



Gambling Research Panel

GRP REPORT NO. 6

2003 Victorian Longitudinal Community Attitudes Survey

Prepared for the Gambling Research Panel by
**The Centre for Gambling Research
Australian National University**

**Funded by the Victorian Government
through the Community Support Fund**



April 2004

ISBN 0975119125

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Acknowledgements

The authors' special thanks go to Sean Downes for his constant support and for facilitating the transfer of this project from the University of Western Sydney to the Australian National University. We also thank Stephen Lilloco at ACNielsen for advice in the survey design and for his prompt, helpful replies to our many queries during data analysis.

The authors also thank the Gambling Research Panel for their valuable feedback and advice.

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Foreword

This report, the *2003 Longitudinal Community Attitudes Survey*, is Project 3 of the Gambling Research Panel's 2001–2002 Research Plan, and is the eighth in a series of community attitudes surveys.

It is the first community attitudes survey to be commissioned by the GRP and was combined with the research reported in the companion publication, *Validation of the Victorian Gambling Screen 2003*.

The Panel was cognisant of the need to track changes in community perceptions and attitudes on key gambling issues. It was also keen to ensure that the current survey reflected changes that have occurred in community attitudes and perceptions and gambling environments since the last survey conducted in 1999 by the Victorian Casino and Gaming Authority. This survey retains comparison with the previous series where relevant and introduces some new questions.

This study is based on a substantial sample, asking 8,479 Victorian residents about their gambling practices, perceptions and attitudes. The questions are broad ranging and include the administration of three gambling prevalence scales in order to test the usefulness of the Victorian Gambling Screen as a possible alternative to existing scales. These results are reported separately in the companion publication. In reading the problem gambling prevalence rates in this study, the standard errors of estimate suggest caution. Also, the application of gambling prevalence screens only to regular gamblers (defined as those who gambled at least weekly or 52 times per year, in gambling activities other than lottery games or instant scratch tickets) may have excluded others who gamble less frequently but for whom gambling is nevertheless problematic.

The Panel is confident that this report will provide valuable information to government, gambling stakeholders and the community to better understand problem gambling behaviour.

The Panel thanks the research team of the Australian National University for its work on this project including: Professor Jan McMillen, Dr David Marshall, Dr Eliza Ahmed and Dr Michael Wenzel. Special thanks go to ACNeilsen for work on the survey design and implementation and to the referees who provided advice to the Panel.

Associate Professor Linda Hancock
Chair, Gambling Research Panel

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Executive Summary

The survey was conducted by ACNielsen in April and May 2003 using an effective random sample of 8,479 Victorian residents, a significantly larger sample than previous Victorian gambling surveys, and the resultant data provided to the Australian National University research team for analysis in July 2003.

Three groups were identified — non-gamblers, non-regular gamblers and regular gamblers — and interviewed about their gambling behaviour, and their attitudes to gambling and its impact on the community.

The significant finding of this survey is that large numbers of Victorians continue to experience problems associated with their gambling. Therefore problem gambling remains an important issue for public policy.

Gambling participation

Despite the apparent overall decrease in the proportion of Victorian adults participating in gambling since 1999, participation rates for most gambling activities have remained relatively steady over the past decade. However, there have been fluctuations in the participation rates of some forms of gambling, including increases in:

- Electronic gaming machine (EGM) participation — 33.5 per cent, up from 30 per cent in 1999;
- Lotto/lottery games (the gambling activity participated in by more Victorians than any other) — 60.5 per cent, up from 51 per cent in 1999;
- Scratch ticket gambling and Club Keno.

Who are the gamblers?

The surveyed population was segmented according to gambling behaviour into three groups:

- Non-gamblers (24.7 per cent);
- Non-regular gamblers (69.1 per cent);
- Regular gamblers (6.2 per cent).

The gambling population in Victoria is broadly representative of the population overall, although regular gamblers are more likely to have the following characteristics:

- Male;
- Aged 50–64 or over-65;
- Lower levels of education (below tertiary level);
- Lower incomes than non-gamblers and non-regular gamblers;
- In receipt of aged and invalid pensions;
- Born in Australia.

Reasons for gambling

Most Victorian regular gamblers (69 per cent) nominate socialising with friends and family as a major reason for gambling. Only 22 per cent gamble alone.

The majority (60 per cent) also said that the thrill and dream of winning and feeling lucky were reasons for their decision to gamble. Similarly, adding interest to a game is also reported by a large proportion (88 per cent) as a motivation (likely to be related to betting activities rather than EGMs or other non-sporting forms of gambling).

Gambling expenditure

EGMs and race/sports betting are reported as the main forms of gambling expenditure; 46.2 per cent of Victorian regular gamblers report that they spent more money on EGMs than on any other form of gambling. EGMs (60 per cent) also dominate as the gambling activity which residents in country Local Government Authorities (LGAs) said they spent most money on in the last 12 months.

Problem gambling

About 15 per cent of regular gamblers in the 2003 Victorian survey are identified as problem gamblers, translating to an estimated one-year prevalence rate of about 1.12 per cent in Victoria's adult population.

Another estimated 15 per cent of regular gamblers in the surveyed population could be borderline cases with a moderate risk of having (or possibly developing) a gambling problem. This again translates to an estimated one-year prevalence rate of about 1 per cent in Victoria's adult population.

Caution: Comparison of the 2003 Victorian results with the 2001 ACT and 1999 Productivity Commission surveys — which both used the SOGS5+ screen to measure problem gambling prevalence — reveals a lower rate of problem gambling in Victoria in 2003 than in either of the other studies. The survey methodology utilised in this particular study differs in a number of ways from previous Victorian community attitude surveys. Thus direct comparability is problematic. Caution is advised when comparing the results of these different surveys.

Problem gamblers are most likely to have the following characteristics:

- Male (They are more strongly represented among problem gamblers because they are already more strongly represented among regular gamblers);
- Aged 50–64 and 35–49;
- Relatively low levels of education (below tertiary level);
- Derive main income from social security payments (other than age pension);
- Live with others who could be affected on a daily basis;
- Live in metropolitan areas;
- Have a family history of gambling;
- Consume alcohol and drugs;
- Depressed.

Playing EGMs/pokies was the favourite type of gambling for 84.2 per cent of problem gamblers identified by the three screens. The proportion of problem gamblers who prefer EGMs (27.8 per cent) is substantially higher than the average for all forms of gambling (15 per cent).

Victorian problem gamblers surveyed are more likely than non-problem gamblers to:

- Experience problems finding time to look after their family's interests;
- Experience problems at work due to gambling;
- Change jobs in the last year due to gambling;
- File for bankruptcy;
- Commit crime to obtain money;
- Experience relationship breakdowns.

Of those Victorians with a self-assessed gambling problem who had sought help for their gambling problems in the last 12 months, 94.8 per cent reported that financial problems or relationship problems had prompted them to seek help.

Community attitudes and perceptions

Overall, the 2003 survey found that Victorians continue to hold negative views towards gambling, in particular EGM gambling. They also have negative perceptions of the effects of gambling on the community.

A substantial majority of Victorians (85.1 per cent) consider that gambling is a serious social problem in Victoria. Similarly, both non-gamblers (87.3 per cent) and gamblers (74.2 per cent) agree that gambling is too widely accessible in Victoria. There is a strong perception by Victorians (80.9 per cent) that gambling-related problems have worsened in Victoria over the last three years.

Attitudes to gambling policy

Victorians expressed strong views on certain aspects of gambling policy in Victoria, with majority community support for specific policy changes. These include:

- ATMs at clubs, hotels and casinos should have a withdrawal limit of \$200 per day (gamblers 86.2 per cent, non-gamblers 86.8 per cent);
- School education programs should include education about responsible gambling (gamblers 86.7 per cent, non-gamblers 87.2 per cent);
- Banknote acceptors should be removed from gaming machines (gamblers 85 per cent, non-gamblers 90.8 per cent);
- There should be trained people in gambling venues to offer assistance to gamblers who display problem behaviour (gamblers 83.7 per cent, non-gamblers 90.1 per cent);
- People should be able to limit the amount they can spend at any one time on poker machines (gamblers 81 per cent, non-gamblers 89.5 per cent);
- Gaming machines should give on-screen warnings about problem gambling (gamblers 86.2 per cent, non-gamblers 86.8 per cent);
- Poker machines should be removed from suburban/local shopping strips (gamblers 80 per cent, non-gamblers 88.5 per cent).

Victorian residents (gamblers 85.5 per cent and non-gamblers 93.7 per cent) are significantly more inclined to prefer an overall reduction in the number of EGMs/gaming machines than was indicated in the 1999 survey (73 per cent). This finding suggests robust community support for policy change.

Despite the negative perceptions of gambling, there is moderate support in the Victorian community (gamblers 62.9 per cent and non-gamblers 51.1 per cent) for gambling taxes in preference to other forms of taxation.

There was also moderate level of agreement that local government authorities should make the final decision about whether more poker machines are allowed in the local community (62.4 per cent agreed overall).

Overall, Victorians appear to see reduction in gambling as a shared responsibility between individuals, the government and gambling providers. However, a large majority (88 per cent) agreed that each individual has responsibility for gambling reduction.

The results of this survey have reaffirmed that problem gambling remains an important issue for public policy in Victoria. Moreover, there is strong support from the surveyed Victorian population for policy change.

Overview of Findings

Introduction

The 2003 Victorian *Longitudinal Community Attitudes Survey's* aims were to:

- Determine current gambling participation patterns and the prevalence of problem gambling in Victoria;
- Validate the survey results on three screens designed to measure the prevalence of problem gambling in the community — the South Oaks Gambling Screen (SOGS5+), the Victorian Gambling Screen (VGS) and the Canadian Problem Gambling Index (CPGI);
- Determine current community attitudes to gambling and gambling policies in Victoria;
- Identify differences between metropolitan and non-metropolitan gambling participation patterns;
- Map longitudinal trends in gambling participation by comparing the survey's findings with previous Victorian studies and relevant parts of the Productivity Commission's 1999 *National Gambling Survey*, the 2001 *ACT Gambling Survey* and the 2001 *Queensland Household Gambling Survey*.

Prior to the formation of the Gambling Research Panel, the Victorian Casino and Gaming Authority commissioned a series of seven surveys (*Survey of Community Gambling Patterns and Perceptions*) the seventh and latest conducted in 1999. The 2003 Victorian *Longitudinal Community Attitudes Survey*, commissioned by the Gambling Research Panel, becomes the eighth. (See Background to Research on page 33)

The survey was conducted by ACNielsen in April and May 2003 using an effective random sample of 8,479 Victorian residents, a significantly larger sample than previous Victorian gambling surveys, and the resultant data provided to the Australian National University research team for analysis in July 2003.

Three groups¹ were identified — non-gamblers, non-regular gamblers and regular gamblers² — and interviewed about their gambling behaviour, and their attitudes to gambling and its impact on the community.

This survey's measurements of problem gambling are based on gamblers' self-assessments, which tend to underestimate the extent of problem gambling. As noted by the Chairman of the Productivity Commission: 'all survey gambling screens are likely to underestimate the extent of problem gambling — however they may choose to define it — simply because people have a natural reluctance to reveal the facts about such matters'.³

¹ Five segments were used in the 1996, 1997, 1998 and 1999 Victorian surveys. Thus, comparisons between this and previous Victorian surveys are limited in some respects.

² As in the Productivity Commission's survey and the 2001 ACT survey, regular gamblers were defined as those who gamble weekly on forms of gambling other than lotteries

³ G. Banks 2002. 'The Productivity Commission's gambling inquiry: 3 years on'. Paper presented to the 12th Annual Conference of the National Association for Gambling Studies (NAGS), Melbourne, p.4.

The survey identifies trends in Victorians' gambling patterns and perceptions but does not investigate contributing factors, which are beyond its scope. Consequently, the survey is not indicative of whether problem gambling and its associated impacts have moderated since the 1999 *Seventh Survey*.⁴

The significant finding of this survey is that large numbers of Victorians continue to experience problems associated with their gambling. Therefore, problem gambling remains an important issue for public policy.

Gambling participation

The survey, conducted in April and May 2003, found that 77.4 per cent of resident Victorian adults participated in at least one of the gambling activities surveyed in the previous 12 months. This is a decrease from the 81 per cent overall participation rate Victoria reported in the 1999 national survey, and compares with the 2001 ACT and Queensland surveys (84.96 per cent and 75 per cent respectively).

Among Victorians surveyed gambling participation levels were highest among:

- Separated or divorced people (84.3 per cent);
- Single parents (86.0 per cent);
- Full-time workers (80.1 per cent);
- Self-supporting retirees (79.2 per cent);
- People on medium incomes (83.4 per cent);
- Rural residents (78.9 per cent).

The levels of gambling participation were lowest among:

- People older than 65 years (72.6 per cent);
- Two-parent families (74.9 per cent);
- Students (55.1 per cent);
- CAE/University educated (74.3 per cent);
- Business owners (69.5 per cent).

There tended to be higher than average numbers of gambling activities undertaken by:

- Regular gamblers (3.78);
- 18–24 year olds (2.83);
- Group households (2.57);
- Students (2.83).

⁴ Victorian Casino and Gaming Authority 2000. *Seventh Community Survey of Community Gambling Patterns and Perceptions*. Victorian Casino and Gaming Authority, Melbourne.

There tended to be lower than average numbers of gambling activities undertaken by people who are:

- Older than 65 years of age (2.14);
- Widowed (2.05);
- Receiving pensions (1.95);
- Unemployed (1.46);
- Born overseas (2.04).

Despite the apparent overall decrease in the proportion of Victorian adults participating in gambling since 1999, participation rates for most gambling activities have remained relatively steady over the past decade. However, there have been fluctuations in the participation rates of some forms of gambling.

