓ Acknowledged heavy gamblers (43%);
- ✓ Students (32%);
- ✓ 18-19 year olds (37%); and,
- ✓ Those "At Risk" (32%).

[54] Question 17: "Do you visit electronic gaming machine venues specifically to play the machines or as a part of a social outing?"
[55] Question 22: "Thinking of the last time you went to an electronic gaming machine venue in Victoria, what other activities did you combine with gambling activities?"

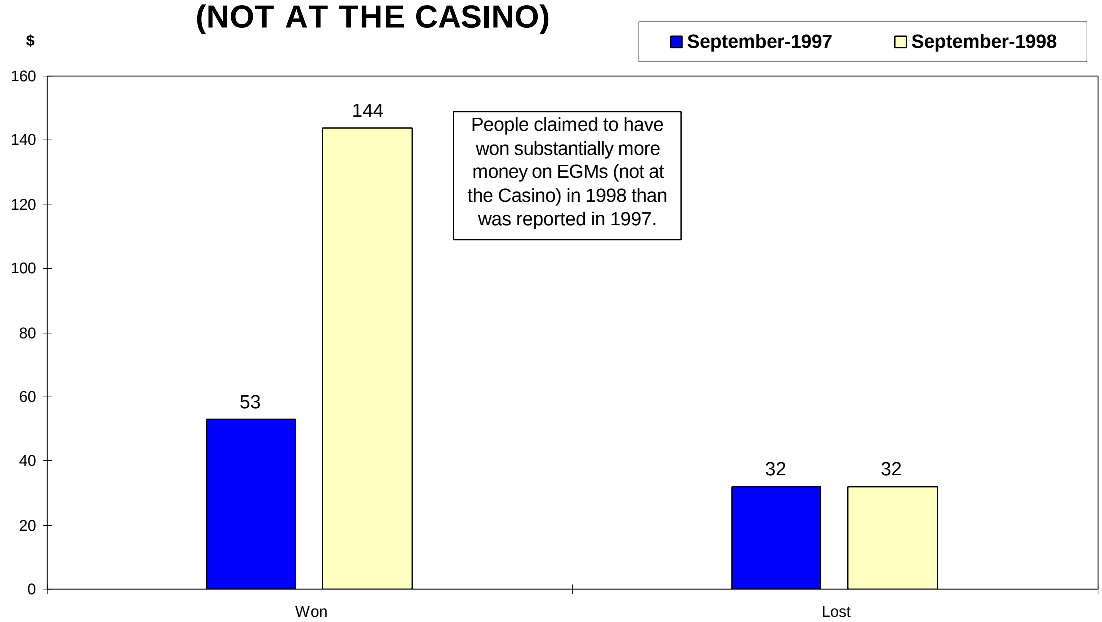
EGM GAMBLING PATTERNS

5.15 WON OR LOST LAST TIME ON EGMs (NOT AT THE CASINO)



BASE: Total Gambled At EGMs (Not at the Casino) in Last 12 Months

5.16 AMOUNT WON OR LOST LAST TIME ON EGMs (NOT AT THE CASINO)



BASE: Total Won/Lost At EGMs (Not at the Casino) in Last 12 Months

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

Figure 5.15[56] opposite provides an analysis of whether EGM gamblers (not at the Casino) won or lost on EGM gambling activities on the last occasion they played EGMs.

The proportion of EGM gamblers (not at the Casino) who reported that they lost was 63%, with only 21% 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[57] 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 was $144, a substantially higher figure than was reported in 1997 ($53) and a substantially higher amount than was reported as a loss ($32). It should be noted that the average reported win of $144 includes a relatively small proportion of respondents who won substantial sums - 60% of those reporting wins on EGMs not at the Casino reported having won $50 or less.

Higher levels of winnings were reported amongst the following groups:

- ✓ Those aged 40-49 years ($276); and
- ✓ Acknowledged Heavy Gamblers ($274);
- ✓ Males ($264); and,
- ✓ Country Victorians ($174).

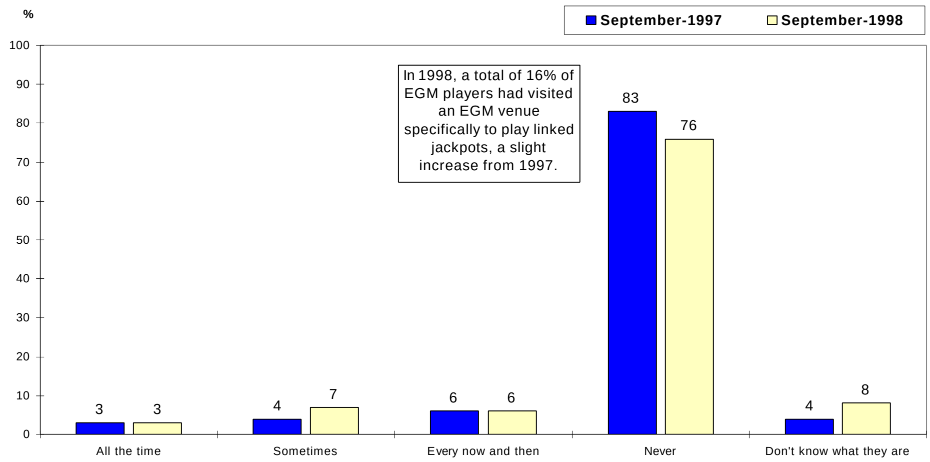
Lower levels of losses were reported amongst the following groups:

- ✓ Social Gamblers ($21);
- ✓ Unskilled workers ($15);
- ✓ 18-19 year olds ($11); and
- ✓ Students ($9).

[56] Question 20: "Thinking of this last time you played electronic gaming machines not at the Casino. Did you win or lose on this occasion?"
[57] Question 21: "How much did you win/lose on this last occasion?"

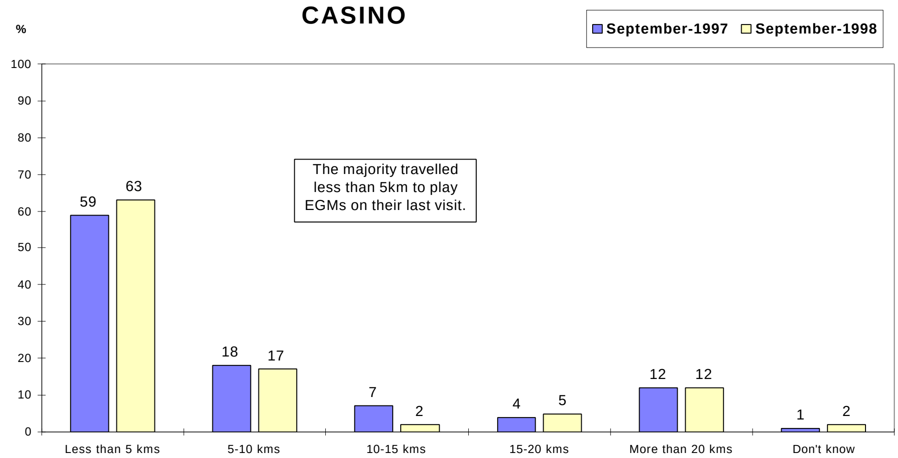
EGM GAMBLING PATTERNS

5.17 VISIT EGM VENUES TO PLAY LINKED JACKPOTS



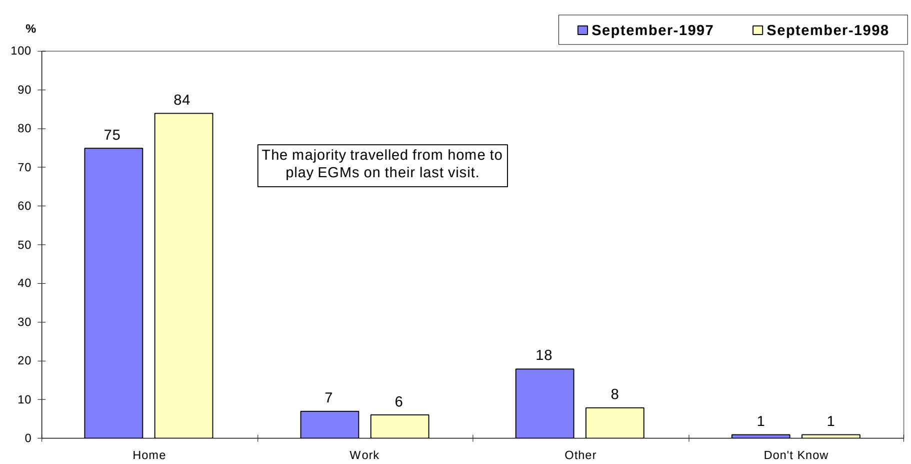
BASE: Total Gambled At EGMs (Not at the Casino) in Last 12 Months

5.18 DISTANCE TRAVELLED TO EGM VENUE - NOT THE CASINO



BASE: Total Gambled At EGMs (Not at the Casino) in Last 12 Months

5.19 WHERE TRAVELLED FROM TO EGM VENUE - NOT THE CASINO



BASE: Total Gambled At EGMs (Not at the Casino) in Last 12 Months

5.17 Visiting EGM Venues to Play Linked Jackpots

Figure 5.17[58] opposite provides an analysis of whether EGM gamblers 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?", 3% responded *all the time*. In 1998, 7% of Victorians *sometimes* went to venues to play EGMs with linked jackpots and 6% went to play linked jackpots *every now & then*.

A total of 16% of EGM gamblers have specifically visited EGM venues to play linked jackpots. This is slightly higher than the 1997 results (13%).

The main reason cited for visiting EGM venues was for the social experience (56%) as opposed to the gambling experience (8%). This is consistent with only a small proportion (16%) 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[59] opposite provides an analysis of the distance travelled to an EGM venue (not at the Casino) on the last visit. Most (63%) EGM gamblers not at the Casino travelled less than 5 kilometres to get to the EGM venue (not at the Casino) they last gambled at. This was a slight increase from 1997 (59%). Furthermore, 17% travelled 5-10 kilometres (18% in 1997), 2% travelled between 10 and 15 kilometres (7% in 1997) whilst 12% travelled more than 20 kilometres to play EGMs on their last visit (12% in 1997).

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

- ✓ Disinterested Gamblers (21%);
- ✓ Those who had not gambled in the last 6 months (19%); and
- ✓ Those living in country areas (26%);

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

Figure 5.19[60] opposite provides an analysis of where EGM gamblers travelled from to get to an EGM venue (not the Casino) on their last visit.

In 1998, the number of people travelling from home to play EGMs (not at the Casino) increased by 9% (75% in 1997 to 84% in 1998), while 6% travelled from work to an EGM venue. Those who gave "other" locations included 2% who travelled from a friends/relatives house, 2% who were on holiday and 1% who travelled from a restaurant.

[58] Question 16: "Some hotels 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?"
[59] Question 18B: "How far did you travel to get to this venue?"
[60] Question 18C: "Did you travel directly from . . . . ?"

5.20 EGM Gambling Patterns - Summary

The main findings regarding EGM gambling patterns include:

- ✓ Participation in EGM gambling declined in 1998, falling to 31% overall, from 39% in 1997. EGMs were more likely to be played at venues other than the casino;
- ✓ EGM gambling as a favourite activity has remained stable since 1995. In 1998, 17% of gamblers named EGMs as their favourite gambling activity;
- ✓ EGM gamblers closely resemble the Victorian population, although a higher proportion of Social Gamblers, Acknowledged Heavy Gamblers, Committed Heavy Gamblers and those identified as being "At Risk" was observed;
- ✓ The proportion of all those who participated in EGM gambling who are regular (those who play at least once a month) EGM gamblers has increased in 1998 to 39% (from 26% in 1997);
- ✓ The amount of time people spent playing EGMs each time that they played decreased to 68 minutes in 1998 from 74 minutes in 1997. When playing EGMs at the Casino people played for an average time of 78 minutes compared to 67 minutes when playing EGMs not at the Casino;
- ✓ In 1998, the average outlay on EGMs each time played increased to $31 (up from $27 per time in 1997). However, the average outlay per week on this activity remained relatively stable at $12. The average outlay on EGMs at the Casino each time played was $48, whilst the average outlay for EGMs not at the Casino each time played was $28;
- ✓ In 1998 EGM gamblers believed they won back a lower proportion of their outlay on EGM gambling activities than in 1997 (29% cf 35% of outlay won back). EGM gamblers who participated in this activity at the Casino perceived a higher return on outlay than those who played EGMs at other venues (33% cf 28%);
- ✓ EGM gamblers reported low to mild satisfaction with EGM gambling activities. There were no real differences in the level of satisfaction with gambling on EGMs at the Casino and gambling on EGMs not at the Casino (59.8 Customer Satisfaction Index (CSI) cf 60.1 CSI);
- ✓ Dissatisfied EGM gamblers continued to participate in this activity as it was a social outing, and because they hope to win;
- ✓ The main motivations for EGM gambling included social reasons, the thrill or dream of winning and the atmosphere. In 1998, there was a decrease in the number of people participating in EGM gambling activities because it is their favourite activity or hobby;

- ✓ EGM gamblers found relaxing at home, going out for dinner, playing sport and going to the movies appealing leisure activities. Significantly, there was a low level of appeal for playing EGMs amongst those who have played EGMs in the last 12 months. Those who played EGMs at the Casino gave this activity a slightly higher appeal rating than did those who played EGMs at venues other than the Casino;

- ✓ Pubs/hotels experienced the highest levels of visitation amongst EGM venues, although visitation to such places to play EGMs decreased to 48% (from 57% in 1997). Visitation to RSL clubs and licensed sports clubs as venues at which to play EGMs has remained relatively stable since 1996. Visitation to the Casino to play EGMs decreased to 33% in 1998 (from 43% in 1997);

- ✓ When people reporting EGM gambling activity at EGM venues other than the Casino were asked whether they visited the venue specifically to play the machines or as part of a social outing, 72% said they visited as part of a social outing. Thirteen percent said both reasons were a factor and only 11% said that they visited EGM venues specifically to gamble;

- ✓ The main activity combined with EGM gambling was dining out;

- ✓ Sixty three percent of EGM gamblers reported a loss on EGM gambling the last time they played EGMs (not at the Casino), ($32 on average). Some 14% reported they broke even the last time they played EGMs (not at the Casino) and 21% claimed they won money ($144 on average);

- ✓ A small proportion of EGM gamblers (16%) visited EGM venues specifically to play linked jackpots. While 3% of EGM gamblers said they play linked jackpots "all the time", 8% did not know what linked jackpots were;

- ✓ The majority (63%) of EGM gamblers travelled less than 5km to get to an EGM venue (not the Casino) the last time they gambled on EGMs; and

- ✓ The last time EGM gamblers played EGMs (not at the Casino) the majority (84%) travelled from home to their EGM venue.

SECTION 6

LOTTO
GAMBLING PATTERNS

6. 6. LOTTO GAMBLING PATTERNS

Section 6 provides a brief summary of lotto gambling patterns. "Lotto" encompasses Lotto, Tattslotto, Oz Lotto, Tatts Keno and Powerball in its definition. Lotto was again the most popular of the gambling activities surveyed with over half of the Victorian population participating. Outlined below, are the key findings regarding lotto gambling patterns.

- ✓ Lotto gambling fluctuated between 60% and 66% for the 1992 - 1997 period. However, in 1998 participation in lotto decreased to an all time low of 52%;
- ✓ There has been a steady decline in lotto gambling as the favourite gambling activity since the first recorded measurement in 1992 at 41% to the very low 20% measurement in 1997. However the percentage of gamblers who named lotto as their favourite gambling activity returned to previous levels in 1998, increasing to 39% and reversing the downward trend observed between 1992 and 1997;
- ✓ The demographic profiles of lotto gamblers and regular lotto gamblers reflect that of the general population of Victoria, but show a higher proportion of Disinterested Gamblers and Occasional Gamblers and a lower proportion of students;
- ✓ The lower level of participation in lotto gambling in 1998 has resulted in a larger core of regulars. Consequently the proportion of regular players increased slightly to 76% in 1998;
- ✓ Lotto gamblers spent approximately 4 minutes each time they played lotto, and tended to play lotto around once a week;
- ✓ The amount that lotto gamblers were prepared to outlay each time they entered lotto was $9 in 1998 (an increase from $8 in 1997);
- ✓ There has been a steady decline since 1994 of the proportion of outlay perceived by lotto players as being won back. This stabilised in 1998, with the perceived return on lotto activities recorded at 10%;
- ✓ Lotto gamblers showed low level satisfaction with lotto gambling activities (57.9 CSI), however this was slightly higher in comparison to 1997 (54.1 CSI);

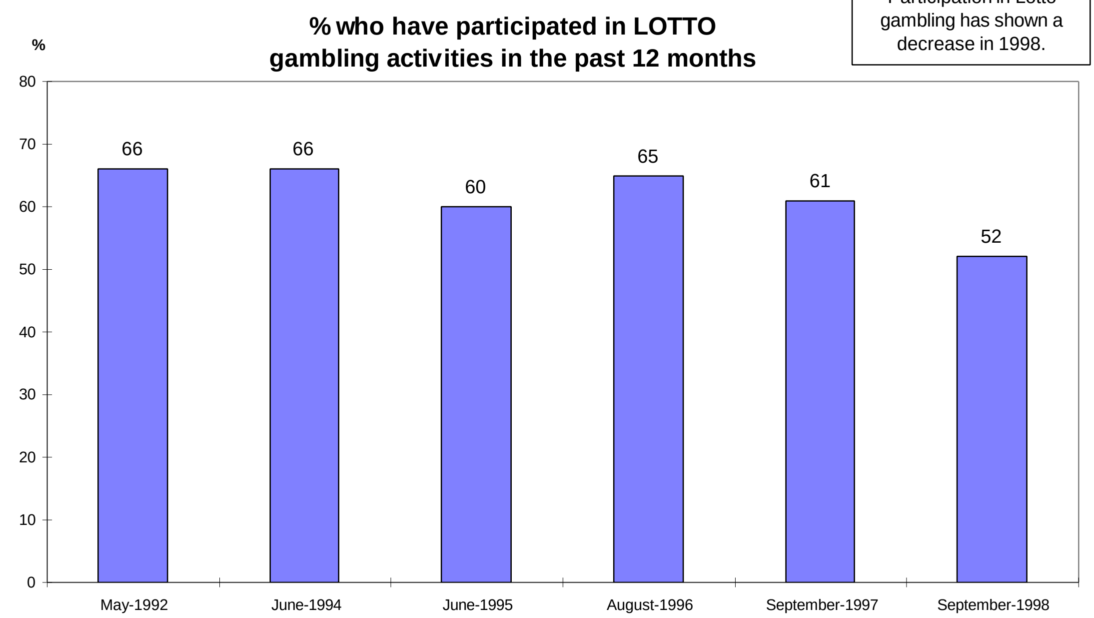
- ✓ Lotto gamblers' main motivations for participating in these activities were the thrill/dream of winning (72%) and the belief in luck/may get lucky (12%);

- ✓ Leisure activities rated as most appealing by lotto gamblers were similar to the population at large, such as relaxing at home (mean rating of 7.9) and going out for dinner (mean rating of 7.2).

LOTTO GAMBLING PATTERNS

6.1 PARTICIPATION RATES

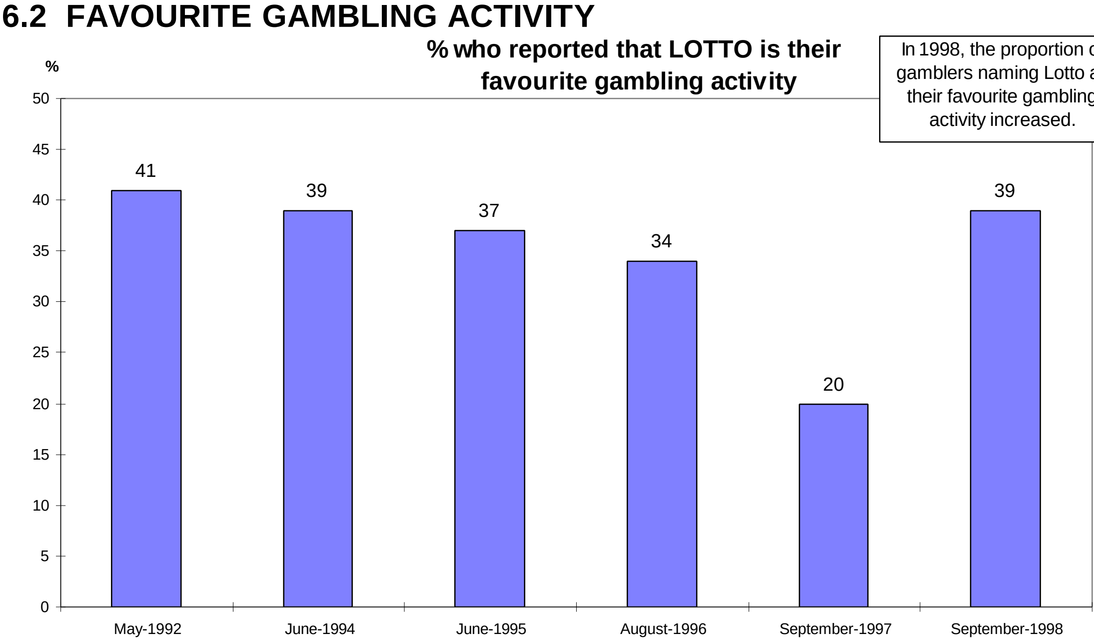
Participation in Lotto gambling has shown a decrease in 1998.



BASE: Total Respondents

6.2 FAVOURITE GAMBLING ACTIVITY

In 1998, the proportion of gamblers naming Lotto as their favourite gambling activity increased.



BASE: Total Gambled in Last 12 Months

[65] Question 1 "Which of the following activities or games have you played or gambled on in the past 12 months?"

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

TABLE 6.1

PROFILE OF LOTTO GAMBLERS

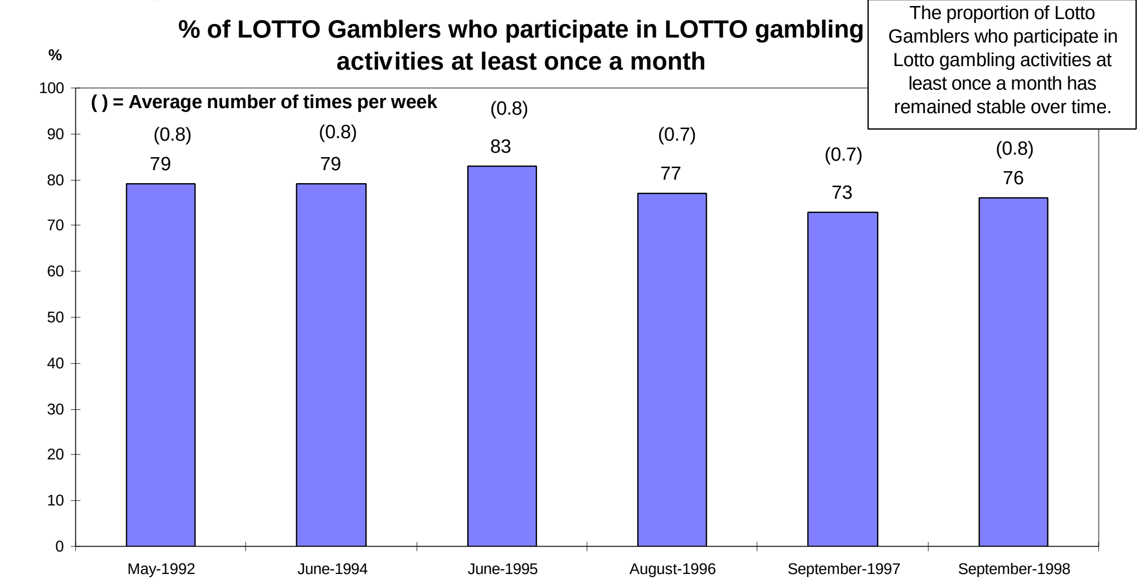
	Total Population	Lotto Gamblers (Last 12 mths) 52 % of total pop	Reg. Lotto Gamblers (Once a mth+) 39% of total pop
GENDER			
Male	49%	48%	51%
Female	51%	52%	49%
AGE			
Average Age	44 yrs	45 yrs	46 yrs
RESPONDENT'S OCCUPATION			
TOTAL FULL TIME	**44%**	**47%**	**46%**
Professionals / Executives	10%	9%	9%
Owners/White Collar Worker	18%	21%	19%
Farm Owner	1%	1%	1%
Skilled Workers	10%	11%	11%
Semi-skilled workers	3%	3%	4%
Unskilled workers / Other	2%	2%	2%
TOTAL PART TIME	**15%**	**16%**	**15%**
TOTAL NOT IN PAID WORKFORCE	**41%**	**37%**	**38%**
Household duties	10%	10%	10%
Student	6%	3%	3%
Self Supporting Retiree	5%	4%	5%
Pensioner	18%	18%	19%
Unemployed	3%	3%	2%
LOCATION			
Melbourne Metropolitan	73%	71%	72%
Other Victoria non metropolitan	27%	29%	28%
SOGS SCORE			
(0-4)	98.5%	98.2%	97.9%
(5-20)	1.5%	1.8%	2.1%
SEGMENT			
Disinterested Gambler	17%	28%	28%
Occasional Gambler	37%	44%	43%
Social Gambler	9%	11%	12%
Acknowledged Heavy Gambler	5%	6%	7%
Committed Heavy Gambler	8%	10%	11%

Significantly higher than average

Significantly lower than average

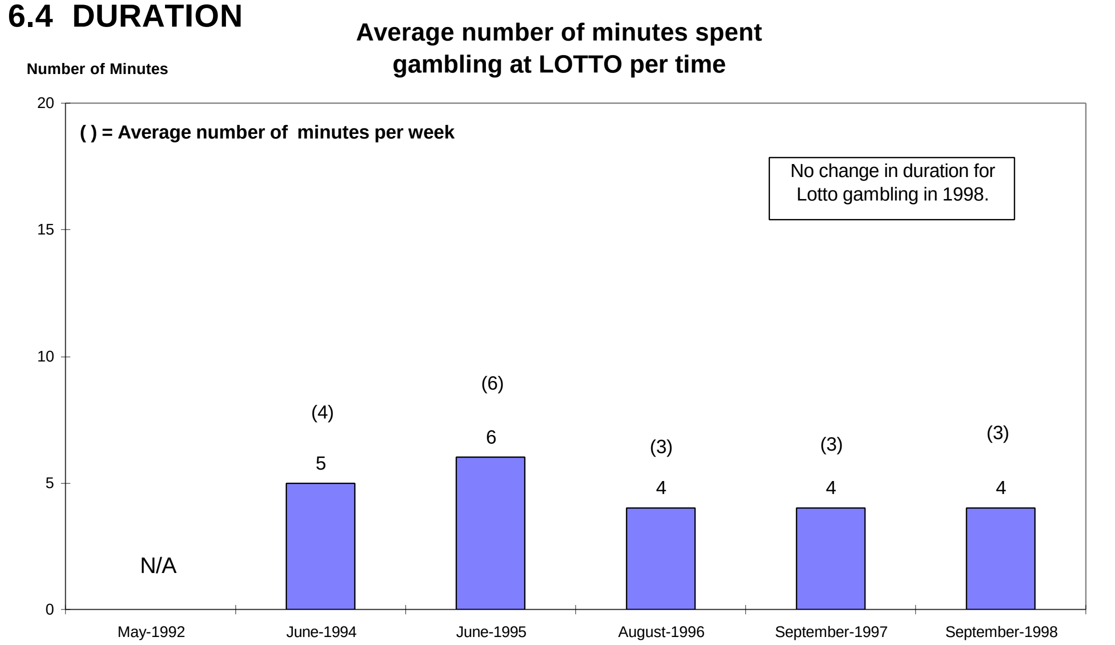
LOTTO GAMBLING PATTERNS

6.3 FREQUENCY



BASE: Total Gambled At Lotto in Last 12 Months

6.4 DURATION

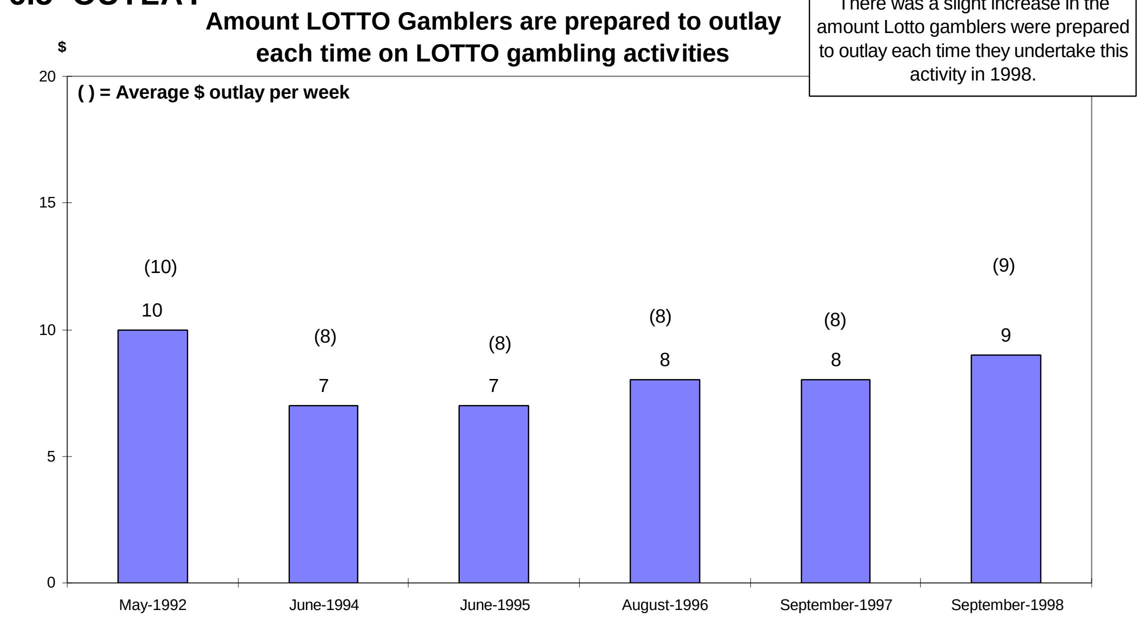


BASE: Total Gambled At Lotto in Last 12 Months

[67] Question 3C "How often do you play Lotto, Tattslotto, Oz Lotto, Tatts Keno or Powerball?"" (unprompted)
[68] Question 4C "And each time you play Lotto, Tattslotto, Oz Lotto, Tatts Keno or Powerball, how much time do you spend playing these games?"

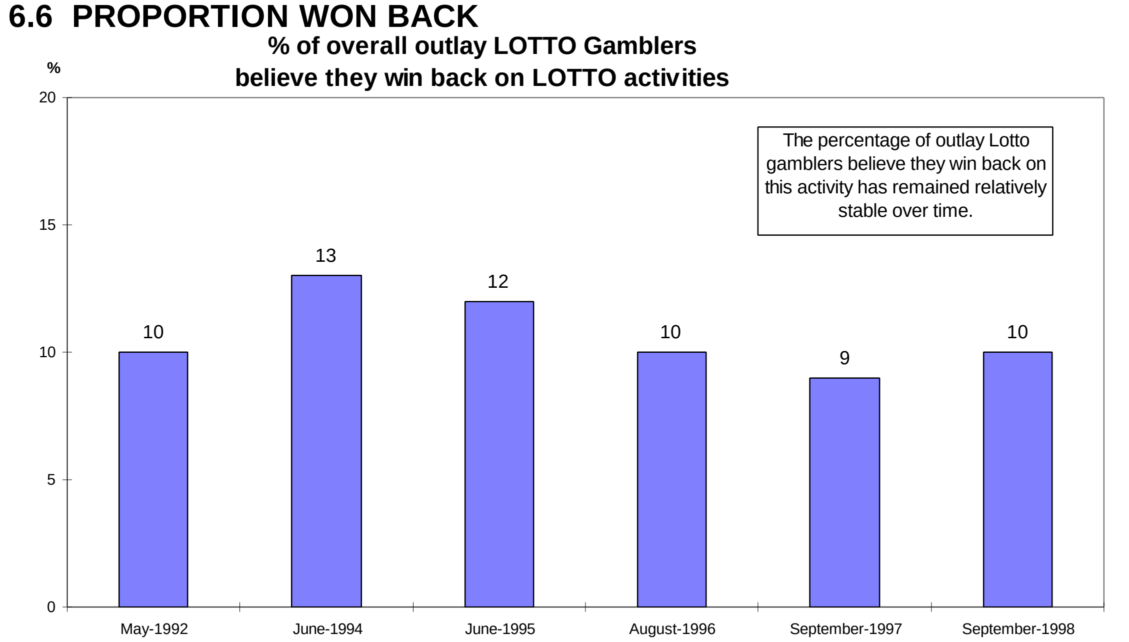
LOTTO GAMBLING PATTERNS

6.5 OUTLAY



BASE: Total Gambled At Lotto in Last 12 Months

6.6 PROPORTION WON BACK



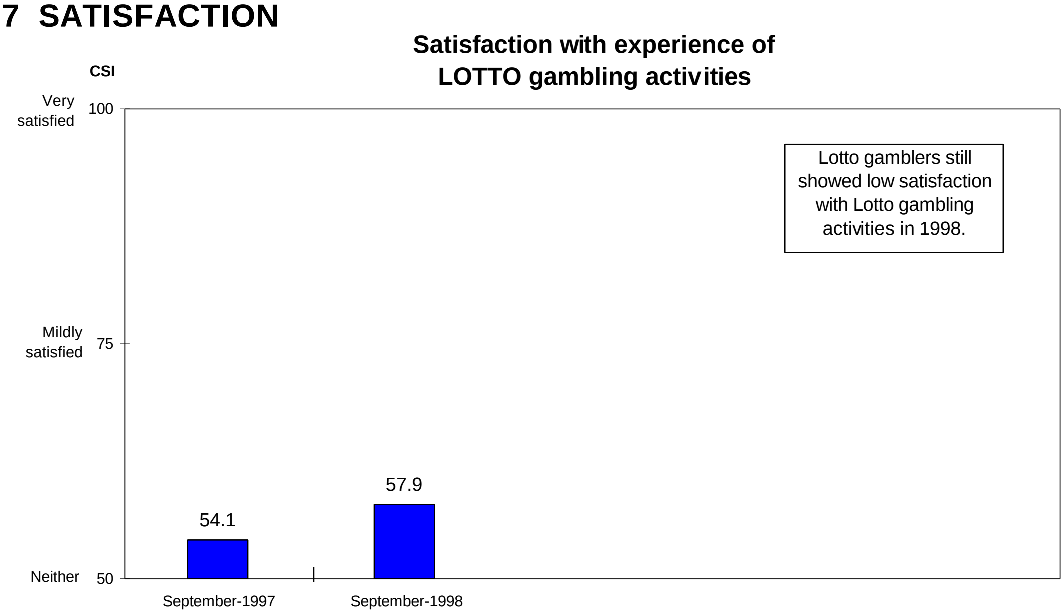
BASE: Total Gambled At Lotto in Last 12 Months

[69] Question 5C "And each time you play Lotto, Tattslotto, Oz Lotto, Tatts Keno or Powerball, what is the dollar value you are prepared to or would outlay on this activity?"

[70] Question 6C "On average, what percentage of your overall outlay do you win back on Lotto, Tattslotto, Oz Lotto, Tatts Keno or Powerball?"

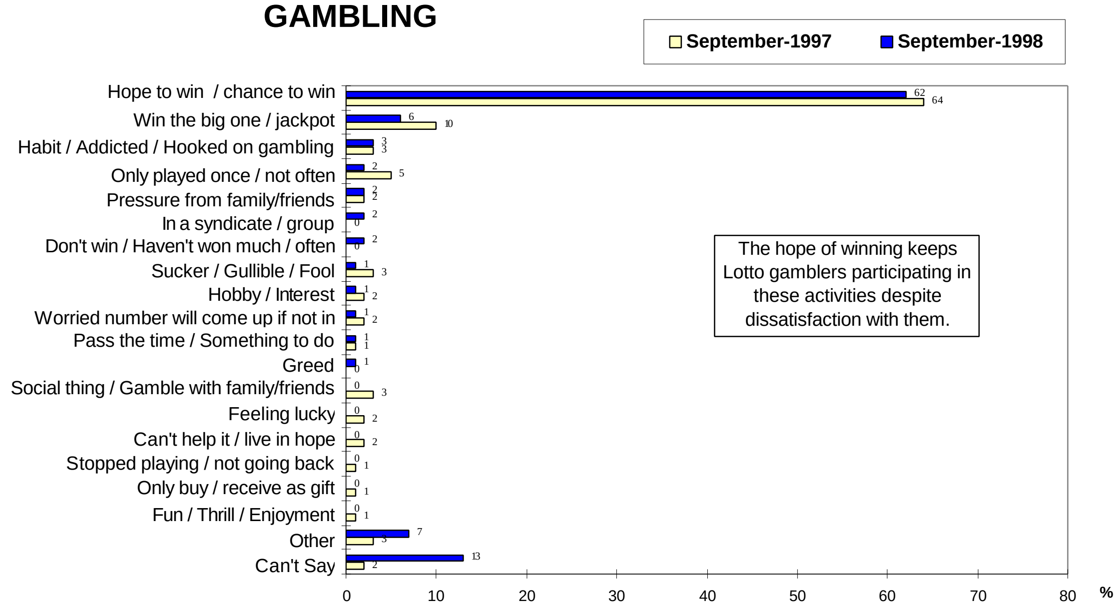
LOTTO GAMBLING PATTERNS

6.7 SATISFACTION



BASE: Total Gambled At Lotto in Last 12 Months

6.8 IF DISSATISFIED, WHY CONTINUE LOTTO GAMBLING



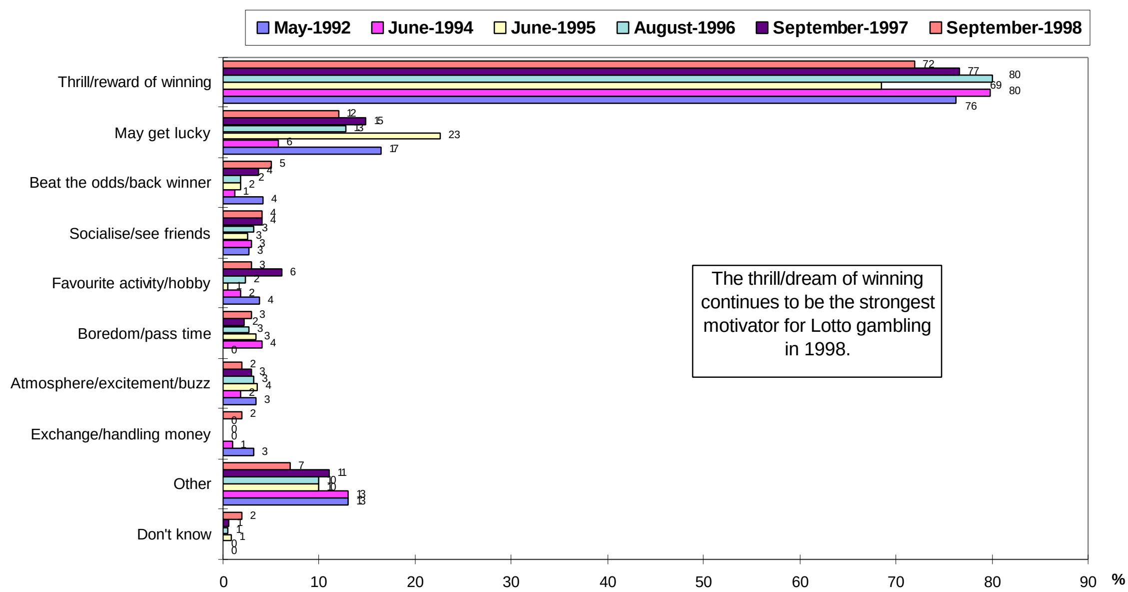
BASE: Total Dissatisfied with Lotto Gambling Activities

[71] Question 8C "Would you say that you are satisfied or dissatisfied with your experience of playing Lotto, Tattslotto, Oz Lotto, Tatts Keno or Powerball?"
[72] Question 9C "Why do you keep entering Lotto if you are dissatisfied?"

LOTTO GAMBLING PATTERNS

6.9 MOTIVATIONS

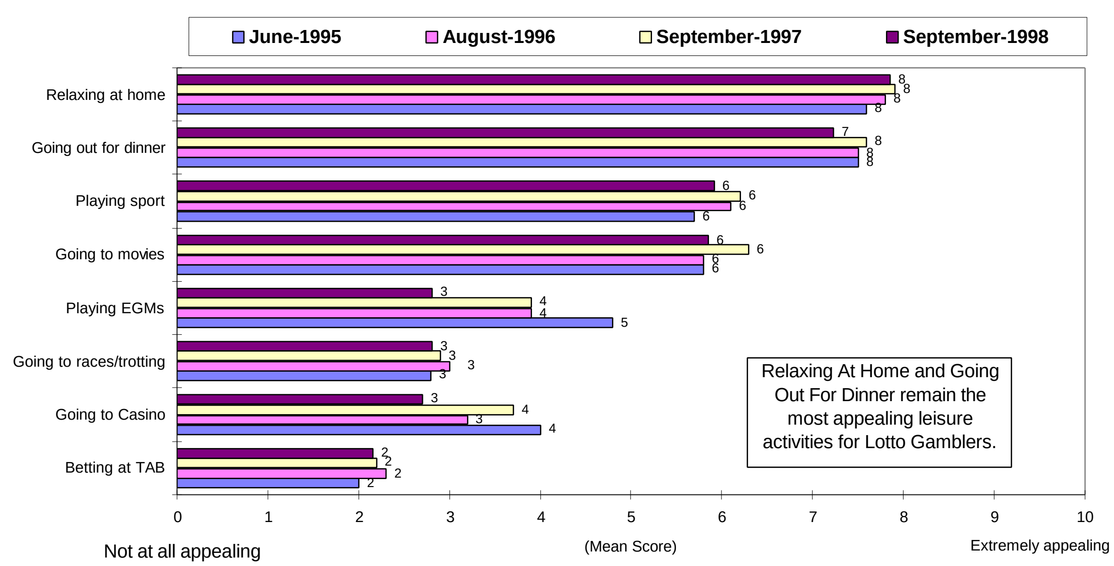
% of LOTTO Gamblers who report that this is a main motivation or reason for gambling at LOTTO



BASE: Total Gambled At Lotto in Last 12 Months

6.10 APPEAL OF LEISURE ACTIVITIES

Level of appeal of leisure activities amongst LOTTO Gamblers



BASE: Total Gambled At Lotto in Last 12 Months

[61] Question 7C "What are the main motivations, attractions or reasons that you play Lotto, Tattslotto, Oz Lotto, Tatts Keno or Powerball?"
[62] 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

7. SCRATCH TICKET GAMBLING PATTERNS

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

- ✓ Scratch ticket gambling participation declined by 16% to 20% in 1998 - the lowest recorded rate;
- ✓ Five percent of gamblers reported scratch ticket gambling as their favourite gambling activity. This is a 3% increase from 1997 (2%);
- ✓ The demographic profile of scratch ticket gamblers reveals that scratch ticket gamblers are more likely to be female and to be in part time employment. Scratch ticket gamblers also show a higher proportion of most Gambling Segments;
- ✓ Similar to lotto gambling, in 1998 the proportion of regular players in scratch ticket gambling increased to 47%, possibly reflecting the behaviour of the core scratch ticket gambling group;
- ✓ The average amount of time spent each time gamblers participated in scratch ticket activities was 3 minutes;
- ✓ On average, scratch ticket gamblers were prepared to pay $4 each time they played. This level of outlay has remained steady since June 1994;
- ✓ There has been a continual increase since 1994 of the proportion of outlay perceived by scratch ticket gamblers as being won back (a high of 26% in 1998);
- ✓ Scratch ticket gamblers showed low level satisfaction with Scratch ticket gambling activities (61.0 CSI);
- ✓ The main reason given for continuing with Scratch ticket gambling despite dissatisfaction with the activity was the hope of winning (52%);

- ✓ The main motivator for scratch ticket gamblers in general was the thrill or dream of winning (53%). Other motivators included: belief in luck (14%), beating the odds (7%) and the atmosphere/excitement (6%);

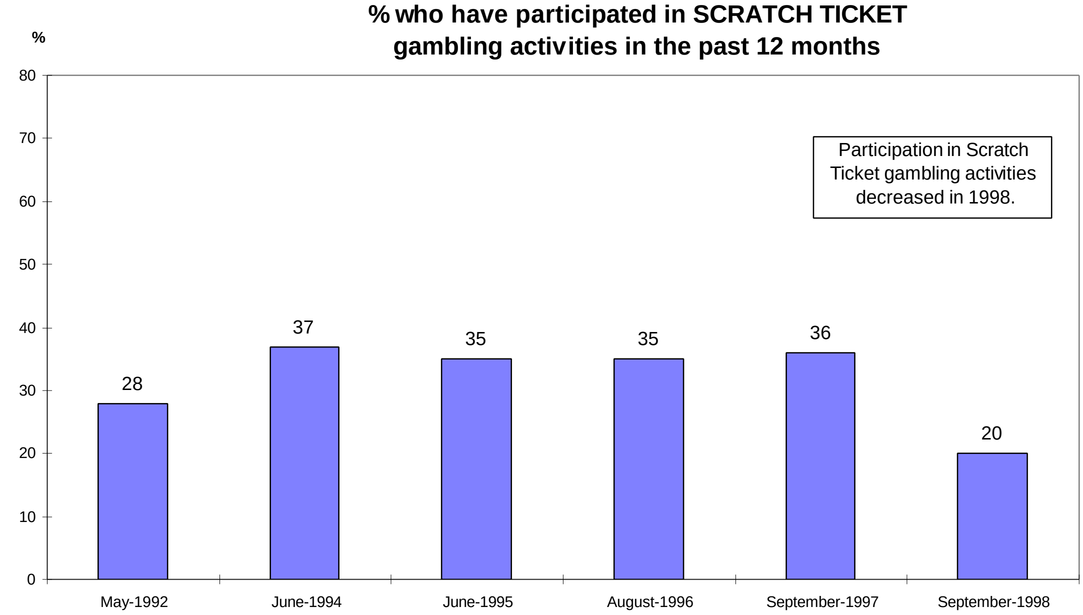
- ✓ Scratch ticket gamblers preferred similar leisure activities to lotto players:
  - relaxing at home (8.0) and
  - going out for dinner (7.6);

whereas high involvement gambling activities such as playing EGMs (3.1) or going to the races or trots (3.11) were considerably less appealing.

SCRATCH TICKET GAMBLING PATTERNS

7.1 PARTICIPATION RATES

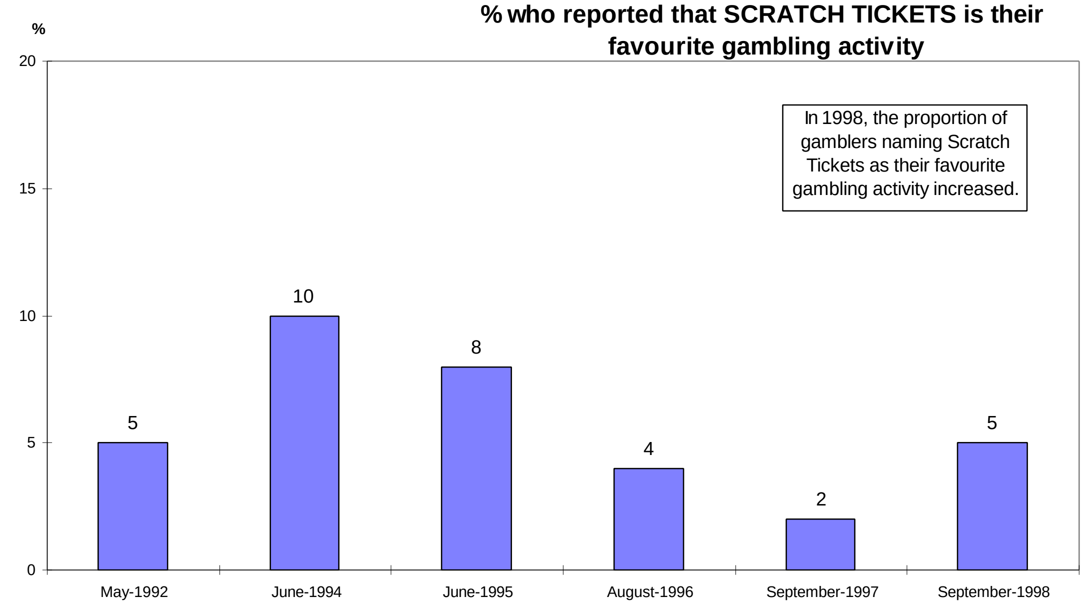
% who have participated in SCRATCH TICKET gambling activities in the past 12 months



BASE: Total Respondents

7.2 FAVOURITE GAMBLING ACTIVITY

% who reported that SCRATCH TICKETS is their favourite gambling activity



BASE: Total Gambled in Last 12 Months

[63] Question 1 "Which of the following activities or games have you played or gambled on in the past 12 months?"

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

PROFILE OF SCRATCH TICKET GAMBLERS

TABLE 7.1

	Total Population	**Scratch ticket Gamblers (Last 12 mths)** **20% of total pop**	**Reg. Scratch ticket Gamblers (Once a mth+)** **10% of total pop**
GENDER			
Male	49%	43%	49%
Female	51%	57%	51%
AGE			
Average Age	44 yrs	41 yrs	40 yrs
RESPONDENT'S OCCUPATION			
TOTAL FULL TIME	**44%**	**45%**	**49%**
Professionals / Executives	10%	10%	10%
Owners/White Collar Worker	18%	19%	18%
Farm Owner	1%	1%	1%
Skilled Workers	10%	10%	14%
Semi-skilled workers	3%	4%	3%
Unskilled workers / Other	2%	2%	3%
TOTAL PART TIME	**15%**	**20%**	**16%**
TOTAL NOT IN PAID WORKFORCE	**41%**	**35%**	**34%**
Household duties	10%	11%	10%
Student	6%	6%	7%
Self Supporting Retiree	5%	2%	1%
Pensioner	18%	14%	13%
Unemployed	3%	2%	3%
LOCATION			
Melbourne Metropolitan	73%	67%	68%
Other Victoria non metropolitan	27%	33%	32%
SOGS SCORE			
(0-4)	98.5%	97.9%	97.6%
(5-20)	1.5%	2.1%	2.4%
SEGMENT			
Disinterested Gambler	20%	25%	23%
Occasional Gambler	33%	40%	35%
Social Gambler	9%	15%	19%
Acknowledged Heavy Gambler	5%	7%	10%
Committed Heavy Gambler	8%	15%	14%

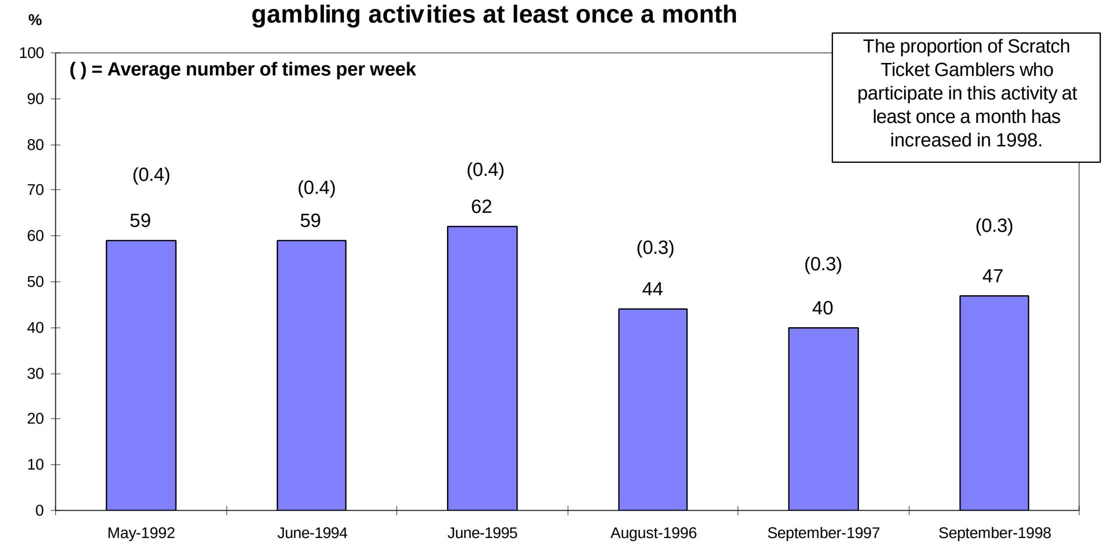
Significantly higher than average

Significantly lower than average

SCRATCH TICKET GAMBLING PATTERNS

7.3 FREQUENCY

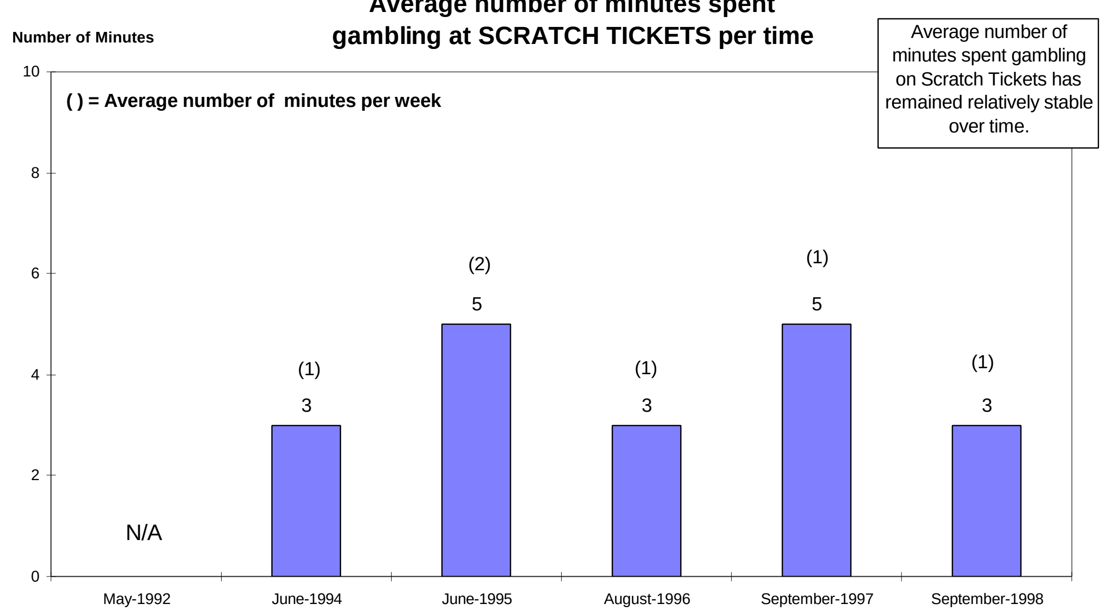
% of SCRATCH TICKET Gamblers who participate in SCRATCH TICKET gambling activities at least once a month



BASE: Total Gambled At Scratch Tickets in Last 12 Months

7.4 DURATION

Average number of minutes spent gambling at SCRATCH TICKETS per time

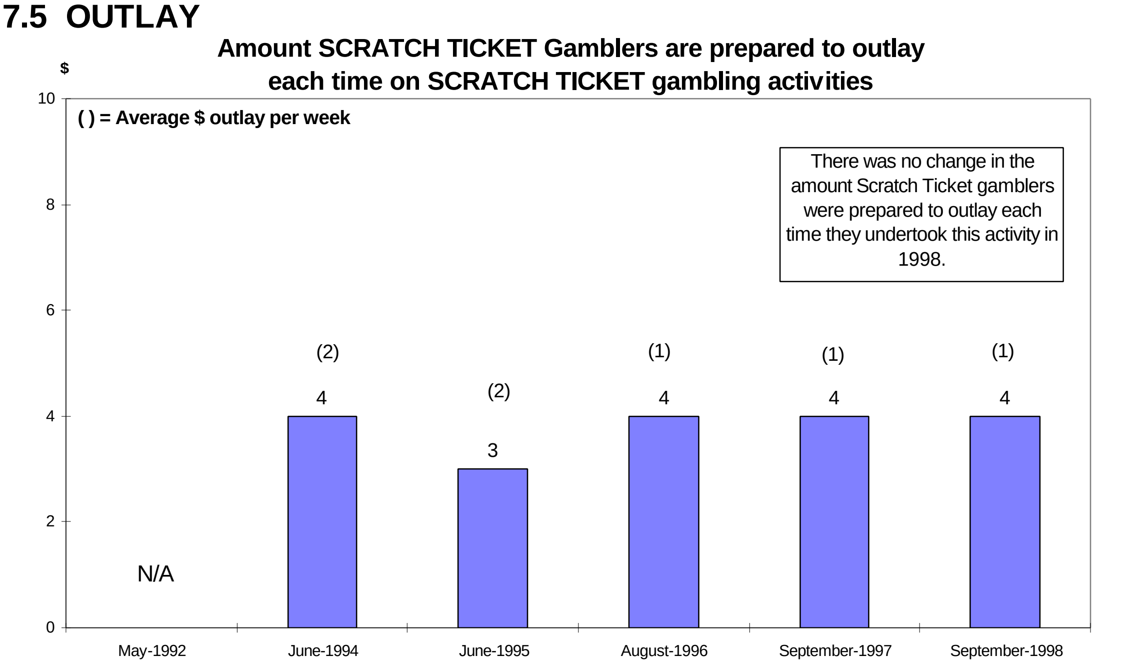


BASE: Total Gambled At Scratch Tickets in Last 12 Months

[65] Question 3D "How often do you enter Scratch ticket, Instant Lotto or Scratch 'n Win?"
[66] Question 4D "And each time you enter Scratch ticket, Instant Lotto or Scratch 'n Win, how much time do you spend playing Scratch ticket, Instant Lotto or Scratch 'n Win?"

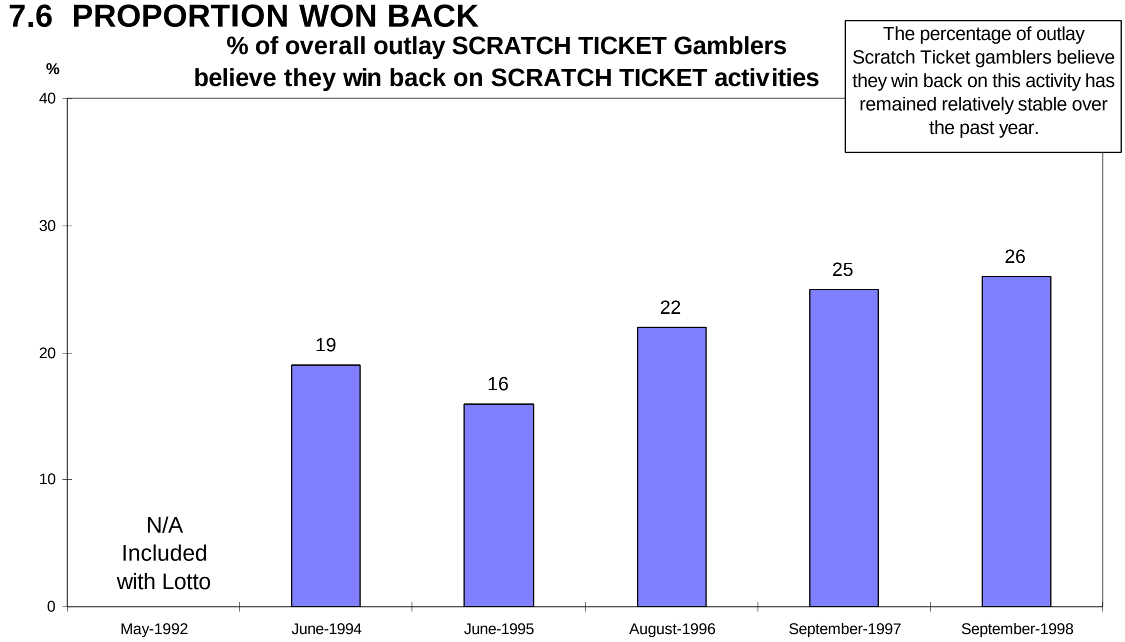
SCRATCH TICKET GAMBLING PATTERNS

7.5 OUTLAY



BASE: Total Gambled At Scratch Ticket in Last 12 Months

7.6 PROPORTION WON BACK

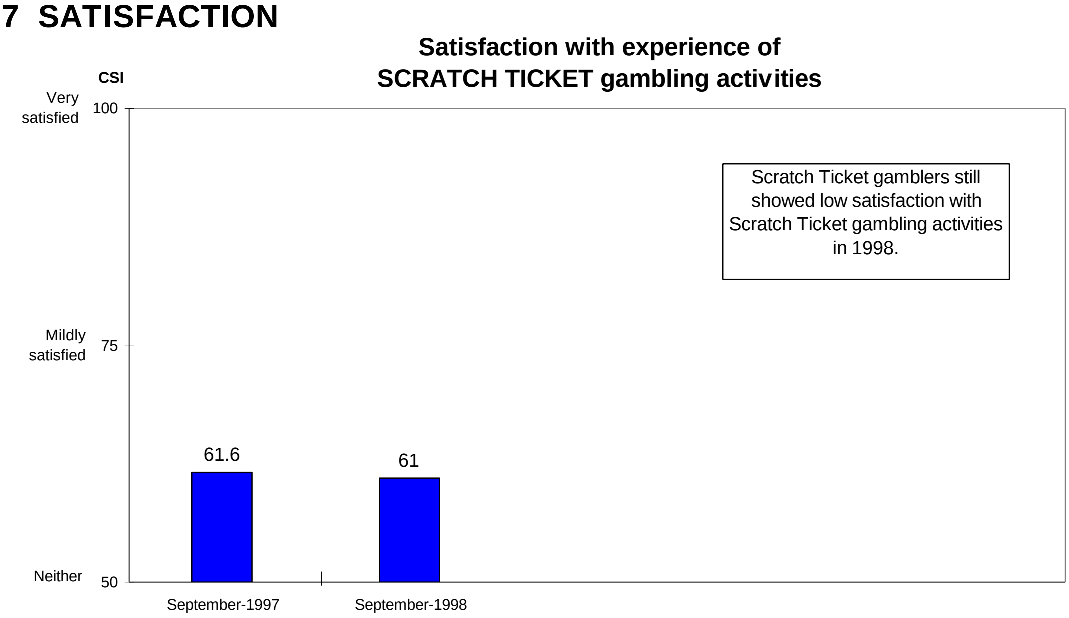


BASE: Total Gambled At Scratch Tickets in Last 12 Months

[67] Question 5D "And each time you enter Scratch ticket, Instant Lotto or Scratch 'n Win, what is the dollar value you are prepared to or would outlay on this activity?"
[68] Question 6D "On average, what percentage of your overall outlay do you win back on Scratch ticket, Instant Lotto or Scratch 'n Win?"

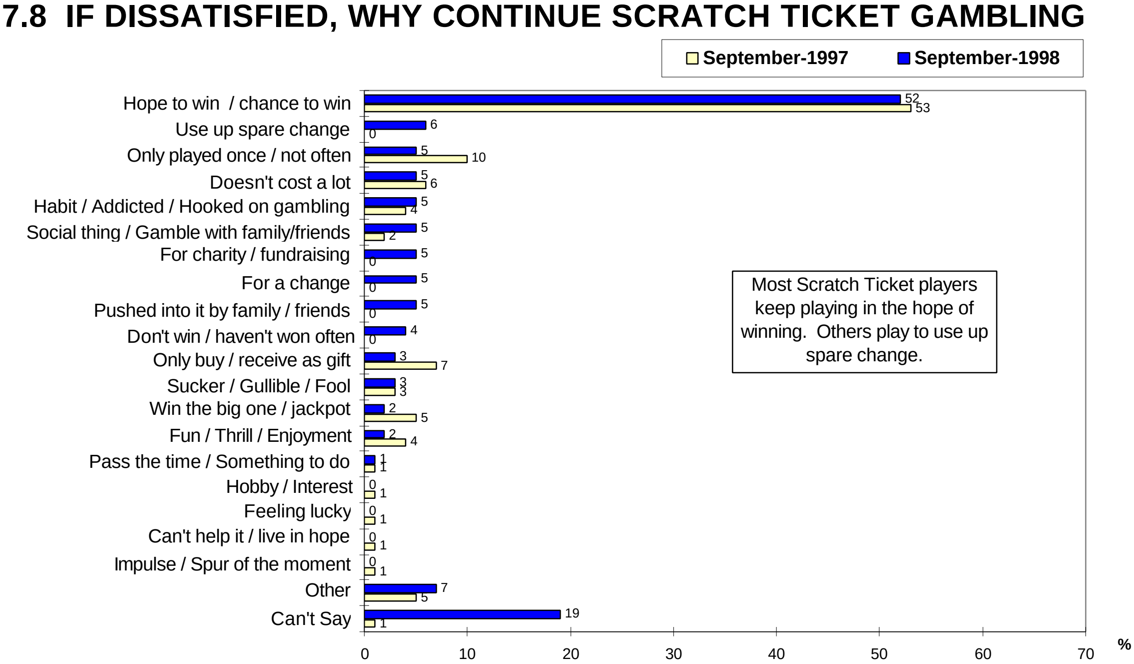
SCRATCH TICKET GAMBLING PATTERNS

7.7 SATISFACTION



BASE: Total Gambled At Scratch Tickets in Last 12 Months

7.8 IF DISSATISFIED, WHY CONTINUE SCRATCH TICKET GAMBLING



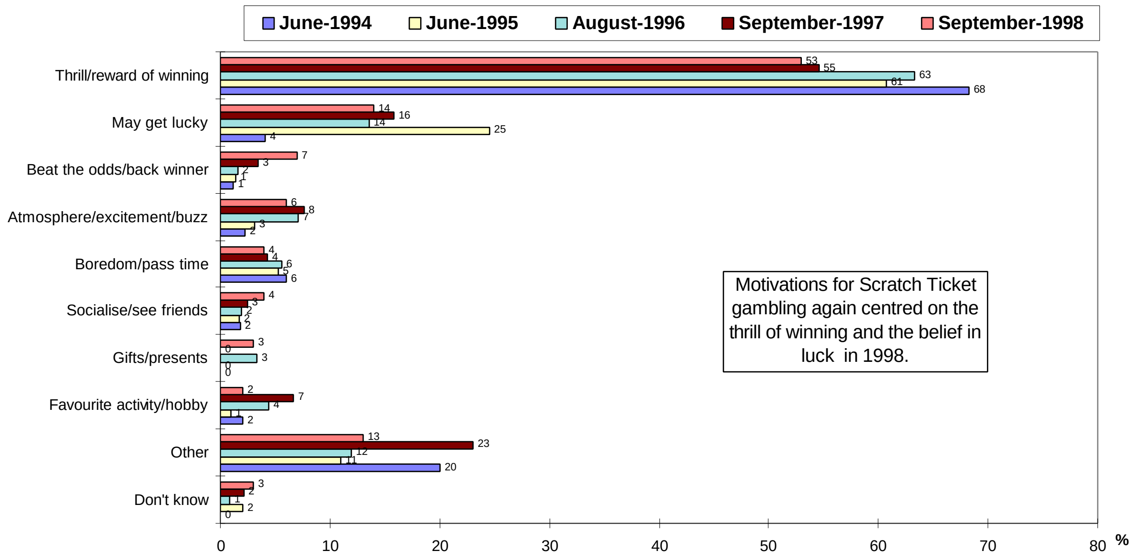
BASE: Total Dissatisfied with Scratch Ticket Gambling Activities

[69] Question 8D "Would you say that you are satisfied or dissatisfied with your experience of entering Scratch ticket, Instant Lotto or Scratch 'n Win?"
[70] Question 9D "Why do you keep entering Scratch ticket, Instant Lotto or Scratch 'n Win if you are dissatisfied?"

SCRATCH TICKET GAMBLING PATTERNS

7.9 MOTIVATIONS

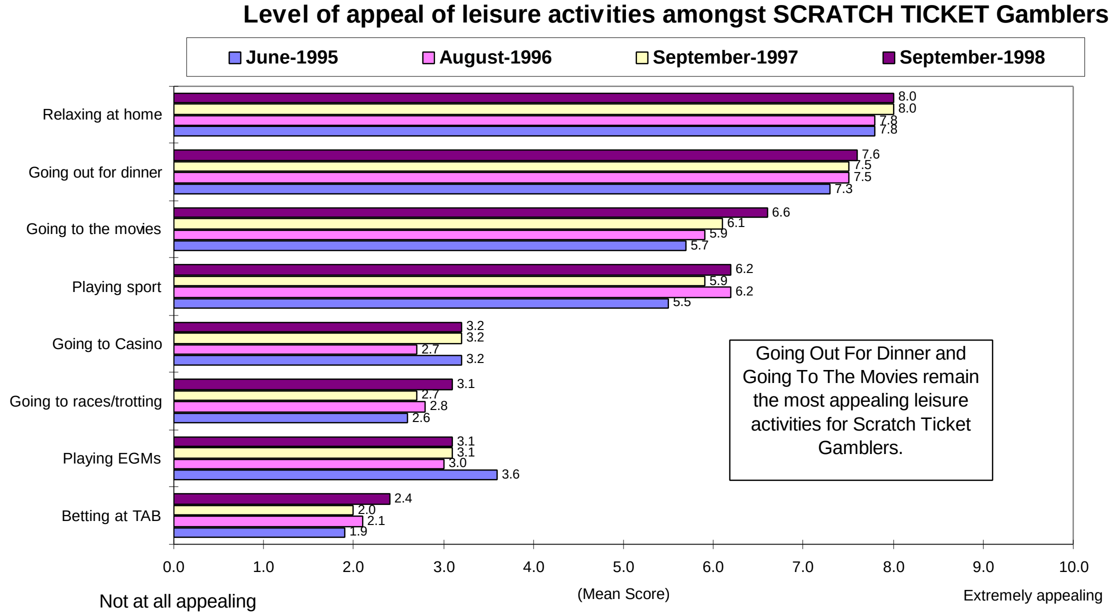
% of SCRATCH TICKET Gamblers who report that this is a main motivation or reason for gambling on SCRATCH TICKETS



BASE: Total Gambled At Scratch Tickets in Last 12 Months

7.10 APPEAL OF LEISURE ACTIVITIES

Level of appeal of leisure activities amongst SCRATCH TICKET Gamblers



BASE: Total Gambled At Scratch Tickets in Last 12 Months

[71] Question 7D "What are the main motivations, attractions or reasons that you enter Scratch ticket, Instant Lotto or Scratch 'n Win?"

[72] 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. One third of Victorians participated in raffles in the past 12 months (33%). Other key findings regarding raffles gambling patterns included;

- ✓ Raffles gambling was the second highest gambling activity participated in by Victorians in the last 12 months (33%). However, this represents a decrease of 28% since 1997, when 61% of Victorians participated in raffles;

- ✓ 11% of gamblers reported raffles as their favourite gambling activity, a 5% increase from 1997 (6%);

- ✓ Raffles gamblers were significantly more likely than the Victorian population to be female, to live in country areas and to be Occasional Gamblers or Disinterested Gamblers. Regular raffles gamblers were likely to live in rural areas and to be Occasional Gamblers or Committed Heavy Gamblers;

- ✓ A greater proportion of raffles gamblers participated in raffles at least once a month than was the case in 1997 (41% cf 34%);

- ✓ Raffles gamblers spent an average of 3 minutes gambling on raffles each time they did so;

- ✓ There has been no change in the amount raffles gamblers were prepared to outlay each time they participated in this activity ($4);

- ✓ Raffles gamblers held low expectations of winning on raffles (5% of outlay reported as won back);

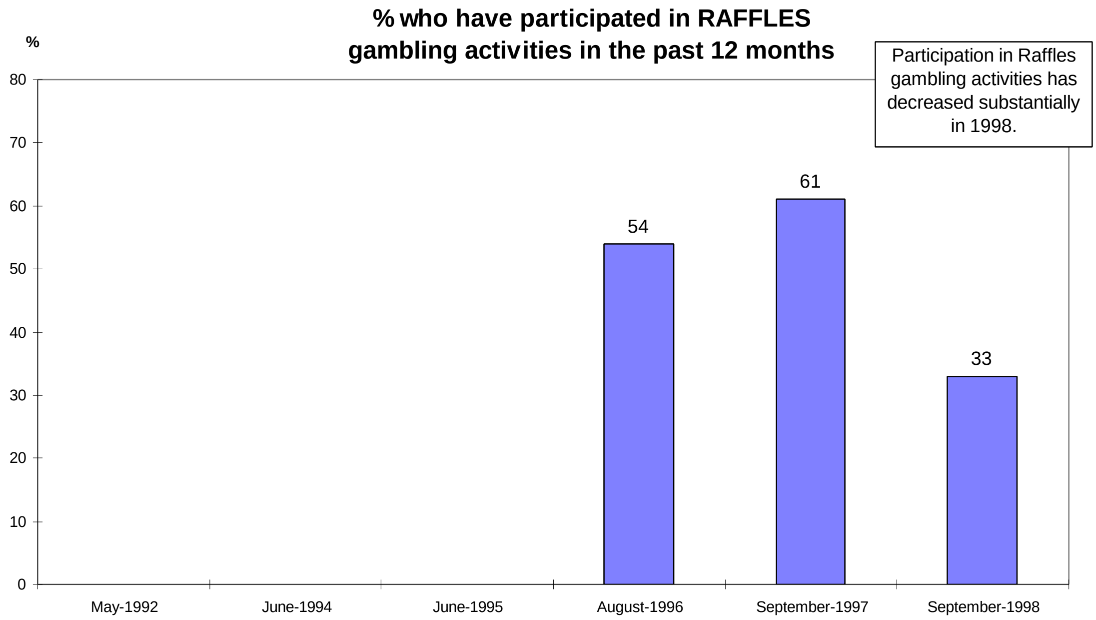
- ✓ As in 1997, raffles gamblers reported low satisfaction with raffles gambling activities (63.8 CSI);

- ✓ The main motivations for gamblers to enter raffles included donations to charity (61%), the thrill or dream of winning (19%) and social reasons (15%);

- ✓ Raffles gamblers found relaxing at home (mean rating of 7.9), going out for dinner (mean rating of 7.5) and going to the movies (mean rating of 6.1) appealing leisure activities, more so than high level gambling leisure activities such as betting at the TAB (mean rating of 2.2), playing EGMs (mean rating of 2.6) and going to the casino (mean rating of 2.7).