The main patterns of interest include:

- An increase in overall electronic gaming machine (EGM) participation — at 33.5 per cent, up from 30 per cent in 1999. This trend is a reversal of decreasing EGM participation rates in Victoria in 1997–99;
- Lotto/lottery games remain the gambling activity participated in by more Victorians than any other (60.5 per cent), an increase from 51 per cent in 1999. However, regular participation in lotteries (at least once per month) has decreased since 1999;
- Participation in scratch ticket gambling and Club Keno has increased;
- Overall participation in race betting (horse and greyhound) is steady at 28.2 per cent;
- Casino gambling participation decreased substantially to 7.3 per cent from 16 per cent in 1999;
- Participation rates in bingo, raffles and sweeps continue to decline since Victorian surveys began in 1992;
- Low levels of participation were reported in sports betting (5.6 per cent) and internet casino betting (0.2 per cent). However, against the general trend, the frequency of internet gambling by a small number of Victorians is higher than the national rates.

The survey found wide variation in gambling participation rates by residents in different Local Government Areas (LGAs) in the preceding 12 months.

The twelve highest participation rates are found in non-metropolitan LGAs, as are the three lowest levels of gambling participation.

A notable finding from this survey is the relatively low rate of EGM participation by residents in Maribyrnong (26.2 per cent). Maribyrnong has the highest number of EGMs per capita and EGM expenditure per capita in Victoria, outside the Melbourne CBD.⁵ It appears that a relatively small section of the local population may be generating high levels of expenditure in that LGA.

⁵ Office of Gaming and Racing, http://www.ogr.vic.gov.au/domino/web_notes/ogr/ogrsite.nsf/pages/MapStats, accessed 26.8.03.

Who are the gamblers?

The surveyed population was segmented according to gambling behaviour into three groups as follows:

- Non-gamblers (24.7 per cent);
- Non-regular gamblers (69.1 per cent);
- Regular gamblers (6.2 per cent).

About 1 per cent of the Victorian adult population (i.e. 15 per cent of regular gamblers) are estimated to be problem gamblers.

Gender

The gambling population in Victoria is broadly representative of the population overall, although regular gamblers are more likely to be male. This pattern is similar to the Productivity Commission's national survey (49.1 per cent) and the 2001 ACT survey (49.8 per cent), but contrasts with the 2001 Queensland survey that found 53 per cent of non-gamblers were male.

Gender preferences for certain forms of gambling are evident. A higher proportion of male gamblers than female gamblers participate in race betting, Keno, casino table games and sports betting. Female gamblers predominate in EGM gambling, scratch tickets and lotto.

Age

Regular gamblers in Victoria were more likely to be in the 50–64 and over-65 age groups than the total surveyed population (51.3 per cent). This compares with 40.1 per cent in the 1999 national survey.

The youngest age group (18–24) is under-represented amongst Victorian regular gamblers in 2003 (12.1 per cent), a smaller proportion than in the 1999 national survey (17.8 per cent).

Education

Regular gamblers in Victoria have lower levels of education and lower incomes than non-gamblers and non-regular gamblers.

Income

Persons receiving aged and invalid pensions are heavily over-represented in the regular gambler segment (17.8 per cent compared to 8.8 per cent in the total sample), as are self-supporting retirees (14 per cent) and pensioners (14.4 per cent).

Country of Birth

Victorian regular gamblers are disproportionately born in Australia (78.5 per cent compared to 73.8 per cent in the total sample).

Other factors

As in the *Seventh Survey*, students and home duties are slightly under-represented amongst regular gamblers (3.3 per cent and 4.1 per cent respectively).

The marital status of the three gambling segments (regular gambler, non-regular gambler and non-gambler) generally reflects the sample population in Victoria.

Non-gamblers show a slight bias towards two-parent families (46.1 per cent compared to 42.5 per cent in the total sample).

There is little difference in gambling participation by those in employment, regardless of their employment status.

Gambling behaviour

Most Victorian regular gamblers first participated in the activity early in their adult years. More than half started gambling between the ages of 18 and 24 years. Nearly 20 per cent reported they were involved with gambling before they were legally entitled to.

Betting on races (28.2 per cent) is the most frequent gambling activity that Victorian regular gamblers first participated in, with lotteries and EGMs as the initial gambling experience.

Twenty-one per cent of respondents cited EGMs as their first form of gambling.

Changing patterns

The majority of regular gamblers have maintained their established patterns of activity. Relatively few people surveyed have taken up new forms of gambling (5.4 per cent).

Of those regular gamblers who reported increases in their gambling activity, 40.6 per cent report increased race betting and 36 per cent have increased EGM gambling.

While overall participation in EGM gambling has increased, a significant proportion of EGM gamblers have decreased (50.9 per cent) or stopped (5.9 per cent) their gambling activity.

Decreased participation in lottery and scratch tickets (31.8 per cent), race betting (21.1 per cent) and casino table games (11.9 per cent) are also reported.

Location for gambling

Of regular gamblers who reported gambling on EGMs more often than any other type of gambling, more than half have played EGMs at a club or hotel in the previous year. Hotels/pubs were nominated as the most common location for EGM gambling by more than 40 per cent of EGM gamblers, compared to 26.9 per cent for the second-ranked venue type, sporting clubs.

The majority of Victorian EGM gamblers do not travel out of their local area to access the machines. More than 57 per cent of EGM gamblers travelled less than 5 kilometres to the venue where they last played machines, and 32.3 per cent travelled less than 2.5 kilometres.

There is little evidence to suggest that regular EGM gamblers actively seek out particular venues for their gambling facilities. Rather, the majority of people who have played EGMs did so as a part of a wider social outing, usually to a local pub or club.

Reasons for gambling

Most Victorian regular gamblers (69 per cent) nominate socialising with friends and family as a major reason for gambling. Only 22 per cent gamble alone.

The majority (60 per cent) also said that the thrill and dream of winning and feeling lucky were reasons for their decision to gamble.

Similarly, adding interest to a game is also reported by a large proportion (88 per cent) as a motivation. This motive is likely to be only related to betting type events rather than EGMs or other non-sporting forms of gambling.

Problem gamblers gave similar reasons for gambling, but there are also notable differences from other gamblers:

- The thrill and dream of winning and feeling lucky were noted by a majority of problem gamblers, especially by EGM gamblers;
- A large majority EGM problem gamblers also said they gambled 'out of boredom', a reason not commonly given by regular gamblers;
- Socialising with friends was not a major reason for problem gamblers.

Time spent gambling

The time normally spent on different types of gambling varies markedly. This is not surprising, given the different modality and dynamics for each type of gambling.

The normal duration of EGM gambling sessions for most Victorians surveyed is less than 30 minutes (53 per cent). Nearly 20 per cent of regular EGM gamblers normally play for less than 10 minutes. However a sizeable portion of EGM gamblers (over 23 per cent) usually play for more than 60 minutes at a time, with 5 per cent playing for more than two hours.

Comparison between residents in metropolitan and non-metropolitan LGAs shows the normal duration of each EGM gambling session is higher in the metropolitan region.

The conformation and dynamics of Club Keno and sports betting are such that gamblers are likely to spend relatively short periods gambling on each occasion.

Taking breaks and keeping track of time

Over 65 per cent of regular gamblers report taking breaks during gambling. The most common reason for taking a break is to drink (56.9 per cent). Other common reasons are to socialise (27.1 per cent), to eat (26.9 per cent), to smoke (22.8 per cent) and to go to the toilet (21.5 per cent). Five per cent take a break to get money from the ATM.

Of the 19.8 per cent of those who gave 'other reasons' for taking a break, race and sports gamblers and bingo gamblers appear to take advantage of defined opportunities for breaks in gambling between events.

When asked how they usually kept track of time when gambling:

- 21.3 per cent said they don't keep track of time when gambling;
- 43 per cent of gamblers report they use a watch;
- 24.8 per cent refer to a clock in the room;
- 15.2 per cent used 'other' ways of keeping track of time, including clocks on the machines;
- Gamblers on racing, sports betting and bingo use structural breaks between events to keep track of time.

Gambling expenditure

EGMs and race/sports betting are reported as the main forms of gambling expenditure:

- In 2003, 46.2 per cent of Victorian regular gamblers report that they spent more money on EGMs than on any other form of gambling during the previous 12 months;
- EGMs (60 per cent) also dominate as the gambling activity which residents in country LGAs said they spent most money on in the last 12 months.

Race betting is the favourite form of gambling for 38 per cent of regular gamblers, as measured by expenditure.

Other forms of gambling are significantly less popular as the principal form of gambling expenditure.

The majority (59.1 per cent) of Victorian regular gamblers say they never or rarely spend more than planned. Less than 15.5 per cent report that they often or always spend more than planned. In contrast, a significantly large proportion (89.7 per cent) of Victorian problem gamblers surveyed in 2001 said they had spent more than they had planned on gambling in the past 12 months. This compares with 2.4 per cent of all Victorian gamblers surveyed, 1.8 per cent in the ACT and 2.9 per cent nationally. Moreover, a significant proportion of problem gamblers (34.5 per cent) report that they plan to spend large amounts (between \$101–\$5000) each time they gamble.

More than 60 per cent of Victorians say they rarely or never spend their gambling winnings during the session in which they were won. In contrast, 78.6 per cent of problem gamblers spend their winnings in the same session.

Victorian regular gamblers were asked what they would otherwise have done with money expended on gambling had they not used it for gambling. The most common response was that the money would have been saved (16 per cent). Such moneys are in effect expenditure diverted from future purposes. Other categories which figure prominently — entertainment and recreation (14.6 per cent), personal items (12.7 per cent) and restaurants/takeaways (12 per cent) — can be termed discretionary expenditure items. It is such retail services that can be negatively impacted by increased gambling activity.

Seventeen per cent of Victorian gamblers may be depriving themselves or their families of goods and services which are considered necessities, reinforcing the findings of the 1999 national survey that 'problem gamblers tend to give up spending on personal items (such as clothing) and paying bills, much more than non-problem gamblers'.

The most common response by problem gamblers (25.6 per cent) was that the money would have been used to pay bills or credit cards, compared with only 2.9 per cent of non-problem gamblers.

Note acceptors

Note acceptors are widely utilised by a majority (55 per cent) of Victorian EGM regular gamblers:

- Nearly 75 per cent of regular EGM gamblers use note acceptors at least sometimes compared to less than 45 per cent of non-regular gamblers;
- 49.2 per cent of all EGM gamblers report using note acceptors at least sometimes and over 22 per cent use them often or always;
- 39 per cent of all Victorian EGM gamblers state that they never use note acceptors on EGMs.

A majority (92 per cent) of problem gamblers reported that they had used note-acceptors when gambling on machines. Most had done so in a pub or hotel. Sixty per cent said they often or always inserted notes when playing gaming machines. Only one problem gambler reported using note-acceptors at Crown Casino; this gambler always did so when gambling.

Loyalty cards do not appear to be popular amongst Victorian EGM regular gamblers; just 20 per cent claim to use them. The Crown Casino loyalty scheme has a slightly higher rate of involvement, but the majority of Victorian regular casino gamblers (62.4 per cent) do not hold memberships in the Crown loyalty scheme.

Source of money used for gambling

About half of Victorian regular gamblers report that they rarely or never withdraw money before they gamble (52.5 per cent); or withdraw money from an ATM at the venue (89.1 per cent); or withdraw money at the cashier; or withdraw money using their credit card; or obtain money by cashing cheques (98.2 per cent).

Over 25 per cent of Victorian gamblers, in particular regular gamblers, report they use ATMs in the venue sometimes or often when they gamble.

Significantly, over 8 per cent of people (more regular than non-regular gamblers) report using their credit cards to obtain cash when they gamble. It is not clear if these transactions occur away from the gambling venue.

The overwhelming majority (89.8 per cent) of Victorian regular gamblers reported that they had not borrowed money to gamble or to pay gambling debts.

Household money is the most common source of money for gambling and 26.7 per cent of Victorian problem gamblers (34.4 per cent measured by VGS item, 41.4 per cent by CPGI item, and only 9.5 per cent by the SOGS item) reported that they had used household money for gambling purposes in the past 12 months. That figure is an increase from 4 per cent in the 1999 national survey and 6.4 per cent in the ACT survey, both of which used the SOGS score for problem gamblers.

Problem gambling

In this survey, three problem gambling screens were used for the primary purpose of their validation under equivalent conditions: (SOGS5+, VGS, CPGI). It is assumed that no problem gambling is found among non-regular gamblers; thus only regular gamblers (defined as those who gambled at least weekly or 52 times per year, in gambling activities other than lottery games or instant scratch tickets) were screened by one of three problem gambling screens. While there are some similarities in the screens, they use different questions, different response formats and different cut-off scores.

Statistical tests determined that the breakdown of characteristics associated with problem and non-problem gambling in the surveyed Victorian population did not significantly differ between the three screens. On this basis, it was decided to disregard the type of screen as a factor in measuring the criteria for problem gambling and non-problem gambling.

In addition to those Victorian respondents who scored on the screens as 'problem gamblers', other 'at risk' groups of gamblers have been identified, thus allowing a more graded classification of gamblers into different risk groups:

- Across all three gambling screens, it is estimated that around 70 per cent of regular gamblers in Victoria did not have a gambling problem in the previous 12 months.
- About 15 per cent of regular gamblers in the 2003 Victorian survey are identified as problem gamblers, translating to an estimated one-year prevalence rate of about 1.12 per cent in Victoria's adult population. This is higher than the SOGS prevalence rate found in the 1999 *Seventh Survey* (0.8 per

cent), but lower than the SOGS prevalence rate for Victoria in the Productivity Commission's 1999 national survey (2.14 per cent);

- In the companion publication, *Validation of the Victorian Gambling Screen 2003*, the VGS estimated a one-year prevalence of 0.74 per cent with a cut-off of 21+ (standard error of estimate 0.18 per cent with a 95 per cent confidence interval of 0.42 - 1.06 per cent) and 1.22 per cent with a cut-off score of 15+ (standard error of estimate 0.21 per cent with a 95 per cent confidence interval of 0.82 - 1.62 per cent);
- Another estimated 15 per cent of regular gamblers in the surveyed population could be borderline cases with a moderate risk of having (or possibly developing) a gambling problem. These are classified as moderate-risk gamblers, in CPGI terms, or borderline problem gamblers [VGS] or 'possible pathological' gamblers [SOGS]. This again translates to an estimated one-year prevalence rate of about 1 per cent in Victoria's adult population;
- Non-problem and low-risk gamblers make up the rest of Victoria's adult population (approximately 98 per cent);
- 2.4 per cent of Victorian regular gamblers reported a self-assessed gambling problem and have wanted help for problems related to their gambling in the last 12 months.