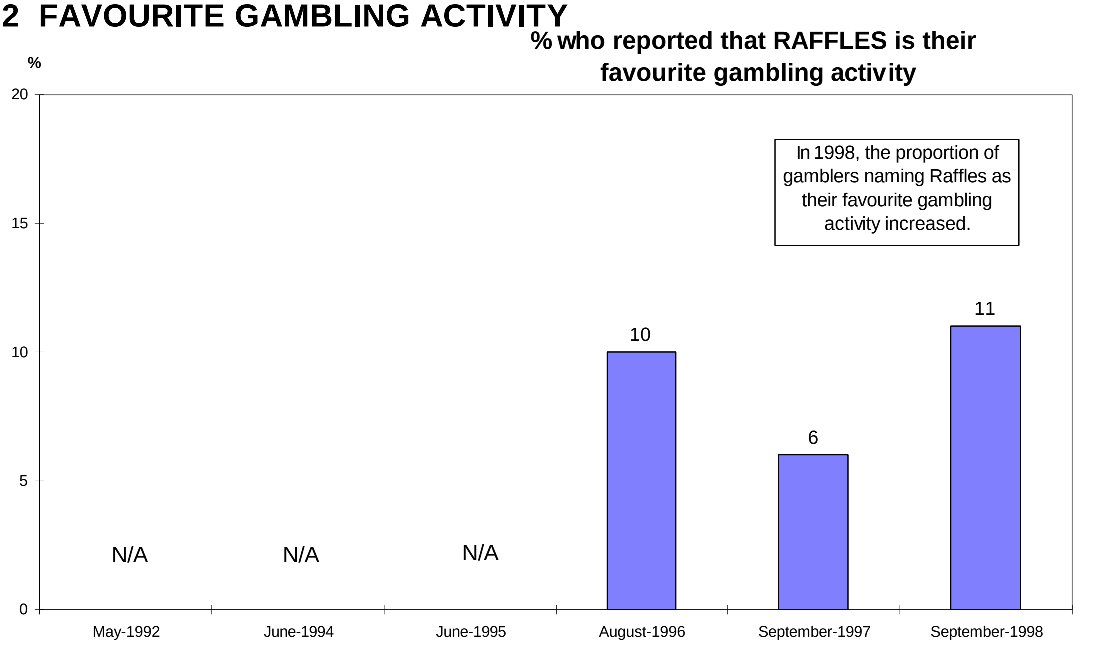
RAFFLES GAMBLING PATTERNS

8.1 PARTICIPATION RATES



BASE: Total Respondents

8.2 FAVOURITE GAMBLING ACTIVITY



BASE: Total Gambled in Last 12 Months

[73] Question 1. Which of the following activities or games have you played or gambled on in the past 12 months?
[74] Question 2 "Which one of these activities is your favourite game or activity?" (unprompted)

PROFILE OF RAFFLES GAMBLERS

TABLE 8.1

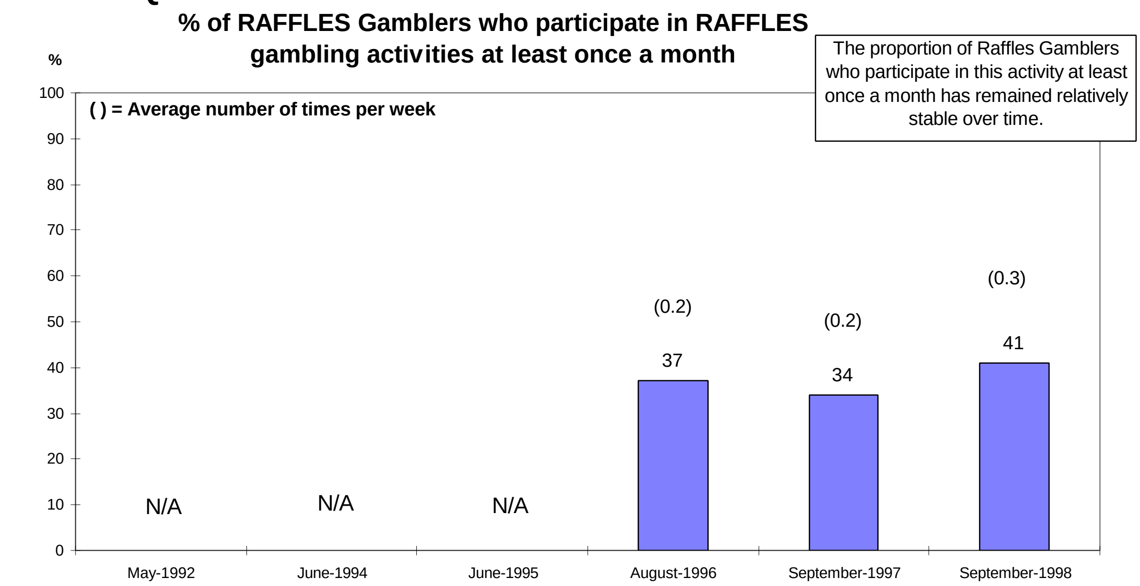
	Total Population	Raffle Gamblers (Last 12 mths) 33% of total pop	Reg. Raffle Gamblers (Once a mth+) 14% of total pop
GENDER			
Male	49%	42%	45%
Female	51%	58%	55%
AGE			
Average Age	44 yrs	44 yrs	46 yrs
RESPONDENT'S OCCUPATION			
TOTAL FULL TIME	**44%**	**46%**	**49%**
Professionals / Executives	10%	10%	10%
Owners/White Collar Worker	18%	19%	22%
Farm Owner	1%	2%	1%
Skilled Workers	10%	11%	13%
Semi-skilled workers	3%	3%	3%
Unskilled workers / Other	2%	2%	1%
TOTAL PART TIME	**15%**	**16%**	**17%**
TOTAL NOT IN PAID WORKFORCE	**41%**	**38%**	**34%**
Household duties	10%	12%	10%
Student	6%	3%	2%
Self Supporting Retiree	5%	5%	4%
Pensioner	18%	16%	19%
Unemployed	3%	1%	0%
LOCATION			
Melbourne Metropolitan	73%	67%	60%
Other Victoria non metropolitan	27%	33%	40%
SOGS SCORE			
(0-4)	98.5%	98.0%	96.9%
(5-20)	1.5%	2.0%	3.1%
SEGMENT			
Disinterested Gambler	20%	27%	21%
Occasional Gambler	33%	46%	44%
Social Gambler*	9%	10%	12%
Acknowledged Heavy Gambler	5%	5%	6%
Committed Heavy Gambler	8%	12%	16%

Significantly higher than average compared to the total population

Significantly lower than average compared to the total population

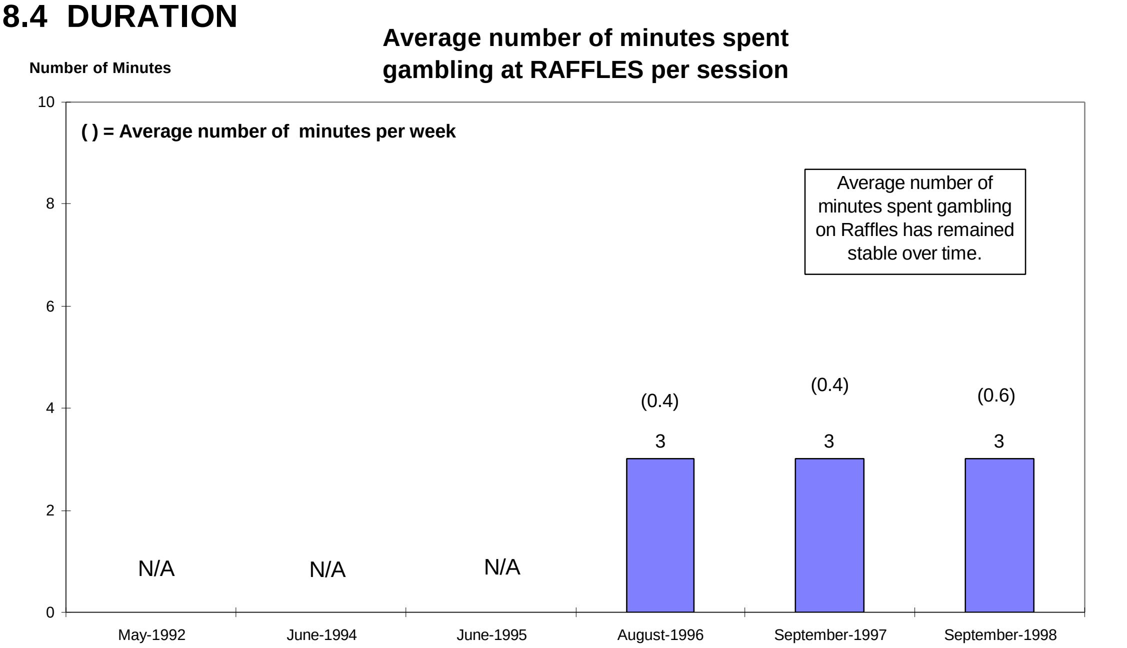
RAFFLES GAMBLING PATTERNS

8.3 FREQUENCY



BASE: Total Gambled At Raffles in Last 12 Months

8.4 DURATION

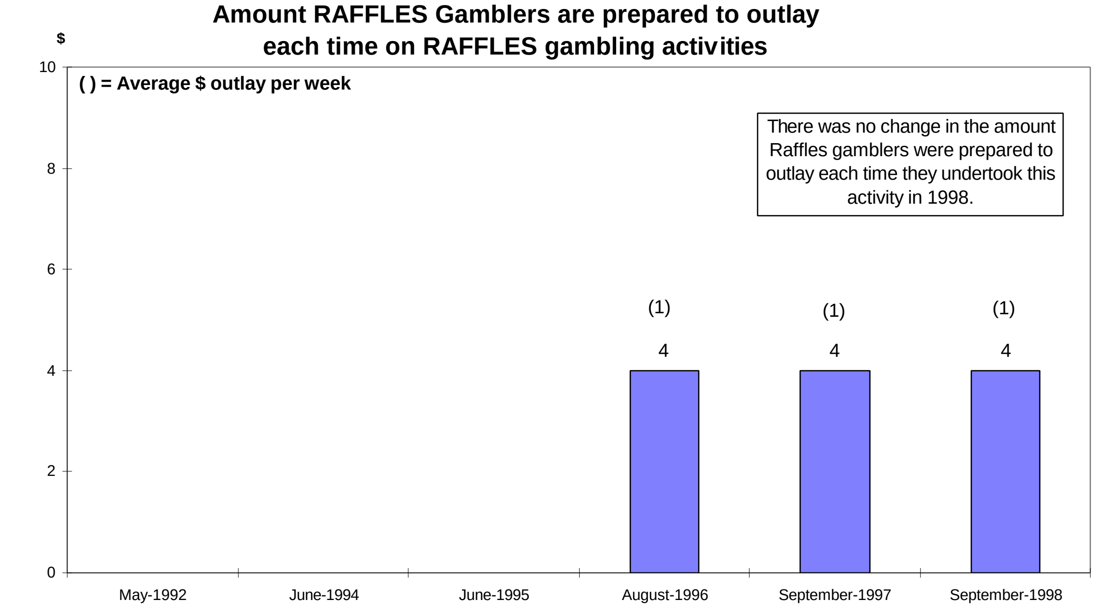


BASE: Total Gambled At Raffles in Last 12 Months

[75] Question 3A "How often do you enter Raffles?"
[76] Question 4A "And each time you enter Raffles, how much time do you spend playing Raffles?"

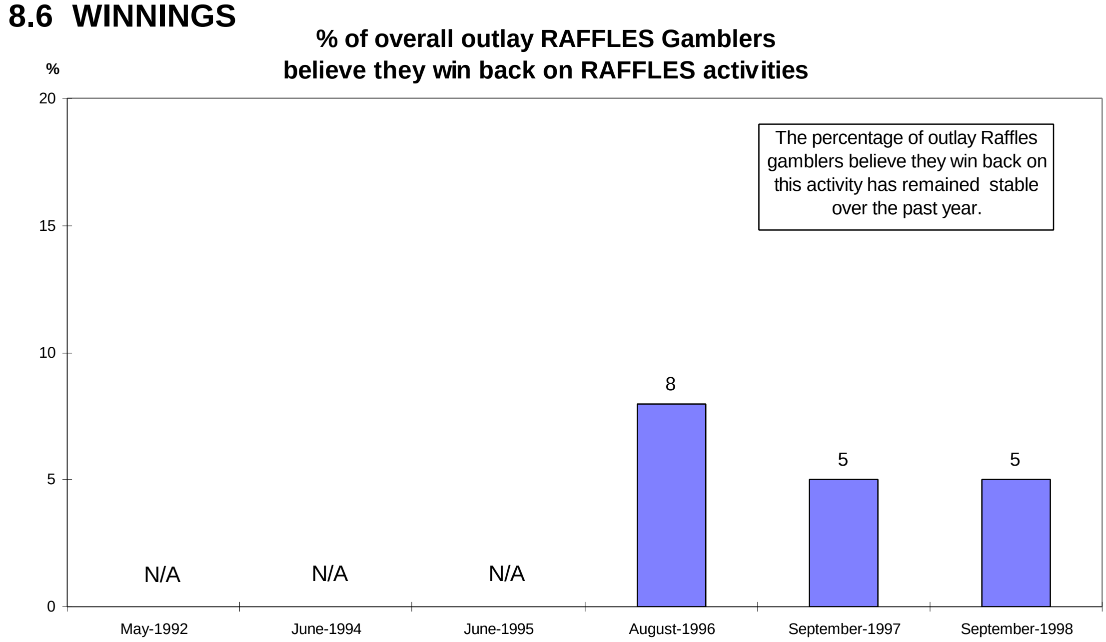
RAFFLES GAMBLING PATTERNS

8.5 OUTLAY



BASE: Total Gambled At Raffles in Last 12 Months

8.6 WINNINGS

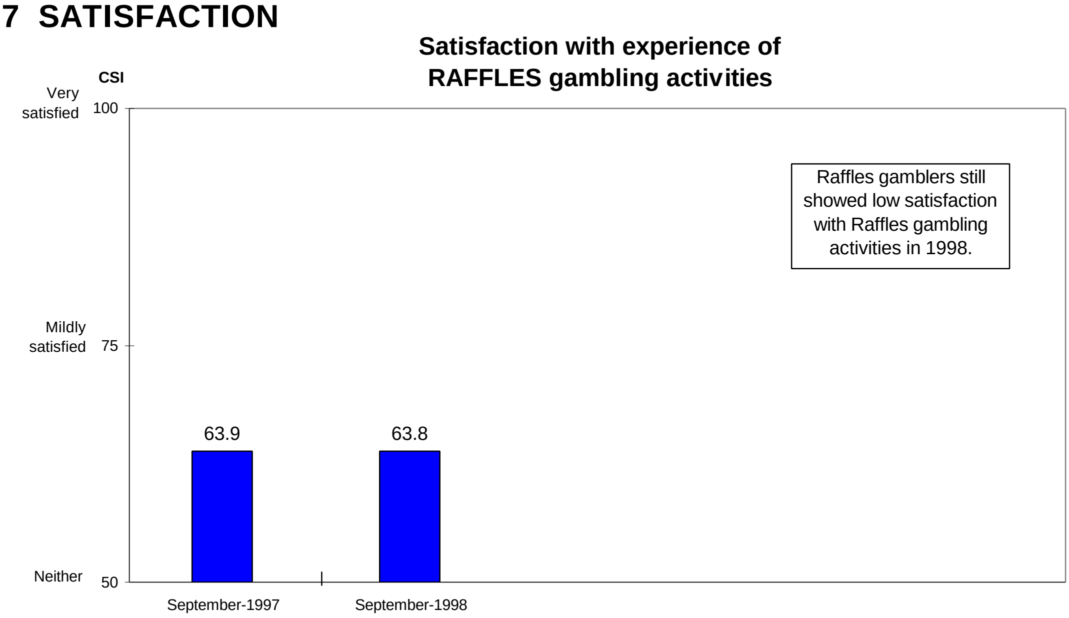


BASE: Total Gambled At Raffles in Last 12 Months

[77] Question 5A "And each time you enter Raffles, what is the dollar value you are prepared to or would outlay on this activity?"
[78] Question 6A "On average, what percentage of your overall outlay do you win back on Raffles?"

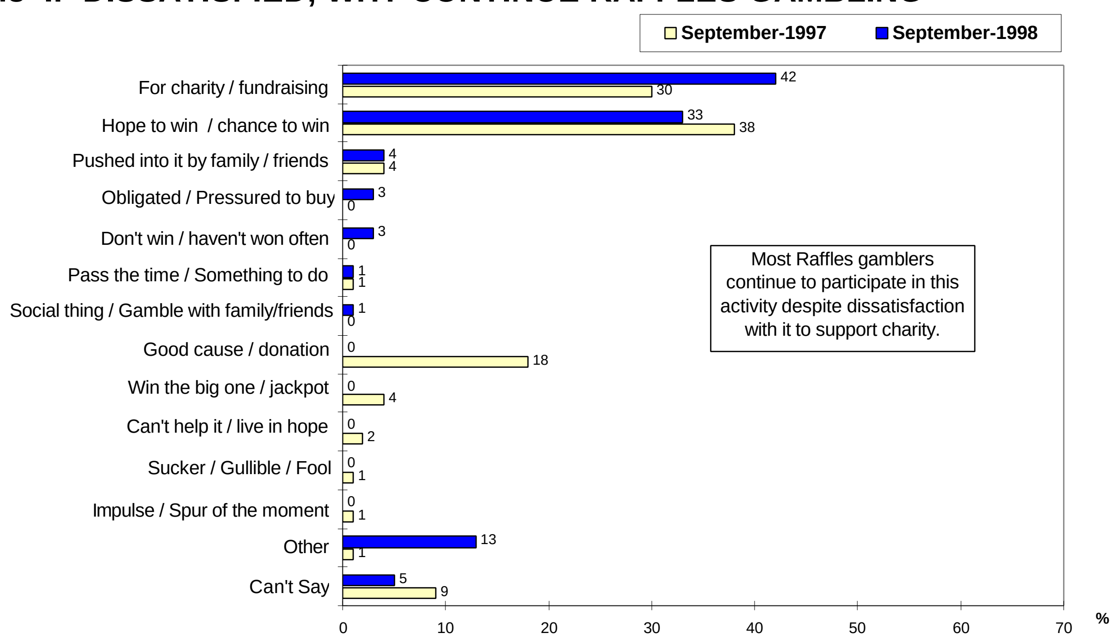
RAFFLES GAMBLING PATTERNS

8.7 SATISFACTION



BASE: Total Gambled At Raffles in Last 12 Months

8.8 IF DISSATISFIED, WHY CONTINUE RAFFLES GAMBLING

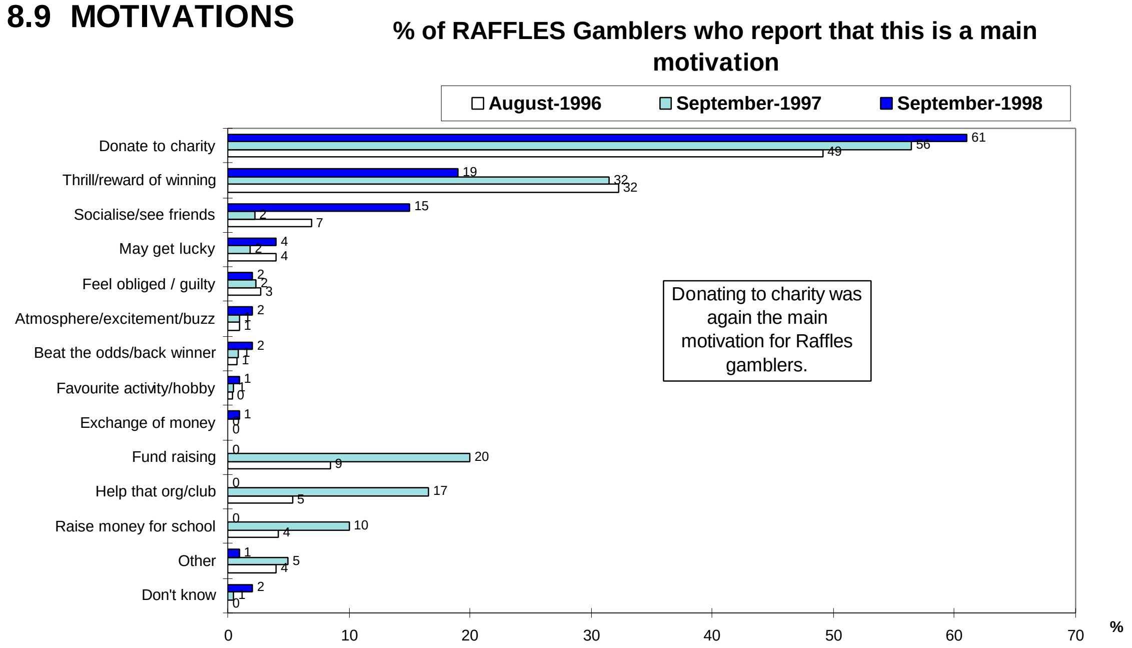


BASE: Total Dissatisfied with Raffles Gambling Activities

[79] Question 8A "Would you say that you are satisfied or dissatisfied with your experience of entering Raffles?"
[80] Question 9A "Why do you keep entering Raffles if you are dissatisfied?"

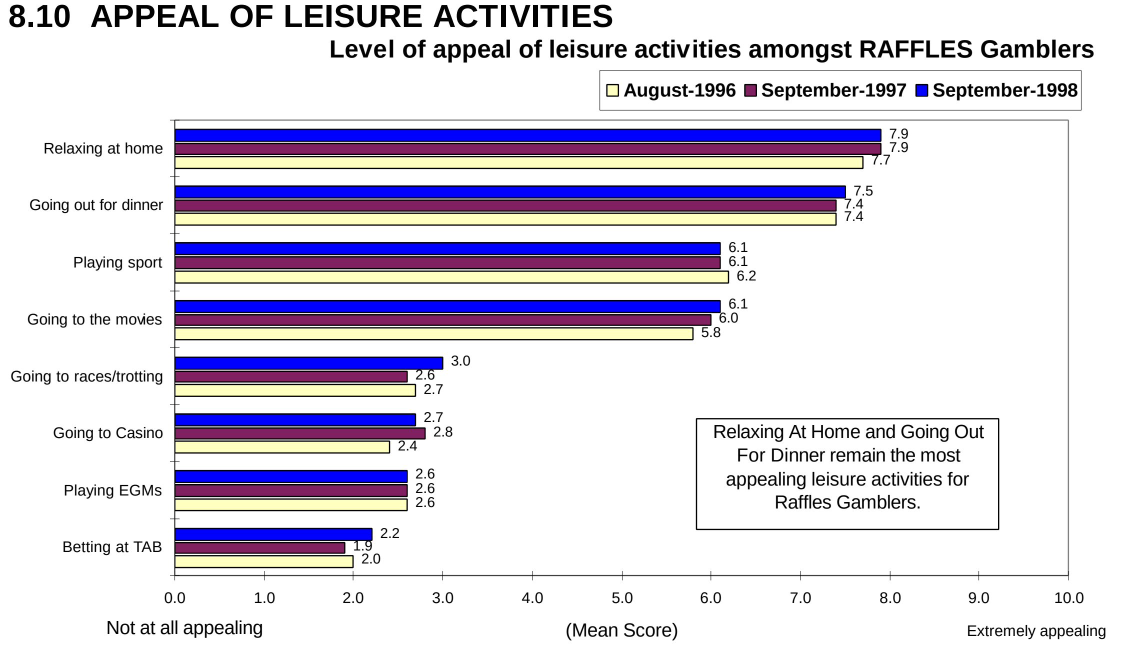
RAFFLES GAMBLING PATTERNS

8.9 MOTIVATIONS



BASE: Total Gambled At Raffles in Last 12 Months

8.10 APPEAL OF LEISURE ACTIVITIES



BASE: Total Gambled At Raffles in Last 12 Months

[81] Question 7A "What are the main motivations, attractions or reasons that you enter Raffles?"
[82] 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

7. 9. BINGO GAMBLING PATTERNS - SUMMARY

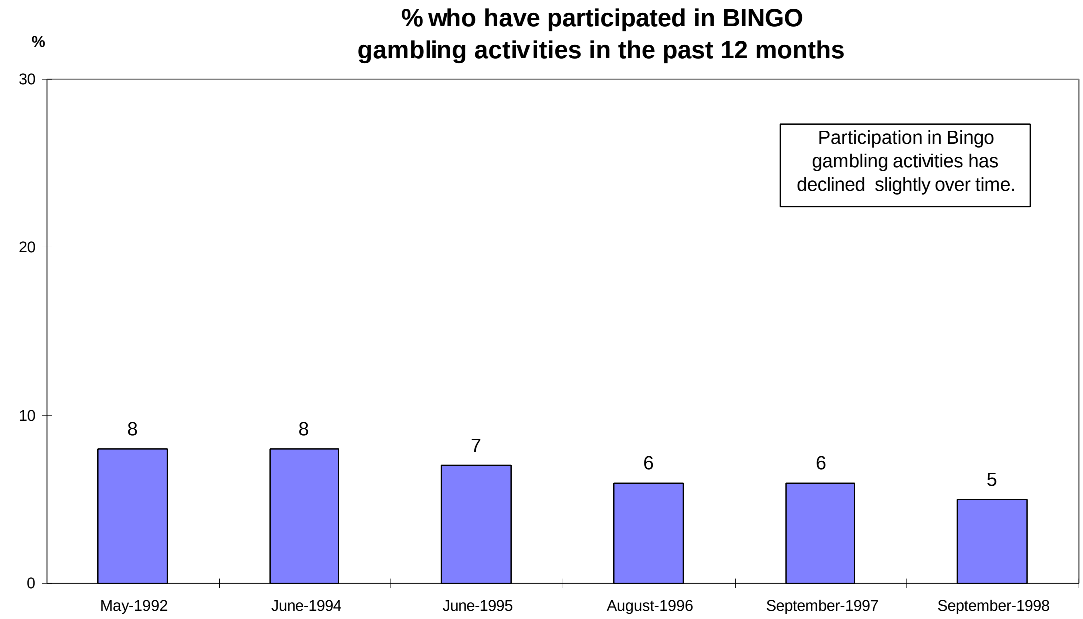
Section 9 provides a brief summary of bingo gambling patterns. The key findings include:

- ✓ A slight downward trend in bingo participation was observed over time, with 5% of gamblers playing bingo in 1998;
- ✓ The number of gamblers who reported bingo as their favourite gambling activity has remained relatively stable over time. In 1998, 3% of gamblers said playing bingo was their favourite gambling activity;
- ✓ Bingo gamblers & regular bingo gamblers alike were significantly more likely to be female, residing in the country, not in paid employment and social gamblers;
- ✓ Regular bingo gamblers were also significantly more likely to be pensioners;
- ✓ There was an increase in the frequency of regular participation in bingo in 1998, with 50% playing at least once a month or more frequently;
- ✓ Overall, bingo gamblers spent approximately 117 minutes (almost 2 hours) each time they played bingo in 1998;
- ✓ On average, Bingo gamblers outlaid $14 each time they played Bingo in 1998. The amount outlaid on this activity has remained relatively stable over time;
- ✓ In 1998, there was a decrease in the proportion of outlay bingo players believed they won back on this activity. On average, bingo gamblers believed they won back 28% of their outlay when they participate in this activity;
- ✓ Bingo gamblers reported a moderate level of satisfaction with bingo gambling activities (74.1 CSI);
- ✓ Bingo gamblers’ reasons for continuing gambling on bingo despite dissatisfaction with the activity included: social reasons (33%) and the hope of winning (11%);
- ✓ Motivations for bingo gamblers included social reasons (67%) or thrill / reward of winning (11%); and,

- ✓ Bingo gamblers found activities such as relaxing at home (mean rating of 8.3) and going out for dinner (mean rating of 7.4) very appealing. They showed a low level of interest in betting at the TAB (mean rating of 2.0) and going to the races or trots (mean rating of 2.8).

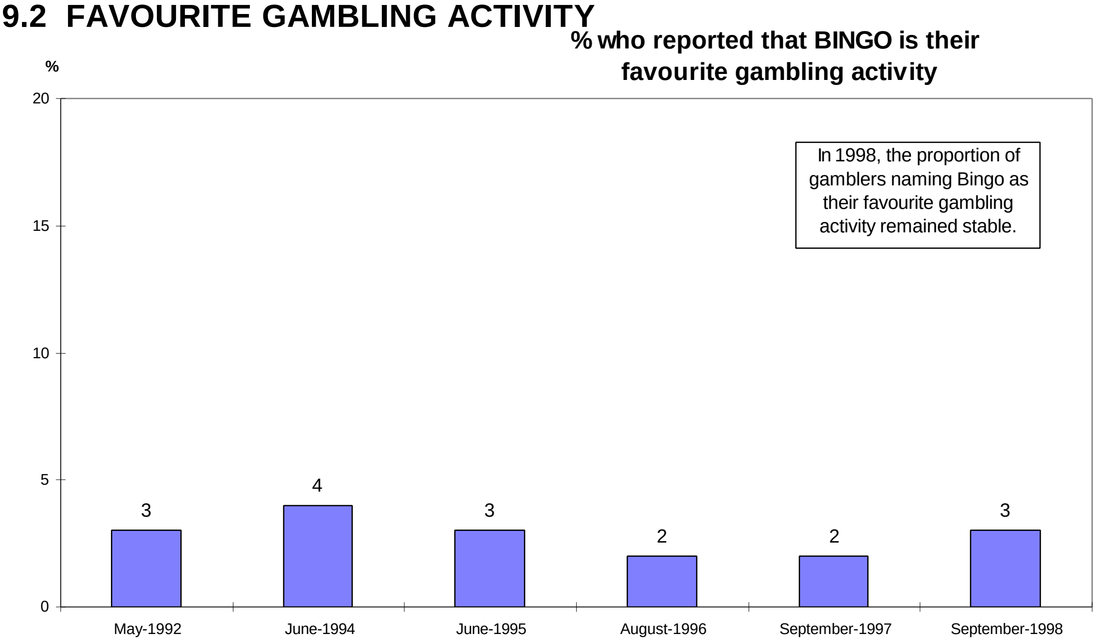
BINGO GAMBLING PATTERNS

9.1 PARTICIPATION RATES



BASE: Total Respondents

9.2 FAVOURITE GAMBLING ACTIVITY



BASE: Total Gambled in Last 12 Months

83 Question 1. Which of the following activities or games have you played or gambled on in the past 12 months?

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

PROFILE OF BINGO GAMBLERS

TABLE 9.1

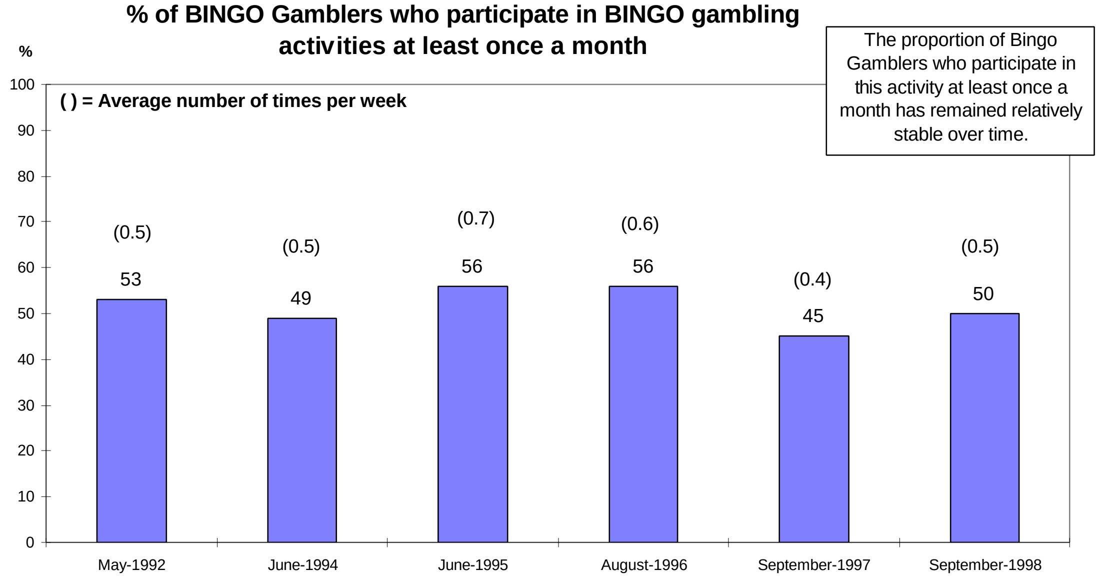
	Total Population	**Bingo Gamblers (Last 12 mths)** **5% of total pop**	**Reg. Bingo Gamblers (Once a mth+)** **3% of total pop**
GENDER			
Male	49%	26%	21%
Female	51%	74%	79%
AGE			
Average Age	44 yrs	53 yrs	60 yrs
RESPONDENT'S OCCUPATION			
TOTAL FULL TIME	**44%**	**20%**	**7%**
Professionals / Executives	10%	2%	-%
Owners/White Collar Worker	18%	6%	2%
Farm Owner	1%	1%	2%
Skilled Workers	10%	11%	3%
Semi-skilled workers	3%	-%	-%
Unskilled workers / Other	2%	-%	-%
TOTAL PART TIME	**15%**	**17%**	**15%**
TOTAL NOT IN PAID WORKFORCE	**41%**	**63%**	**79%**
Household duties	10%	10%	13%
Student	6%	1%	-%
Self Supporting Retiree	5%	6%	2%
Pensioner	18%	45%	64%
Unemployed	3%	2%	-
LOCATION			
Melbourne Metropolitan	73%	63%	52%
Other Victoria non metropolitan	27%	37%	48%
SOGS SCORE			
(0-4)	98.5%	94.0%	93.8%
(5-20)	1.5%	6.0%	6.2%
SEGMENT			
Disinterested Gambler	20%	25%	29%
Occasional Gambler	33%	38%	35%
Social Gambler	9%	15%	19%
Acknowledged Heavy Gambler	5%	14%	11%
Committed Heavy Gambler	8%	8%	6%

Significantly higher than average compared to the total population

Significantly lower than average compared to the total population

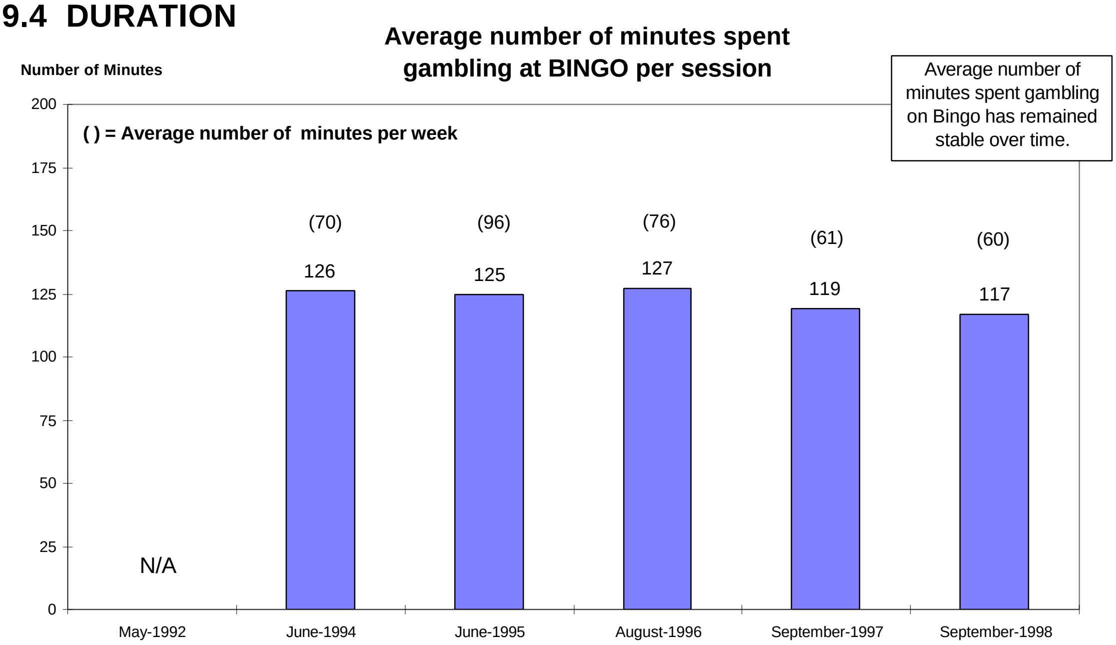
BINGO GAMBLING PATTERNS

9.3 FREQUENCY



BASE: Total Gambled At Bingo in Last 12 Months

9.4 DURATION

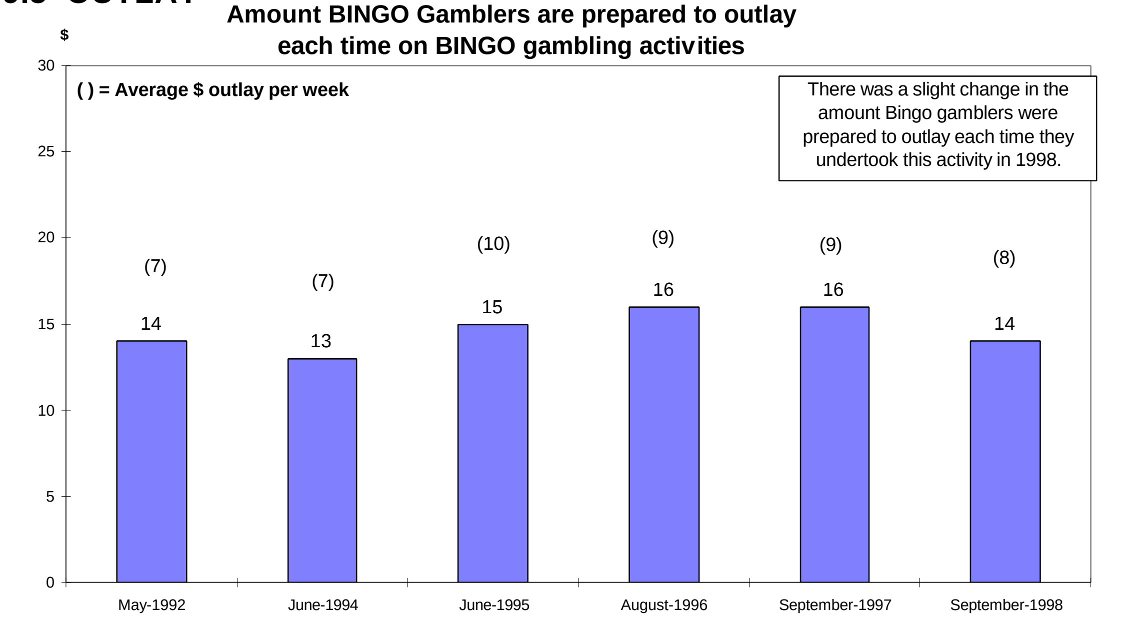


BASE: Total Gambled At Bingo in Last 12 Months

[85] Question 3B "How often do you play Bingo?"
[86] Question 4B "And each time you play Bingo, how much time do you spend playing Bingo?"

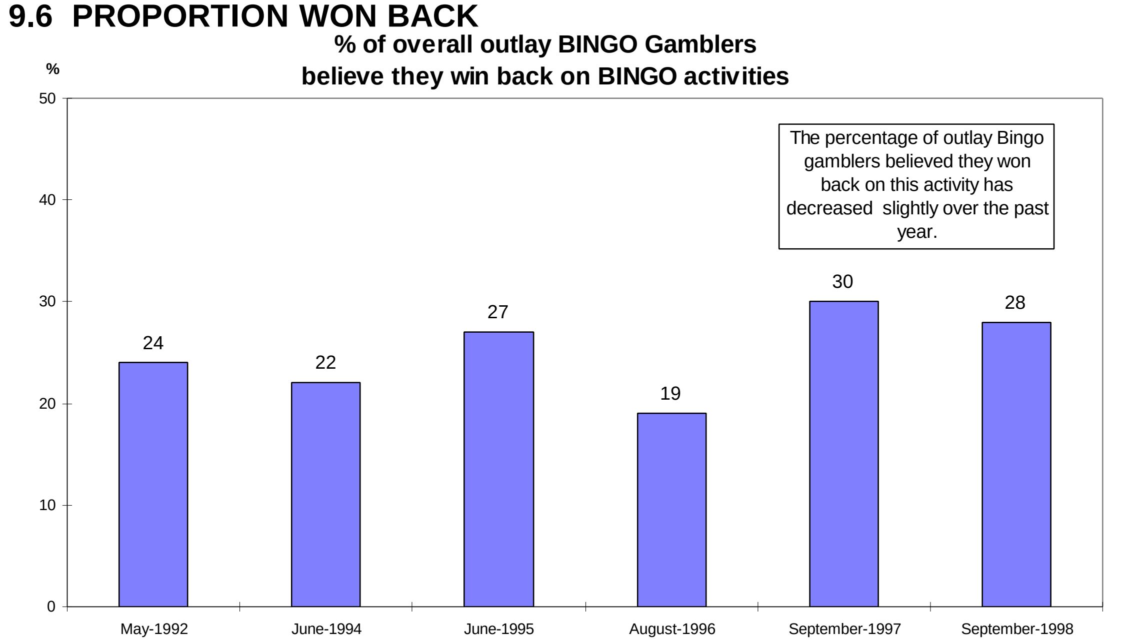
BINGO GAMBLING PATTERNS

9.5 OUTLAY



BASE: Total Gambled At Bingo in Last 12 Months

9.6 PROPORTION WON BACK

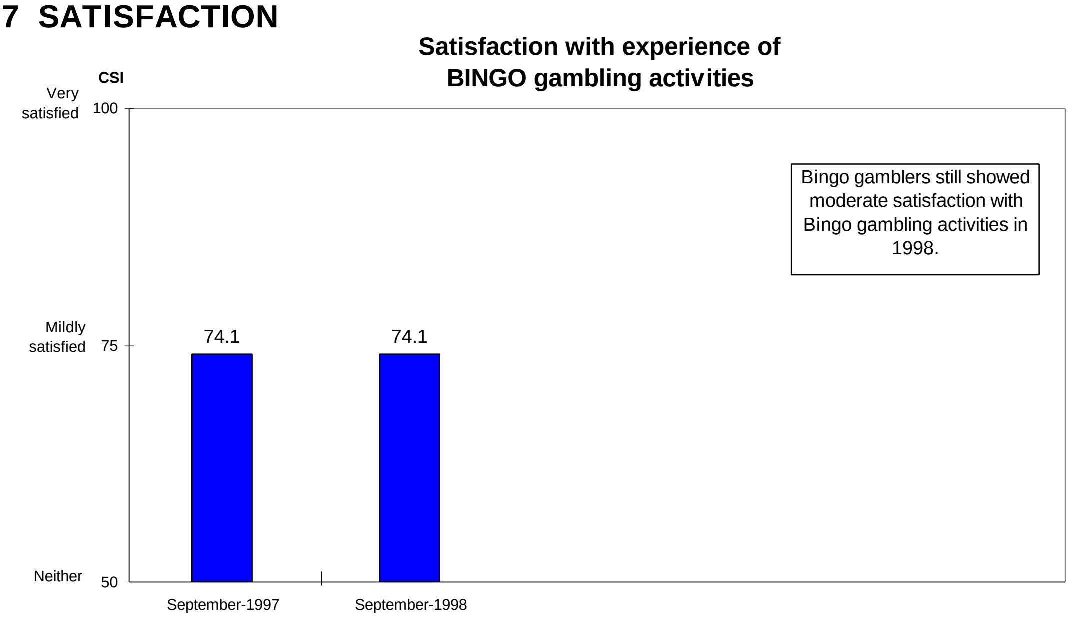


BASE: Total Gambled At Bingo in Last 12 Months

[87] Question 5B "And each time you play Bingo, what is the dollar value you are prepared to or would outlay on this activity?"
[88] Question 6B "On average, what percentage of your overall outlay do you win back on Bingo?"

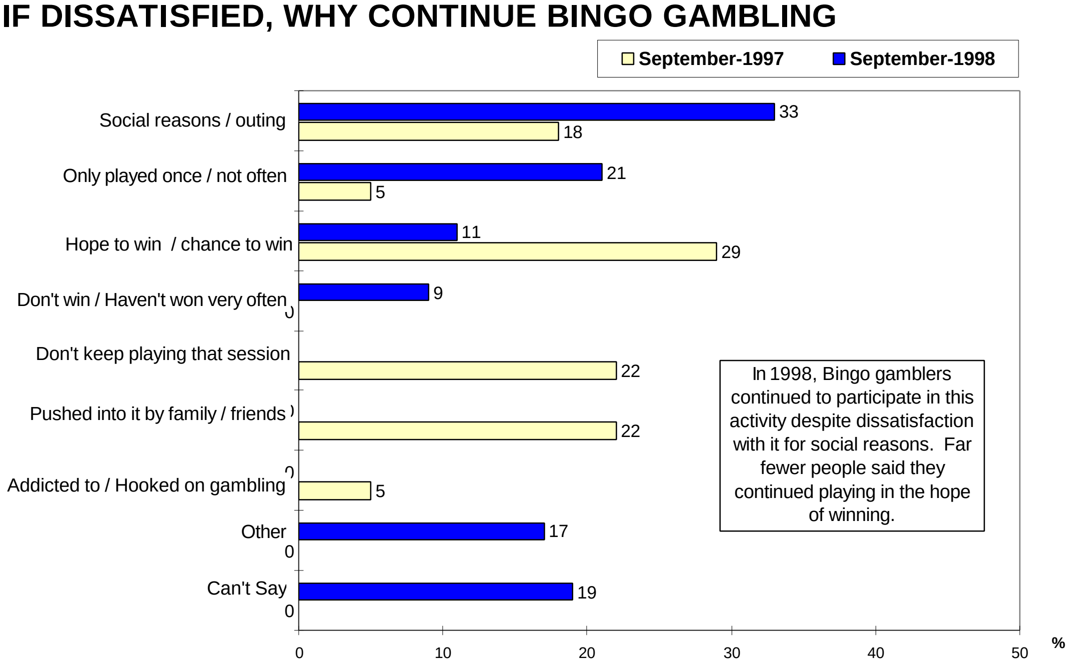
BINGO GAMBLING PATTERNS

9.7 SATISFACTION



BASE: Total Gambled At Bingo in Last 12 Months

9.8 IF DISSATISFIED, WHY CONTINUE BINGO GAMBLING

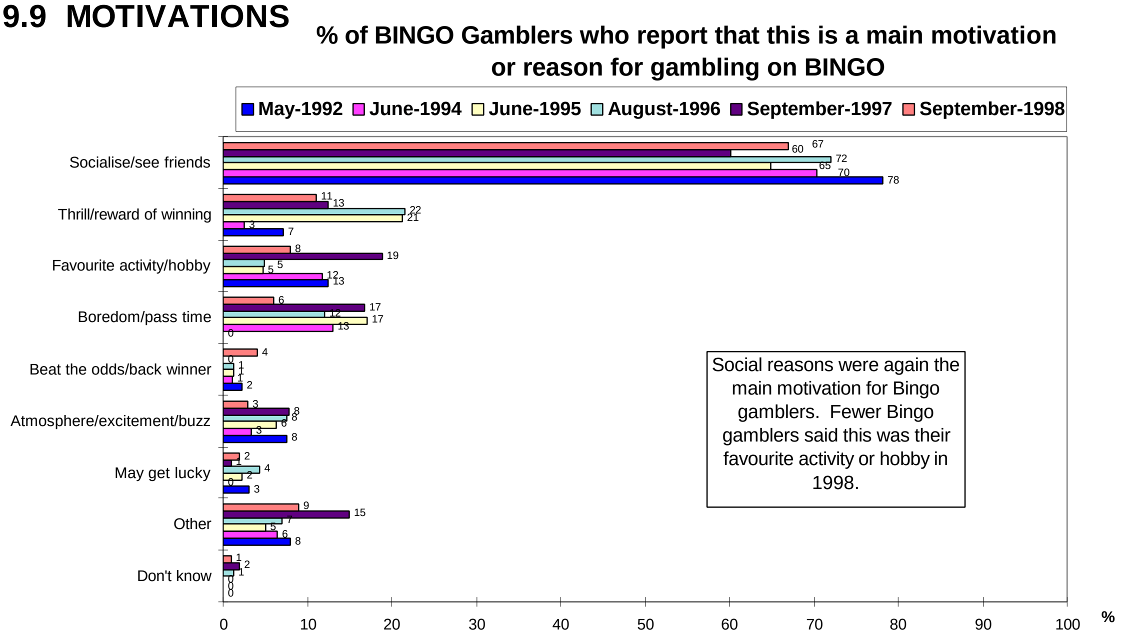


BASE: Total Dissatisfied with Bingo Gambling Activities

[89] Question 8B "Would you say that you are satisfied or dissatisfied with your experience of playing Bingo?"
[90] Question 9B "Why do you keep playing Bingo if you are dissatisfied?"

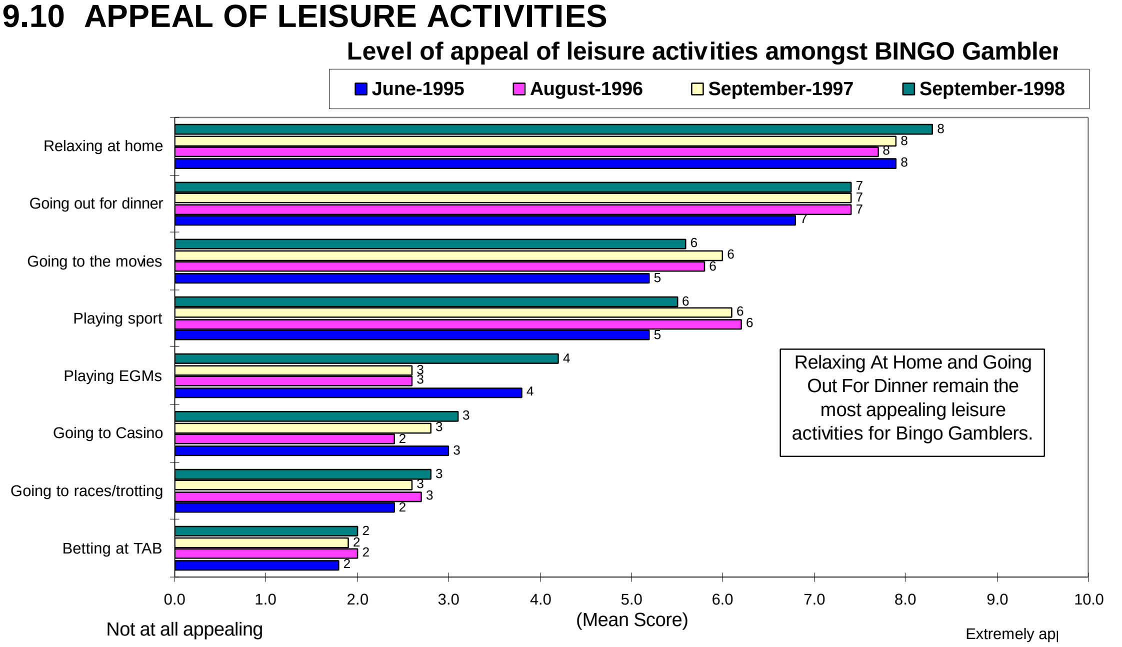
BINGO GAMBLING PATTERNS

9.9 MOTIVATIONS



BASE: Total Gambled At Bingo in Last 12 Months

9.10 APPEAL OF LEISURE ACTIVITIES



BASE: Total Gambled At Bingo in Last 12 Months

[91] Question 7B "What are the main motivations, attractions or reasons you play Bingo?"
[92] 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

INFORMAL CARDS GAMBLING PATTERNS

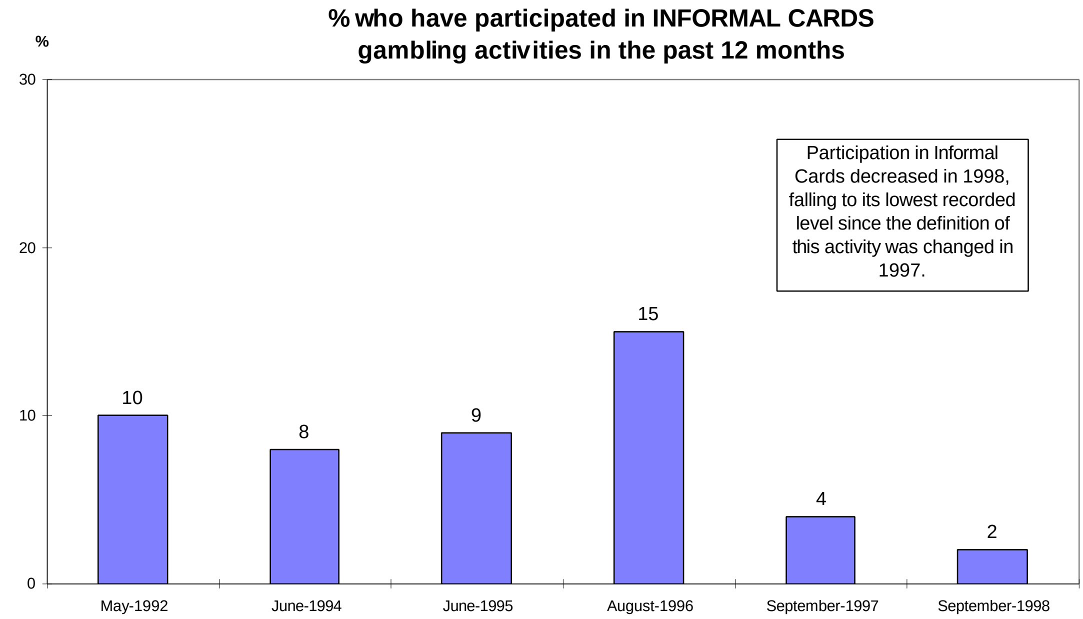
10. INFORMAL CARDS GAMBLING PATTERNS - SUMMARY

Section 10 provides an outline of informal cards gambling patterns. Informal cards was defined as 'informal cards played for money not at the Casino'. This definition was the same as the definition used in 1997. Outlined below are the key findings regarding informal card gambling patterns:

- ✓ The participation rate for Informal cards was relatively low (2%), and has decreased slightly since 1997;
- ✓ Very few people reported informal cards gambling as a favourite gambling activity (1%);
- ✓ Informal card 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 informal cards in the last 12 months, just over half (52%) participated in this activity regularly (at least once a month);
- ✓ Informal card gamblers spent approximately 216 minutes (around three and a half hours) each time they played informal cards.
- ✓ Informal card gamblers were prepared to outlay $44 each time they participated in informal card activities ($15 on average per week);
- ✓ Informal card players believe they win back approximately 70% of their outlay when participating in this gambling activity;
- ✓ In 1998 satisfaction with informal cards decreased slightly (87.8 CSI in 1998, down from 92.1 CSI in 1997) but overall satisfaction was high;
- ✓ The main motivation for participation in informal cards was to socialise and see friends (78%);
- ✓ Informal card gamblers rated relaxing at home (mean rating of 8.3), going out for dinner (mean rating of 7.7) or going to the movies (mean rating of 6.4) as appealing leisure activities.

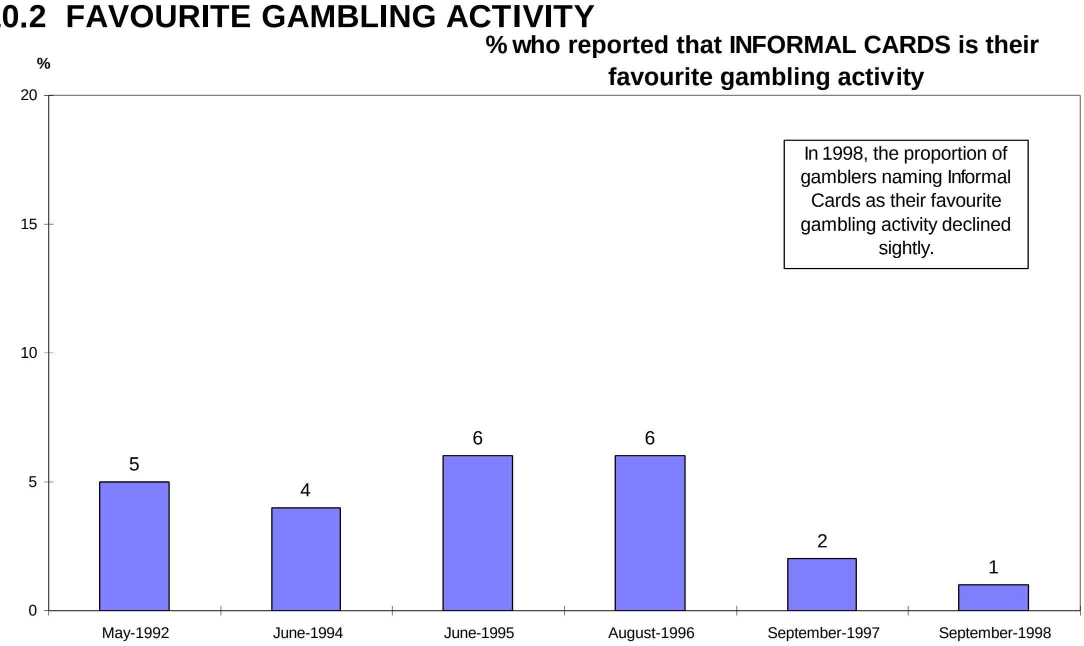
INFORMAL CARDS GAMBLING PATTERNS

10.1 PARTICIPATION RATES



BASE: Total Respondents

10.2 FAVOURITE GAMBLING ACTIVITY



BASE: Total Gambled in Last 12 Months

[93] Question 1. Which of the following activities or games have you played or gambled on in the past 12 months?
[94] Question 2 "Which one of these activities is your favourite game or activity?" (unprompted)

PROFILE OF INFORMAL CARDS GAMBLERS

TABLE 10.1

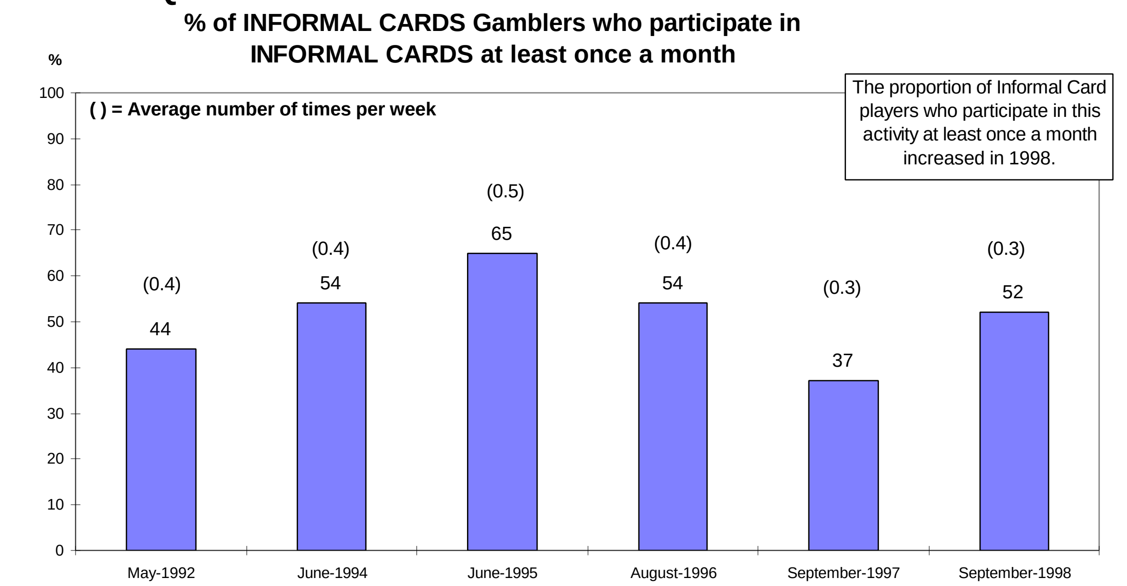
	Total Population	Informal Card Gamblers (Last 12 mths) 2% of total pop	Reg. Informal Card Gamblers (Once a mth+) 1% of total pop
GENDER			
Male	49%	71%	64%
Female	51%	29%	36%
AGE			
Average Age	44 yrs	38 yrs	39 yrs
RESPONDENT'S OCCUPATION			
TOTAL FULL TIME	**44%**	**57%**	**61%**
Professionals / Executives	10%	4%	-
Owners/White Collar Worker	18%	26%	25%
Farm Owner	1%	-%	-
Skilled Workers	10%	19%	31%
Semi-skilled workers	3%	3%	-
Unskilled workers / Other	2%	6%	6%
TOTAL PART TIME	**15%**	**10%**	**-**
TOTAL NOT IN PAID WORKFORCE	**41%**	**33%**	**39%**
Household duties	10%	3%	5%
Student	6%	10%	7%
Self Supporting Retiree	5%	-	-
Pensioner	18%	17%	27%
Unemployed	3%	3%	-
LOCATION			
Melbourne Metropolitan	73%	92%	82%
Other Victoria non metropolitan	27%	8%	18%
SOGS SCORE			
(0-4)	98.5%	94.1%	94.1%
(5-20)	1.5%	5.9%	5.9%
SEGMENT			
Disinterested Gambler	20%	15%	5%
Occasional Gambler	33%	36%	35%
Social Gambler	9%	6%	12%
Acknowledged Heavy Gambler	5%	10%	13%
Committed Heavy Gambler	8%	34%	35%

Significantly higher than average compared to the total population

Significantly lower than average compared to the total population

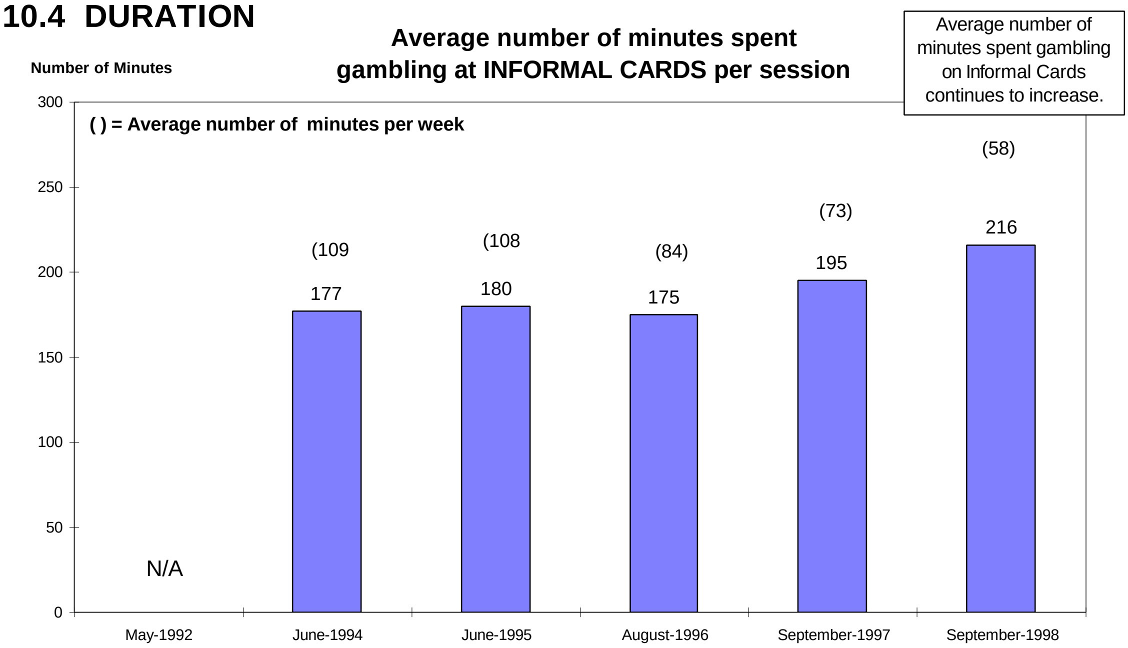
INFORMAL CARDS GAMBLING PATTERNS

10.3 FREQUENCY



BASE: Total Gambled At Informal Cards in Last 12 Months

10.4 DURATION



BASE: Total Gambled At Informal Cards in Last 12 Months

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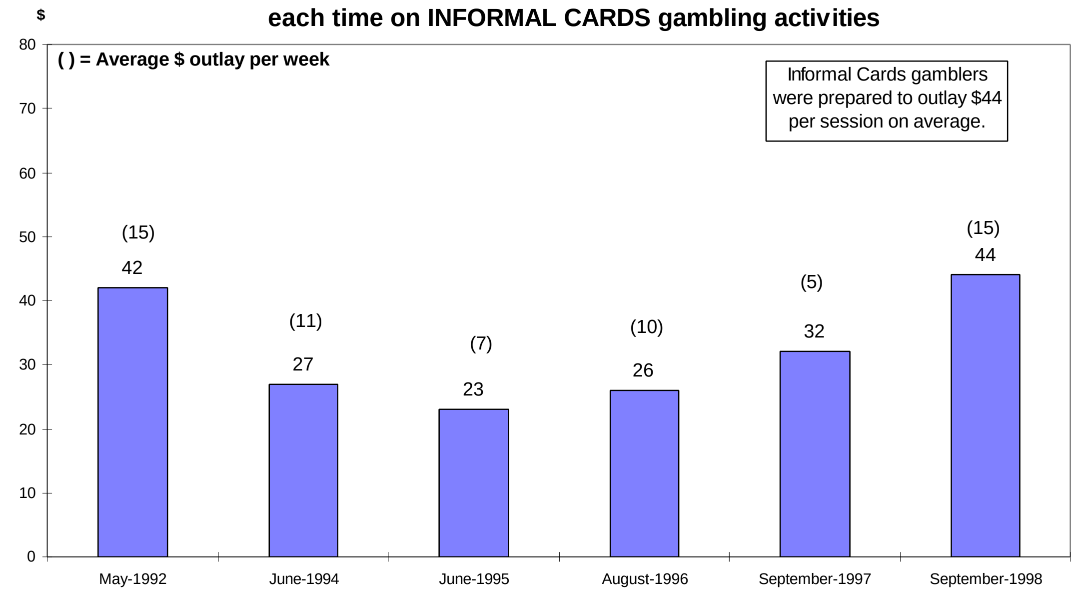
[95] Question 3E "How often do you play Informal Cards?"
[96] Question 4E "And each time you play Informal Cards, how much time do you spend playing?"

INFORMAL CARDS GAMBLING PATTERNS

10.5 OUTLAY

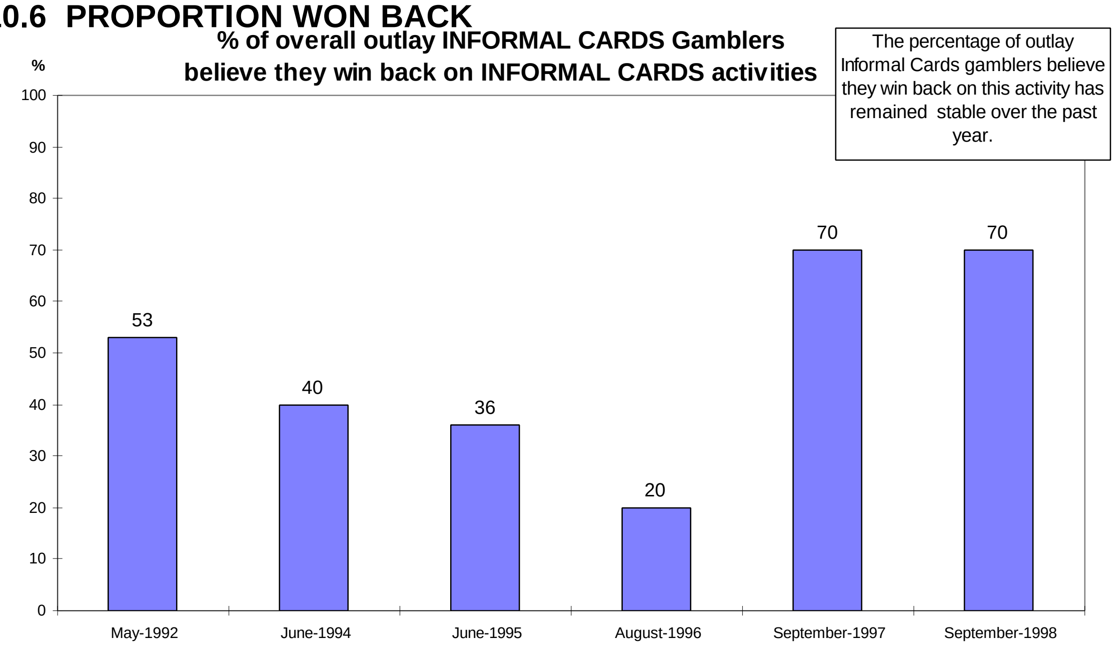
Amount INFORMAL CARDS Gamblers are prepared to outlay each time on INFORMAL CARDS gambling activities



BASE: Total Gambled At Informal Cards in Last 12 Months

10.6 PROPORTION WON BACK

% of overall outlay INFORMAL CARDS Gamblers believe they win back on INFORMAL CARDS activities

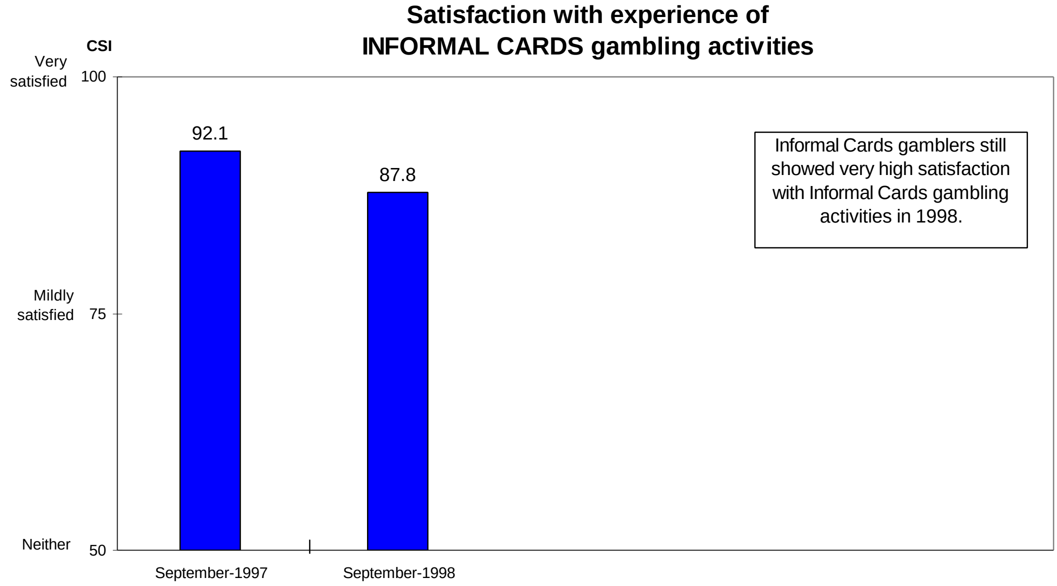


BASE: Total Gambled At Informal Cards in Last 12 Months

[97] Question 5E "And each time you play Informal Cards, what is the dollar value you are prepared to or would outlay on this activity?"
[98] Question 6E "On average, what percentage of your overall outlay do you win back on Informal Cards?"

INFORMAL CARDS GAMBLING PATTERNS

10.7 SATISFACTION



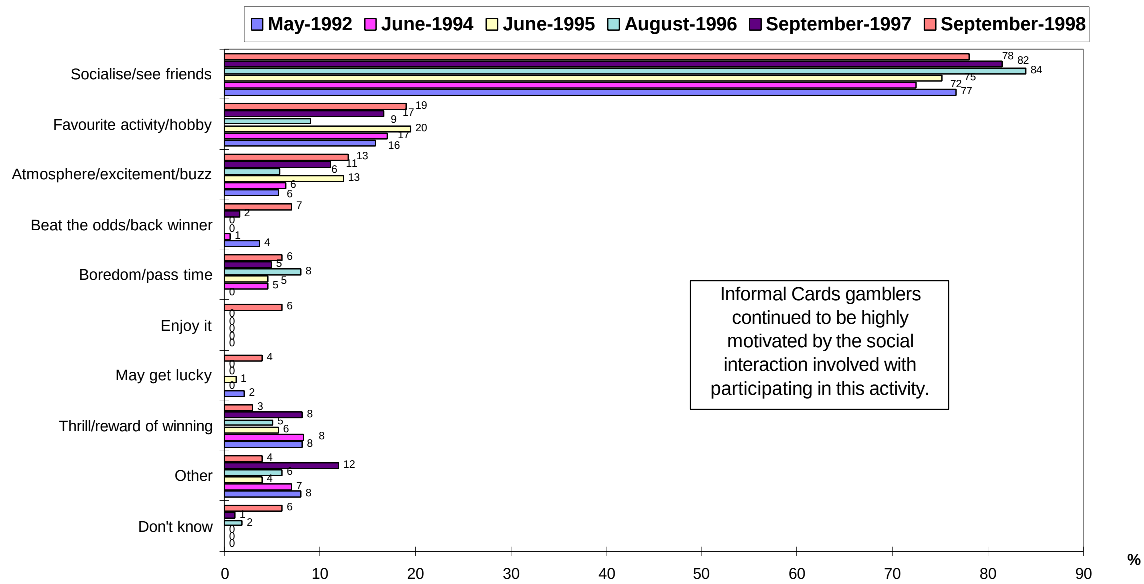
BASE: Total Gambled At Informal Cards in Last 12 Months

[99] Question 8E "Would you say that you are satisfied or dissatisfied with your experience of playing Informal Cards?"

INFORMAL CARDS GAMBLING PATTERNS

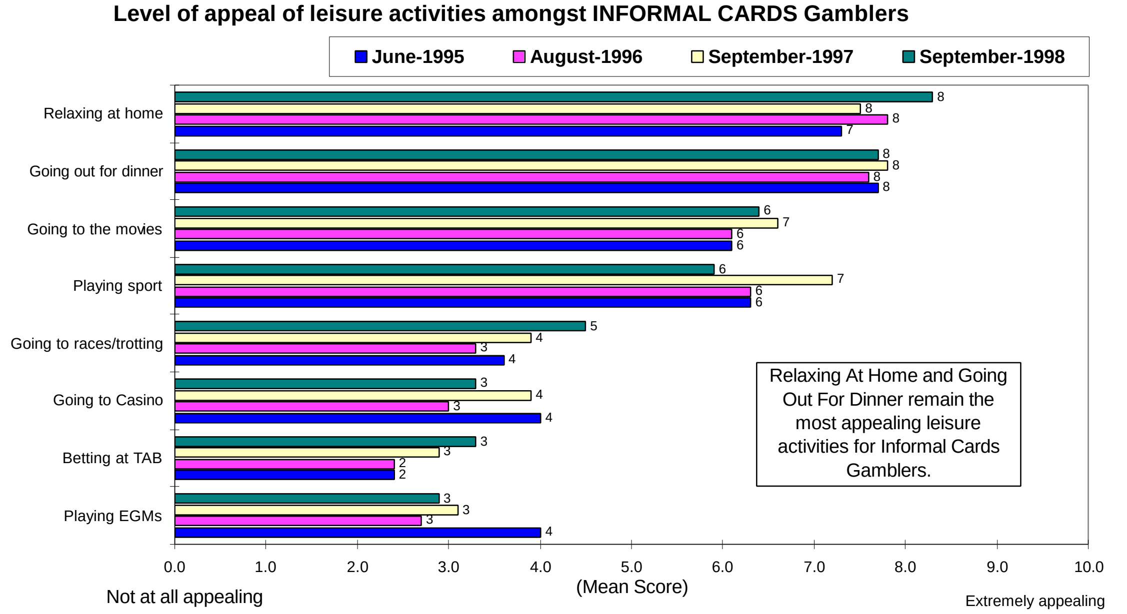
10.8 MOTIVATIONS

% of INFORMAL CARDS Gamblers who report that this is a main motivation or reason for gambling on INFORMAL CARDS



10.9 APPEAL OF LEISURE ACTIVITIES

Level of appeal of leisure activities amongst INFORMAL CARDS Gamblers



BASE: Total Gambled At Informal Cards in Last 12 Months

[100] Question 7E "What are the main motivations, attractions or reasons you play Informal Cards?"
[101] 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 horse racing gambling patterns. Outlined below are the main findings.