Social profiles: Problem gamblers

Gender

Across the three screens, 61.2 per cent of problem gamblers are male, which is significantly more than the proportion of males in the general population (48.5 per cent). However, while males are more strongly represented among problem gamblers, this is probably because they are already more strongly represented among regular gamblers (64.9 per cent).

Male regular gamblers are not more prone to having a gambling problem than female regular gamblers. Among male regular gamblers, 14.2 per cent have a gambling problem, which is about the same as the ratio of problem gamblers among female regular gamblers (16.7 per cent). Compared to males, female problem gamblers reported later commencement of gambling activity.

Age

Generally, problem gamblers are disproportionately found among the age groups 50–64 (36.8 per cent) and 35–49 (33.8 per cent), compared to their shares in the general population (28.8 per cent and 24.6 per cent, respectively).

Other factors

Twenty-four per cent of regular gamblers of non-English speaking background have a gambling problem. Similarly, 28.2 per cent of regular gamblers who are separated or divorced and 25.0 per cent of regular gamblers on social security benefits have a gambling problem.

Problem gamblers were more likely to have relatively low levels of education (less than tertiary degrees) and those who derived their main income from social security payments (other than age pension). A higher proportion of people who were unemployed (and to some degree those with home duties) had gambling problems than gamblers with a different employment status. However, most problem gamblers across the gambling modes are working full-time.

The majority of problem gamblers live with others who could be affected on a daily basis; 13 per cent of the surveyed problem gamblers in Victoria live alone.

Problem gambling was more frequent among Victorians living in metropolitan areas than among those living in rural areas.

Problem gambling appears to be related to other problems such as a family history of problem gambling (36.8 per cent), alcohol and drug consumption while gambling (43.6 per cent), serious feelings of depression (59.0 per cent) and suicidal tendencies (11.1 per cent).

Regular (on average weekly) gambling on EGMs, racing and casino table games is a significant indicator of an increased likelihood of problem gambling. EGMs in particular are associated with problem gambling for a significant proportion of Victorian regular gamblers. Playing EGMs/pokies was the favourite type of gambling for 84.2 per cent of problem gamblers identified by the three screens. The proportion of problem gamblers who prefer EGMs (27.8 per cent) is substantially higher than the average for all forms of gambling (15 per cent).

Thirteen per cent of Victorian problem gamblers prefer casino gambling, significantly lower than EGMs and below the average for gambling overall. Betting on horse or greyhound races or a sporting event was the third favourite type of gambling among problem gamblers (8.8 per cent).

Problem gamblers in Victoria differ in terms of other variables. For example, those who play pokies/gaming machines were most likely from two-parent households, whereas those who prefer either race betting or Crown Casino games were most likely from a 'couple with no children' household. In contrast to problem gamblers who play pokies and/or betting, Crown Casino gamblers were younger and were born overseas.

Moderate-risk gamblers

Approximately 1 per cent of the Victorian population are moderate-risk gamblers. Overall, an estimated 15.2 per cent of regular gamblers in Victoria are at moderate risk.

Gender

A majority (59.7 per cent) of moderate-risk gamblers are male, and 40.1 per cent are female. However, relative to the overall proportion of females among regular gamblers (35.1 per cent), females are slightly over-represented among the moderate-risk gamblers.

Age

A disproportionate number of 18–24 year-olds (23.3 per cent) are moderate-risk gamblers, compared with the 25–34 age group (6.1 per cent).

Other factors

Moderate risk gamblers are disproportionately separated or divorced (20.5 per cent), or in two-parent families (20.8 per cent).

Only a small number of moderate-risk gamblers seek help (4.5 per cent), reflecting the fact that this group tends not to self-assess that they have a problem (a mean of 3.01 on a scale from 1 to 10, compared to 5.66 for problem gamblers).

A history of gambling problems in their immediate family is reported by 22.1 per cent of moderate risk gamblers while 16.2 per cent say they have the urge to gamble when something painful happens in their life; and 52.9 per cent report that they gamble under the influence of alcohol or drugs. The latter figure is not only higher than for low-risk regular gamblers but also higher than for problem gamblers (44.1 per cent).

Compared to other regular gamblers, more moderate-risk gamblers (16.4 per cent) elect table games in casino as their favourite gambling activity.

Low-risk gamblers

Gender

Low-risk gamblers are predominantly male (66.8 per cent), reflecting the greater base rate of males among Victorian regular gamblers generally.

Age and other factors

Low-risk gamblers tend to be over 65 years-old (83.5 per cent), widowed (78.1 per cent), live on superannuation or aged pension as their main income source (79.2 per cent), live in group households (77.4 per cent) or living as a couple with no children (78.7 per cent).

These findings suggest that problem gambling treatment services, specific education campaigns and provision of harm minimisation strategies should be designed to focus on populations where the key socio-demographic attributes predominate.

Problem gambling: comparison with other surveys

Comparison of the 2003 Victorian results with the 2001 ACT and 1999 Productivity Commission surveys — which both used SOGS5+ to measure problem gambling prevalence — reveals a lower rate of problem gambling in Victoria in 2003 than in either of the other studies.

Because the VGS has not been used previously in a population survey, no comparisons can be made with that particular screen.

The CPGI has been utilised only once previously in Australia — in the 2001 *Queensland Household Survey* — where a very similar result to this survey was reported (0.83 per cent score of 8+).

At the SOGS 5+ level, the estimated 1 per cent prevalence rate reported in this survey is lower than the ACT survey findings (1.91 per cent), higher than the 1999 *Seventh Survey* prevalence rates (0.8 per cent), but lower than the Productivity Commission's findings for Australia (2.07 per cent) and Victoria (2.14 per cent).⁶

Caution is advised when comparing the results of different surveys. Different outcomes can result from the use of different screens or sampling frames and the time lapse between surveys.

For the purposes of policy and service provision it is important to recognise that the three most favoured modes of gambling (EGMs, casino table games and racing) each attracted different sub-populations of problem gamblers. All of the socio-demographic characteristics discussed above showed marked leanings towards specific sub-groups in the Victorian population, particularly in relation to gender, age, education, language spoken at home, place of birth and metropolitan residence.

These findings suggest that problem gambling treatment services, specific education campaigns and provision of harm minimisation strategies should be designed to focus on populations where the key socio-demographic attributes predominate.

⁶ Note that the State prevalence estimates from the PC's *National Gambling Survey* are less reliable than the national estimates due to smaller sample sizes.

Impacts of gambling

The 2003 Victorian survey shows problem gamblers experienced higher rates of all adverse impacts than Victorian gamblers overall. The Victorian findings are also higher than results for the 1999 national survey and 2001 *ACT Gambling Survey*.

When asked what effect gambling had on their enjoyment of life, nearly three quarters of Victorian regular gamblers surveyed state that gambling has no influence on their enjoyment of life, while 4.4 per cent indicated that gambling had made life less enjoyable. On the other hand, over 20 per cent stated that life was more enjoyable because of their gambling activities.

These responses are comparable to the findings of the 2001 ACT survey and the 1999 Productivity Commission national survey.

However gambling made the lives of a large majority (69.5 per cent) of Victorian problem gamblers less enjoyable. This is a much larger percentage of problem gamblers compared to the 1999 national figure of 50.1 per cent and ACT problem gamblers (35.3 per cent).

Adverse personal impacts

The 2003 Victorian survey found evidence that problem gambling has had profound impacts on the personal and psychological well-being of some gamblers in the last 12 months:

- 2.1 per cent of Victorian regular gamblers report that on occasions gambling has adversely affected the time available to look after their family's interests;
- 0.6 per cent report that gambling had resulted in the breakdown of personal relationships;
- 1.4 per cent report that gambling has adversely affected their performance at work in the preceding 12 months. A further 2.1 per cent had experienced some adverse employment impacts from gambling.

These findings are broadly comparable to the 1999 national survey but slightly lower than reported by ACT gamblers in 2001.

Victorian problem gamblers surveyed are more likely than non-problem gamblers to:

- Experience problems finding time in the past 12 months to look after their family's interests (37 per cent). A larger proportion of male problem gamblers than female reported this impact;
- Experience problems at work due to gambling (54 per cent compared to 2.6 per cent of all Victorian gamblers surveyed);
- Change jobs in the last year due to gambling (6 per cent compared to 0.5 per cent);
- File for bankruptcy (6 per cent compared to 0.7 per cent for gamblers overall);
- Commit crime to obtain money (4 per cent compared to 0.3 per cent);
- Experience relationship breakdown (11 per cent compared to 1.1 per cent of all Victorian gamblers). A much higher proportion of females (15.4 per cent), especially in two age groups (18–24, 35–49) had experienced problems with relationships than had male problem gamblers (7.1 per cent).

Correlates of problem gambling

To further explore the relationship between gambling and adverse consequences, Victorian gamblers surveyed were also asked a number of self-assessment questions about activities and events associated with gambling. As in previous sections, the sample of 'problem gamblers' in this analysis include problem gamblers identified across all three screens:⁷

- 36.8 per cent of problem gamblers, compared with only 16.1 per cent of non-problem regular gamblers, report that somebody in their immediate family had a gambling problem;
- Problem gamblers tend to consume alcohol or drugs while gambling (43.6 per cent) more often than non-problem regular gamblers (36.3 per cent);
- A considerable proportion of problem gamblers (41.8 per cent) feel the urge to gamble when something painful happens in their life, compared to non-problem regular gamblers (6.9 per cent);
- A greater proportion of problem gamblers (27.0 per cent) have been under doctor's care for stress related health issues in the past 12 months, compared to non-problem regular gamblers (8.6 per cent);
- Majority of problem gamblers (59.0 per cent) have felt seriously depressed in the last 12 months, compared to a rate of 13.1 per cent of non-problem regular gamblers;
- In the past 12 months a considerable 11.5 per cent of problem gamblers have thought about or attempted suicide as a result of their gambling, while only 1.1 per cent of non-problem regular gamblers had suicidal tendencies.

Help-seeking behaviour

There appears to be a difference in help-seeking behaviour between people identified as 'problem gamblers' by the problem gambling screens and those who self-identify as having gambling problems and wanting help. However, these findings should be treated with extreme caution because of the small sample sizes.

Problem gamblers identified by screens

The majority of problem gamblers identified by screens in this survey had not sought help for their gambling problems (70.8 per cent). Almost half (49.2 per cent) of problem gamblers who had not sought help said they did not seek help because they had not considered they had a problem. Similarly, a frequent reason given for not seeking help was that gamblers thought they could resolve the problem themselves (41.9 per cent).

Self-assessed problem gamblers

In contrast, 2.4 per cent of Victorian regular gamblers surveyed said they have wanted help for problems related to their gambling in the last 12 months. Of this group of self-assessed problem gamblers, 70.8 per cent tried to get help for problems related to gambling. This is a much larger proportion than self-assessed problem gamblers in the ACT survey (28 per cent).

⁷ Comparisons with the Productivity Commission and ACT survey findings are limited in this section because these surveys did not ask questions on many of the correlates investigated in this Victorian survey.

The large majority of this group (64.5 per cent) of regular gamblers who wanted help first sought help from family and friends. Almost half of this group (49.3 per cent) said they had tried to exclude themselves from a gambling venue, while 28.7 per cent had sought professional or personal help for their gambling problems. However, only 2.4 per cent had talked to a person at a gambling venue regarding gambling support services.

The survey found relatively low use of the Gambling Help Line, Gamblers Help agencies and Gamblers Anonymous (12.4 per cent). The most common form of help provided to those Victorian gamblers who have sought help for their self-assessed gambling problems in the last 12 months is financial assistance/material aid (57.4 per cent). This indicates a significant shift from the 1999 national survey and 2001 ACT survey, in which counselling was by far the dominant form of assistance to problem gamblers. A minority (40.8 per cent) of those Victorian self-assessed problem gamblers who sought help in the last 12 months are currently seeing a counsellor.

Proportionately, a much lower percentage of problem gamblers in non-metropolitan areas (1 per cent) wanted help for their gambling in the previous 12 months than in the metropolitan area (3.1 per cent), although both figures are very low. This is a reflection of the lower proportion of persons in rural areas who self-identified as problem gamblers.

Of those Victorians with a self-assessed gambling problem who had sought help for their gambling problems in the last 12 months:

- 94.8 per cent reported that financial problems relationship problems had prompted them to seek help. This is significantly higher than the findings for the national survey and ACT survey (32.4 per cent);
- 70.2 per cent of Victorians who sought help were urged to do so by someone else.

Victorian gamblers who had sought help (84.7 per cent) found out about Victorian help services

- Through television advertising (84.7 per cent);
- Informal mechanisms such as word of mouth (71.6 per cent);
- Asking someone for help (54.4 per cent).

Factors identified by that group to encourage early help-seeking behaviour include:

- Confidence that the service would help (92.2 per cent);
- Recommendation by others (84.5 per cent);
- Support services more accessible locally (90.2 per cent), available in the gaming venue (80.8 per cent), around the clock (82.7 per cent) and advertised more widely;
- Anonymity (86.1 per cent).

A large majority (67.5 per cent) of Victorian gamblers who had sought help for their self-assessed problems indicated that they had attended a problem gambling service in the last 12 months but stopped going.