- ✓ In 1998, 14% of Victorians said they had gambled on horse racing in the last 12 months - the lowest participation rate recorded since the current set of surveys commenced;
- ✓ However the proportion of gamblers who said horse racing was their favourite activity increased slightly to 10% in 1998, up from 7% in 1997;
- ✓ Horse Racing gamblers tended to be males or full-time workers, or white collar workers. There was a significantly higher proportion of committed heavy gamblers and acknowledged heavy gamblers amongst this group, and were more likely to be "At Risk";
- ✓ Of the 14% of gamblers who had gambled on horse racing in the last 12 months, nearly half (49%) were regular horse racing gamblers, participating in this activity at least once a month. This level of regular participation was the same as in 1996 and 10% higher than in 1997;
- ✓ The duration for each horse racing session has remained relatively stable since 1996. In 1998, horse racing gamblers spent an average of 71 minutes on this activity each time they participated in it;
- ✓ Horse racing gamblers were prepared to outlay $29 each time they gambled on this activity;
- ✓ The proportion of outlay perceived by horse racing gamblers as being won back has remained steady (47% in 1998);
- ✓ Horse racing gamblers were reasonably satisfied with horse racing gambling activities (74.6 CSI);

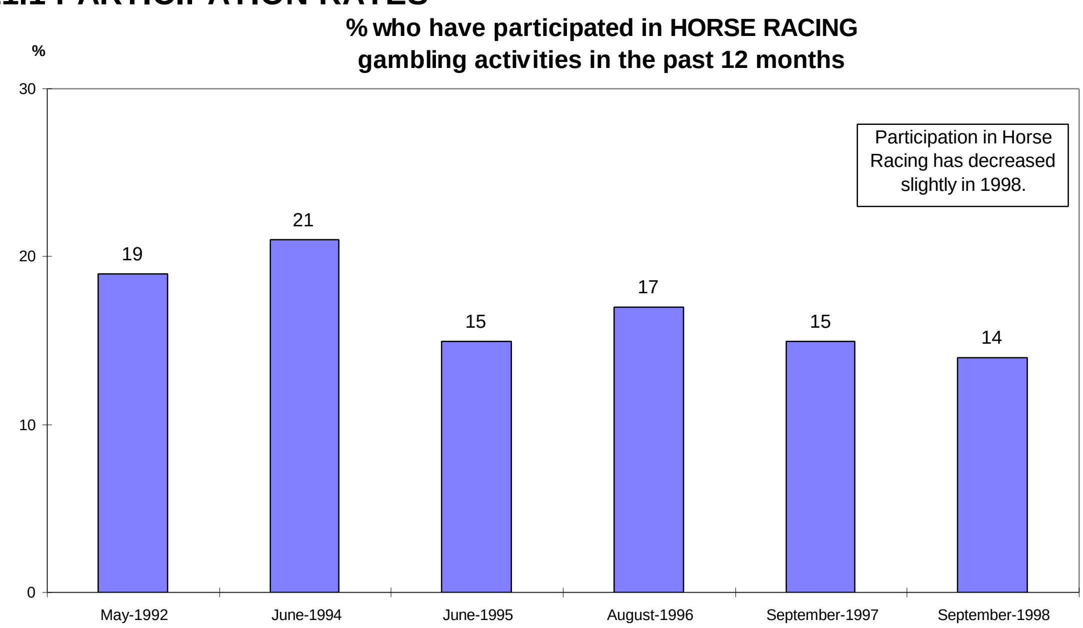
- ✓ Dissatisfied horse racing gamblers' main reason for continuing gambling on the activity were 'hope to win/chance to win' (20%) and 'for social reasons/outings' (20%); and,

- ✓ The primary motivations for horse racing gamblers included social reasons (34%), the atmosphere/excitement (24%), the thrill or dream of winning (23%) and beating odds (16%);

- ✓ Horse racing gamblers rated activities such as relaxing at home (mean rating of 8.0), going out for dinner (mean rating of 7.4) and playing sport (mean rating of 6.7) as being particularly appealing.

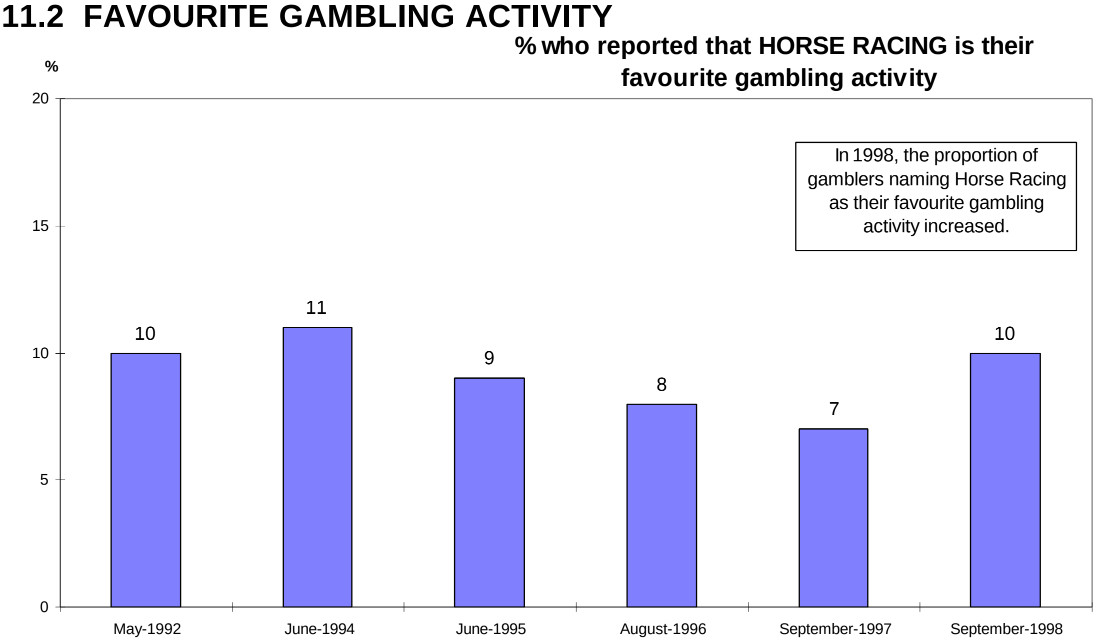
HORSE RACING GAMBLING PATTERNS

11.1 PARTICIPATION RATES



BASE: Total Respondents

11.2 FAVOURITE GAMBLING ACTIVITY



BASE: Total Gambled in Last 12 Months

[102] Question 1. Which of the following activities or games have you played or gambled on in the past 12 months
[103] Question 2 "Which one of these activities is your favourite game or activity?" (unprompted

PROFILE OF HORSE RACING GAMBLERS

TABLE 11.1

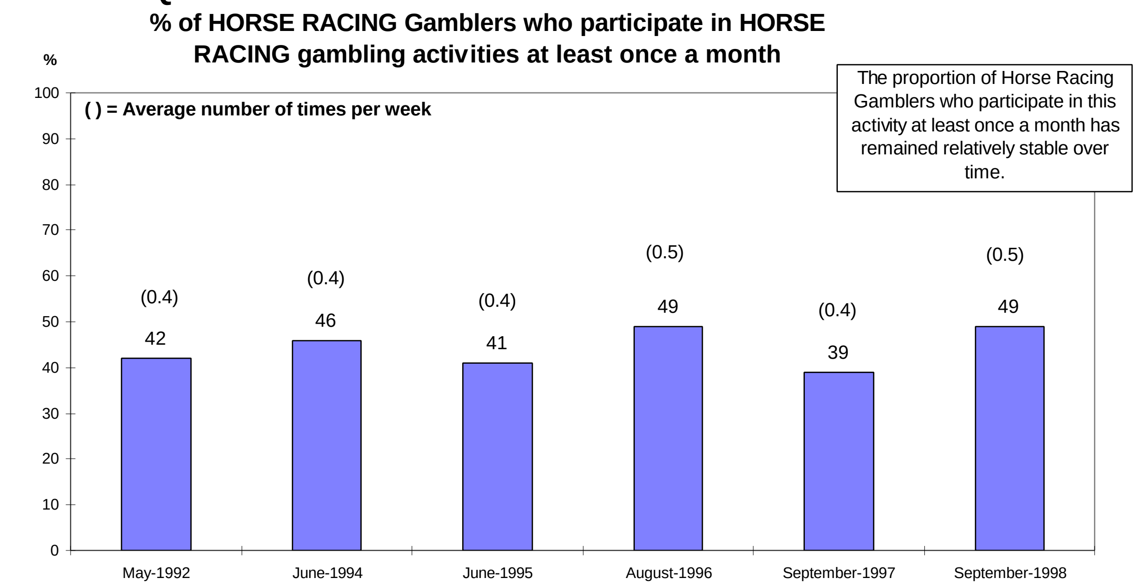
	Total Population	Horse Racing Gamblers (Last 12 mths) 14% of total pop	Reg. Horse Racing Gamblers (Once a mth+) 7% of total pop
GENDER			
Male	49%	60%	72%
Female	51%	40%	28%
AGE			
Average Age	44 yrs	41 yrs	45 yrs
RESPONDENT'S OCCUPATION			
TOTAL FULL TIME	**44%**	**56%**	**48%**
Professionals / Executives	10%	9%	9%
Owners/White Collar Worker	18%	25%	17%
Farm Owner	1%	1%	-
Skilled Workers	10%	13%	17%
Semi-skilled workers	3%	5%	4%
Unskilled workers / Other	2%	2%	2%
TOTAL PART TIME	**15%**	**12%**	**14%**
TOTAL NOT IN PAID WORKFORCE	**41%**	**32%**	**38%**
Household duties	10%	7%	4%
Student	6%	4%	4%
Self Supporting Retiree	5%	5%	5%
Pensioner	18%	14%	23%
Unemployed	3%	3%	3%
LOCATION			
Melbourne Metropolitan	73%	72%	71%
Other Victoria non metropolitan	27%	28%	29%
SOGS SCORE			
(0-4)	98.5%	95.1%	92.7%
(5-20)	1.5%	4.9%	7.3%
SEGMENT			
Disinterested Gambler	20%	15%	11%
Occasional Gambler	33%	36%	10%
Social Gambler	9%	12%	6%
Acknowledged Heavy Gambler	5%	10%	9%
Committed Heavy Gambler	8%	34%	64%

Significantly higher than average compared to the general population

Significantly lower than average compared to the general population

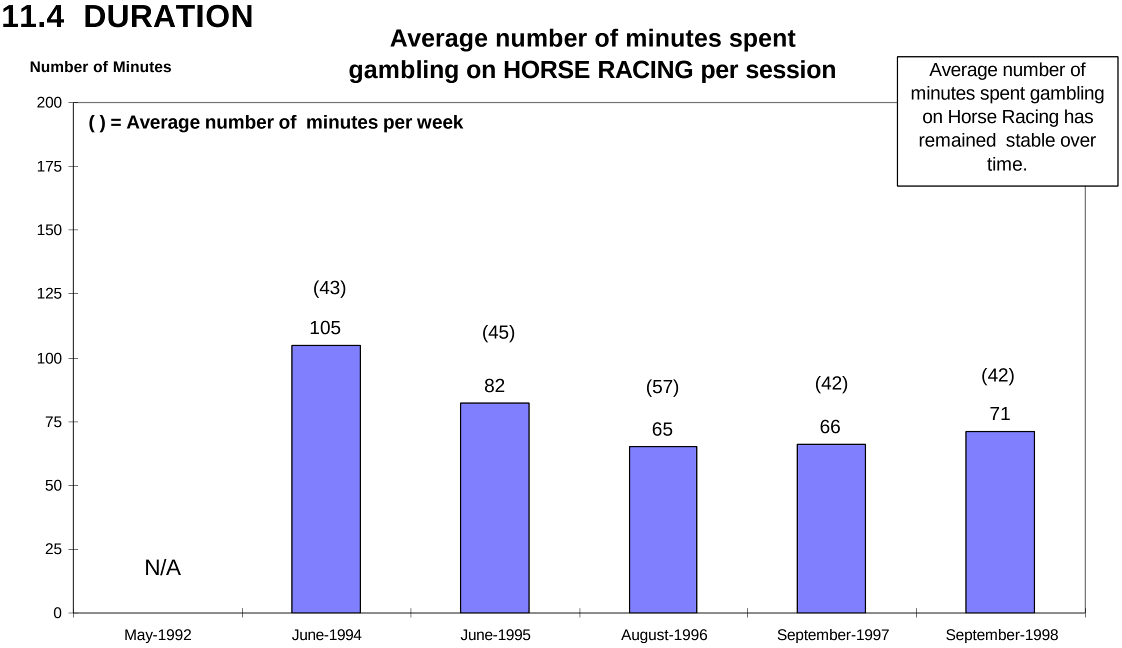
HORSE RACING GAMBLING PATTERNS

11.3 FREQUENCY



BASE: Total Gambled At Horse Racing in Last 12 Months

11.4 DURATION



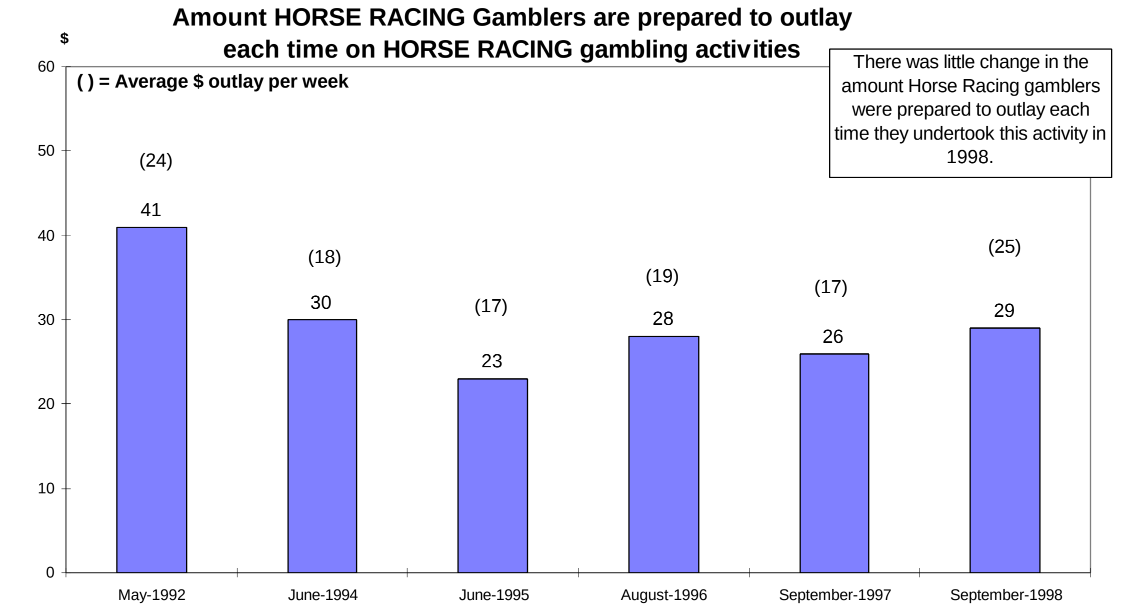
BASE: Total Gambled At Horse Racing in Last 12 Months

[104] Question 3F "How often do you bet on Thoroughbred Horse Racing?"

[105] Question 4F "And each time you bet on Thoroughbred Horse Racing, how much time do you spend betting?"

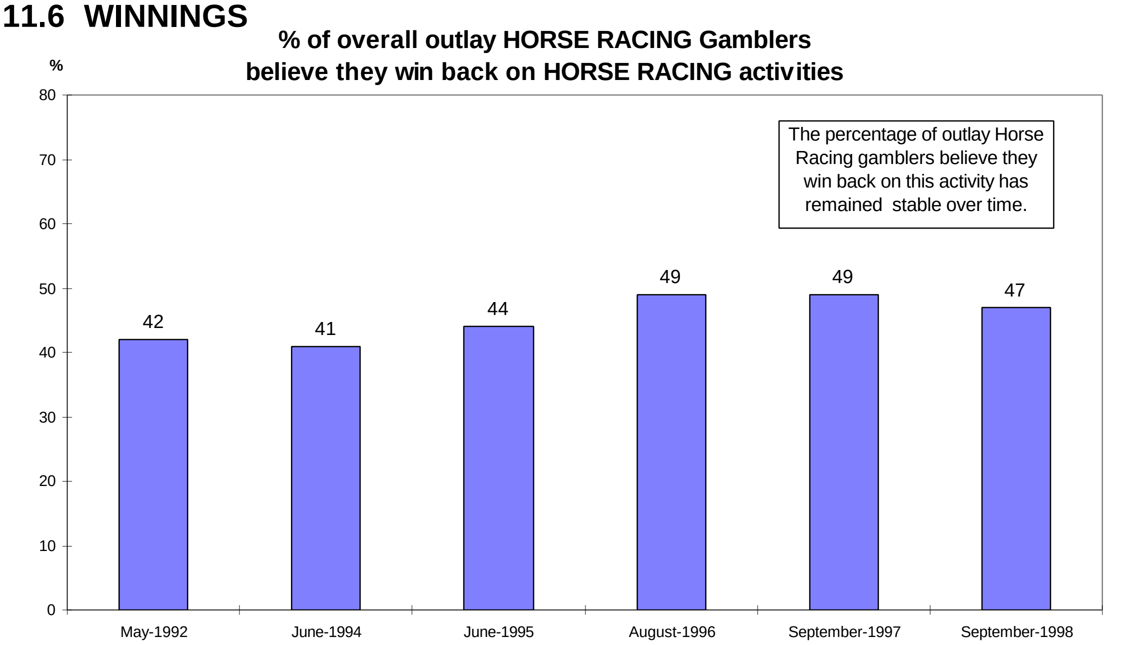
HORSE RACING GAMBLING PATTERNS

11.5 OUTLAY



BASE: Total Gambled At Horse Racing in Last 12 Months

11.6 WINNINGS



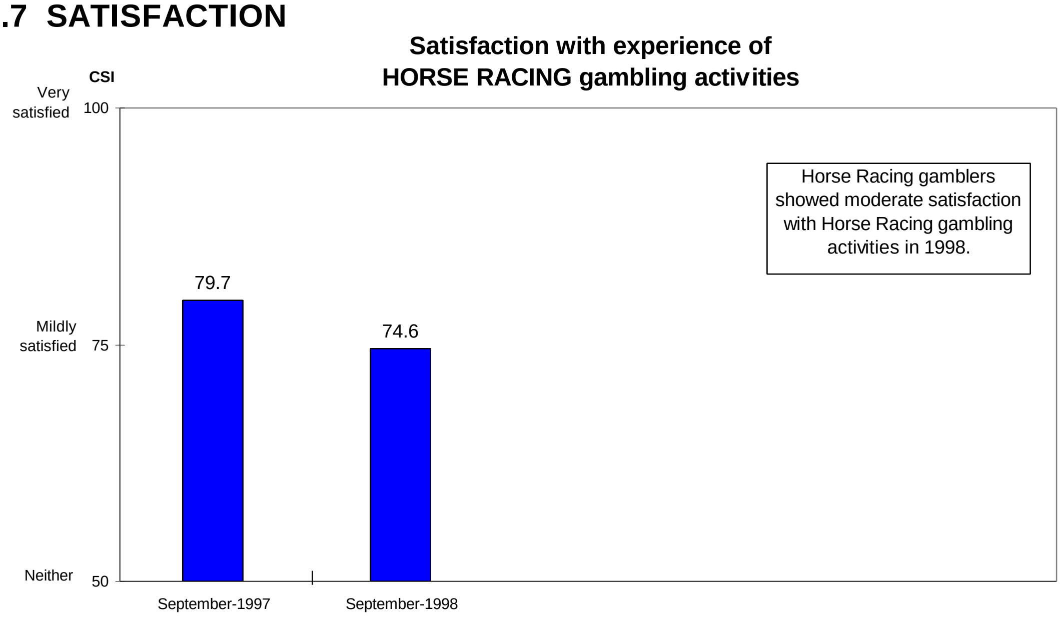
BASE: Total Gambled At Horse Racing in Last 12 Months

[106] Question 5F "And each time you bet on Thoroughbred Horse Racing, what is the dollar value you are prepared to or would outlay on this activity?"

[107] Question 6F "On average, what percentage of your overall outlay do you win back on Thoroughbred Horse Racing?"

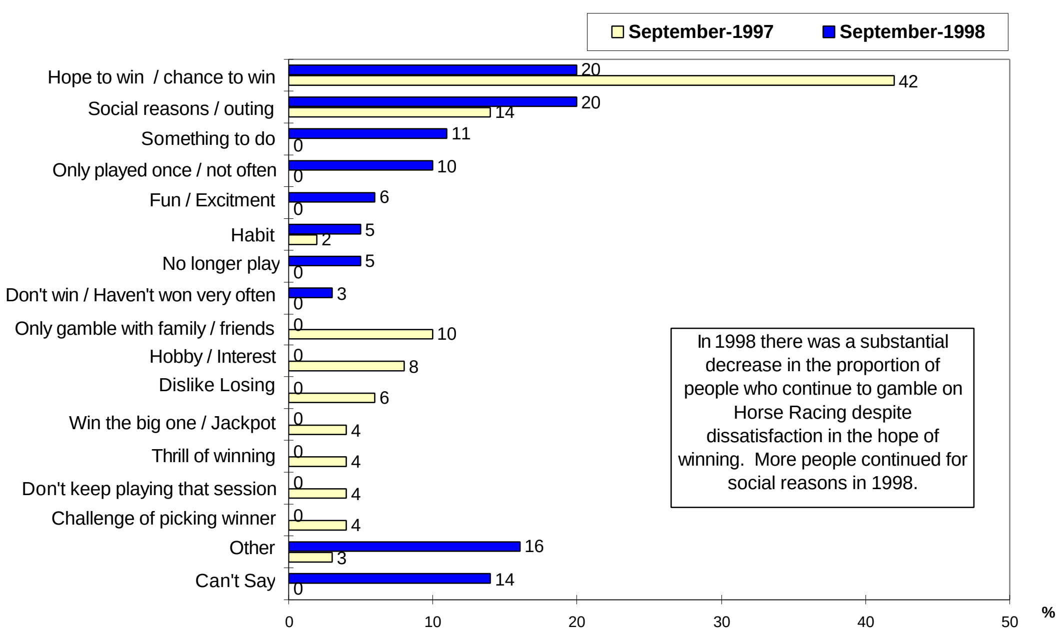
HORSE RACING GAMBLING PATTERNS

11.7 SATISFACTION



BASE: Total Gambled At Horse Racing in Last 12 Months

11.8 IF DISSATISFIED WHY CONTINUE HORSE RACING GAMBLING



BASE: Total Dissatisfied with Horse Racing Gambling Activities

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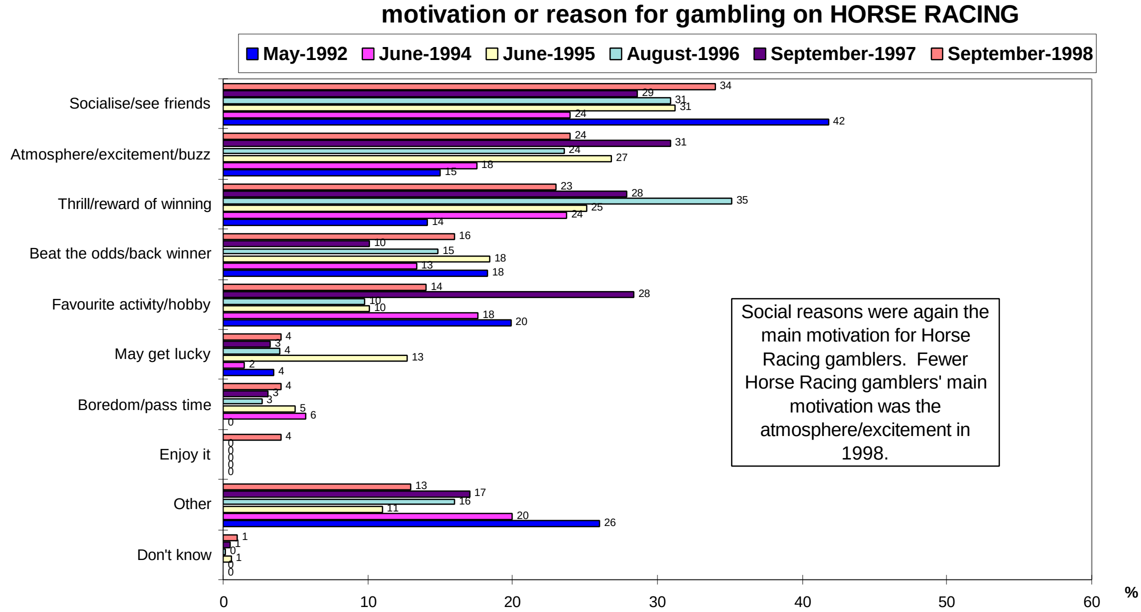
108 Question 8F "Would you say that you are satisfied or dissatisfied with your experience of betting on Thoroughbred Horse Racing?"

109 Question 9F "Why do you keep betting on Thoroughbred Horse Racing if you are dissatisfied?"

HORSE RACING GAMBLING PATTERNS

11.9 MOTIVATIONS

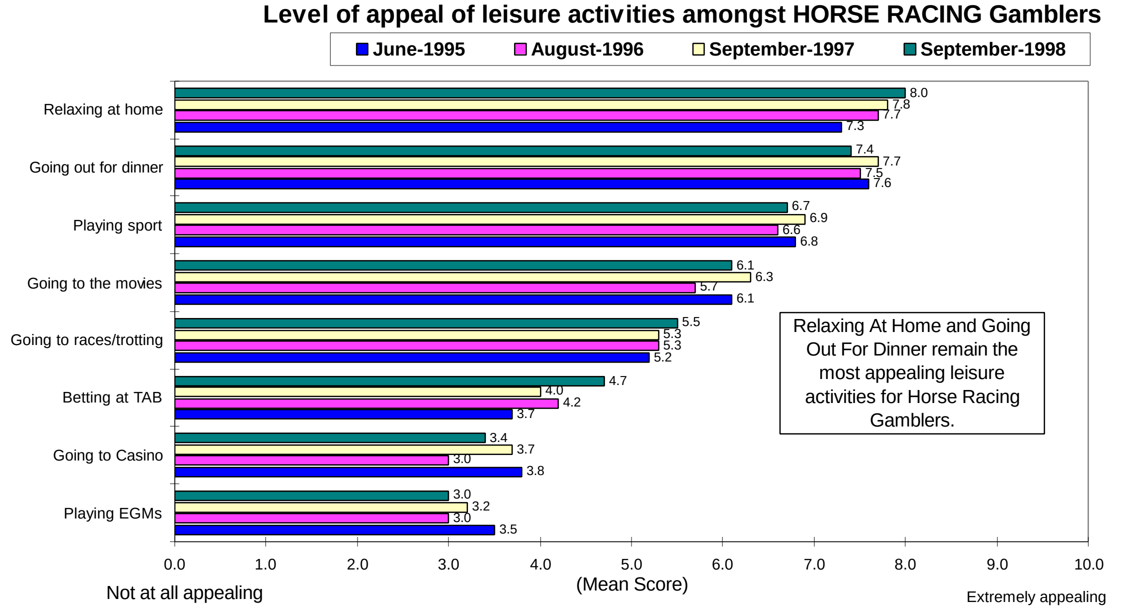
% of HORSE RACING Gamblers who report that this is a main motivation or reason for gambling on HORSE RACING



BASE: Total Gambled At Horse Racing in Last 12 Months

11.10 APPEAL OF LEISURE ACTIVITIES

Level of appeal of leisure activities amongst HORSE RACING Gamblers



BASE: Total Gambled At Horse Racing in Last 12 Months

[110] Question 7F "What are the main motivations, attractions or reasons you bet on Thoroughbred Horse Racing?"

[111] 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. TROTTING GAMBLING PATTERNS - SUMMARY

Section 12 provides a graphical summary of Trotting gambling behaviour. The main findings are outlined below:

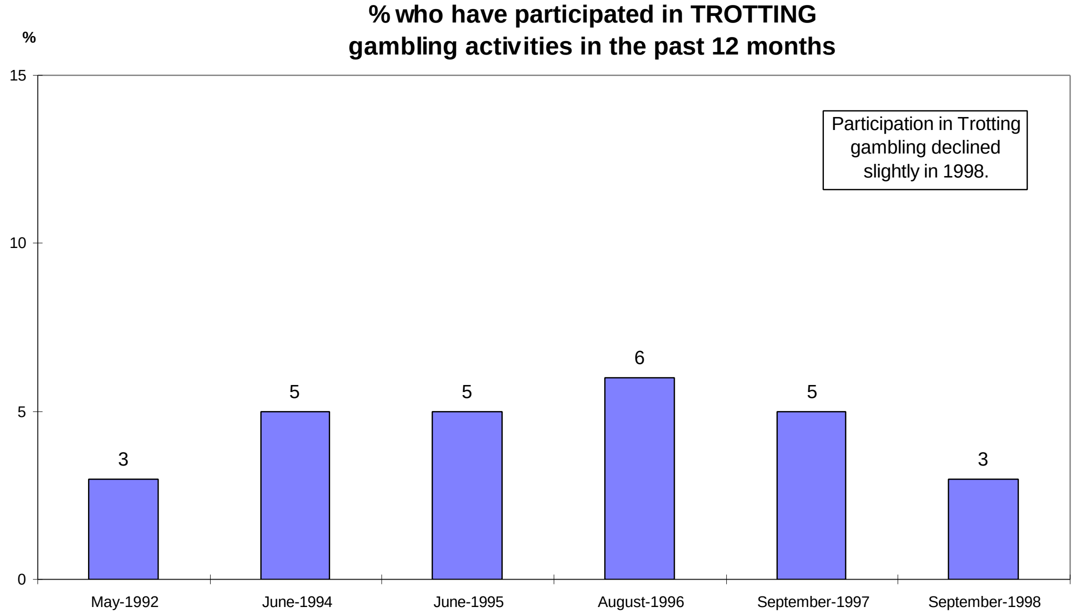
- ✓ Gambling on trotting activities was low, with only 3% participating in this activity in 1998, a decrease from 5% in 1997;
- ✓ One per cent of gamblers reported Trotting as their favourite activity. This level has remained stable since 1992;
- ✓ Regular trotting gamblers were predominantly male and tended to be younger than average. They were significantly more likely to be semi skilled workers, in the "At Risk" group, and to be Committed Heavy Gamblers;
- ✓ Of the 3% of Victorians who bet on the Trots, 40% did so regularly (at least once a month or more). This represents a slight decrease from 1997 when 43% of gamblers bet on the Trots regularly;
- ✓ Trotting gambling activities had an average duration of 64 minutes per session, a decrease from 73 minutes in 1997;
- ✓ Trotting gamblers outlaid approximately $26 per session on Trotting activities, an increase of $3 since 1997;
- ✓ There was a moderate expectation of proportion of outlay won back from Trotting gambling but this decreased slightly in 1998 (50% in 1997 to 38% in 1998);
- ✓ Trotting gamblers were mildly satisfied with Trotting gambling (73.7 CSI);
- ✓ Dissatisfied Trotting gamblers' reasons for continued gambling included hope to win/chance to win (35%), and for social reasons/outing (25%);
- ✓ The main motivations for Trotting gambling were thrill/dream of winning (42%), social reasons (39%), atmosphere/excitement (19%) and beating the odds (14%); and,

- ✓ Trotting gamblers rated relaxing at home (mean rating of 7.9) and going out for dinner (mean rating of 7.5) as highly appealing leisure activities.