The most common reason (75.1 per cent) for stopping professional help was that they felt they had overcome the problem, while 11.8 per cent indicated that the services were 'not helping', and more than 25 per cent expressed dissatisfaction.

The possible stigma of being labelled a 'problem gambler' and the tendency by many gamblers not to recognise that they have a problem appear to be disincentives to seeking help and early intervention.

The survey findings also suggest that there is limited participation by Victorians in support services based solely on designated gambling services. Although the findings from such small samples are only indicative, responses suggest that existing gambling support services in Victoria do not meet the needs of the whole community.

Community Attitudes and Perceptions

Overall, the 2003 survey found that Victorians continue to hold negative views towards gambling, in particular EGM gambling. They also have negative perceptions of the effects of gambling on the community. The opinions of Victorian non-gamblers are more negative than those of gamblers.

Attitudes to specific policy changes are relatively strong and widely held. As in the 1999 *Seventh Survey*, more respondents strongly agreed with negative attitudinal statements and strongly disagreed with positive attitudinal statements about gambling than in previous surveys.⁸

Even so, although the 2003 survey found more respondents with strongly negative attitudes on some issues than in 1999, on others the overall tenor of opinion appears to have stabilised and moderated since the *Seventh Survey*.

Perceptions of gambling in general

Fewer Victorian residents than Australians as a whole believe that gambling has an overall positive effect on society. A substantial majority of Victorians (85.1 per cent) consider that gambling is a serious social problem in Victoria. This is a slight increase above the 1999 *Seventh Survey* which found that most Victorians thought that gambling is a serious social problem (83 per cent).

Gamblers (74.5 per cent) and non-gamblers (85.4 per cent) either disagree or strongly disagree that overall, gambling does more good for the Victorian community than harm. Similarly, both non-gamblers (87.3 per cent) and gamblers (74.2 per cent) agree that gambling is too widely accessible in Victoria.

Metropolitan areas tend to have a greater proportion of residents with a much stronger opinion in either direction.

Perceptions of the effects of gambling

Community attitudes towards the effects of gambling in the Victorian survey are broadly consistent with the results of the *Seventh Survey*, the 1999 national survey and the 2001 *ACT Gambling Survey*. However, the opinions of Victorian non-gamblers on the effects of gambling in the community are more negative than those of gamblers. For example:

- There is a strong perception (80.9 per cent) that gambling-related problems have got worse in Victoria over the last three years. This is a slight decline from the proportion of Victorians (84 per cent) who expressed the same view in the *Seventh Survey*;

⁸ Comparisons with similar attitudinal questions in the 1999 national survey and ACT gambling survey are noted where relevant. The *Queensland Household Gambling Survey* did not investigate attitudes and perceptions.

- Victorians in 2003 also strongly disagree with the statement that poker machines in clubs and hotels do more good than harm for the Victorian community. The pattern of agreement/disagreement on this issue is similar for Victorian gamblers and non-gamblers;
- On average, Victorian residents are less convinced than Australians were in 1999 as to one of the advantages most often cited in relation to gambling — increased recreational enjoyment (43.4 per cent of gamblers and 60.8 per cent of non-gamblers disagreed with the statement);
- Non-gamblers (88.5 per cent) strongly disagreed and gamblers (68.8 per cent) disagreed that gambling has improved the social life in their suburb or local community.

Attitudes to gambling policy

Victorians expressed strong views on certain aspects of gambling policy in Victoria, with majority community support for specific policy changes. In general, non-gamblers had stronger opinions than gamblers:

- ATMs at clubs, hotels and casinos should have a withdrawal limit of \$200 per day (gamblers 86.2 per cent, non-gamblers 86.8 per cent);
- School education programs should include education about responsible gambling (gamblers 86.7 per cent, non-gamblers 87.2 per cent);
- Banknote acceptors should be removed from gaming machines (gamblers 85 per cent, non-gamblers 90.8 per cent);
- There should be trained people in gambling venues to offer assistance to gamblers who display problem behaviour (gamblers 83.7 per cent, non-gamblers 90.1 per cent);
- People should be able to limit the amount they can spend at any one time on poker machines (gamblers 81 per cent, non-gamblers 89.5 per cent);
- Gaming machines should give on-screen warnings about problem gambling (gamblers 86.2 per cent, non-gamblers 86.8 per cent);

There was a high level of agreement between gamblers (80 per cent) and non-gamblers (88.5 per cent) that poker machines should be removed from suburban/local shopping strips.

Moreover, Victorian residents (gamblers 85.5 per cent and non-gamblers 93.7 per cent) are significantly more inclined to prefer an overall reduction in the number of EGMs/gaming machines than was indicated in the 1999 survey (73 per cent). This finding suggests strong community support for policy change.

Despite the negative perceptions of gambling, there is moderate support in the Victorian community (gamblers 62.9 per cent and non-gamblers 51.1 per cent) for gambling taxes in preference to other forms of taxation.

There was also moderate level of agreement that local government authorities should make the final decision about whether more poker machines are allowed in the local community (62.4 per cent agreed overall).

Overall, Victorians appear to see reduction in gambling as a shared responsibility between individuals, the government and gambling providers (Table 99). A large majority (88 per cent) agreed that each individual has responsibility for gambling reduction. This is a significant increase on the response by Victorians in 1999, when 77 per cent held this view. More gamblers (43.6 per cent) than non-gamblers (39.2 per cent) strongly agreed with this proposition.

Policy findings

The results of this survey have reaffirmed that problem gambling remains an important issue for public policy in Victoria. Moreover, there is strong support from the surveyed Victorian population for policy change.

The problem gambling prevalence rates found in this survey are helpful for policy development in a number of ways⁹, as they assist in:

- Estimating the proportion of the Victorian population in need of active intervention, and thus can be used to guide allocation of support services or inform other intervention strategies;
- Identifying the number of Victorian gamblers with public health or other risks significantly higher than the average;
- Estimating the costs of problem gambling. As with all public health problems, the costs need to be assessed by gauging the magnitude of problem gambling for all Victorians adversely affected by gambling, not just those whose risks identify them as a 'problem gambler'.

⁹ Adapted from Lattimore, R. and R. Phillips 2000. 'The Impacts of legal gambling and the prevalence of problem gambling in Australia'. Paper presented to the Eleventh International Conference on Gambling and Risk Taking, MGM Grand Casino, Las Vegas, June 12-16, 2000.

Background to research

Introduction

This report presents the findings of a large statewide survey of Victorian residents (8,479 respondents) conducted to identify current gambling patterns and perceptions, and to determine how they may have altered since the commencement of the Victorian longitudinal community surveys in 1992.

The study has been commissioned by the Gambling Research Panel (GRP) as one of nine inter-related projects that formed the core research program of the Panel for the financial year 2001–02.

Objectives of the Research

The research has several interrelated objectives which were specified by the Gambling Research Panel as follows:

- Identify and report on changing patterns of gambling participation and perceptions in Victoria since the *Seventh Community Survey of Community Gambling Patterns and Perceptions* was conducted for the Victorian Casino and Gaming Authority (VCGA) in November 1999;
- Identify and report on the prevalence of problem gambling in Victoria and changes since 1999 and on community perceptions of the consequences of problem gambling;
- Incorporate three problem gambling screens — South Oaks Gambling Screen (SOGS5+)¹⁰, the Canadian Problem Gambling Index (CPGI)¹¹ and Victorian Gambling Screen (VGS)¹² — into the community survey to allow cross-validation tests of the three screens. Findings of the comparative Validation Study are presented in a separate report (*Gambling Screen Validation Report*);
- Compare statewide and regional patterns where relevant;
- Track relevant new dimensions and influences including possible prejudices;
- Identify other issues and implications that might need to be addressed by government, community groups, venue operators and others; and
- Offer recommendations to guide future research into gambling patterns and community perceptions.

In broad terms these objectives continue the intention of the series of seven surveys (*Survey of Community Gambling Patterns and Perceptions* 1992–1999) previously conducted to examine the social impact of gaming and gambling in Victoria. In particular this survey updates information on

¹⁰ SOGS was developed by Lesieur, H.R. and S.B. Blume 1987. 'The South Oaks Gambling Screen (SOGS). A new instrument for the identification of pathological gambling'. *American Journal of Psychiatry* 144 (9), pp.1184-1188. The SOGS screen has since been subject to several modifications and applications. This survey utilised the SOGS5+ version used in the Productivity Commission national survey in 1999 and the 2001 *ACT Gambling Survey*.

¹¹ Ferris, J. and H. Wynne. 2001. *The Canadian Problem Gambling Index Final Report*. Report to the Canadian Inter-Provincial Taskforce on Problem Gambling.

¹² Ben Tovim, D., A. Esterman and B. Tolchard. 2001. *The Victorian Gambling Screen*. Gambling Research Panel, Melbourne.

changes in community gambling patterns and perceptions provided in the *Seventh Community Survey of Community Gambling Patterns and Perceptions*.¹³

At the same time, the objectives of this survey differ in significant ways from previous surveys in the series. Specifically, this survey has addressed additional issues including a range of current policy and research concerns identified by the Gambling Research Panel in the tender documents and subsequent negotiations with the research team. Information provided on these issues will assist the Gambling Research Panel to provide relevant and focussed advice to the Victorian Government.

The additional objectives of this survey, however, have necessarily meant that we have been unable to replicate some components of previous surveys in the series. For example, practical limitations on the length of the questionnaire prevented us asking questions regarding gambler satisfaction with each gambling activity. Hence in this report we have been unable to present a Customer Satisfaction Index similar to that provided in the *Seventh Survey*.

As explained below, the multiple objectives and complexity of the survey also required modifications to the methodology and sampling frame used in previous Victorian surveys.

Methodology

The main research activities involved a literature review, a large-sample telephone survey with complementary questions to enhance collection of data pertinent to the project objectives, and statistical analysis of survey data. These methods were supplemented by consultation with the Gambling Research Panel (GRP), relevant stakeholders in Victoria and technical experts in other states and overseas.

A literature review of relevant Victorian, overseas and Australian research on community gambling patterns and perceptions, as well as analysis of secondary data, informed the design of the telephone survey, analysis of the survey data and the issues addressed in this report. A comprehensive literature review was conducted in order to:

- Guide development of additional or modified survey questions as agreed in consultation with the Gambling Research Panel (GRP) and representatives of industry and the Victorian community;
- Guide analysis of survey data on gambling participation, problem gambling and community perceptions of gambling;
- Utilise and update baseline survey information to trace changing patterns and perceptions of gambling;
- Gather information on other relevant issues and implications identified by government, community groups, venue operators and others; and
- Identify background information on Victorians and on relevant gambling issues specified in the GRP's research objectives.

The research utilised a telephone survey methodology that builds on previous community attitude surveys in Victoria to gather additional data on community gambling patterns, problem gambling and community attitudes since the *Seventh Survey of Community Gambling Patterns and Perceptions*, and on community perceptions regarding gambling and problem gambling.

¹³ Victorian Casino and Gaming Authority 2000. *Seventh Community Survey of Community Gambling Patterns and Perceptions*. Victorian Casino and Gaming Authority, Melbourne.

The survey questionnaire was designed to:

- Provide continuity with previous VCGA surveys where possible, identifying past patterns and allowing for examination of longitudinal changes in gambling attitudes, perceptions and habits;
- Measure the prevalence of problem gambling in Victoria and community perceptions of the consequences of problem gambling;
- Allow validation tests on the three problem gambling screens (SOGS5+, VGS, CPGI);
- Obtain information on other relevant issues and implications identified by government, community groups, venue operators and others; and
- Allow comparisons with recent surveys conducted elsewhere, specifically the National Gambling Survey commissioned by the Productivity Commission for its 1999 inquiry into *Australia's Gambling Industries*, the 2001 *ACT Gambling Survey* and the 2001 *Queensland Household Survey*.¹⁴

Following the literature review, the research team submitted a draft questionnaire design to the Gambling Research Panel, incorporating the essential core elements from previous VCGA community gambling and attitude surveys combined with elements from the three interstate survey instruments noted above.

Subsequent changes to the survey instrument were developed in consultation with the GRP and various Victorian community representatives. This revised questionnaire was designed to allow the level of replication and continuity desired by the GRP, comparison from these previous studies and the incorporation of additional questions suggested in prior consultation with the Panel and relevant stakeholders.

A number of survey questions asked in previous surveys in the Victorian series were identified as either problematic, or of low priority, or no longer relevant to the current Victorian context. Such questions were removed from the questionnaire to enable us to include questions which were more relevant to the specific and expanded objectives of this study. Some previous survey questions were removed which related to issues being examined in other research commissioned by the GRP. On the other hand, questions about help-seeking behaviour, the policy environment, harm-minimisation strategies and family history were added to the range of questions in the survey. However, given the complexity and scope of the questionnaire, not all suggested issues and questions could be included. The final questionnaire design was negotiated with and approved by the GRP. Details of stakeholders consulted for the research are attached as Appendix D.

Other changes to the 2003 survey questions included:

- Asking only one question on race betting, rather than asking separate questions of the three various racing codes (thoroughbred, trotting and greyhounds);
- Similarly, where previous Victorian surveys had asked separate questions about footy-bet and sports betting, these were combined into one question;

¹⁴ Productivity Commission 1999. *Australia's Gambling Industries. Final Report*. Report No. 10. AusInfo, Canberra; McMillen, J. et al. 2001. *Survey of Gambling and Problem Gambling in the ACT*. Report to the ACT Gambling and Racing Commission. Australian Institute for Gambling Research, Sydney; Queensland Government Treasury 2001. *Queensland Household Gambling Survey 2001*. Queensland Government.

- Soccer Pools was incorporated into the general question on lotto/lottery games;
- Guided by the Productivity Commission and ACT surveys, specific questions on participation in raffles and sweeps, bingo and private cards were not asked in this survey; and
- Further refinements to improve phrasing, data collection and response rates were made following the piloting of the questionnaire. The Survey Questionnaire is included as Appendix A.

Moreover, drawing on an initial draft of the *Evaluation of the Victorian Gambling Screen* report commissioned by the GRP (December 2002), the survey incorporated three problem gambling screens (SOGS5+, CPGI and VGS) to allow preliminary validation tests of the three screens. For comparability, the research strategy maintains continuity with previous Victorian problem gambling prevalence studies, the Productivity Commission and ACT gambling surveys, all of which used the SOGS5+ score for problem gambling, while allowing comparative testing of the VGS screen and possible progression to another new screen, the CPGI. The CPGI screen has been utilised in a large statewide prevalence survey in Queensland (2001) and in several Canadian provinces. The VGS was developed by Flinders Technologies Pty Ltd for application in large population surveys but it has not previously been tested on a large population sample.

However, the survey design and statewide survey were completed prior to publication of the final *Evaluation of the Victorian Gambling Screen* report in June 2003.¹⁵ Thus this research was unable to incorporate all that report's recommendations into the survey research design (e.g. analysis of item difficulty and validity). Moreover, budget constraints and methodological considerations prevented the administration of all three screens (SOGS5+, VGS, CPGI) to a common population sample. Rather, with GRP approval, each screen was administered to a separate cohort of regular gamblers and the responses and prevalence rates compared.

This study also differs from previous VCGA surveys in that a central aim was to gain a more representative and in-depth understanding of interviews to ensure a minimum of 150 'problem gamblers', (based on an assumption of 2 per cent prevalence in the adult population). As explained below, for various reasons this target was not achieved.

Pilot Study

In September 2002 ACNielsen conducted a Pilot Study of the questionnaire with 112 respondents. A pilot test was essential for a survey of this scale and complexity. Following the Pilot Study and consultation with the GRP a number of improvements were made to the questionnaire design. The main benefits of the Pilot Study were:

- Interview length was tested and all questionnaire segments (with the exception of the screener) were shortened;
- Feedback was provided about the performance of the questionnaire, in terms of its reception by respondents and whether the questions were readily understood;
- The survey was assessed for the most effective introduction. A decision was made to follow the example of the Productivity Commission and ACT surveys and indicate that the survey was being conducted on behalf of the Gambling Research Panel and that it focused on people's attitudes to gambling;

¹⁵ Melbourne Enterprise International 2003. *Evaluation of the Victorian Gambling Screen*. Gambling Research Panel, Melbourne.

- The CATI programming was checked to ensure that it worked as intended; and
- The training package for interviewers was checked to identify areas for additional attention in the training for the main survey.

Following the pilot study the questionnaire text and field procedures were also refined to optimise response rates.

Statewide Survey

The statewide survey was conducted by ACNielsen in April and May 2003. A selected sample approach was used rather than a strict random sample approach; that is, the same method was adopted as in the 2001 *ACT Gambling Survey*. This method means that regular gamblers were over-sampled, providing reasonable numbers for analysis purposes. Survey costs were contained by selecting only a proportion of non-gamblers and non-regular gamblers.

Households were randomly selected from Victorian residential telephone numbers in the Electronic White Pages (EWP). A significantly larger sample than previous Victorian surveys was required to achieve an adequate sample of people with gambling problems for cross-validation analysis of the three screening instruments (SOGS5+, CPGI and VGS).

The distribution of the sample across Victoria and metropolitan/non-metropolitan areas was roughly in proportion to population, using the latest available 1996 census data reported by the Australian Bureau of Statistics (ABS).¹⁶ In common with most surveys of this kind, the sample design had some limitations in its coverage. It excluded the homeless, people in institutions (treatment settings, hospitals and prisons) and people without a telephone or with an unlisted number. Overall, while random digit dialling (or variants of this approach) reduces the bias of omitting unlisted numbers, it does so at higher cost and greater likelihood of refusals. On balance, the research team opted for random selection from residential telephone numbers in the latest Electronic White Pages directory.

The process of randomisation was designed to ensure that a proportionate sample of respondents from ethnic, ATSI and cultural groups was initially sampled. Moreover, multilingual interviewers employed at the initial point of contact facilitated inclusion of these groups who do not possess the language skills to participate in English. ACNielsen also ensured that respondents with a hearing impairment were not disadvantaged in terms of participation. A detailed description of the sampling methodology and response process is provided in Appendix B: Methodology and Technical Report.

A total of 8,479 adults (over 18 years) residing in households with a telephone were interviewed. A randomised screening process was used to select an adult from each household for interview. After dropouts, a total of 1,758 interviews were completed, representing an overall interview response rate of 98.62 per cent. Computer assisted telephone interviewing (CATI) achieved a closely monitored and controlled survey process that resulted in high quality data.

To address the research objectives a two-phase selected sampling process was designed to guide respondents through the relevant pathways of the survey (Figure 1).

¹⁶ Data from the 2001 Census was not publicly available before commencement of the survey.

In the first phase, an initial screening process determined respondents' gambling status (non-gambler, non-regular gambler, regular gambler):

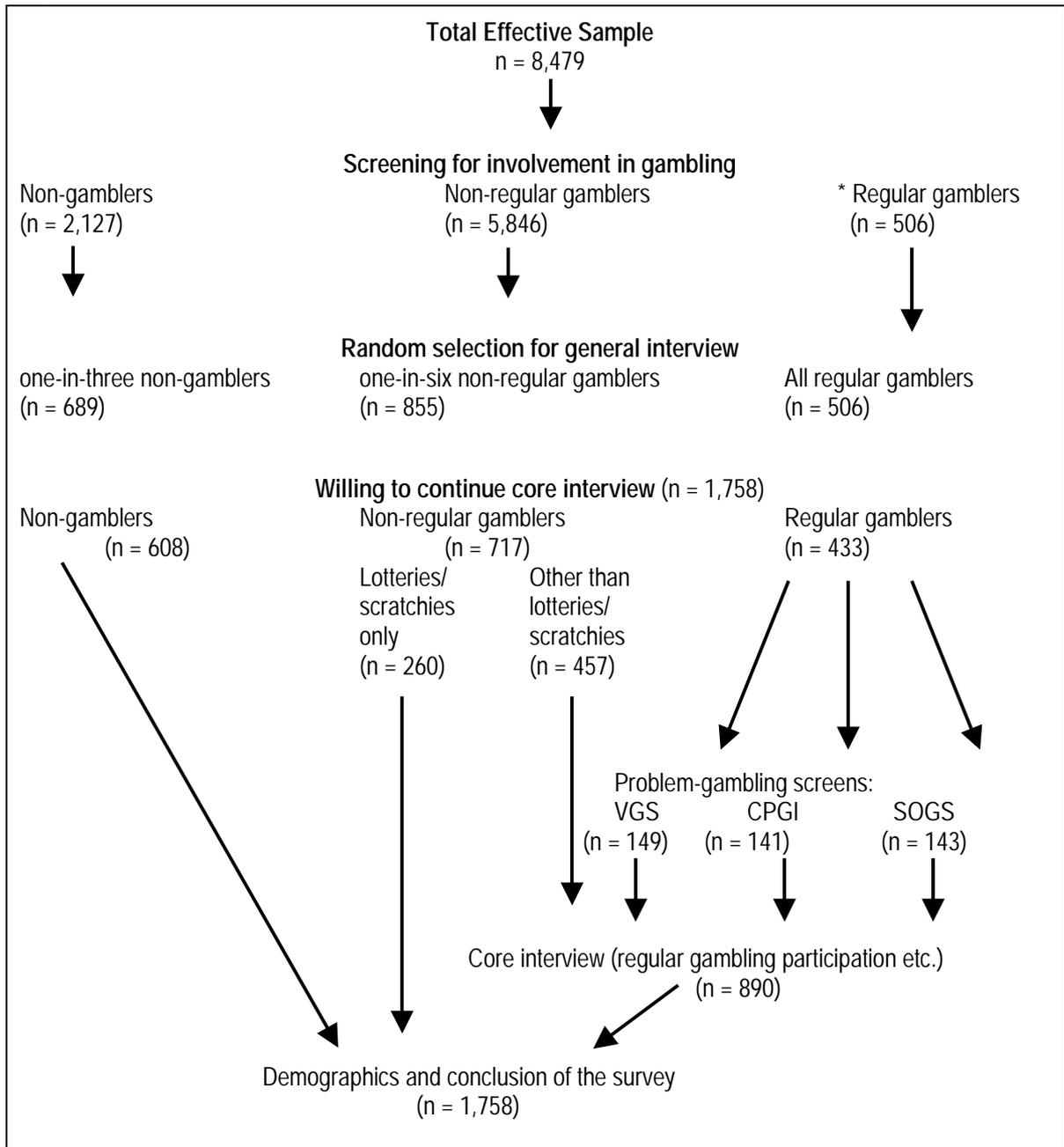
- Gamblers were classified as 'regular gamblers' if they had participated at least weekly (i.e. 52 times a year) in any of the activities referred to in Question S4 of the survey (other than lottery games or instant scratch tickets) in the previous 12 months;
- If respondents had gambled less than once a week in only one activity, or if their overall frequency of gambling was less than 52 times a year, they were classified as 'non-regular gamblers'.

In the second phase, a more detailed questionnaire was completed by respondents on the basis of a selective (random) interview strategy:

- A selected sample of those qualifying in the two most populous groups — non-gamblers (1:3) and non-regular gamblers (1:6) — were interviewed for the core survey;¹⁷
- Regular gamblers were randomly divided into three cohorts; and
- Each cohort was asked the specific questions for one of the three problem gambling screens (SOGS5+, CPGI, VGS). The screens themselves are provided in Appendix E: Problem Gambling Screens.

¹⁷ These sampling ratios were similar to those used in the Productivity Commission's national survey and the 2001 ACT gambling survey.

Figure 1: Selected sample process



Note: In this figure, n = unweighted figures. Except where indicated, all figures presented in Tables and Figures below are weighted. Thus the core interview weighted n = 1,767 (see explanation for the weightings procedure below).

* Regular gamblers are defined as those who participated at least weekly (i.e. 52 times per year) in gambling activities other than lottery games or scratch tickets.

The large initial sample size of 8,479 respondents meant that even with the one-in-three sampling of non-gamblers and the one-in-six sampling of non-regular gamblers, the sizes of the groups administered complete surveys were much larger than any previous Victorian gambling survey.

The use of this sampling approach meant that a more complex weighting scheme was used in Phase 2. The data for non-gamblers and non-regular gamblers were weighted up, using weighting factors from the information on the population for non-gamblers and non-regular gamblers obtained in the screener questionnaire.

Quality standards and data checking

ACNielsen's data and weightings were cross-checked for accuracy by statisticians at ANU prior to data analysis. In some cases the weighted socio-economic and demographic profile data provided by ACNielsen are not identical representations of the wider Victorian population. As is evident in Table 1, a number of variables are either under- or over-represented amongst the 2003 survey sample than was evident in the Victoria adult population on the night of the 2001 Census of Population and Housing.

Table 1: Comparison of selected socio-economic and demographic data, Victorian 2003 Survey and 2001 Census

	Weighted Victorian Sample	Census 2001
Gender		
Male	48.5%	49%
Female	51.5%	51%
Age Groups		
18-24	12.7%	12.7%
25-29	8.5%	9.5%
30-34	10.4%	10.3%
35-39	10.2%	10.3%
40-44	9.6%	10.2%
45-49	9.0%	9.3%
50-54	9.0%	8.7%
55-59	9.1%	6.7%
60-64	6.5%	5.5%
65-69	4.7%	4.6%
70+	10.3%	12.2%
English Main Language Spoken at Home		
Yes	92.7%	74.8%
No	7.3%	25.2%
Other Selected Variables		
Married or living with a partner	64.8%	45.3%
Single person	9.3%	9.0%
Working full-time	48.1%	38.6%
Working part-time	17.4%	18.9%
Unemployed	2.3%	6.8%
Degree from University or CAE	43.5%	14.2%

Such an outcome is always possible in a survey procedure which relies upon a randomisation process to generate an initial representative sample. This was the approach adopted by ACNielsen. Non-responses can also affect the representativeness of the survey data. In this case, although the weighting procedure standardises the response data for the age, gender and metro/non-metropolitan variables (see below), there remains an inbuilt bias towards certain groups throughout the analysis. However, after weighting, we consider that these variations are within acceptable limits.

Those variables in which direct comparison is possible, and for which the survey sample appears to differ, show a bias towards English-speaking, married, well-educated and full-time employees than is evident in the general Victorian population. For example 43.5 per cent of the survey sample reports having tertiary qualifications compared to just 14 per cent in Victoria overall. Another major anomaly is that just 7 per cent of the survey sample speaks a language other than English at home compared with over 25 per cent of Victoria's population.

Moreover, direct comparison of survey response data with census data is not possible in some cases due to inconsistencies in the data classifications. For example, the ABS do not report educational levels in terms of 'highest level of education reached' as was asked in QR9 of the Victorian 2003 survey. Rather, the ABS provides two distinct categories of educational data — highest level of schooling completed and non-school qualifications — which do not identify highest level of education attainment for any individual. Therefore ABS data do not differentiate people who drop out of school early and later attain tertiary qualifications from those who have attained no higher education.

Other inconsistencies between ABS and survey data are the way income is recorded (ABS reports income in weekly terms and the Victorian survey in annual terms); the main source of income (the ABS reports labour force participation and industry of employment, but it does not report the main income source); and language spoken at home (the range of languages offered by the ABS differs to that offered in the Victorian survey).