TROTTING GAMBLING PATTERNS

12.1 PARTICIPATION RATES

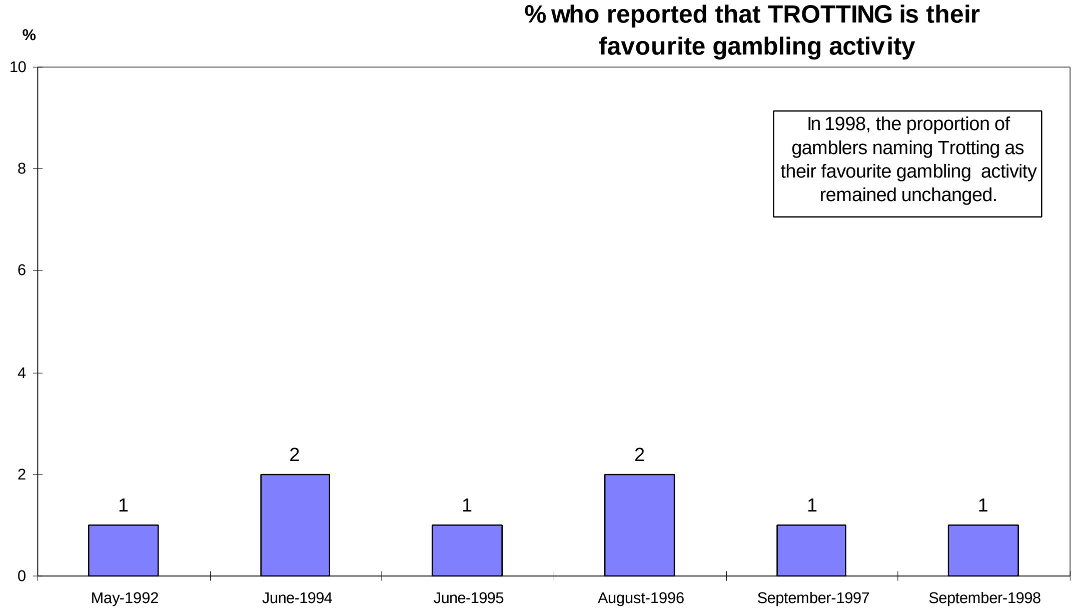
% who have participated in TROTTING gambling activities in the past 12 months



BASE: Total Respondents

12.2 FAVOURITE GAMBLING ACTIVITY

% who reported that TROTTING is their favourite gambling activity



BASE: Total Gambled in Last 12 Months

[112] Question 1. Which of the following activities or games have you played or gambled on in the past 12 months
[113] Question 2 "Which one of these activities is your favourite game or activity?" (unprompted)

PROFILE OF TROTTING GAMBLERS

TABLE 12.1

	Total Population	Trotting Gamblers (Last 12 mths) 3% of total pop	Reg. Trotting Gamblers (Once a mth+) 1% of total pop
GENDER			
Male	49%	73%	75%
Female	51%	27%	25%
AGE			
Average Age	44 yrs	39 yrs	37 yrs
RESPONDENT'S OCCUPATION			
TOTAL FULL TIME	**44%**	**68%**	**66%**
Professionals / Executives	10%	10%	10%
Owners/White Collar Worker	18%	21%	23%
Farm Owner	1%	-	-
Skilled Workers	10%	26%	23%
Semi-skilled workers	3%	9%	11%
Unskilled workers / Other	2%	2%	-
TOTAL PART TIME	**15%**	**14%**	**5%**
TOTAL NOT IN PAID WORKFORCE	**41%**	**18%**	**29%**
Household duties	10%	5%	13%
Student	6%	-	0%
Self Supporting Retiree	5%	9%	6%
Pensioner	18%	9%	11%
Unemployed	3%	2%	0%
LOCATION			
Melbourne Metropolitan	73%	67%	68%
Other Victoria non metropolitan	27%	33%	32%
SOGS SCORE			
(0-4)	98.5%	91.5%	89.0%
(5-20)	1.5%	8.5%	11.0%
SEGMENT			
Disinterested Gambler	20%	9%	-%
Occasional Gambler	33%	25%	-%
Social Gambler	9%	8%	6%
Acknowledged Heavy Gambler	5%	10%	5%
Committed Heavy Gambler	8%	59%	89%

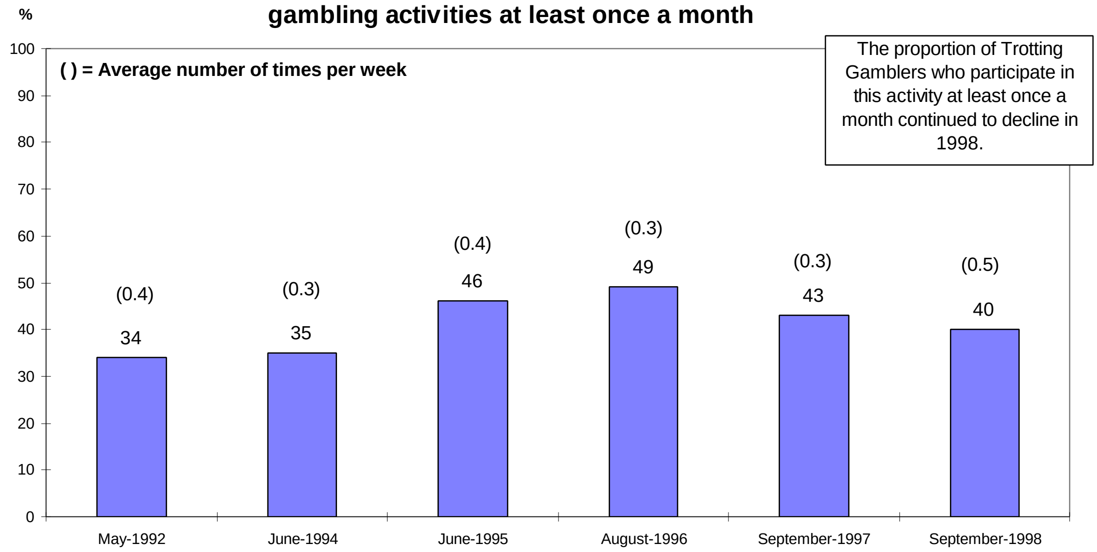
Significantly higher than average compared to the general population

Significantly lower than average compared to the general population

TROTTING GAMBLING PATTERNS

12.3 FREQUENCY

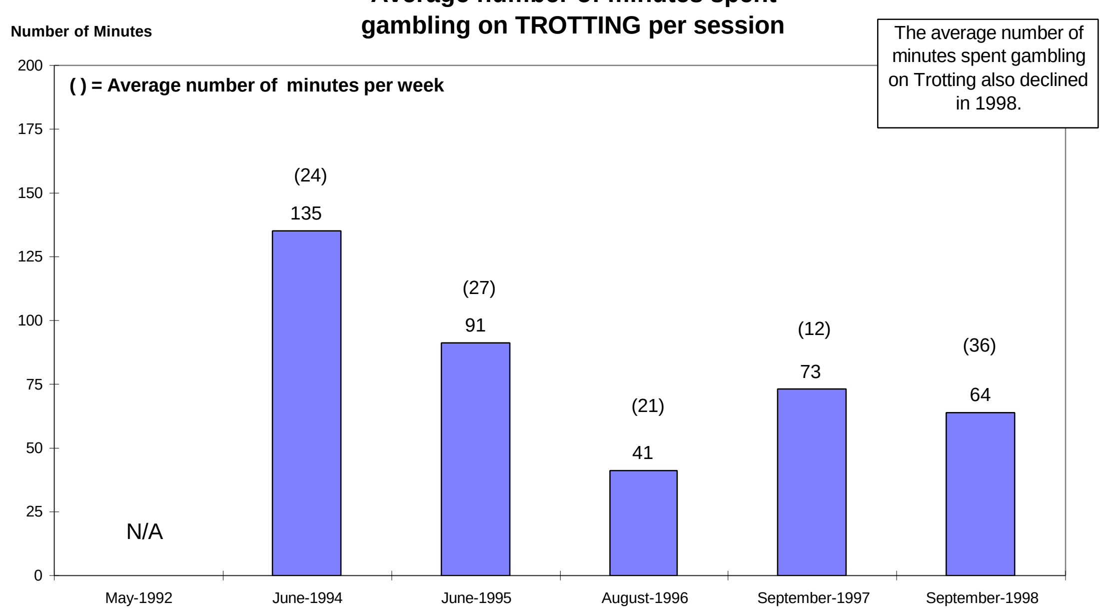
% of TROTTING Gamblers who participate in TROTTING gambling activities at least once a month



BASE: Total Gambled At Trotting in Last 12 Months

12.4 DURATION

Average number of minutes spent gambling on TROTTING per session

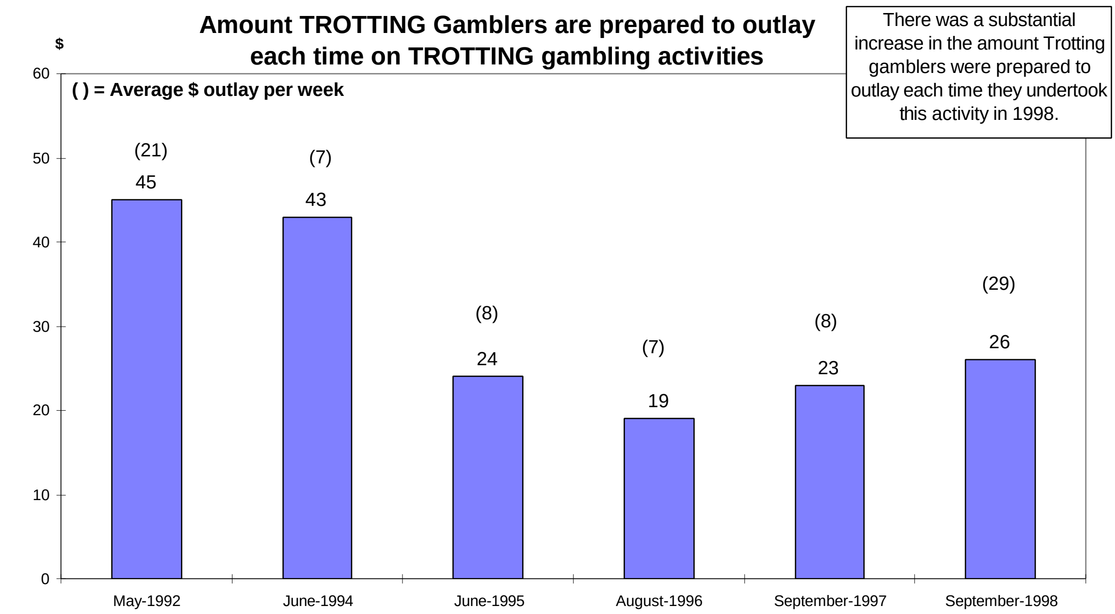


BASE: Total Gambled At Trotting in Last 12 Months

[114] Question 3G "How often do you bet on Trotting or Harness Racing?"
[115] Question 4G "And each time you bet on Trotting or Harness Racing, how much time do you spend betting?"

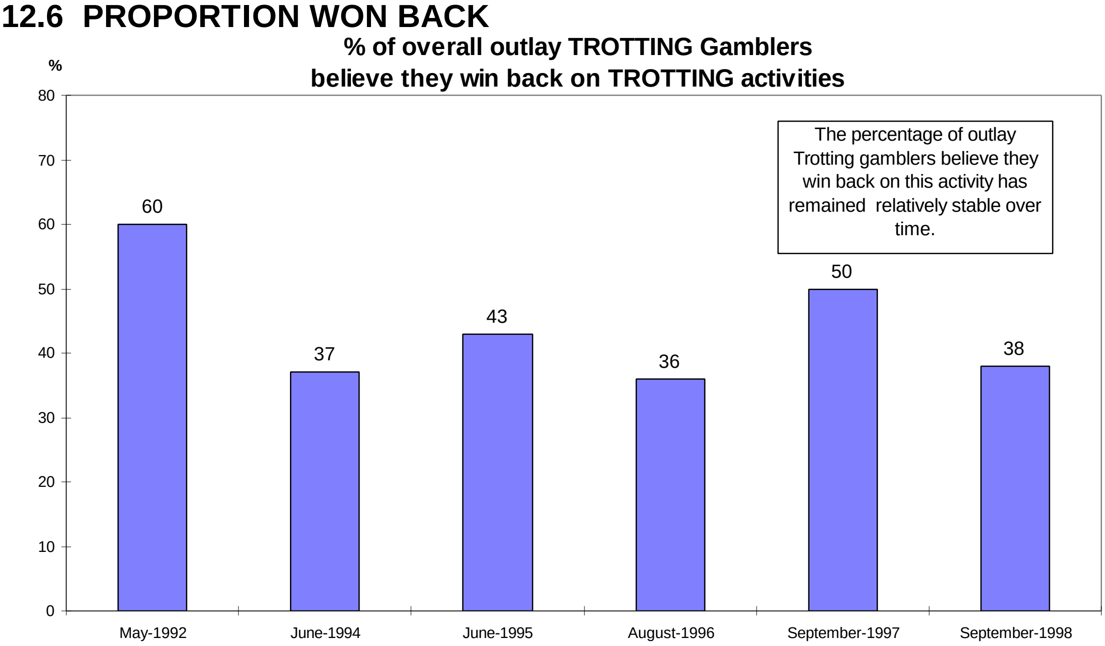
TROTTING GAMBLING PATTERNS

12.5 OUTLAY



BASE: Total Gambled At Trotting in Last 12 Months

12.6 PROPORTION WON BACK

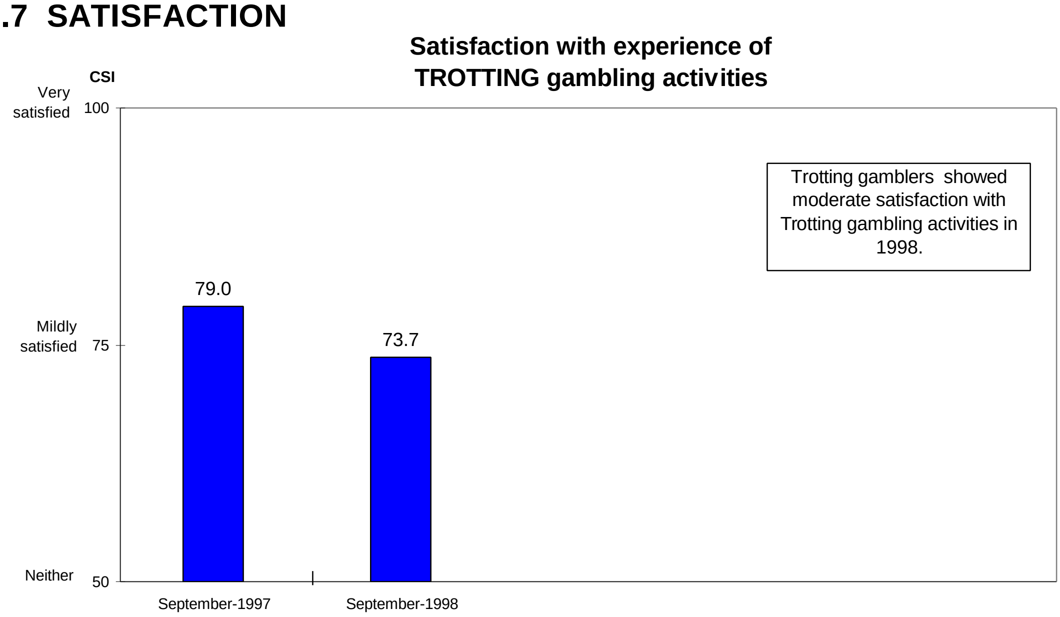


BASE: Total Gambled At Trotting in Last 12 Months

[116] Question 5G "And each time you bet on Trotting or Harness Racing, what is the dollar value you are prepared to or would outlay on this activity?"
[117] Question 6G "On average, what percentage of your overall outlay do you win back betting on Trotting or Harness Racing?"

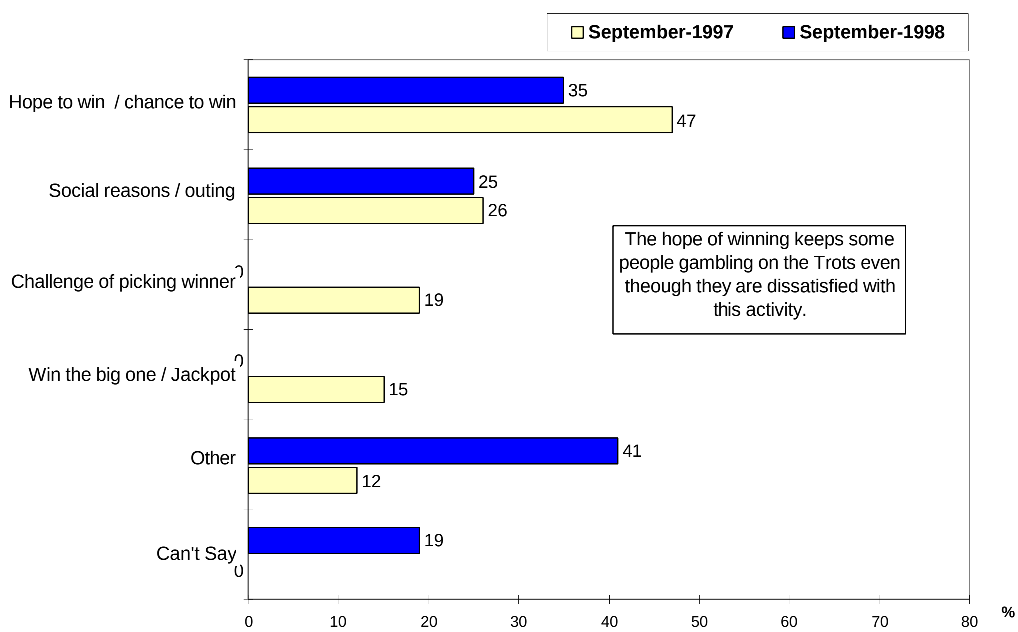
TROTTING GAMBLING PATTERNS

12.7 SATISFACTION



BASE: Total Gambled At Trotting in Last 12 Months

12.8 IF DISSATISFIED WHY CONTINUE TROTTING GAMBLING



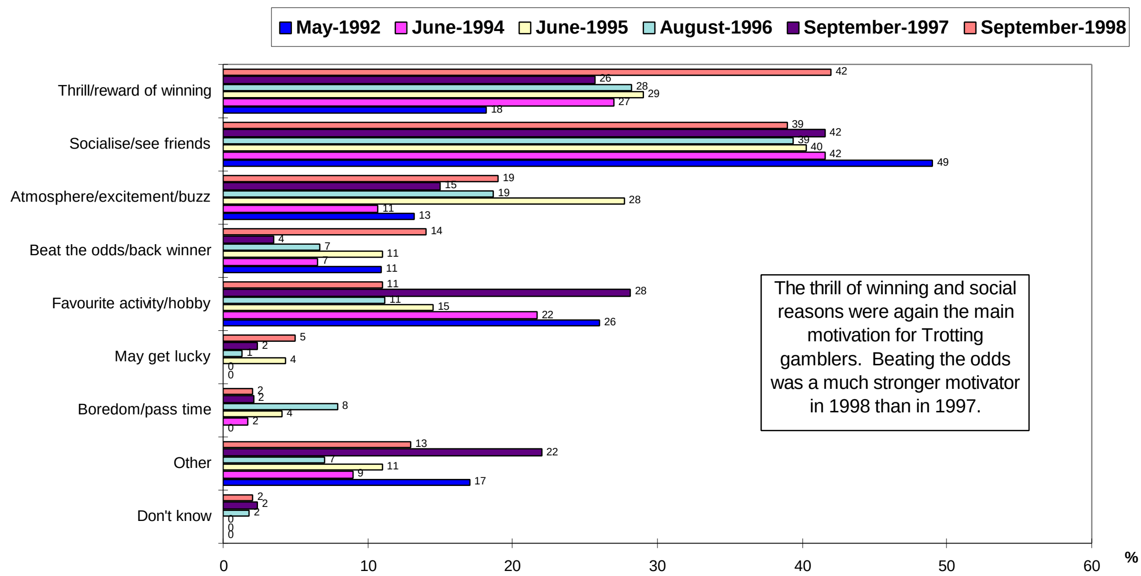
BASE: Total Dissatisfied with Trotting Gambling Activities

[118] Question 8G "Would you say that you are satisfied or dissatisfied with your experience of betting on Trotting or Harness Racing?"
[119] Question 9F "Why do you keep betting on Thoroughbred Horse Racing if you are dissatisfied?"

TROTTING GAMBLING PATTERNS

12.9 MOTIVATIONS

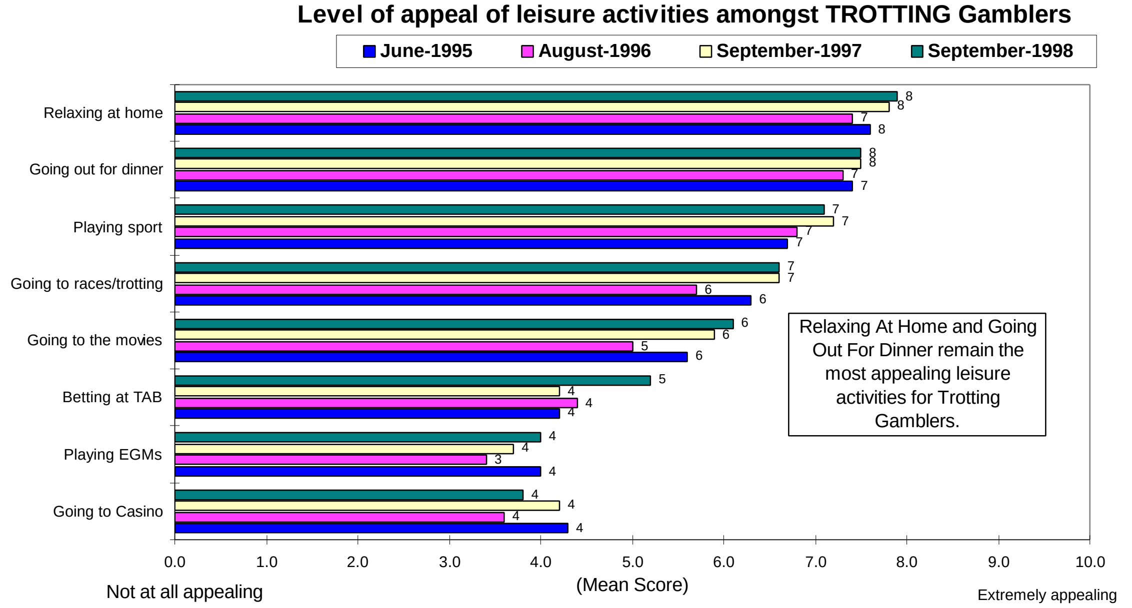
% of TROTTING Gamblers who report that this is a main motivation or reason for gambling on TROTTING



BASE: Total Gambled At Trotting in Last 12 Months

12.10 APPEAL OF LEISURE ACTIVITIES

Level of appeal of leisure activities amongst TROTTING Gamblers



BASE: Total Gambled At Trotting in Last 12 Months

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[120] Question 7G "What are the main motivations, attractions or reasons you bet on Thoroughbred Horse Racing?"
[121] 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.

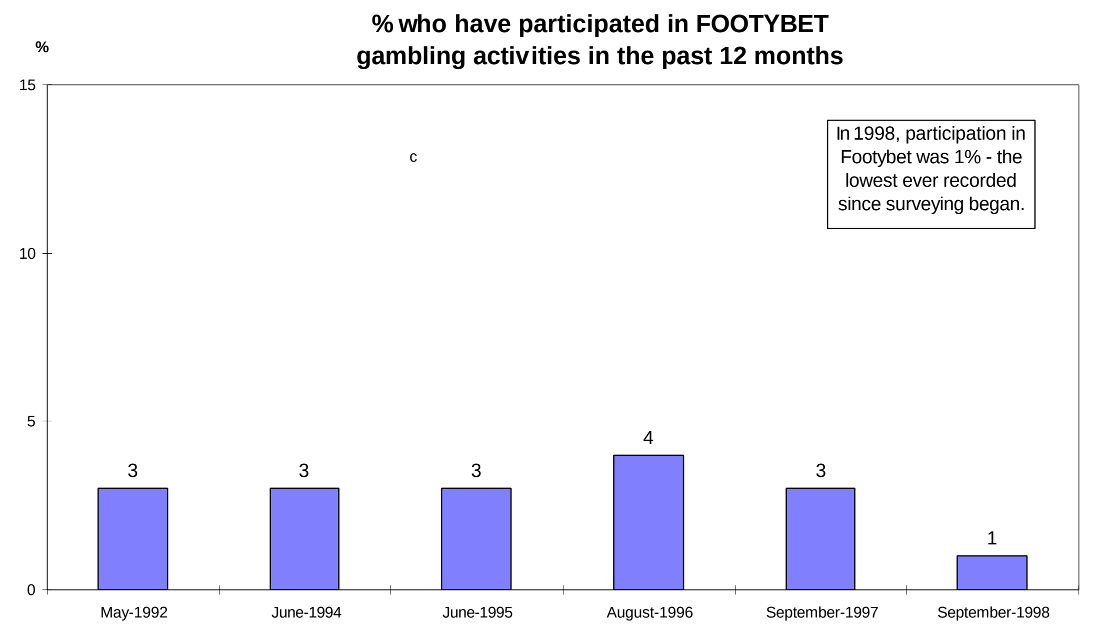
- ✓ Participation in footybet gambling decreased in 1998, with only 1% of Victorians participating in this activity in the last 12 months;
- ✓ As in 1997, less than 1% of gamblers reported that footybet was their favourite gambling activity;
- ✓ Although low levels of participation in footybet gambling were reported, the frequency of this activity amongst "footy-betters" increased in 1998, with 56% of footybet gamblers participating in this activity at least once a month;
- ✓ Footybet gamblers and regular footybet gamblers were more likely to be young males, and to be committed heavy gamblers. Regular footybet gamblers were also more likely to reside in metropolitan areas and to be semi skilled workers;
- ✓ Footybet gamblers spent approximately $15 each time they played footybet;
- ✓ Footybet gamblers spent twice as much time on this activity in 1998 compared with 1997 (12 minutes each time cf 6 minutes each time);
- ✓ Footybet gamblers reported higher levels of proportion of outlay returned (53%) in 1998;
- ✓ Footybet gamblers showed a high level satisfaction with footybet gambling activities (80.6 CSI);
- ✓ Dissatisfied Footybet gamblers[122] continued playing footybet despite dissatisfaction with the activity because they hoped to win or to win the big one/jackpot;
- ✓ Motivations for footybet gamblers were social reasons (32%) and the thrill/dream of winning (18%); and,

[122] Sample size too small to provide statistically reliable results

- ✓ Activities rated as highly appealing by footybet gamblers included relaxing at home (mean rating of 8.1) going out for dinner (mean rating of 7.1) and going to the movies (mean rating of 6.7).

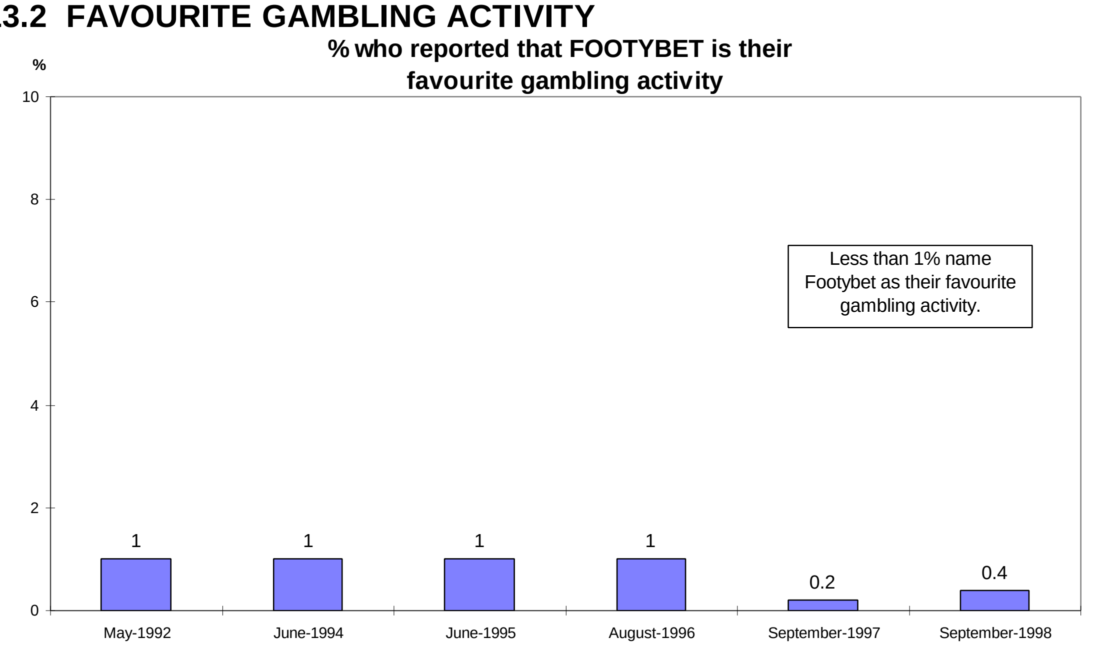
FOOTYBET GAMBLING PATTERNS

13.1 PARTICIPATION RATES



ASE: Total Respondents

13.2 FAVOURITE GAMBLING ACTIVITY



BASE: Total Gambled in Last 12 Months

123 Question 1. "Which of the following activities or games have you played or gambled on in the past 12 months"

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

PROFILE OF FOOTYBET GAMBLERS

TABLE 13.1

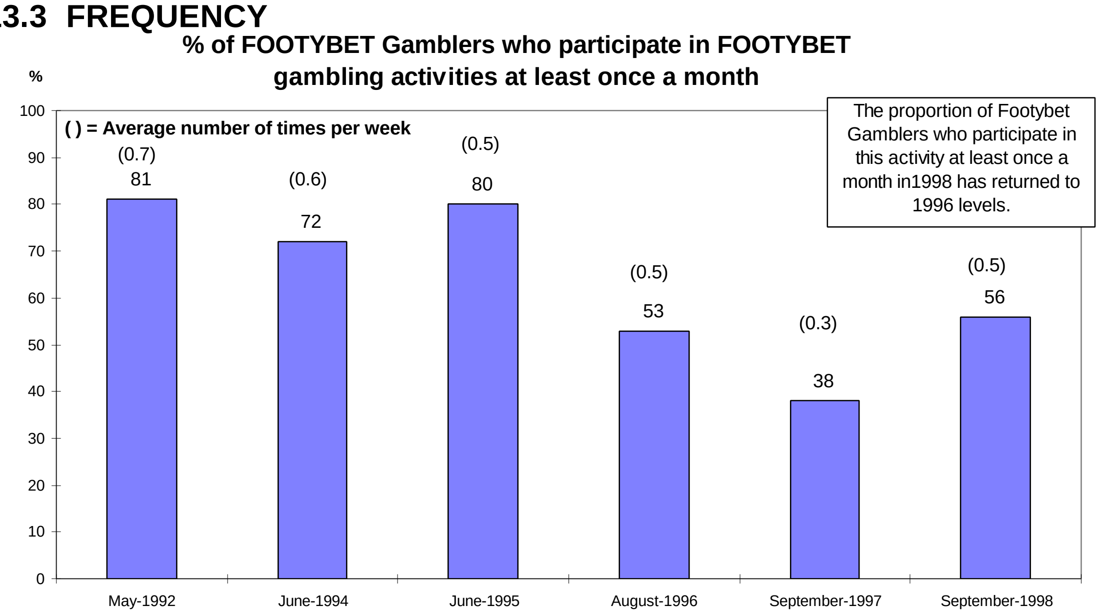
	Total Population	Footybet Gamblers (Last 12 mths) 1% of total pop	Reg. Footybet Gamblers (Once a mth+) 1% of total pop
GENDER			
Male	49%	79%	85%
Female	51%	21%	15%
AGE			
Average Age	44 yrs	37 yrs	32 yrs
RESPONDENT'S OCCUPATION			
TOTAL FULL TIME	**44%**	**55%**	**65%**
Professionals / Executives	10%	4%	7%
Owners/White Collar Worker	18%	23%	24%
Farm Owner	1%	-%	-%
Skilled Workers	10%	9%	8%
Semi-skilled workers	3%	19%	25%
Unskilled workers / Other	2%	-%	-%
TOTAL PART TIME	**15%**	**19%**	**17%**
TOTAL NOT IN PAID WORKFORCE	**41%**	**26%**	**18%**
Household duties	10%	4%	-%
Student	6%	-%	-%
Self Supporting Retiree	5%	6%	10%
Pensioner	18%	11%	-%
Unemployed	3%	4%	8%
LOCATION			
Melbourne Metropolitan	73%	84%	100%
Other Victoria non metropolitan	27%	16%	-%
SOGS SCORE			
(0-4)	98.5%	100%	100%
(5-20)	1.5%	-	-%
SEGMENT			
Disinterested Gambler	20%	5%	9%
Occasional Gambler	33%	27%	31%
Social Gambler	9%	10%	10%
Acknowledged Heavy Gambler	5%	15%	8%
Committed Heavy Gambler	8%	44%	43%

Significantly higher than average compared to the general population

Significantly lower than average compared to the general population

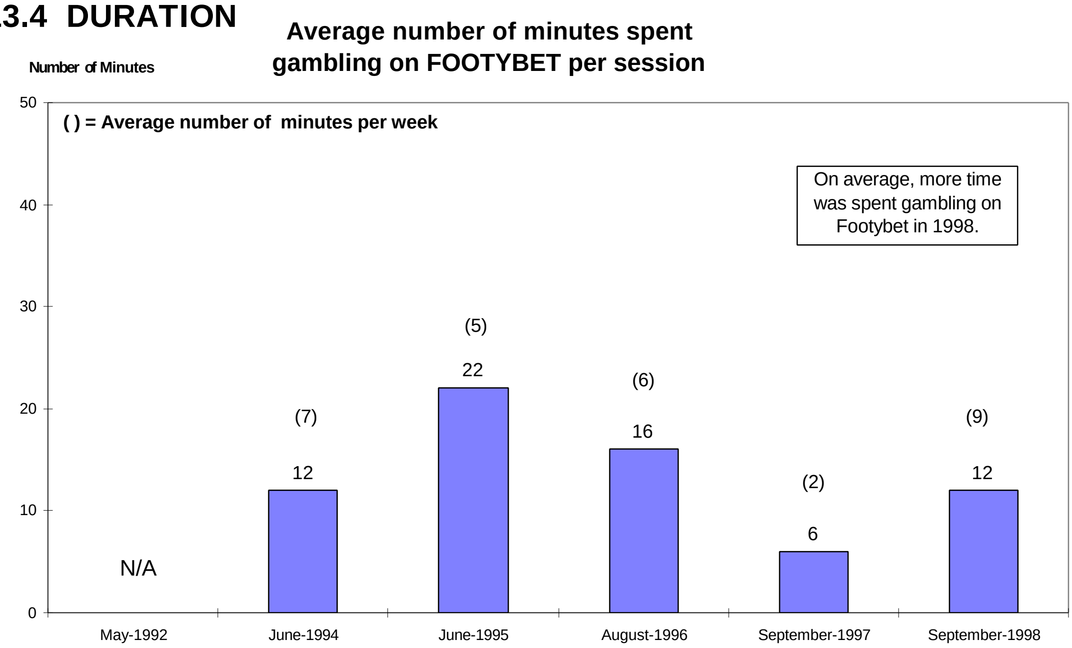
FOOTYBET GAMBLING PATTERNS

13.3 FREQUENCY



BASE: Total Gambled At Footybet in Last 12 Months

13.4 DURATION



BASE: Total Gambled At Footybet in Last 12 Months

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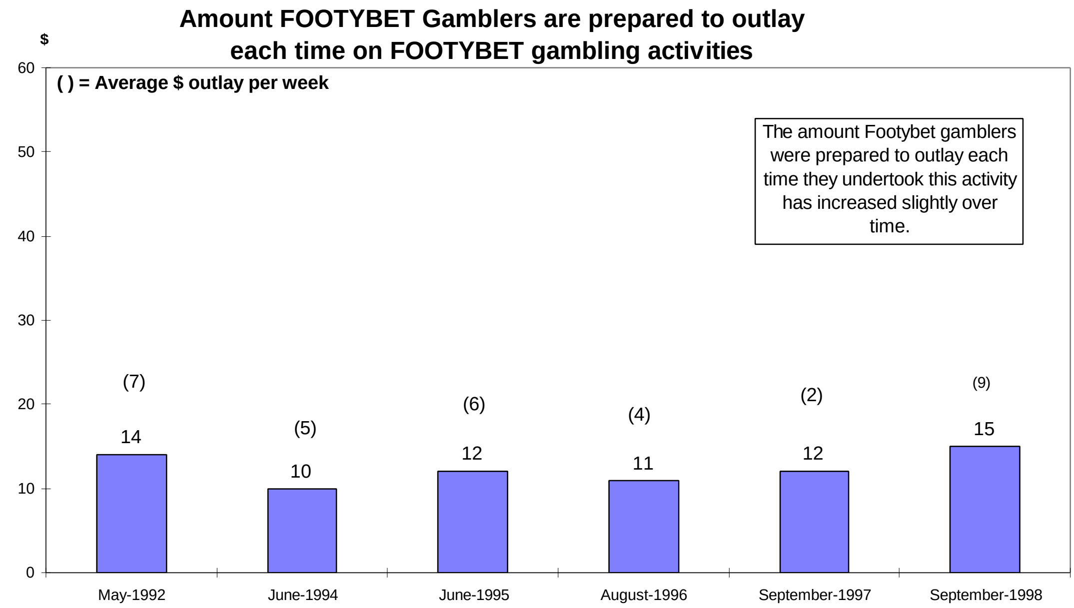
[125] Question 3L "How often do you enter Footybet?"
[126] Question 4L "And each time you enter Footybet, how much time do you spend entering Footybet?"

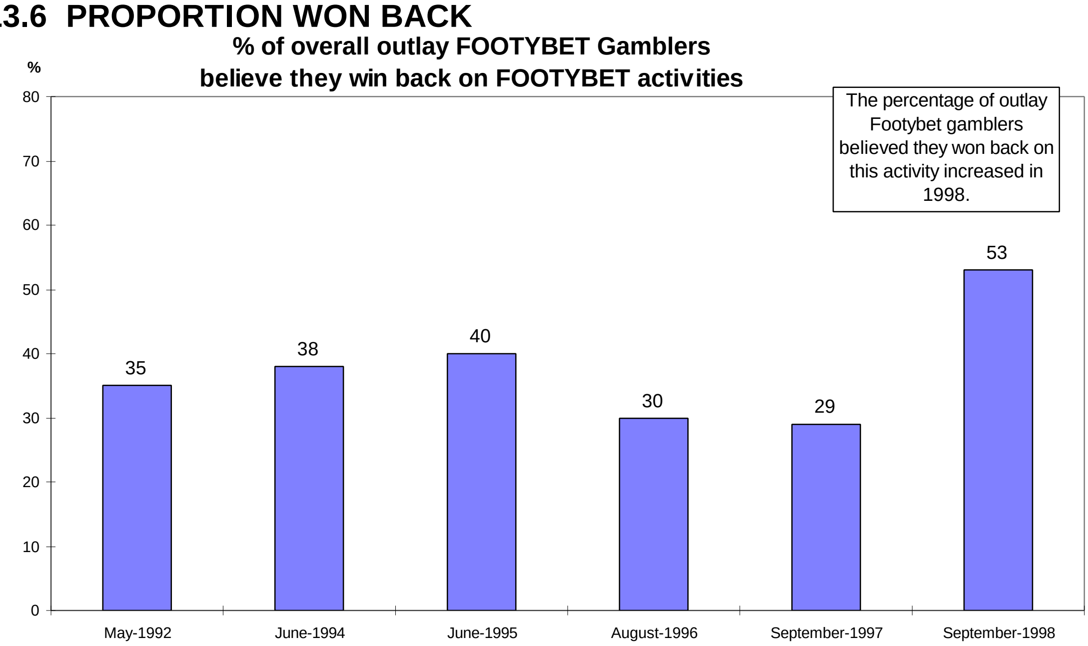
FOOTYBET GAMBLING PATTERNS

13.5 OUTLAY



BASE: Total Gambled At Footybet in Last 12 Months

13.6 PROPORTION WON BACK



BASE: Total Gambled At Footybet in Last 12 Months

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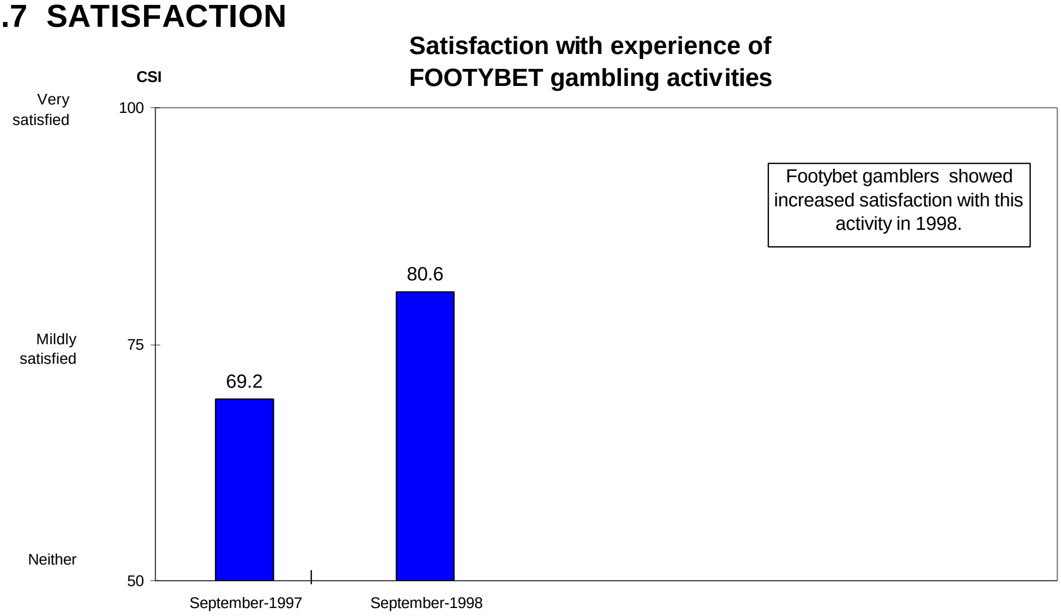
[127] Question 5L "And each time you enter Footybet, what is the dollar value you are prepared to or would outlay on this activity?"
[128] Question 6L "On average, what percentage of your overall outlay do you win back on Footybet?"