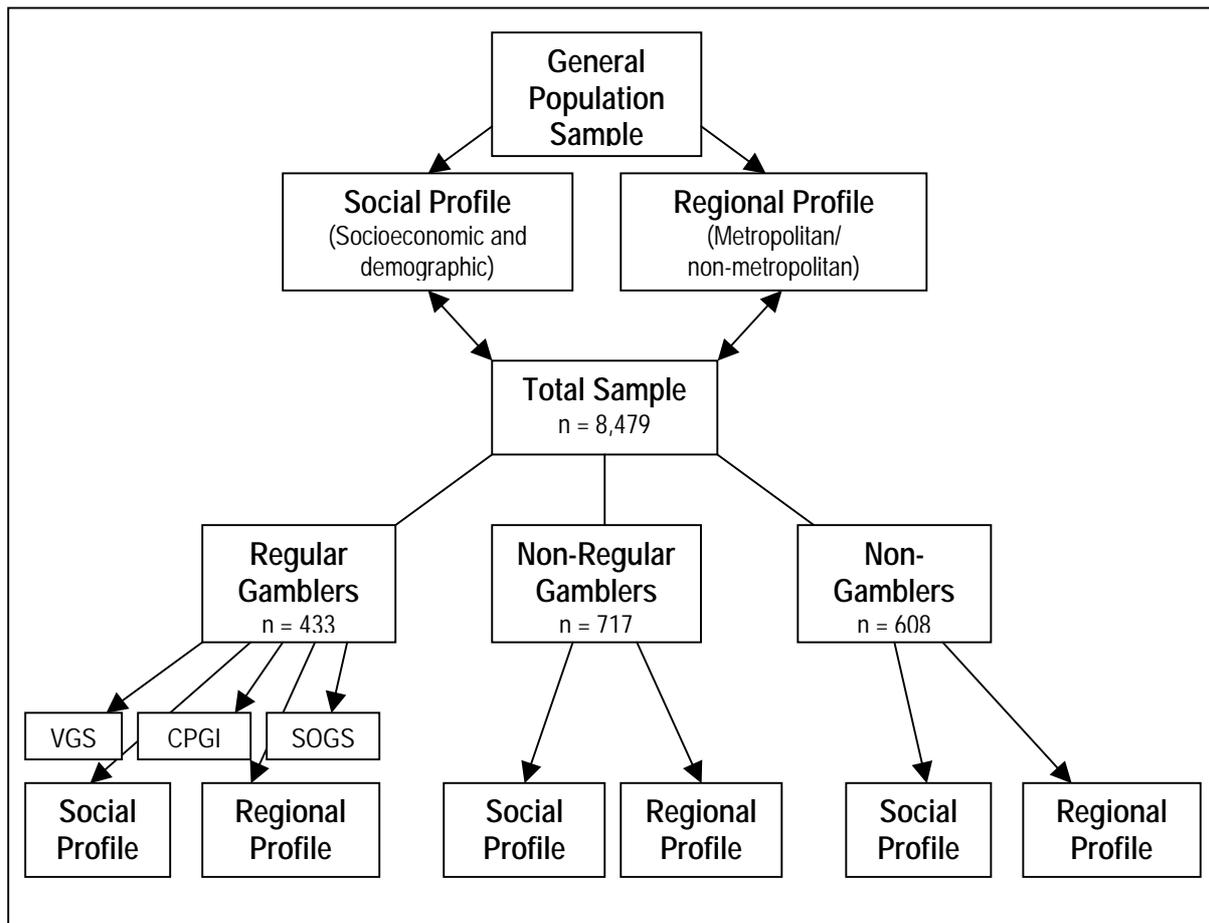
Weighting the data

To increase the representativeness of the survey response data for the target population (i.e. all adults living in Victoria) a weighting procedure was applied that involved three elements:

- First, sample selection and non-response biases can affect the representativeness of the sample. The survey data were thus weighted to ensure that the sample is representative for at least three major socio-demographic variables — age, gender and metropolitan/non-metropolitan location. Census data from the ABS were used to identify the distributions in the target population for all combinations of these variables, and the sample data were weighted in order to match those distributions;
- Second, the survey procedure specified that only one adult per household was to be interviewed (that adult was determined by the birthday method). This implies that, for each household contacted, people living in a larger household had a lower probability of being selected for the interview than people living in smaller households. The data were thus also weighted by the number of adults living in the respondent's household;
- Third, while these two elements in combination established appropriate weights for the total sample of respondents, it further needed to be taken into account that different sections of the survey involved only selected gambling groups identified in the initial screener (non-gamblers, non-regular gamblers and regular gamblers). For instance, the interview segment on gambling and policy attitudes involved, on a random basis, only one-in-three non-gamblers, one-in-six non-regular gamblers and one-in-one regular gamblers. As a consequence, the sample for that part of the survey did not represent those groups of gamblers in their actual population proportions. The data for each segment were thus weighted to re-establish the representation of gambling groups as in the overall sample. For a more detailed description of the weighting procedure, see Appendix B.

Data were analysed to provide social profiles of the main survey groupings (Figure 2). The GRP also requested that analysis of survey results be provided on a geographic basis. Basic geographic analysis of the survey data has been possible by utilising key identifiers which have been sorted and categorised in the data processing stage. LGA identifiers were attached to each case in the sample initially drawn. This information was supplemented by a metropolitan/non-metropolitan breakdown based on the EWP collected in the interview process. This allowed the final results to be sorted by groups of LGAs and geographic analysis on groupings where sample sizes permitted.

Figure 2: The data analysis process



Note: In this Figure, n = unweighted figures. Except where indicated, all figures presented in Tables and Figures below are weighted.

Literature review

The literature review for this study provided background information on relevant gambling issues identified in previous Victorian surveys and surveys conducted in other jurisdictions. This includes the development of a profile of the socio-demographic composition of the population of Victorians aged 18+ and a history of changing patterns of gambling participation, the prevalence of problem gambling and community attitudes to gambling. This information provides a picture of the unique nature of the Victorian community and the gambling environment, and assisted the development of relevant questions for the telephone survey. Background information for this survey is provided in Appendix A: Victorian Context.

Previous community attitude surveys

Several studies have progressively mapped community attitudes and perceptions on gambling in Victoria since poker machines were allowed in hotels/clubs and Crown Casino was established. Summaries of the methodologies and findings of previous community surveys commissioned by the VCGA are accessible on the VCGA's website and in *The Social and Economic Impacts of Gaming: A Framework for Research* (2001).¹⁸ Relevant findings have been incorporated into later sections of this report to trace trends and comparisons over time.

¹⁸ *The Social and Economic Impacts of Gaming: A Framework for Research*. 2001. Social and Economic Research Centre (SERC), Gambling Research Panel. Melbourne.

The *Seventh Survey of Community Gambling Patterns and Perceptions* (March 2000) is most relevant to this 2003 survey and informed the research design.

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The history of the Victorian surveys of community gambling patterns and perceptions has been:²⁰

- May 1992 — the first survey, conducted prior to the introduction of gaming machines;
- May 1994 — the second survey, conducted following the introduction of gaming machines and prior to the opening of the temporary Melbourne Casino;
- May/June 1995 — the third survey, conducted following the opening of the temporary Melbourne casino;
- August/September 1996 — the fourth survey, conducted as a continuation of the monitoring of gambling patterns;
- September 1997 — the fifth survey, conducted following the opening of the permanent Melbourne Casino. For the first time, this survey included the essential elements of 'positive and negative perceptions of gambling', an area which had previously been researched separately. It also included the use of the SOGS for the first time. This coincided with the VCGA's commissioning of a project to design a replacement instrument for the SOGS, one which it was envisaged would be better suited as a general population screen. This new screen is the VGS, used for the first time in this latest survey (2002–3);
- *The Sixth Survey of Community Gambling Patterns and Perceptions — April 1999*. The Sixth Survey sample was a total of 1,737 respondents, comprising 1268 metropolitan and 469 rural. In addition to the themes and objectives of previous surveys, the *Sixth Survey* had a specific aim to examine the statistical changes, if any, in the Victorian community following the opening of the Crown Casino;
- *Seventh Survey of Community Gambling Patterns and Perceptions — March 2000*. The *Seventh Survey* also developed an improved survey instrument following an extensive review and evaluation of the questionnaire used in the *Sixth Survey*. The initial adult population sample was a total of 1,760 respondents, comprising 1,256 metropolitan and 504 rural residents. Gambler respondents, consistent with the previous three community surveys, were segmented into the following categories, defined by gambling behaviour and attitudes:
 - Disinterested gamblers;
 - Occasional gamblers;
 - Social gamblers;

¹⁹ *The Social and Economic Impacts of Gaming: A Framework for Research*. 2001. Social and Economic Research Centre (SERC), Gambling Research Panel. Melbourne.

²⁰ VCGA 2000. op. cit. p.3.

- Acknowledged heavy gamblers;
- Committed heavy gamblers;
- Another group, ‘at risk’ gamblers, was defined by their response to the SOGS questions.

As noted above, this 2003 survey has not adopted those categories. Rather, it has followed the approach used in the Productivity Commission and ACT 2001 surveys and segmented Victorian respondents into three groups: non-gamblers, regular gamblers and non-regular gamblers.

The themes of the *Seventh Survey* were essentially consistent with previous Victorian community perceptions and attitudes surveys. That is, the themes examined gambling patterns, in particular, frequency and duration of visits to venues; socio-demographics; expenditure; the proportion of gamblers to non-gamblers; the incidence of problem gamblers; positive and negative perceptions and attitudes towards gambling; and motivational factors for visits to venues. The report produced a comparative summary of Victorian attitudes and perceptions of gambling since 1996.²¹ That summary has formed the basis of the trend analysis of community perceptions in this report.

The *Seventh Survey* report noted that inconsistencies in findings through the seven surveys could be explained by at least the following issues:

- The decision to include or exclude outliers;
- Changes in the coding procedures between different consultants;
- Changes in time of year/time of week when interviewing has taken place;
- Changes in the sample design (provided by Geospend in the most recent Victorian surveys);
- Random change in the sample; and
- Changes in the briefings to interviewers by different consultants.

All those factors could apply when comparing the results of this survey with previous Victorian surveys, or with the Productivity Commission, ACT and Queensland gambling surveys. It is important to note that, while the *Sixth Survey* had removed most outliers for its analysis, the *Seventh Survey* did not.²² For consistency with the most recent Victorian study, we have not removed outliers when analysing the data from this current survey.

Further, the *Seventh Survey* report acknowledges that the ‘fluctuations caused by the small number of high-value gamblers included in the sample from year to year suggest that a much larger sample of gamblers may be called for’.²³ The report discusses the possible use of a selected screening process and disproportionate sampling in order to achieve a higher response rate without necessarily increasing the total sample size. A selected sampling approach was utilised in this survey, as it was in the Productivity Commission’s 1999 *National Survey* and the 2001 *ACT Gambling Survey*.

²¹ *Seventh Survey of Community Gambling Patterns and Perceptions*. 2000. Victorian Casino and Gaming Authority. Appendix C.

²² *ibid.*, p.23.

²³ *ibid.*, p.23.

As part of its research program the VCGA also commissioned the *Longitudinal Examination of Perceptions and their Relationship with Actual Findings* (2000) to examine the relationship between people's perceptions of the gaming industry and their own gambling practices. It was intended as the first study in a longitudinal research program designed to trace the effectiveness of community awareness programs in aligning public perceptions and attitudes with actual behaviour. That report provided relevant background information for this study regarding Victorians' perceptions of gambling as a form of entertainment and recreation, the industry's contributions to the economy, motivations for gambling, problem gambling and the extent to which the social problems of gambling outweigh the benefits.

Other Victorian research

The VCGA also commissioned a number of community studies which examine the social and economic impacts of gambling in local areas.²⁴ For the purposes of this particular survey, each of these studies provided contextual data on gambling participation and community perceptions of gambling in Victoria.

An improved survey design was further assisted by a comprehensive assessment of those VCGA and other relevant gambling studies in Victoria with particular reference to the theoretical, empirical and practical limitations of assessing the actual impacts of EGM gambling in diverse localities.²⁵ Although community gambling research is far more developed in Victoria than is the case in many other jurisdictions, considerable research gaps remain. Our review identified numerous concerns regarding previous Victorian population surveys. For example:

- Telephone questionnaires used in several VCGA studies offer pre-determined options for responses which imply that a short factual answer is required;
- Low-income and NESB groups are more likely to be unwilling or unable to participate than other groups in the Australian population;
- The small sample sizes used in population surveys conducted by the VCGA have limited the surveys' ability to gauge prevalence rates of problem gamblers;
- Difficulty in making meaningful comparisons due to the use of different screens to measure the prevalence of problem gambling.

²⁴ For a comprehensive review of these studies, see *The Social and Economic Impacts of Gaming: A Framework for Research*. 2001. Social and Economic Research Centre (SERC). Gambling Research Panel. Melbourne.

²⁵ McMillen, J. *et al.* 2001. *The Methodology Report*. Prepared for the Victorian Local Governance Association, Melbourne.

2003 Survey Results

As explained previously in this report, the 2003 Victorian *Longitudinal Community Attitudes Survey* provided an effective random sample of 8,479 Victorian residents. Three main population groups were identified for general interview at the start of the survey: non-gamblers, non-regular gamblers and regular gamblers. As in the Productivity Commission's 1999 *National Gambling Survey* and 2001 *ACT Gambling Survey*, regular gamblers were defined as those who gamble weekly on forms of gambling other than lotteries. These three sample groups were interviewed on their patterns of gambling behaviour, their attitudes to gambling and its perceived impact on the community. Specific detailed data was gathered on the experience of regular gamblers with particular reference to gamblers who experience problems.

In consultation with the Gambling Research Panel (GRP) and representatives of industry and community groups, the questionnaire designed for the telephone survey included questions from previous Victorian surveys, in particular the *Seventh Survey of Community Gambling Patterns and Perceptions* (conducted in October and November 1999). However, at the request of the GRP extensive refinements to previous Victorian questionnaires were informed by the Productivity Commission's national survey and the 2001 ACT gambling survey, specifically to provide information on significant issues identified in those studies such as patterns of gaming machine use, the adverse consequences of gambling and help seeking behaviour. The revised questionnaire also included questions from the *2001 Queensland Household Survey*, such as correlates of problem gambling, and several questions related to current policy issues in Victoria.

This section reports the results from the gambling behaviour component of the survey and is divided into three core sections:

- The first reports on the overall findings from the survey. This includes the reported participation rates for the various modes of gambling, gambling frequency reported by those who do participate and their estimates of gambling expenditure. Where relevant, this analysis will include comparisons with other recent Australian surveys;
- The second section looks at who gambles in Victoria. It provides an outline of the demographic profile of Victorian gamblers as well as considering the gambling patterns of specific socio-demographic groups;
- The third section outlines some of the more specific gambling behaviours of the Victorian population, based on selected samples of non-regular gamblers and regular gamblers.

Where data allow, each section includes analysis of regional gambling trends as well as statewide Victorian patterns. Regional analysis will largely focus on differences between metropolitan and non-metropolitan patterns but where possible will extend to more detailed regional information.

While this survey has identified trends in gambling patterns and perceptions as reported by Victorians, it has not attempted to investigate causal factors or explanations for any changes or differences between groups that have been found. Those research issues are beyond the scope of this study.

Gambling participation

This section of the report presents the findings from the 2003 *Victorian Survey* and compares them, where relevant, with findings from the Productivity Commission's 1999 *National Gambling Survey*, the 2001 *ACT Gambling Survey*, the 2001 *Queensland Household Gambling Survey* and previous Victorian surveys. Except where indicated, all figures presented below are weighted.

In part, differences between survey results can be explained by the way that the survey questions were asked. For example, respondents in the Victorian population survey conducted in April–May 2003 were classified as having gambled if they had partaken of any of the activities referred to in question QS4 of the survey in the preceding 12 months. Moreover, as previously indicated (see Methodology, p. 34), the *Seventh Survey* used a different sampling frame for the regular gambling population; thus direct comparisons with this survey are not possible.

Note that the number of gambling activities surveyed in Victoria increased in 1995, 1996 and 1997 but has remained relatively constant since then. Furthermore, previous Victorian surveys asked specific questions about participation in bingo, raffles and sweeps; this survey did not, leaving respondents to self-report these activities which were then recorded in a broad 'other' gambling category. The *Seventh Survey* and Productivity Commission also did not distinguish between those people who may have bought lotto tickets or instant scratch tickets for someone else, while both the 2001 *ACT Gambling Survey* and this 2003 Victorian survey made this distinction.

Since Victorian gambling surveys were first conducted in May 1992, the overall rate of gambling participation by the adult population has fluctuated from a low (75 per cent) in 1992 soon after the introduction of electronic gaming machines (EGMs) to clubs and hotels, to a peak of 87 per cent in 1996 (Figure 3).

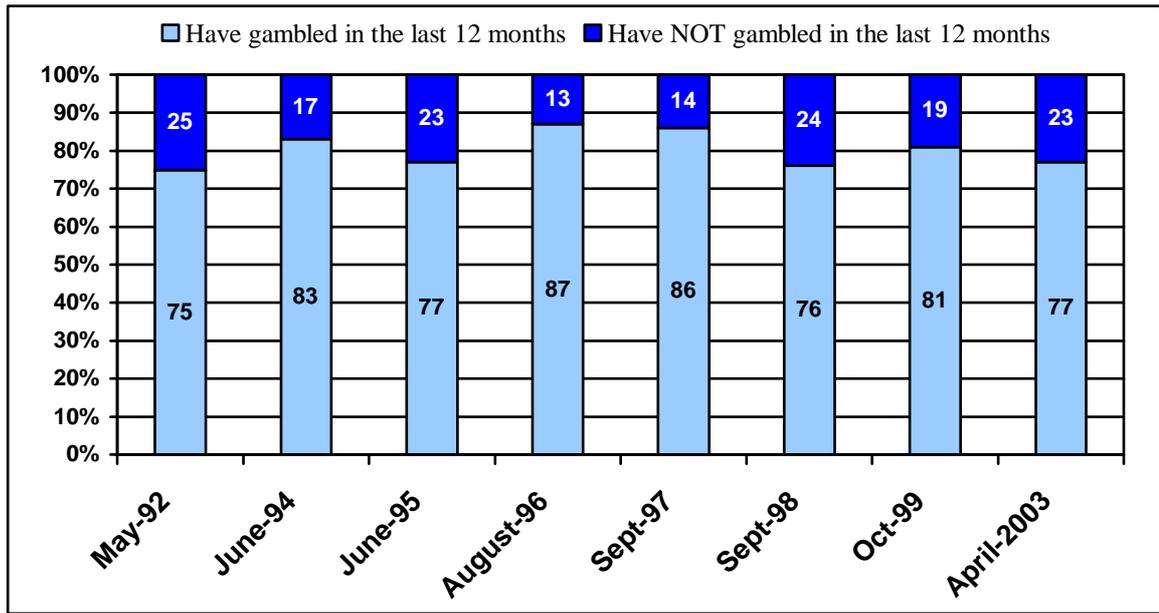
The Victorian population survey conducted in April and May 2003 found that 77.4 per cent of Victorian resident adults participated in at least one of the gambling activities surveyed in the previous 12 months. This is a decrease from 81 per cent in the overall participation rate by Victorians in 1999. This is also lower than the findings by the Productivity Commission that 81 per cent of adult Victorians and Australians had participated in at least one gambling activity. It is also lower than participation rates in the 2001 Queensland survey (84.96 per cent), but higher than reported by the ACT gambling survey in 2001 (75 per cent).²⁶

The apparent decrease in overall gambling participation by Victorians since the 1999 *Seventh Survey* could be affected by a number of factors, including:

- Declining consumer interest in gambling overall, or in certain modes of gambling;
- Changes in business practices that affect access and availability of gambling options;
- Competition from other forms of leisure and entertainment;
- The impact of harm minimisation policies introduced since 2000; and
- Changes in the general economic and/or social environment.

²⁶ Productivity Commission op. cit., p.3.16.

Figure 3: Victorian gambling participation rates — time series 1992–2003



Source: Victorian Gambling Surveys (various years).

It should be noted that participation rates range from minimal to heavy involvement across a range of gambling activities and are no proxy for assessing levels of problem gambling.

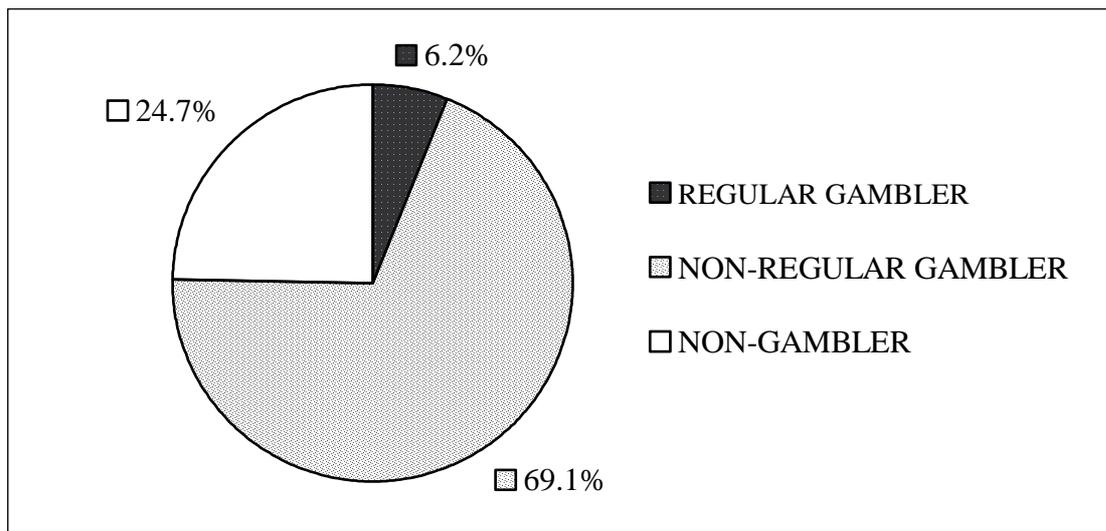
Gambling segments

The initial surveyed population was segmented according to gambling behaviour into three groups as follows (Figure 4):

- 2,095 non-gamblers (24.7 per cent);
- 5,859 non-regular gamblers (69.1 per cent);
- 525 regular gambler (6.2 per cent).

Respondents were identified as belonging to a particular segment depending upon their answers to the following survey questions: QS4, QS6. Out of the 8,479 initial survey participants, 525 of the weighted sample were classified as regular gamblers, on the basis of an initial assessment of their gambling involvement.

Detailed descriptions of the gambling participation and attitudes to gambling of each these segments are provided on the following pages. Responses by these three survey segments have been analysed throughout the report as they provide valuable insight into the diverse nature of gambling activities and attitudes by Victorians.

Figure 4: Adult population (18+) by gambling group, Victoria 2002

Source: Total respondents. Weighted n = 8,479

The segments identified for this 2003 survey are comparable to similar segments identified for the Productivity Commission's national survey and the ACT gambling survey. For example, the ACT survey segments were non-gambler (26.6 per cent), non-regular gambler (64.7 per cent) and regular gambler (8.4 per cent).

However, comparisons with other Victorian surveys are approximate, not only because these proportions varied across surveys, but also because the definitions proposed for 'gambler' and 'regular' gambler in this survey were not necessarily identical to all previous Victorian studies.

Participation rates

The proportion of Victorians who participated in gambling activities during the previous 12 months was calculated. As shown in Table 2, there tended to be high gambling participation levels among:

- Separated or divorced people (84.3 per cent)
- Single parents (86.0 per cent);
- Full-time workers (80.1 per cent)
- Self-supporting retirees (79.2 per cent);
- People on medium incomes (83.4 per cent); and
- Rural residents (78.9 per cent); and
- Social security payees (79 per cent).

There tended to be lower levels of gambling participation amongst:

- People older than 65 years (72.6 per cent)
- Two parent families (74.9 per cent);
- Students (55.1 per cent);
- CAE/University educated (74.3 per cent); and
- Business owners (69.5 per cent).

Table 2: Participation on gambling and average number of gambling activities among gamblers, for different socio-demographic variables

Characteristic	Participation in gambling (among total population) ^a	Average number of gambling activities (among gamblers) ^b
Gambling group		
Non-gamblers	(0%)	-
Non-regular gamblers	(100%)	2.20
Regular gamblers	(100%)	3.43
Gender		
Male	77.7	2.34
Female	77.1	2.26
Age		
18-24	77.4	2.62
25-34	76.7	2.39
35-49	78.9	2.25
50-64	79.1	2.25
65+	72.6	2.10
Born overseas^c		
Yes	78.6	2.40
No	74.1	2.05
Marital status^c		
Married or living with partner	77.6	2.25
Separated or divorced	84.3	2.46
Widowed	77.0	2.21
Single	74.9	2.48
Household type^c		
Single person	78.2	2.30
Group (related or unrelated)	77.9	2.47
Couple, no children (at home)	79.8	2.19
One parent family	86.0	2.39
Two parent family	74.9	2.34
Employment status^c		
Working full-time	80.1	2.33
Working part-time	78.5	2.40
Home duties	78.4	2.42
Student	55.1	2.76
Retired (self supporting)	79.2	2.19
Pensioner	74.2	2.06
Unemployed	78.0	1.67
Education^c		
Up to Year 10/fourth form	80.1	2.23
Finished high school	81.8	2.48
TAFE/technical education	78.3	2.21
CAE/University	74.3	2.06
Main source of income^c		
Wage/salary	79.8	2.33
Own business	69.5	2.48
Superannuation/Aged pension	76.5	2.22
Social security payment	79.1	2.25
Income level^c		
Less than \$10,000	74.2	2.44
\$10,000-\$24,999	76.4	2.45
\$25,000-\$34,999	81.3	2.39
\$35,000-\$49,999	83.4	2.25
\$50,000-\$69,999	77.0	2.18
\$70,000 or more	80.1	2.26
Location		
Metropolitan	76.8	2.30
Rural	78.9	2.31

^a Participation in gambling was defined as having engaged in at least one of the following gambling activities in the last 12 months: poker machines, horse or greyhound races, scratch tickets, lotteries, Club Keno, casino table games, sports betting, internet casino games, or other (except raffles or sweeps). Weighted n = 8,479.

^b Number of distinct gambling forms (out of the nine options) in which gamblers engaged. Across all non-regular and regular gamblers, the average number of gambling activities was 2.31.

^c Calculations were based on the sub-sample of non-regular and regular gamblers who were selected to complete the entire interview (weighted n = 1,150).

Number of gambling activities

The mean number of gambling activities undertaken in the 12 months prior to the survey was calculated for all Victorian gamblers surveyed (Table 2). The number of gambling activities engaged in by people who reported gambling activity in 2003 was 2.30, similar to the findings of the *Seventh Survey* in 1999. On average, regular Victorian gamblers participated in 3.43 gambling activities during the previous 12 months and non-regular gamblers took part in 2.2 gambling activities. This suggests that the trend since 1996 towards a decline in the number of gambling activities partaken by Victorian gamblers has steadied.

When comparing the 2003 survey with other surveys in the Victorian series to evaluate trends, it is important to note that the number of gambling activities measured can vary as additional gambling options are introduced and others are removed.

In 2003 there tended to be higher than average numbers of gambling activities (mean numbers) undertaken by:

- Regular gamblers (3.43);
- Young people between 18 and 24 years (2.62);
- Group households (2.47); and
- Students (2.76).

There tended to be lower than average numbers of gambling activities undertaken by:

- People older than 65 years of age (2.10);
- Born overseas (2.05);
- Pensioners (2.06); and
- Unemployed (1.67).

The number of gambling activities undertaken by Victorians in 2003 varies little between metropolitan and non-metropolitan populations.