FOOTYBET GAMBLING PATTERNS

13.7 SATISFACTION

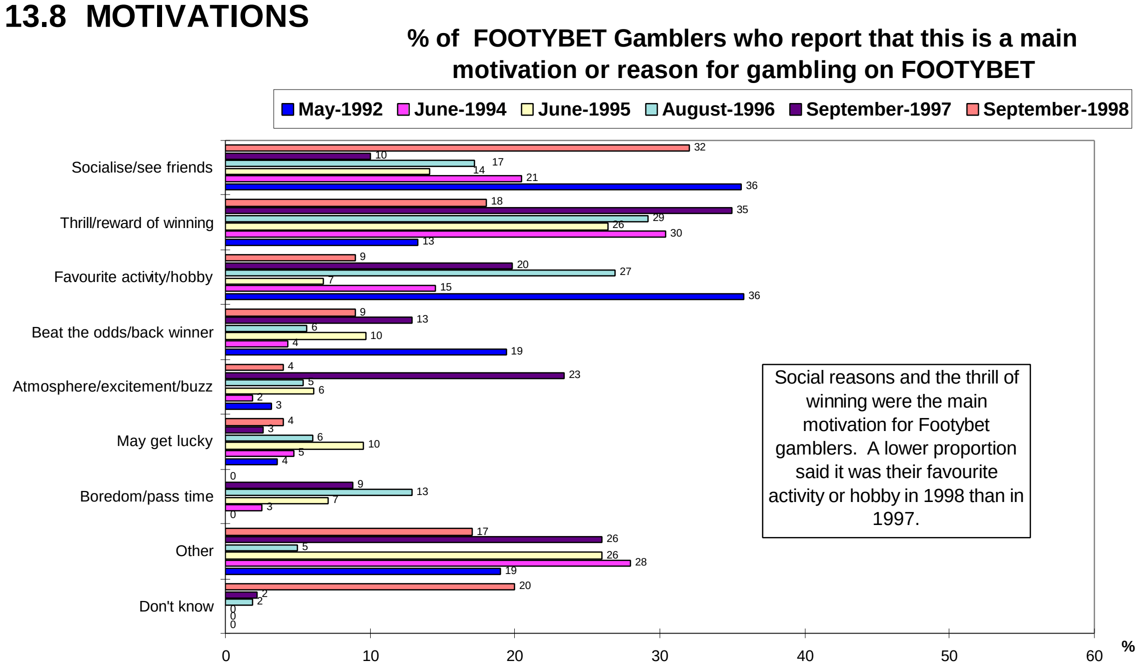


BASE: Total Gambled At Footybet in Last 12 Months

[129] Question 8L "Would you say that you are satisfied or dissatisfied with your experience of entering Footybet?"

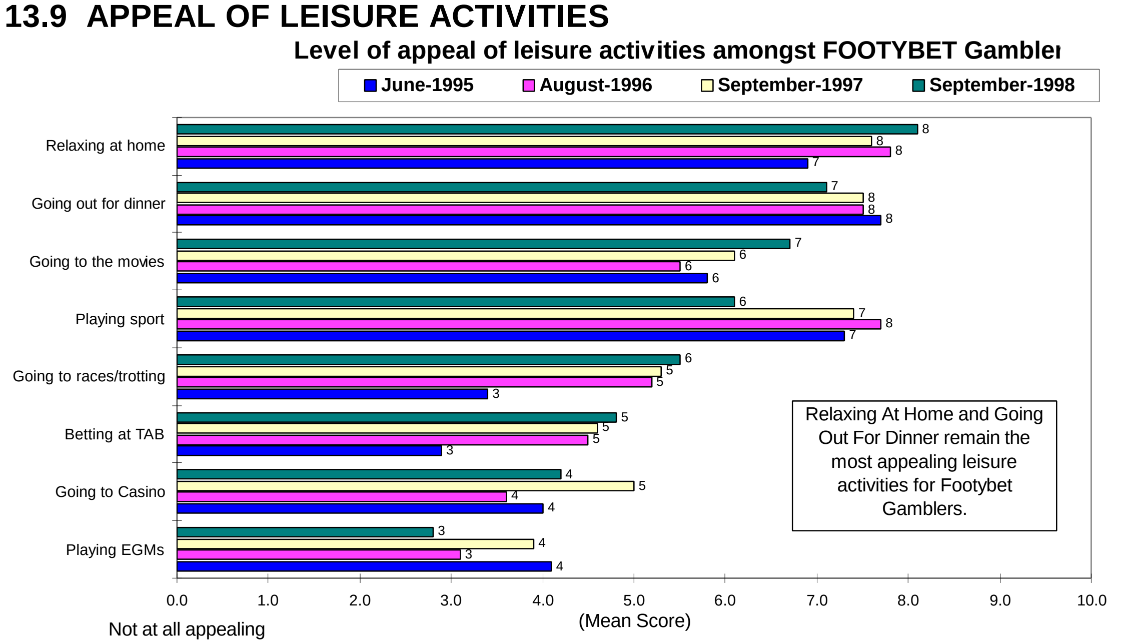
FOOTYBET GAMBLING PATTERNS

13.8 MOTIVATIONS



BASE: Total Gambled At Footybet in Last 12 Months

13.9 APPEAL OF LEISURE ACTIVITIES



130 Question 7L "What are the main motivations, attractions or reasons you enter Footybet?"
131 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 14

CLUB KENO
GAMBLING PATTERNS

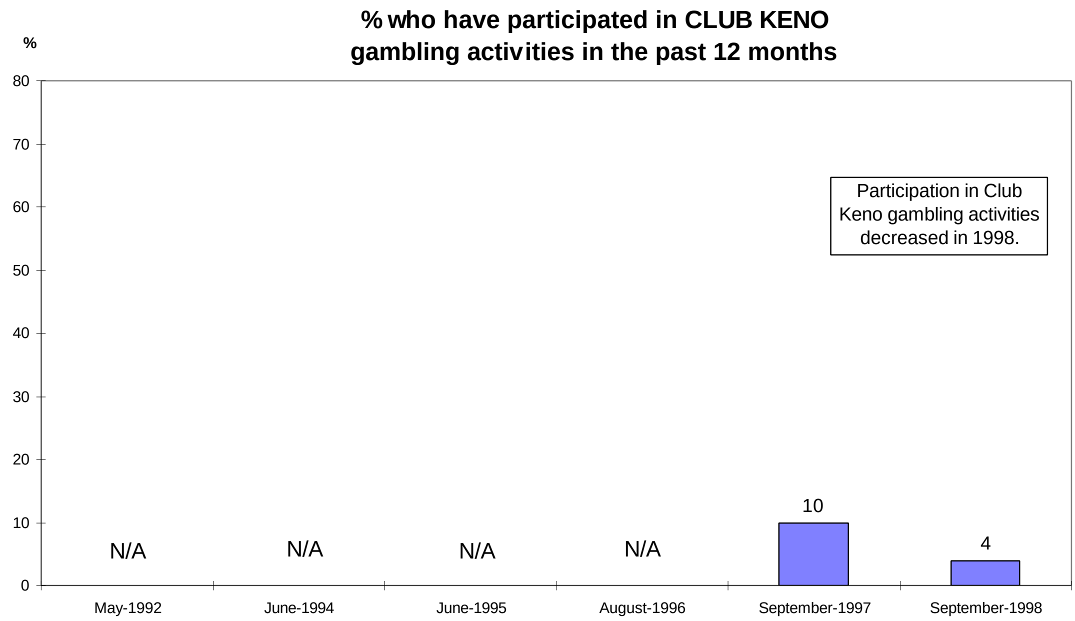
14. CLUB KENO GAMBLING PATTERNS - SUMMARY

Section 14 provides an overview of club keno gambling patterns. The key findings to emerge were:

- ✓ In 1998 club keno participation rates decreased to 4% (down from 10% in 1997);
- ✓ Club keno as the favourite gambling activity remained low in 1998 at 1%;
- ✓ Club keno gamblers were significantly more likely to be from rural Victoria, to be social gamblers, acknowledged heavy gamblers or to be committed heavy gamblers. They were also more likely to be "At Risk";
- ✓ Out of all gamblers who played club keno, 37% were core regular club keno gamblers participating in this activity at least once a month;
- ✓ Club keno gamblers spent approximately 27 minutes per session when playing club keno;
- ✓ There has been no real change in the amount club keno gamblers were prepared to outlay each time they entered this activity ($8);
- ✓ On average, club keno gamblers believed they won back 25% of their outlay on this activity;
- ✓ Club keno gamblers reported a moderate level of satisfaction with club keno gambling activities (66 CSI);
- ✓ Dissatisfied club keno gamblers continued to play club keno in the hope of winning (30%), because it was at the venue (21%) or because they only gamble with family/friends (15%);
- ✓ Socialising or seeing friends was the main motivator for gambling on club keno for 45% of participants in this activity;
- ✓ Club keno gamblers rated relaxing at home (7.8) and going out for dinner (7.6) as the most appealing leisure activities.

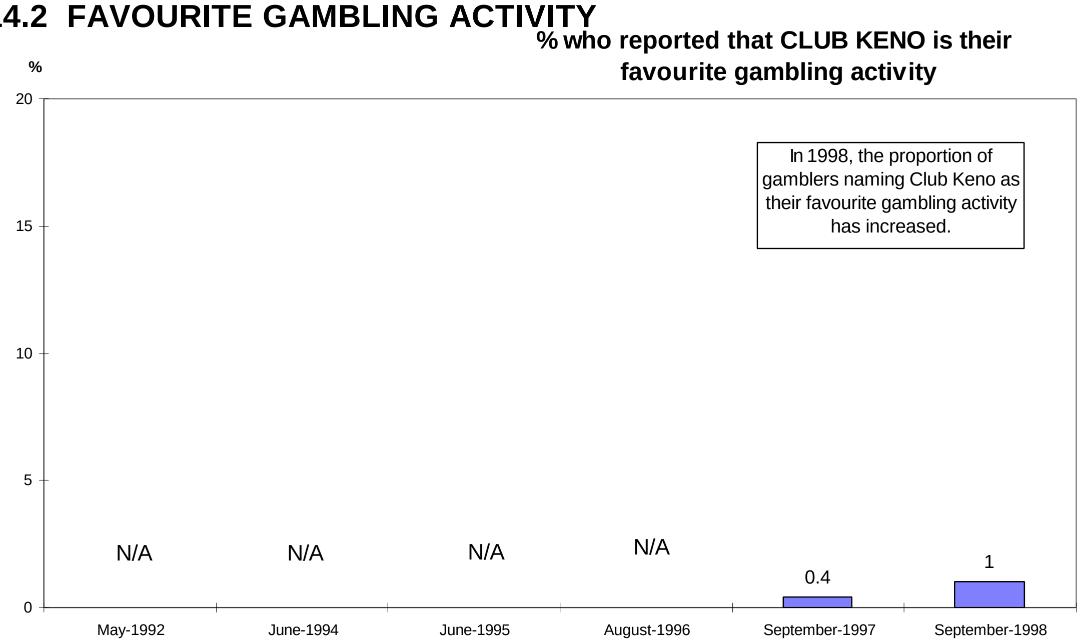
CLUB KENO GAMBLING PATTERNS

14.1 PARTICIPATION RATES



BASE: Total Respondents

14.2 FAVOURITE GAMBLING ACTIVITY



BASE: Total Gambled in Last 12 Months

[132] Question 1. "Which of the following activities or games have you played or gambled on in the past 12 months?"

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

PROFILE OF CLUB KENO GAMBLERS

TABLE 14.1

	Total Population	**Club Keno Gamblers (Last 12 mths)** **4% of total pop**	**Reg. Club Keno Gamblers (Once a mth+)** **2% of total pop**
GENDER			
Male	49%	51%	59%
Female	51%	49%	41%
AGE			
Average Age	44 yrs	42 yrs	42 yrs
RESPONDENT'S OCCUPATION			
TOTAL FULL TIME	**44%**	**43%**	**38%**
Professionals / Executives	10%	1%	-
Owners/White Collar Worker	18%	23%	17%
Farm Owner	1%	2%	4%
Skilled Workers	10%	9%	9%
Semi-skilled workers	3%	7%	4%
Unskilled workers / Other	2%	1%	4%
TOTAL PART TIME	**15%**	**21%**	**19%**
TOTAL NOT IN PAID WORKFORCE	**41%**	**36%**	**44%**
Household duties	10%	10%	3%
Student	6%	4%	7%
Self Supporting Retiree	5%	5%	8%
Pensioner	18%	14%	18%
Unemployed	3%	3%	8%
LOCATION			
Melbourne Metropolitan	73%	61%	66%
Other Victoria non metropolitan	27%	39%	34%
SOGS SCORE			
(0-4)	98.5%	93.2%	88.3%
(5-20)	1.5%	6.8%	11.7%
SEGMENT			
Disinterested Gambler	20%	15%	9%
Occasional Gambler	33%	28%	37%
Social Gambler	9%	20%	18%
Acknowledged Heavy Gambler	5%	11%	12%
Committed Heavy Gambler	8%	26%	25%

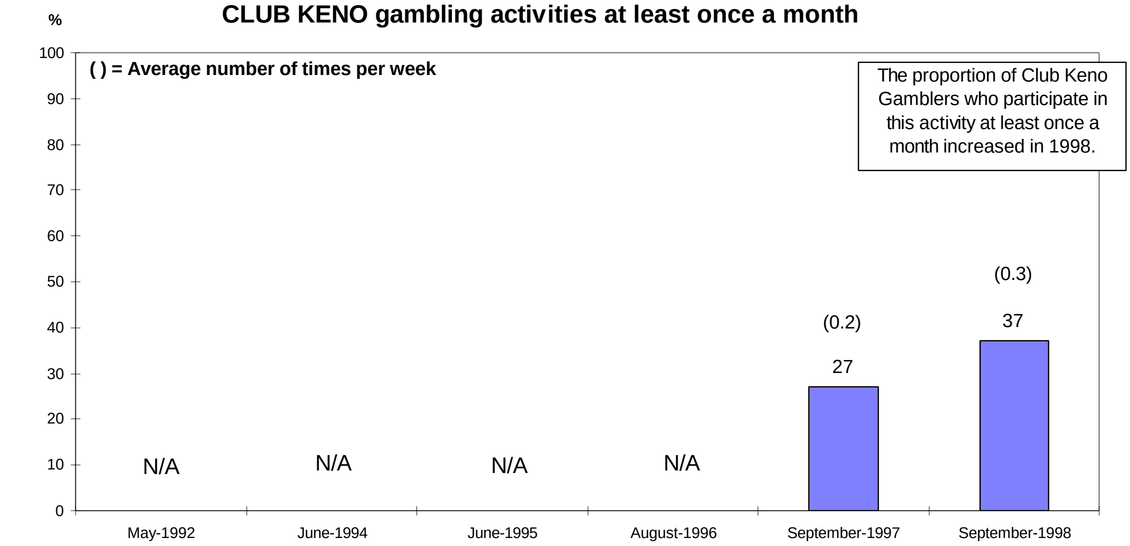
(oval) Significantly higher than average compared to the general population

(box) Significantly lower than average compared to the general population

CLUB KENO GAMBLING PATTERNS

14.3 FREQUENCY

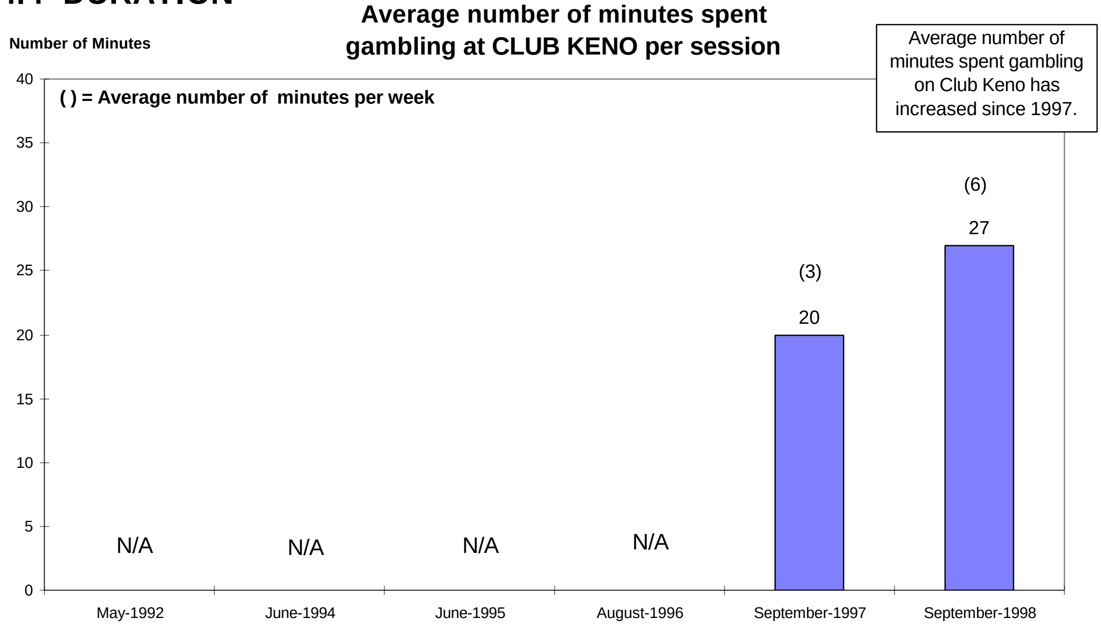
% of CLUB KENO Gamblers who participate in CLUB KENO gambling activities at least once a month



BASE: Total Gambled At Club Keno in Last 12 Months

14.4 DURATION

Average number of minutes spent gambling at CLUB KENO per session



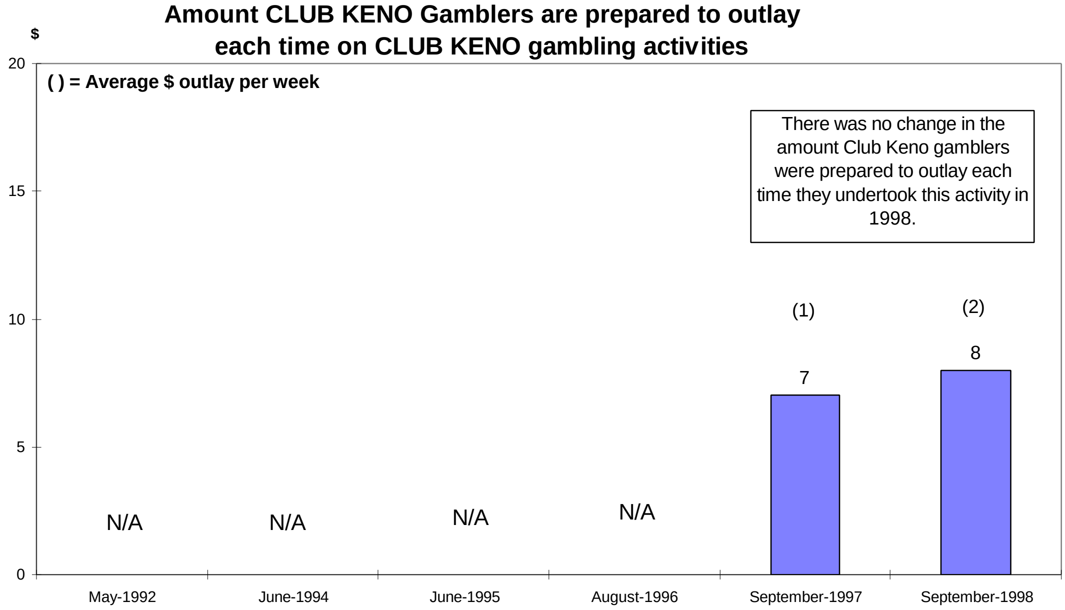
BASE: Total Gambled At Club Keno in Last 12 Months

[134] Question 3O "How often do you enter Keno at a club or hotel?"
[135] Question 4O "And each time you enter Keno at a club or hotel, how much time do you spend entering Keno?"

CLUB KENO GAMBLING PATTERNS

14.5 OUTLAY

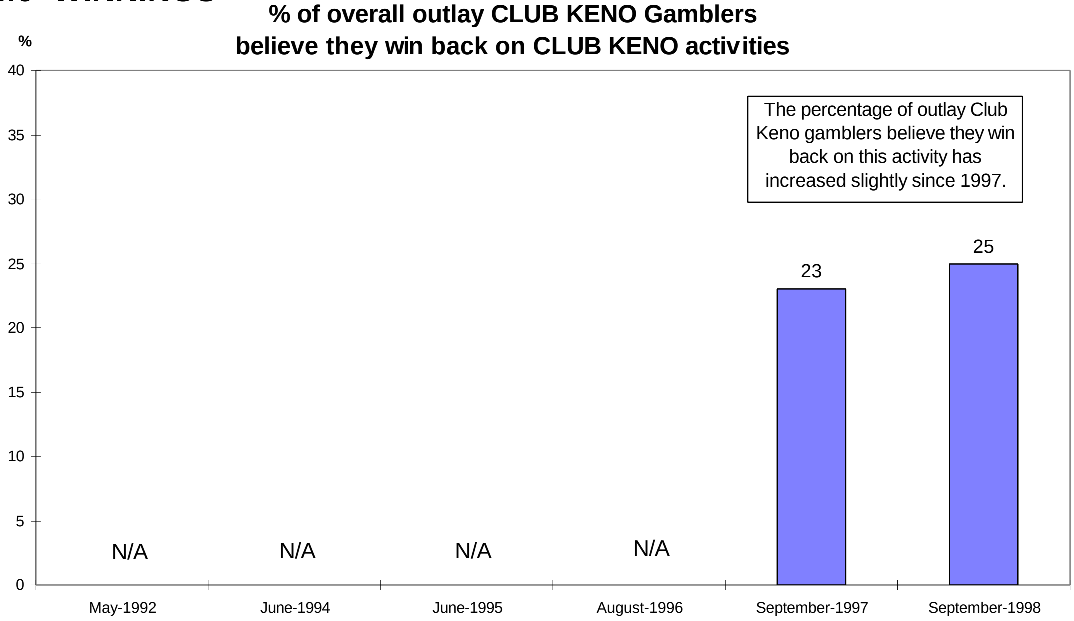
Amount CLUB KENO Gamblers are prepared to outlay each time on CLUB KENO gambling activities



BASE: Total Gambled At Club Keno in Last 12 Months

14.6 WINNINGS

% of overall outlay CLUB KENO Gamblers believe they win back on CLUB KENO activities

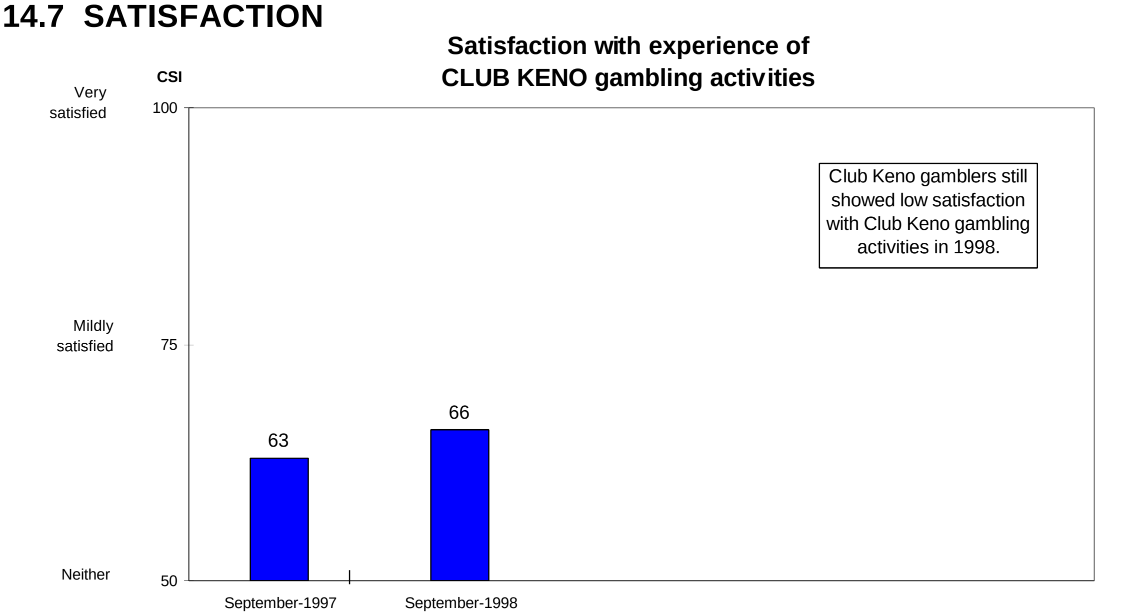


BASE: Total Gambled At Club Keno in Last 12 Months

[136] Question 5O "And each time you enter Keno at a club or hotel, what is the dollar value you are prepared to or would outlay on this activity?"
[137] Question 6O "On average, what percentage of your overall outlay do you win back on entering Keno at a club or hotel?"

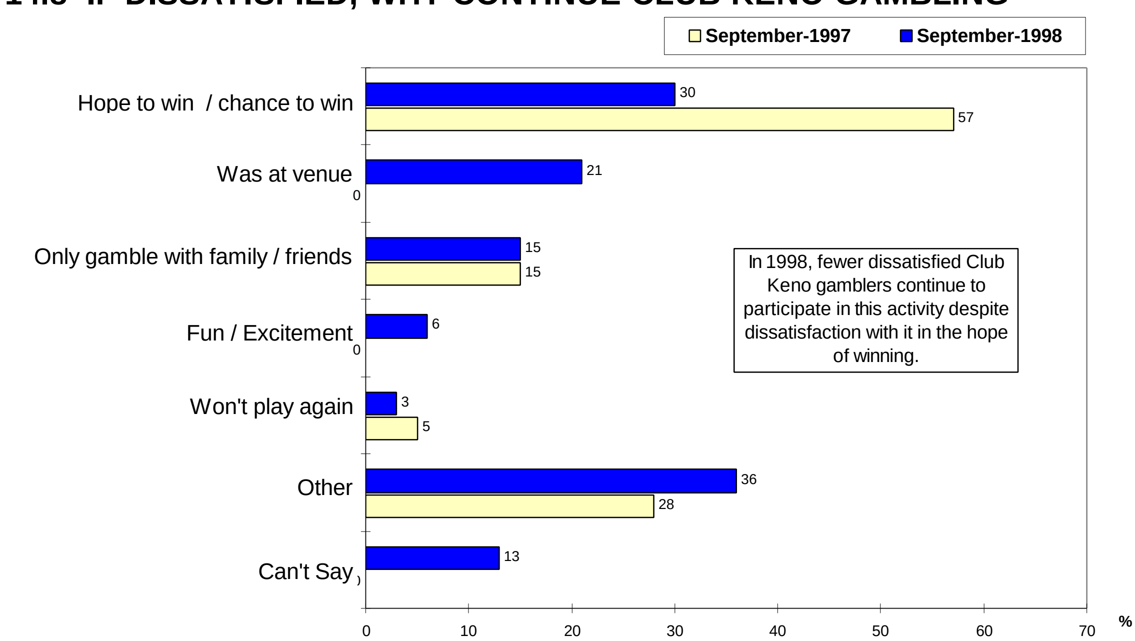
CLUB KENO GAMBLING PATTERNS

14.7 SATISFACTION



BASE: Total Gambled At Club Keno in Last 12 Months

14.8 IF DISSATISFIED, WHY CONTINUE CLUB KENO GAMBLING



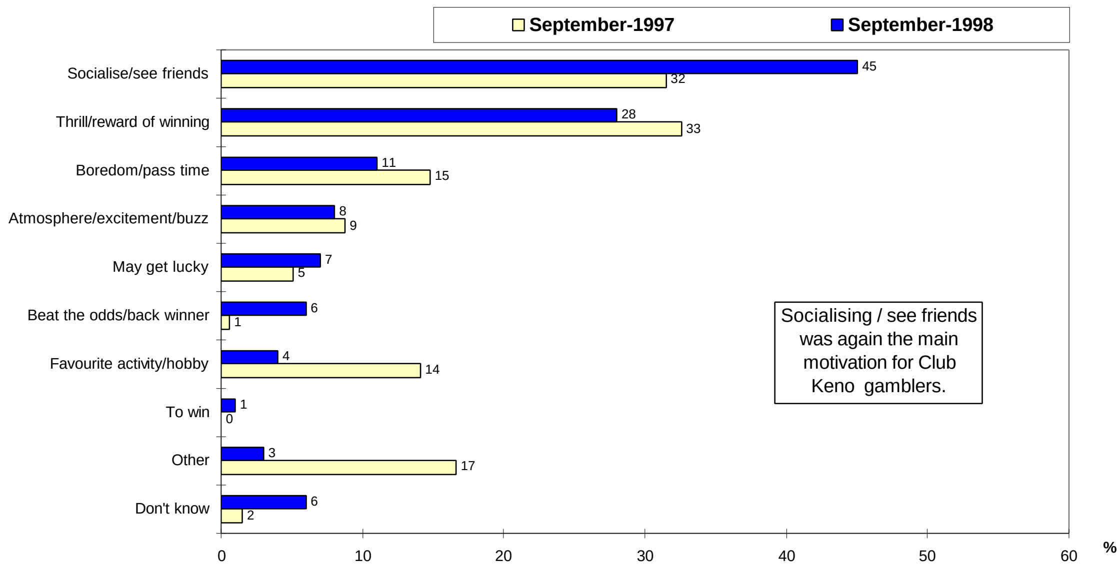
BASE: Total Dissatisfied with Club Keno Gambling Activities

[138] Question 8O "Would you say that you are satisfied or dissatisfied with your experience of entering Keno at a club or hotel?"
[139] Question 9O "Why do you keep entering Keno at a club or hotel if you are dissatisfied?"

CLUB KENO GAMBLING PATTERNS

14.9 MOTIVATIONS

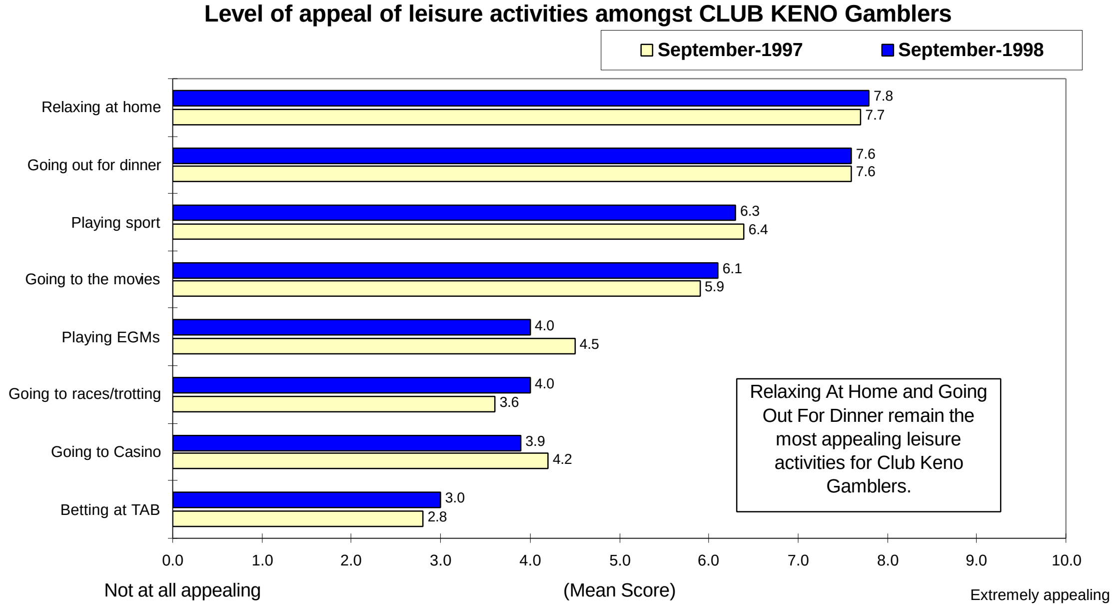
% of CLUB KENO Gamblers who report that this is a main motivation or reason for gambling on CLUB KENO



BASE: Total Gambled At Club Keno in Last 12 Months

14.10 APPEAL OF LEISURE ACTIVITIES

Level of appeal of leisure activities amongst CLUB KENO Gamblers



BASE: Total Gambled At Club Keno in Last 12 Months

[140] Question 7O "What are the main motivations, attractions or reasons you enter Keno at a club or hotel?"
[141] 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

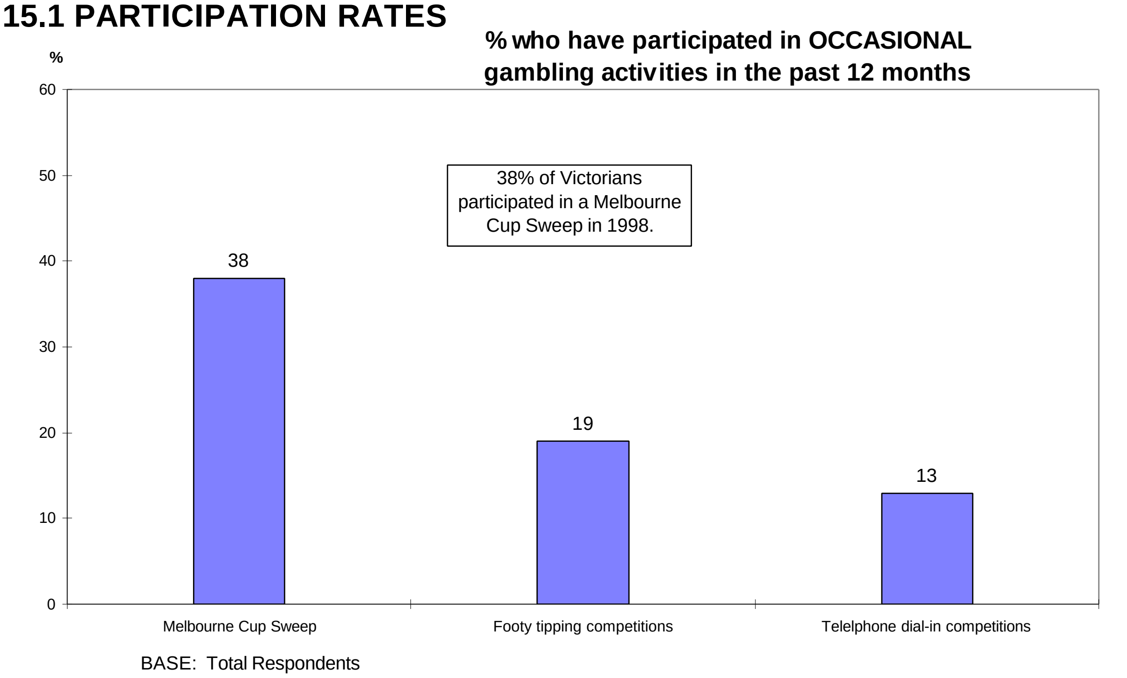
15. OTHER GAMBLING PATTERNS

Section 15 of this report provides a graphical summary of participation rates for greyhound racing, soccer pools, sportsbet and 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 or gambled on in the past 12 months?"

In 1998, three additional questions were added to the survey in order to determine participation in footy tipping competitions, Melbourne Cup sweeps and telephone dial-in competitions (where participants dial 0055 or 1-900 numbers). An overview of participation in these activities is also provided in Section 15.1.

OCCASIONAL GAMBLING PATTERNS

15.1 PARTICIPATION RATES



15.1 Occasional/Annual Gambling Activities

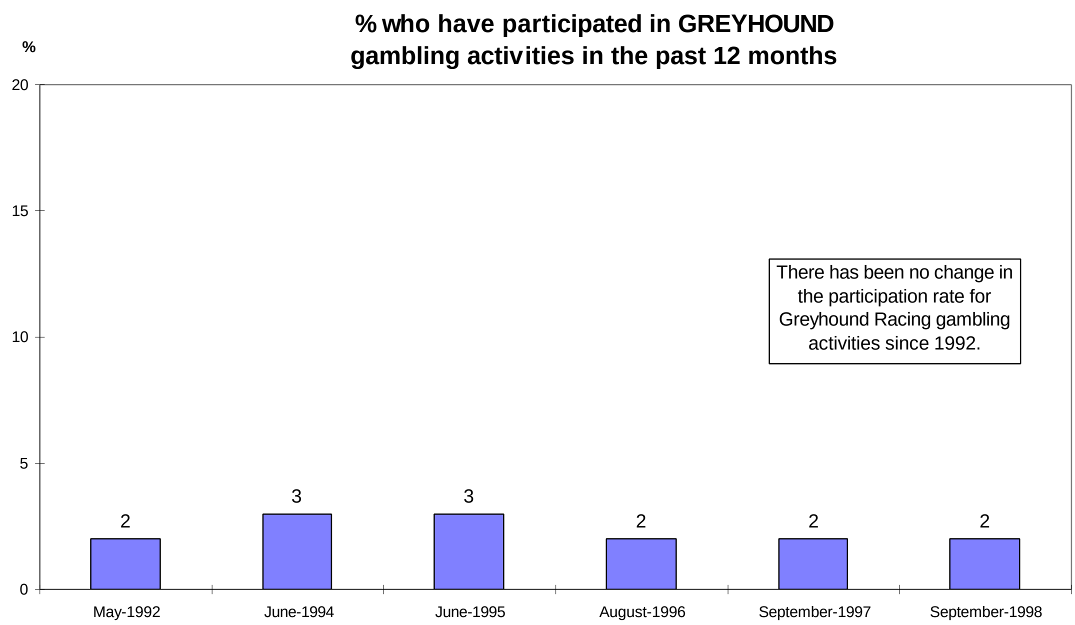
Figure 15.1[142] opposite shows the participation rates in occasional and annual gambling activities (footy tipping competitions, Melbourne Cup sweeps and telephone dial-in competitions). Participation in Melbourne Cup sweeps was found to be quite high, with 38% of Victorians participating in this activity. Almost one fifth (19%) of Victorians had participated in footy tipping competitions in the last 12 months. Telephone dial-in competitions were participated in by fewer people, with only 13% of Victorians saying they had entered such competitions in the last 12 months.

While there was high participation in the Melbourne Cup (38% of Victorians), the average yearly outlay on this activity was quite low, at $12.41. Outlay on footy tipping competitions was also quite low, with participants in this activity reporting an average outlay of $38 per year. People who participated in telephone dial-in competitions were likely to do so once or twice a year.

[142] 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?"

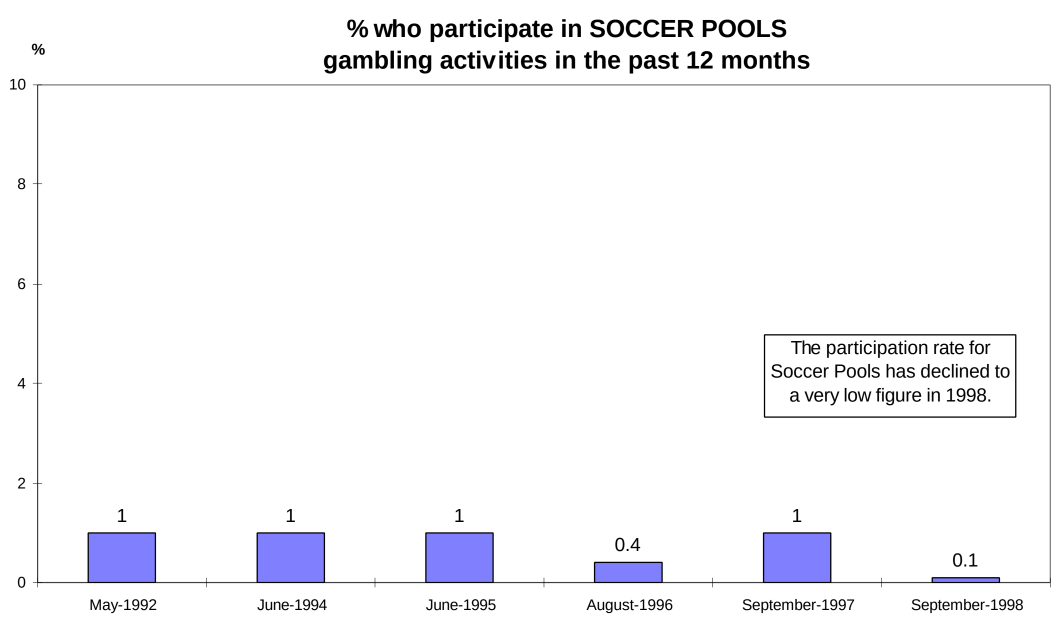
OTHER GAMBLING PATTERNS

15.2 PARTICIPATION RATES



BASE: Total Respondents

15.3 PARTICIPATION RATES



BASE: Total Respondents

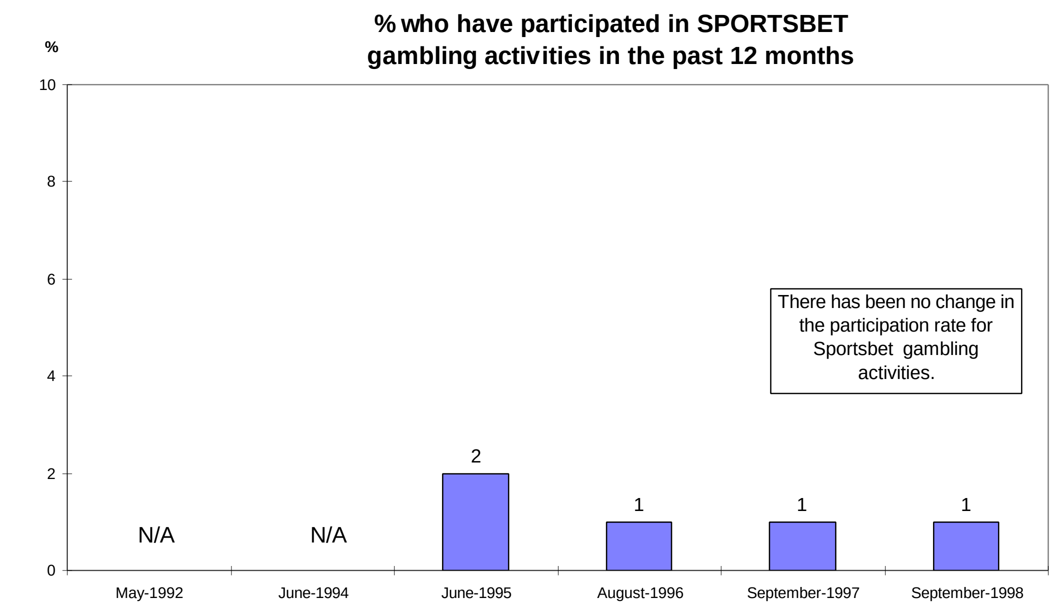
[143] Question 1. "Which of the following activities or games have you played or gambled on in the past 12 months?"

15.2 Other Gambling Activities

Section 15.2 provides a graphical summary of participation rates for greyhound racing, soccer pools, sportsbet and Internet gambling. The participation levels for these activities were very low, hence detailed interpretation of the results in these instances were not valid.

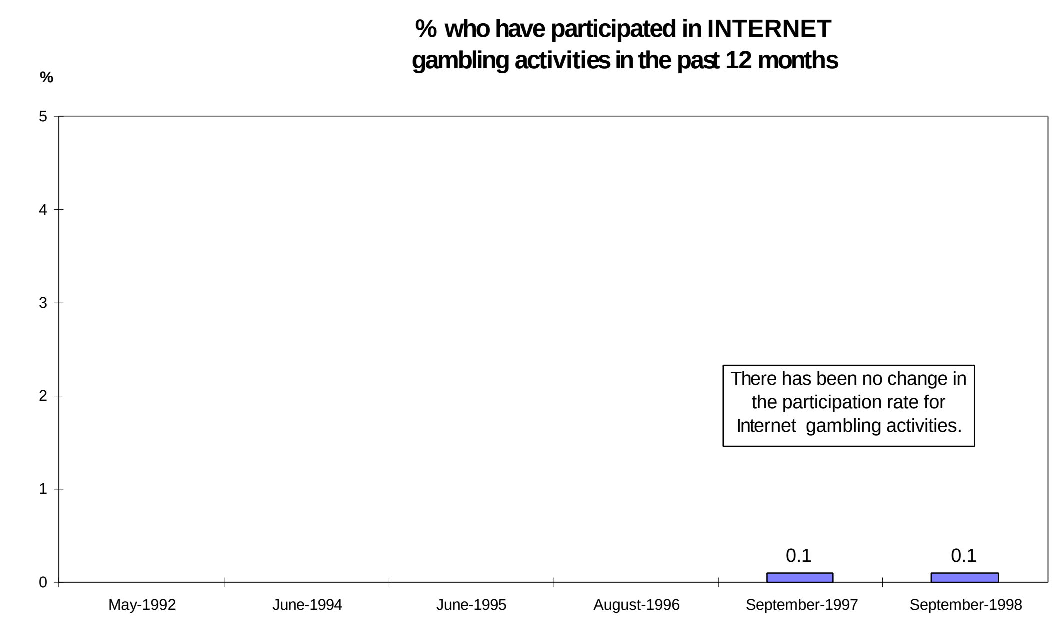
OTHER GAMBLING PATTERNS

15.4 PARTICIPATION RATES



BASE: Total Respondents

15.5 PARTICIPATION RATES



BASE: Total Respondents

144 Question 1. "Which of the following activities or games have you played or gambled on in the past 12 months?"

APPENDIX 1

THE QUESTIONNAIRE

Sixth Survey of Community Gambling Patterns & Perceptions (1998)

INTRODUCTION
Good %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 aged 18 or over whose birthday is the closest to today's date?

IF NEW RESPONDENT, REPEAT INTRODUCTION

IF FOREIGN LANGUAGE, MAKE APPOINTMENT FOR INTERVIEW IN THAT LANGUAGE

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)

THE BUILDING INDUSTRY	1
A TAB AGENCY OR TABCORP	2
TATTERSALLS AGENCY OR CORPORATION	3
A VENUE WHERE THERE ARE ELECTRONIC GAMING MACHINES	4
THE CROWN CASINO	5
THE RETAIL MOTOR INDUSTRY	6
A MARKET RESEARCH COMPANY	7
VICTORIAN CASINO & GAMING AUTHORITY	8
NONE OF THESE	9

IF CODES 2-5 OR 7-8 ON QA, THANK AND TERMINATE

Q.1 Which of the following activities or games have you played or gambled 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)	Informal cards for money not at the casino	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)	Electronic gaming machines not at the Casino	1	2
j)	Electronic gaming machines at the Casino	1	2
k)	Any other game at the Casino	1	2
l)	Footy betting on the TAB (Footy Bet)	1	2
m)	Fixed odds sports betting (with Sportsbook or Bookmakers)	1	2
n)	Soccer pools	1	2
o)	Keno at a club or hotel	1	2
p)	Internet gambling	1	2
q)	None of these *(Go to Q.22A)*	1	2

IF NOT GAMBLED IN LAST 12 MONTHS (CODES 2 OR 3 ON Q1a AND Q1b AND Q1c AND Q1d AND Q1e AND Q1f AND Q1g AND Q1h AND Q1i AND Q1j AND Q1k AND Q1l AND Q1m NAD Q1n AND Q1o AND Q1p AND Q1q) ASK QC

QC. So you haven't gambled on any of these in the last 12 months?

Yes, not gambled in last 12 months
No, have gambled on these in last 12 months
IF YES (CODE 1 ON QC, GO TO Q24a1a
IF NO (CODE 2 ON QC) TAB BACK AND CLASSIFY GAMBLING TYPE

Q2. Which ONE of these is your FAVOURITE game or activity?
DO NOT READ
SINGLE RESPONSE

Raffles	01
Bingo	02
Lotto, Tattslotto, Oz Lotto, Tatts Keno, or Powerball	03
Scratch ticket, Instant lotto or Scratch 'n win	04
Informal cards for money not at the casino	05
Thoroughbred horse racing (the gallops)	06
Trotting or harness racing (the trots)	07
Greyhound racing (the dogs)	08
Electronic gaming machines not at the Casino	09
Electronic gaming machines at the Casino	10
Any other game at the Casino	11
Footy betting on the TAB (Footy Bet)	12
Fixed Odds Sportsbetting (with Sportsbook or Bookmakers)	13
Soccer pools	14
Keno at a club or hotel	15
Internet gambling	16
Can't Say	97

FOR EACH ACTIVITY UNDERTAKEN IN Q1, ASK Q3 TO Q9

Q.3a) FOR EACH ACTIVITY UNDERTAKEN IN Q.1, ASK Q.3 TO Q.9
How often do you play *(…say name of activity in Q.1…)* ? (READ OUT SCALE)

More than 3 times a week	1
2 to 3 times a week	2
Once a week	3
Once a fortnight	4
Once a month	5
Once every 2 to 3 months	6
Every 6 months	7
Once a year	8
Less often	9
Can't Say	10

Q.3b) IF BOTH EGM'S AND ANY OTHER GAMBLING GAMES AT CASINO IN Q.1 ASK Q.3b)
Overall, how often do you go to the Casino to play the electronic gaming machines or to play other gambling games? (READ OUT SCALE)

More than 3 times a week	1
2 to 3 times a week	2
Once a week	3
Once a fortnight	4
Once a month	5
Once every 2 to 3 months	6
Every 6 months	7
Once a year	8
Less often	9
Can't Say	10

Q.3c) IF BOTH EGM ACTIVITIES IN Q.1 ASK Q.3c)
Overall, how often do you play the electronic gaming machines at the Casino or other venues? (READ OUT SCALE)

More than 3 times a week	1
2 to 3 times a week	2
Once a week	3
Once a fortnight	4
Once a month	5
Once every 2 to 3 months	6
Every 6 months	7
Once a year	8
Less often	9
Can't Say	10

FOR EACH ACTIVITY MENTIONED IN Q.1 ASK Q4
Q4. And each time you play *(…say activity in Q.1…)* how much time do you spend *(…playing / entering / studying the form and betting on…)* this activity? IF CAN'T SAY, ASK FOR BEST GUESS

RECORD TIME SPENT IN MINUTES |___|___|___|

FOR EACH ACTIVITY MENTIONED IN Q.1 ASK Q5
Q5. And each time you play *(…say name of activity…)* on average, what is the dollar value you are prepared to or would outlay on this activity?

RECORD AMOUNT SPENT IN DOLLARS |___|___|___|___|

None	0
No limit	9997
Can't Say	9998
Refused	9999

FOR EACH ACTIVITY MENTIONED IN Q.1 ASK Q6
Q6. On average, what percentage of your overall outlay do you think you win back on *(…say name of activity…)*?
READ OUT
PROBE FOR ESTIMATE

Under 10%	1
10% to less than 25%	2
25% to less than 40%	3
40% to less than 55%	4
55% to less than 70%	5
70% to less than 85%	6
85% to less than 100%	7
100% to less than 150%	8
150% to less than 200%	9
Over 200%	10
None	11
(Don’t know)	12
(Refused)	13

FOR EACH ACTIVITY MENTIONED IN Q.1 ASK Q7
Q7. What are the main motivations, attractions or reasons you play *(…say name of activity…)*?
DO NOT READ OUT
PROBE FULLY
ACCEPT MULTIPLES
IF OTHER, HIGHLIGHT OTHER AND TYPE RESPONSE

Thrill/dream rewards of winning	1
Atmosphere/excitement/gives a buzz	2
Beating the odds/back a winner	3
Exchange of money/handling money	4
Upbringing/family background	5
Ego/self esteem	6
Favourite recreational activity/hobby	7
Social reasons/see friends	8
Compulsions/addiction	9
Like taking risks/risk taker	10
Belief in luck/may get lucky	11
Want to be successful	12
Boredom/pass time	13
Other *(Specify)*	14
(Don’t know)	15

FOR EACH ACTIVITY MENTIONED IN Q.1 ASK Q8
Q8. Would you say that you are satisfied or dissatisfied with your experience of gambling on *(…say name of activity…)*? Is that very or mildly… (satisfied or dissatisfied)?

Very satisfied	1
Mildly satisfied	2
Neither satisfied nor dissatisfied	3
Mildly dissatisfied	4
Very dissatisfied	5
(Don’t know)	6

FOR EACH ACTIVITY MENTIONED IN Q.1 ASK Q9 - (ASK IF DISSATISFIED ON Q8, OTHERWISE GO TO Q10)
Q9 Why do you keep gambling on *(…say name of activity…)* if you are dissatisfied?
PROBE FULLY

RECORD ANSWER VERBATIM

Q10. Overall, in an average week, how much would you outlay or spend IN TOTAL on the gambling activities you play?

RECORD AMOUNT SPENT IN DOLLARS |___|___|___|___|

None	0
No limit	9997
Don't know/not sure	9998
Refused	9999

IF NONE (CODE 0) ON Q10, GO TO Q12, OTHERWISE CONTINUE

Q11. Where does this weekly outlay (the money you spend) come out of?
DO NOT READ OUT
MULTIPLE RESPONSE
IF SOMEWHERE ELSE, HIGHLIGHT AND TYPE IN RESPONSE

Money for food/bills/transport	1
Money for accommodation	2
Pocket money	3
From personal or household entertainment or recreation budget	4
Specific gambling budget	5
Part of an amount set aside for major purchases like a car, holiday or furniture	6
Pension/wage/job	7
From general bank savings	8
Somewhere else *(Specify)*	9
Can't Say	10

IF CODE 1 ON Q1a TO 1p ASK Q12
IF CODE 1 ON Q1q GO TO Q23

Q12 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

IF YES (CODE 1 ON Q12 ASK Q13
IF NO OR DON'T KNOW (CODE 2 OR 3 ON Q12 GO TO Q15a

Q13. 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

IF WIN OR LOSE (CODES 1 OR 2 ON Q13 ASK Q14
IF BROKE EVEN OR CAN'T REMEMBER (CODES 3 OR 4 ON Q13 GO TO Q15a

Q14. How much did you win/lose in total ?

RECORD AMOUNT IN DOLLARS |___|___|___|___|

Don't know/not sure	9998
Refused	9999

IF USED GAMING MACHINES AT CASINO OR ELSEWHERE IN THE LAST 12 MONTHS (CODE 1 ON Q1i OR CODE 1 ON Q1j) ASK Q 15a

IF NOT USED GAMING MACHINES AT CASINO OR ELSEWHERE IN THE LAST 12 MONTHS (CODES 2 OR 3 ON Q1i OR CODES 2 OR 3 ON Q1j) GO TO Q23

Q15a. Which type of venues do you play electronic gaming machines at?
READ OUT
MULTIPLE RESPONSE
IF SOMEWHERE ELSE, HIGHLIGHT AND TYPE IN RESPONSE

Licensed sports club (golf, football, bowls etc.)	1
Pub/hotel	2
RSL Club	3
Casino	4
Or somewhere else *(Specify)*	5
(None of the above)	6

Q15b. And which of these venues do you go to the MOST to play electronic gaming machines?
SINGLE RESPONSE
IF SOMEWHERE ELSE, HIGHLIGHT AND TYPE IN RESPONSE

Licensed sports club (golf, football, bowls etc.)	1
Pub/hotel	2
RSL Club	3
Casino	4
Or somewhere else *(Specify)*	5
(None of the above)	6

IF PLAY EGM'S NOT AT THE CASINO (CODE 1 ON Q1i ASK Q16- Q.21 OTHERWISE GO TO Q22

Q16. 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?

All the time	1
Sometimes	2
Every now and then	3
Never	4
(Don't know what linked jackpots are)	5

IF CODES 1 OR 2 OR 3 ON Q16 ASK Q16A
IF CODES 4 OR 5 ON Q16 GO TO Q17

Q16A**.** 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

Q17 Do you visit electronic gaming machine venues specifically to play the machines or as part of a social outing?
READ OUT

Specifically to gamble	1
For a social outing	2
Both	3
Varies	4

THERE IS NO QUESTION 18a ON THIS QUESTIONNAIRE

Q18b. I'd like you to think about the last time you went to an electronic gaming machine venue in Victoria, not including the casino How far did you travel to get to this venue?

Less than 5 kilometres	1
5 to 10 kilometres	2
10 to 15 kilometres	3
15 to 20 kilometres	4
Over 20 kilometres	5
(Don't know)	6

Q18c. Did you travel to this venue directly from… ?
READ OUT
IF OTHER HIGHLIGHT OTHER AND TYPE IN RESPONSE

Home	1
Work	2
Other *(Specify)*	3
(Don't know)	4

Q19. How long ago was the last time you played gaming machines not at the casino? 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 know)	5

IF CODES 1-4 ON Q19 ASK Q20-21
IF CODE 5 ON Q19 GO TO Q22

Q20. Thinking of this last time you played electronic gaming machines not at the casino. Did you win or lose on this occasion?

Win	1
Lose	2
Broke even	3
(Can't remember)4	

IF WIN OR LOSE (CODES 1 OR 2 ON Q20) ASK Q21
IF BROKE EVEN OR CAN'T REMEMBER (CODES 3 OR 4 ON Q20) GO TO Q22

Q21. How much did you win/lose on this last occasion ?

RECORD AMOUNT IN DOLLARS |___|___|___|___|

Don't know/not sure	9998
Refused	9999

Q22. Still thinking of the last time you went to an electronic gaming machine venue in Victoria, what other activities did you combine with gambling activities?
READ OUT
MULTIPLE RESPONSE
IF SOMETHING ELSE. HIGHLIGHT AND TYPE IN RESPONSE

Dining out	1
Attending the theatre	2
Attending the movies	3
Attending a concert	4
Shopping	5
Live entertainment (eg. A band)	6
Attending a regular sporting event (eg. Footy)	7
Attending a special event (eg. Grand Prix, Melb Cup)	8
Or something else *(Specify)*	9
Nothing else – gambling only	10
(Can't remember)	11

IF CODE 1 ON Q1a TO 1p ASK Q23
IF CODE 1 ON Q1q GO TO Q24a1

Q23. 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 EG. WATCHING TV
g). PLAYING THE ELECTRONIC GAMING MACHINES
h). GOING TO THE CASINO

ASK EVERYONE

Q24a1a. In the last 12 months have you participated in a FOOTY TIPPING competition?

YES	1
NO	2
CAN'T SAY	3

Q24a1b. In the last 12 months have you participated in a MELBOURNE CUP SWEEP?

YES	1
NO	2
CAN'T SAY	3

Q24a1c. In the last 12 months have you participated in any TELEPHONE DIAL IN COMPETITIONS where you dial numbers such as 0055 OR 1900 NUMBERS?

YES	1
NO	2
CAN'T SAY	3

IF PARTICIPATED IN FOOTY TIPPING (CODE 1 ON Q24a1a) GO TO Q24a2a
IF PARTICIPATED IN MELBOURNE CUP SWEEP (CODE 1 ON Q24a1b) ASK Q24a2b

IF PARTICIPATED IN TELEPHONE DIAL IN COMPETITIONS (CODE 1 ON Q24a1c) GO TO Q24a3

IF DID NOT PARTICIPATE IN FOOTY TIPPING OR MELBOURNE CUP SWEEP OR TELEPHONE DIAL IN COMPETITIONS (CODES 2 OR 3 ON Q24a1a AND CODES 2 OR 3 ON Q24a1b AND CODES 2 OR 3 ON Q24a1c) GO TO Q24b

Q24a2a. How much did you outlay or spend IN TOTAL on FOOTY TIPPING COMPETITIONS?

RECORD AMOUNT SPENT IN DOLLARS |___|___|___|___|

None	0
No limit	9997
Don't know/not sure	9998
Refused	9999

IF PARTICIPATED IN MELBOURNE CUP SWEEP (CODE 1 ON Q24a1b) ASK Q24a2b, OTHERWISE GO TO Q24a3

Q24a2b. How much did you outlay or spend IN TOTAL on A MELBOURNE CUP SWEEP?

RECORD AMOUNT SPENT IN DOLLARS |___|___|___|___|

None	0
No limit	9997
Don't know/not sure	9998
Refused	9999

IF PARTICIPATED IN TELEPHONE DIAL IN COMPETITIONS (CODE 1 ON Q24a1c) ASK Q24a3, OTHERWISE GO TO Q24b

Q24a3. How often do you participate in telephone dial in competitions where you dial numbers such as 0055 or 1900 numbers?
READ OUT

More than 3 times a week	1
2 to 3 times a week	2
Once a week	3
Once a fortnight	4
Once a month	5
Once every 2 to 3 months	6
Every 6 months	7
Once a year	8
Less often	9
Can't Say	10

ASK EVERYONE

Q24b. Have you visited the new Crown Entertainment Complex in Melbourne? (Opened May 8th 1997)

Yes	1
No	2
Can't Say	3

IF YES (CODE 1 ON Q24b) ASK Q24c, OTHERWISE GO TO Q28

Q24c) : Did you enter the gaming area at this complex?

Yes	1
No	2
Can't Say	3

Q25 When was your last visit to the new Crown entertainment complex in Melbourne?
PROBE FOR BEST GUESS ON MONTH

ENTER MONTH AND YEAR

Q26a What activities did you undertake at the Casino on your last visit?
READ OUT
MULTIPLE RESPONSE
IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

Played electronic gaming machines	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 the hotel (Crown Towers/Centra)	11
Used the ATMs	12
Or some other activity *(Specify)*	13

Q26b. And which one of these activities would you say is the MAIN thing you went to the Casino to do?
SINGLE RESPONSE
RECORD AUTOMATICALLY IF ONLY ONE MENTIONED IN Q26a
IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

Played electronic gaming machines	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 reason *(Specify)*	13
Can't say	14

Q.27 Which games did you play at the Casino?
READ OUT
MULTIPLE RESPONSE
IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

Electronic Gaming Machines	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
Can't say	10
Other *(Specify)*	11

IF HAVE NEVER BEEN TO NEW CROWN ENTERTAINMENT COMPLEX (CODES 2 OR 3 ON Q24b) ASK Q28 OTHERWISE GO TO Q29

Q28. Why haven't you visited the new Crown Entertainment Complex?
DO NOT READ OUT
MULTIPLE RESPONSE
IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

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 *(Specify)*	10

ASK EVERYONE

Q29. Which one of the following statements best describes you personally? Are you someone who…?
READ OUT
SINGLE RESPONSE

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

IF GAMBLED IN LAST 12 MONTHS ASK Q30
IF NOT GAMBLED IN LAST 12 MONTHS GO TO Q30j

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 (Q30a-Q30j)

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 secretively so that my friends, family and acquaintances will not know

ASK EVERYONE

Q30j. Have you, yourself or any of your family members ever experienced difficulties with excessive gambling?

Yes	1
No	2
Can't say	3

IF YES (CODE 1 ON Q30j) ASK Q30k, OTHERWISE GO TO Q31a

Q30k. 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

ASK EVERYONE

Q31. 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

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

STATEMENTS

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 electronic gaming machines
g) The number of electronic gaming machines 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.

Q32. 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

STATEMENTS

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 gaming machines 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 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/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
n) Welfare groups are coping with the social impact of gambling in Victoria

Q33a. 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?
IF YES HIGHLIGHT AND TYPE RESPONSE

No	1
Yes *(Specify)*	2
Can't Say	3

Q33b. Do you believe that you personally have benefited from these initiatives?

Yes	1
No	2
Can't Say	3

IF GAMBLED IN LAST 12 MONTHS ASK Q34
IF NOT GAMBLED IN LAST 12 MONTHS) GO TO Q36

Q34. Have you participated in any gambling activities in the past 6 months?

Yes	1
No	2
Can't Say	3

IF YES (CODE 1 ON Q34 ASK Q35, OTHERWISE GO TO Q36

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.

Q35a. 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/less than half the time	2
Most of the time I lost	3
Every time I lost	4
(Can't say)	5
(Refused)	6

Q35b. Have you ever claimed to be WINNING money when you really had lost? Would you say…?
READ OUT

Never	1
Sometimes/less than half the time	2
Most of the time I lost	3
Every time I lost	4
(Can't say)	5
(Refused)	6

Q35c. 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

THE FOLLOWING QUESTIONS STILL RELATE TO THE LAST 6 MONTHS AND ONLY REQUIRE YES OR NO ANSWERS.

Q35d. Did you gamble more than you intended to? (IF NECESSARY: IN THE LAST 6 MONTHS)

Yes	1
No	2
(Can't say)	3
(Refused)	4

Q35e. Have people criticised your gambling? (IF NECESSARY: IN THE LAST 6 MONTHS)

Yes	1
No	2
(Can't say)	3
(Refused)	4

Q35f. Have you felt guilty about the way you gamble or what happens when you gamble? (IF NECESSARY: IN THE LAST 6 MONTHS)

Yes	1
No	2
(Can't say)	3
(Refused)	4

Q35g. Have you felt that you would like to stop gambling but didn't think you could? (IF NECESSARY: IN THE LAST 6 MONTHS)

Yes	1
No	2
(Can't say)	3
(Refused)	4

Q35h. Have you hidden betting slips, gambling money or any other sign of gambling from your partner, children or other important people in your life? (IF NECESSARY: IN THE LAST 6 MONTHS)

Yes	1
No	2
(Can't say)	3
(Refused)	4

Q35i. Have you ever argued with people you live with about how you generally handle money? (IF NECESSARY: IN THE LAST 6 MONTHS)

Yes	1
No	2
(Can't say)	3
(Refused)	4

IF YES (CODE 1 ON Q35i) ASK Q35j, OTHERWISE GO TO Q35k

Q35j. Have money arguments ever centred on your gambling? (IF NECESSARY: IN THE LAST 6 MONTHS)

Yes	1
No	2
(Can't say)	3
(Refused)	4

Q35k. Have you borrowed money from someone and not paid them back because of your gambling? (IF NECESSARY: IN THE LAST 6 MONTHS)

Yes	1
No	2
(Can't say)	3
(Refused)	4

Q35l. Have you lost time from work or study because of gambling? (IF NECESSARY: IN THE LAST 6 MONTHS)

Yes	1
No	2
(Can't say)	3
(Refused)	4

Q35m. Have you borrowed money to gamble or pay off gambling debts? (IF NECESSARY: IN THE LAST 6 MONTHS)

Yes	1
No	2
(Can't say)	3
(Refused)	4

Q35n. Have you ever borrowed money to gamble or to pay gambling debts from household money? (IF NECESSARY: IN THE LAST 6 MONTHS)

Yes	1
No	2
(Can't say)	3
(Refused)	4

Q35o. Have you borrowed money to gamble or to pay gambling debts from your spouse or partner? (IF NECESSARY: IN THE LAST 6 MONTHS)

Yes	1
No	2
(Can't say)	3
(Refused)	4

Q35p. (Have you borrowed money to gamble or to pay gambling debts) from other relatives or in-laws? (IF NECESSARY: IN THE LAST 6 MONTHS)

Yes	1
No	2
(Can't say)	3
(Refused)	4

Q35q. (Have you borrowed money to gamble or to pay gambling debts) from banks, finance companies or credit unions? (IF NECESSARY: IN THE LAST 6 MONTHS)

Yes	1
No	2
(Can't say)	3
(Refused)	4

Q35r (Have you borrowed money to gamble or to pay gambling debts) from credit cards? (IF NECESSARY: IN THE LAST 6 MONTHS)

Yes	1
No	2
(Can't say)	3
(Refused)	4

Q35s. (Have you borrowed money to gamble or to pay gambling debts) from high interest rate finance companies? (IF NECESSARY: IN THE LAST 6 MONTHS)

Yes	1
No	2
(Can't say)	3
(Refused)	4

Q35t. (Have you borrowed money to gamble or to pay gambling debts) from cashing in stocks, bonds or other securities? (IF NECESSARY: IN THE LAST 6 MONTHS)

Yes	1
No	2
(Can't say)	3
(Refused)	4

Q35u. (Have you borrowed money to gamble or to pay gambling debts) from selling personal or company property? (IF NECESSARY: IN THE LAST 6 MONTHS)

Yes	1
No	2
(Can't say)	3
(Refused)	4

Q35v. (Have you borrowed money to gamble or to pay gambling debts) by writing cheques knowing there was no money in the account? (IF NECESSARY: IN THE LAST 6 MONTHS)

Yes	1
No	2
(Can't say)	3
(Refused)	4

Q35w. (Have you borrowed money to gamble or to pay gambling debts) by obtaining money illegally? (IF NECESSARY: IN THE LAST 6 MONTHS)

Yes	1
No	2
(Can't say)	3
(Refused)	4

ASK EVERYONE

Q36. 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

Q37. Into 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

Q38A. Are you married, de facto, divorced, widowed, separated, engaged, planning to marry or single?

MARRIED	1
DE FACTO	2
DIVORCED	3
WIDOWED	4
SEPARATED	5
ENGAGED	6
PLANNING TO MARRY	7
SINGLE	8

Q.38 Which 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 home7	7
Other related individuals	8
Other *(Specify)*	9
(Refused)	10

IF NO DEPENDENT CHILDREN IN HOUSEHOLD (CODES 1, 2, 3, 5, 7, 8, 9 OR 10 GO TO 40, OTHERWISE ASK Q39

Q39. How many dependent children live in the household?

One	1
Two	2
Three	3
Four or more	4

Q40. 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

IF WORK FULL TIME (CODE 1 ON Q40) ASK Q41 OTHERWISE GO TO Q42

Q41. What is your occupation?
RECORD POSITION AND INDUSTRY

IF PART OF A COUPLE (CODES 3 OR 6 OR 7 OR 8) ASK Q42, OTHERWISE GO TO Q44

Q42. Are you the main income earner?

Yes	1
No	2
Can’t Say	3

IF YES (CODE 1 ON Q42) GO TO Q44
IF NO OR CAN’T SAY (CODES 2 OR 3 ON Q42) ASK Q43

Q43. What is the occupation of the main income earner?

RECORD POSITION AND INDUSTRY

Q44. What is your country of birth?
DO NOT READ OUT

Australia	1
United Kingdom/Scotland/Ireland/Wales	2
New Zealand	3
North America (USA/Canada)	4
Greece	5
Italy	6
Other West Europe (eg. Germany/France/Holland)	7
Eastern Europe (eg. Russia/Georgia/Bulgaria etc.)	8
Middle East (eg. Israel/Iraq/Egypt)	9
Vietnam	10
Malaysia	11
Philippines	12
Hong Kong	13
Other Asia/Pacific	14
Africa	15
Other *(Specify)*	16
(Refused/Don’t know/Unsure)	17

Q45. Were your parents born in Australia?

Yes – Father	1
Yes – Mother	2
Yes – Both	3
No – Neither	4

Q46. Is English the main language spoken in your house?

Yes	1
No	2

Q47. Into which of these ranges is your personal annual pre-tax income? Is it…?
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

Q48. Into which of these ranges is the combined pre-tax income or you and your partner?
Is it…?
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

Q49. What is your religion?
DO NOT READ OUT

Anglican	1
Catholic	2
Baptist/Church of Christ	3
Presbyterian/Methodist/Uniting Church	4
Salvation Army	5
Lutheran	6
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

Q50. Just for our records can I please take down your name. This help my supervisor check this interview, if required.

RECORD NAME

Q51. And your postcode?
RECORD POSTCODE

THANK RESPONDENT, MENTION VCGA AND CLOSE INTERVIEW

TO THE INTERVIEWER
Q52. 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

Q53. 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

RECOMMENDED PERCENTAGE ALLOWANCE FOR SAMPLING VARIANCE OF A PERCENTAGE (95% CONFIDENCE LEVEL)

Percentages near

	Sample Sizes:	**10%**	**20%**	**30%**	**40%**	**50%**	**60%**	**70%**	**80%**	**90%**
Total population	**1737**	**1.4%**	**1.9%**	**2.2%**	**2.4%**	**2.4%**	**2.4%**	**2.2%**	**1.9%**	**1.4%**
Gamblers	1326	1.6%	2.2%	2.5%	2.7%	2.7%	2.7%	2.5%	2.2%	1.6%
Lotto	907	2.0%	2.7%	3.0%	3.3%	3.3%	3.3%	3.0%	2.7%	2.0%
Raffles	594	2.5%	3.3%	3.8%	4.0%	4.1%	4.0%	3.8%	3.3%	2.5%
Total EGMs	544	2.6%	3.4%	3.9%	4.2%	4.3%	4.2%	3.9%	3.4%	2.6%
EGMs not at Casino	427	2.9%	3.9%	4.4%	4.7%	4.8%	4.7%	4.4%	3.9%	2.9%
Scratch Tickets	360	3.2%	4.2%	4.8%	5.2%	5.3%	5.2%	4.8%	4.2%	3.2%
Total Casino	314	3.4%	4.5%	5.2%	5.5%	5.6%	5.5%	5.2%	4.5%	3.4%
EGMs at Casino	263	3.7%	4.9%	5.7%	6.0%	6.2%	6.0%	5.7%	4.9%	3.7%
Thoroughbred	232	3.9%	5.3%	6.0%	6.4%	6.6%	6.4%	6.0%	5.3%	3.9%
Cards/table games	104	5.9%	7.8%	9.0%	9.6%	9.8%	9.6%	9.0%	7.8%	5.9%
Bingo	97	6.1%	8.1%	9.3%	9.9%	10.2%	9.9%	9.3%	8.1%	6.1%
Keno	72	7.1%	9.4%	10.8%	11.5%	11.8%	11.5%	10.8%	9.4%	7.1%
Trotting/Harness	49	8.6%	11.4%	13.1%	14.0%	14.3%	14.0%	13.1%	11.4%	8.6%
Greyhounds	38	9.7%	13.0%	14.9%	15.9%	16.2%	15.9%	14.9%	13.0%	9.7%
Informal cards	33	10.4%	13.9%	16.0%	17.1%	17.4%	17.1%	16.0%	13.9%	10.4%
Footy betting	21	13.1%	17.5%	20.0%	21.4%	21.8%	21.4%	20.0%	17.5%	13.1%
Sports betting	12	17.3%	23.1%	26.5%	28.3%	28.9%	28.3%	26.5%	23.1%	17.3%
Soccer Pools	2	42.4%	56.6%	64.8%	69.3%	70.7%	69.3%	64.8%	56.6%	42.4%
Internet	1	60.0%	80.0%	91.7%	98.0%	100.0%	98.0%	91.7%	80.0%	60.0%
None of these	403	3.0%	4.0%	4.6%	4.9%	5.0%	4.9%	4.6%	4.0%	3.0%