Participation in gambling activities

Despite the overall decrease in the proportion of Victorian adult residents participating in gambling since 1999, participation rates for most gambling activities have remained relatively steady over the past decade. However, there have been fluctuations in the participation rates of some forms of gambling. The main patterns of interest include:

- An increase in EGM participation — at 33.5 per cent, up from 30 per cent in 1999. This trend is a reversal of decreasing EGM participation rates between 1997–1999;
- EGM gambling continues to have the third highest participation rate of any Victorian gambling activity after lotto/lottery games (60.5 per cent) and instant scratch tickets (33.9 per cent). A similar pattern was also found in the Productivity Commission's 1999 national survey, the *ACT Gambling Survey* and the *Queensland Household Gambling Survey* (Table 3);

Table 3: Gambling participation and frequency by gambling mode, comparisons with other surveys

Form of gambling	Total participation ^a %			Less than once/month ^b %		1-3 times/month ^b %		1-3 times/week ^{ba} %		More than 3 times/week ^b %	
	VIC 2003	2001 ACT	PC 1999	VIC 2003	PC 1999	VIC 2003	PC 1999	VIC 2003	PC 1999	VIC 2003	PC 1999
EGMs, poker machines	33.5	38.1	38.6	69.5	62.1	22.1	24.5	7.6	11.4	0.9	2.0
Bet on horse or greyhound races	28.2	23.3	24.3	77.9	70.9	11.8	13.6	8.3	13.4	2.0	2.2
On-course	13.6	10.0	13.4	n/a	84.2	n/a	10.7	n/a	4.9	n/a	0.2
Off-course	22.3	18.6	19.0	n/a	73.0	n/a	11.8	n/a	13.9	n/a	1.3
Played lotto/lottery game	60.5	48.4	60.0	35.0	25.4	19.8	23.9	43.5	44.5	1.7	6.2
Bought instant scratch tickets	33.9	43.4	46.2	65.6	51.9	22.9	33.4	11.3	14.0	0.2	0.7
Table Games at Crown Casino	7.3	35.9	n/a	85.6	n/a	12.6	n/a	1.5	n/a	0.3	n/a
Played Club Keno	5.1			83.1		12.8		4.0		0.0	
at a club or hotel	4.5	6.9	15.9	n/a	72.2	n/a	19.6	n/a	7.1	n/a	1.1
at Crown Casino	1.2	10.0	10.9	n/a	82.3	n/a	15.2	n/a	2.3	n/a	0.2
Bet on a sporting event	5.6	5.9	6.3	67.7	52.4	20.5	24.6	11.4	23.0	0.4	0.0
Played an internet casino game	0.2	0.2	0.4	64.4	60.3	22.7	15.2	6.0	20.9	6.8	3.6
Other	1.4	5.1	5.3	56.9	68.1	16.3	22.5	21.0	7.4	5.9	2.0
Participated in any gambling activity	77.4	72.9	81.5	40.3	26.4	20.4	24.1	37.0	36.6	2.3	13.0

Source: Total respondents; ACT *Gambling Survey*, 2001 op. cit.; Productivity Commission 1999, op.cit. p. 3.16 (Table 3.3); Queensland Treasury 2001. *Queensland Household Gambling Survey*, Brisbane: Queensland Government.

^a Based on total sample (weighted n = 8,479)

^b Represents the proportion of respondents who participated in that form of gambling. Therefore, based on varying n.

- Lotto/lottery games remain the gambling activity participated in by more Victorians than any other (60.5 per cent), an increase from 51 per cent in 1999. Nearly 4.6 per cent of this group played lotto/lottery games for someone else;
- Scratch ticket gambling participation has also increased significantly from 20 per cent in 1999 to 33.9 per cent. Nearly 26.6 per cent of this group bought instant scratch tickets for someone else;
- Race betting (horse and greyhounds) participation appears to remain steady at 28.2 per cent, although direct comparisons are not possible with previous Victorian surveys which asked separated questions of participation in the various racing codes. Participation by Victorians in these forms of gambling during the 12 months prior to May 2003 is higher than the participation rate for race betting reported in either the 2001 ACT or 1999 Productivity Commission surveys;
- Casino gambling participation decreased substantially to 7.3 per cent from 16 per cent in 1999 — and significantly lower than the peak participation rate of 25 per cent in 1997. This participation rate also falls well below that reported in surveys by the Productivity Commission, ACT and Queensland for casinos in other states;
- Club Keno participation increased to 5.1 per cent, up from 3 per cent in 1999. However participation remains considerably lower than the peak of 10 per cent in 1997. In 2003, participation in Club Keno was significantly higher at a Victorian club or hotel (4.4 per cent) than at Crown Casino (1.2 per cent). While this corresponds to the national participation pattern found by the Productivity Commission, it contrasts to the findings of the 2001 ACT survey that participation in Club Keno was higher in the casino than in clubs/hotels;
- Bingo had the highest participation rate for ‘other’ forms of gambling (37.8 per cent of a total 1.4 per cent of the surveyed population), although the participation rate has continued to decline since Victorian surveys began in 1992;
- Sports betting (5.6 per cent) and internet casino betting (0.2 per cent) reported, as in previous years, low levels of participation. These rates are comparable to ACT residents in 2001, but internet gambling participation by Victorians in the previous 12 months was half the national participation rate reported in the 1999 Productivity Commission survey.

Significantly, only 6.1 per cent of that 1.4 per cent 'other gambling' group reported participation in raffles and sweeps in the previous 12 months. This is a substantial decrease from the 33.9 per cent participation rate for raffles and sweeps reported for the total surveyed Victorian population in 1999. As previously noted, no specific questions related to these forms of gambling were asked in this latest survey. An explanation for the widely divergent findings between 1999 and 2003 could be that some Victorians surveyed in 2003 may not consider these activities as 'gambling' and thus did not volunteer unprompted information.

Participation rates — metropolitan/non-metropolitan areas

The focus of this section is upon the regional variations in rates of gambling participation from the Victorian population data. As is evident in Appendix A (Table 112) there are significant differences in the provision of EGM facilities across the state. Accessibility to Crown Casino is also easier for residents of some areas than for others. Access to other types of gambling is likely to be more uniform throughout Victoria.

Analysis of regional participation rates concentrates on comparisons of metropolitan and non-metropolitan findings. Where sample sizes are adequate, comparisons are also possible between local government areas (LGAs).

Participation in all gambling

Table 4 shows there are no significant variations in overall gambling participation between metropolitan and non-metropolitan regions. This pattern is broadly similar to the findings of the *Seventh Survey* in 1999.²⁷

However a slightly higher proportion of metropolitan than non-metropolitan residents are non-gamblers.

Participation in different types of gambling

There is little difference between metropolitan and non-metropolitan regions in participation rates in different types of gambling (Table 5).

Table games at Crown Casino is the only form of gambling which indicates clear metropolitan/non-metropolitan differences. The level of participation on casino table games is notably higher in the metropolitan area.

Participation rates in EGMs, scratch tickets, lotteries, Keno and internet gaming are all slightly higher in the non-metropolitan area.

Participation rates in race and sports betting are both slightly higher in the Melbourne area.

Table 4: Participation rates for any form of gambling in the last 12 months, metropolitan and non-metropolitan areas

Gambling involvement	Metropolitan	Non-Metropolitan
No gambling	23.2	21.1
Gambling (at least one activity)	76.8	78.9

Source. Total respondents (weighted n= 8,479).

²⁷ op.cit., p.50.

Table 5: Participation rates for each form of gambling in the last 12 months, metropolitan and non-metropolitan regions

Gambling activities (multiple response)	Metropolitan	Non-Metropolitan
EGMs	32.8	35.4
Race betting	28.3	28.0
Scratch tickets	32.4	38.3
Lotteries	60.1	61.5
Keno	4.9	5.7
Table games at Crown Casino	8.6	3.8
Sports betting	6.0	4.3
Casino games on Internet	0.2	0.3

Source: Total respondents (weighted n = 8,479).

Gambling Participation Rates by Local Government Area

Table 6 records the participation rates for different forms of gambling by individual Local Government Areas (LGAs). LGAs with small sample sizes were excluded from this analysis. We have applied a cut-off point of 50 respondents per LGA. This procedure was determined in consultation with the Gambling Research Panel to remove those LGAs where small sample sizes would preclude meaningful analysis. Subsequently 32 LGAs, all of which are in non-metropolitan areas, were excluded from Table 6.

All gambling

A relatively narrow range of gambling participation rates over the previous 12 months is evident across the LGAs (Table 6):

- Participation rates of local residents range from 58.0 per cent (Surf Coast) through to 85.5 per cent (Warrnambool);
- Only four of the 46 LGAs have participation rates below 70 per cent;
- Within the Melbourne area, the outer-metropolitan LGAs of Cardinia, Melton and Frankston all stand out with high levels of gambling participation whilst the lowest rates of gambling participation are evident in the inner suburbs of Yarra, Melbourne and Stonnington.

EGMs

The survey found a wider variation in EGM participation at the LGA level:

- The outer western Melbourne LGA of Wyndham (45.9 per cent) has an EGM participation rate which is more than double that reported in Surf Coast (22 per cent) and Stonnington (22.8 per cent);
- Within Melbourne, inner suburban LGAs dominate the lower end of the gambling participation scale. 17 per cent of surveyed residents in Yarra reported participation on EGMs in the last 12 months, whilst Stonnington, Port Phillip and Boroondara all have EGM participation rates less than 25 per cent;
- In contrast, 45.9 per cent of respondents in Wyndham participated in EGM gambling in the previous 12 months. The outer suburban LGAs of Frankston, Hume and Brimbank also have figures above 40 per cent;
- A notable finding from this survey is the relatively low rate of EGM participation reported by residents in Maribyrnong (26.2 per cent). Maribyrnong has the highest number of EGMs and EGM expenditure per adult in Victoria, outside the Melbourne CBD.²⁸ It appears that a relatively small section of the local population may be generating high levels of expenditure in that LGA;

²⁸ Office of Gaming and Racing, http://www.ogr.vic.gov.au/domino/web_notes/ogr/ogrsite.nsf/pages/MapStats, accessed 26.8.03.

- Of the non-metropolitan LGAs, the regional cities of Bendigo (45.8 per cent) and Shepparton (44.1 per cent) have the highest rates of EGM participation whilst Surf Coast (22 per cent), Wangaratta (26.4 per cent) and Baw Baw (26.8 per cent) have the lowest.

Race betting

Like EGMs, a relatively wide range of participation rates across LGAs is evident for race betting.

The highest figure of 46.3 per cent in Warrnambool is more than double the participation rate reported in Surf Coast (19.6 per cent), both non-metropolitan LGAs.

The highest participation rates for race betting in the Melbourne LGAs are in the inner areas of Stonnington (37.9 per cent), Boroondara (37 per cent), Bayside (35.6 per cent) and Port Phillip (34 per cent). These LGAs all recorded low EGM participation.

Scratch tickets

Like EGMs and race betting, scratch ticket purchases also appear to vary greatly between LGAs.

As was the case for 'any gambling' and 'race betting', Warrnambool tops the list of LGAs, with more than half of respondents reporting scratch ticket purchases in the previous 12 months.

Surf Coast also maintains its overall trend of low gambling participation rates; 18 per cent of respondents participated in scratch tickets.

The highest participation rates in the metropolitan area was reported in Frankston where 43.4 per cent of respondents had bought scratch tickets in the previous 12 months compared to Yarra's 23.3 per cent.

Lotteries

A narrower range of participation rates is evident for lotteries than for the other types of gambling:

- The outer Melbourne LGA of Melton (72.2 per cent lottery participation) recorded less than twice the rate reported in Surf Coast (41.2 per cent);
- The other Melbourne LGAs which reported greater than 70 per cent participation in lotteries are also outer suburban (Hume at 71.3 per cent and Brimbank at 70 per cent). Fewer than 50 per cent of survey respondents in the Melbourne LGAs of Yarra and Manningham had participated in lotteries in the last 12 months.

Casino

Not surprisingly, casino gaming is the form of gambling with the highest variation across LGAs over the last 12 months:

- The lowest levels of participation in casino table games were reported by respondents in non-metropolitan LGAs (13 of the 15 lowest participation rates). The two exceptions are Yarra (1.7 per cent) and Hume (4.8 per cent);
- Greater Bendigo has the highest casino participation rate amongst non-metropolitan LGAs (7.8 per cent); this LGA is more distant from Crown Casino than many of the other rural LGAs which have lower participation rates.

Table 6: Participation rates, major types of gambling in the last 12 months: Local Government Areas (LGAs) ranked by 'any gambling'

LGAs	(n)	Any gambling	EGMs	Race betting	Scratch tickets	Lotteries	Casino table games
Warrnambool	(55)	85.5	38.2	46.3	50.9	63.6	3.6
Bass Coast	(53)	84.9	39.6	34.0	41.5	67.9	1.9
Cardinia	(99)	83.8	33.3	27.3	34.3	62.6	9.1
La Trobe	(124)	83.1	37.4	32.5	34.7	67.5	6.5
Melton	(89)	83.1	31.1	31.5	34.8	72.2	5.6
Frankston	(196)	82.7	44.9	26.5	43.4	69.7	5.6
Ballarat	(156)	82.7	35.0	30.1	35.3	63.1	3.8
Mildura	(80)	82.5	31.3	23.8	40.7	67.5	5.0
Moonee Valley	(192)	82.3	34.9	33.9	28.6	59.4	14.1
Wyndham	(133)	82.0	45.9	31.8	36.8	66.9	13.5
Greater Dandenong	(155)	81.9	37.0	20.6	33.5	69.7	9.0
Whittlesea	(158)	81.0	34.8	25.8	37.3	63.3	8.2
Kingston	(229)	80.8	35.5	32.0	34.5	64.6	6.1
Brimbank	(219)	80.4	41.4	21.5	33.8	70.0	15.5
Hume	(168)	80.4	42.9	32.3	41.7	71.3	4.8
Maribyrnong	(122)	80.3	26.2	32.2	27.9	59.5	10.7
Monash	(352)	79.8	32.3	25.9	33.4	60.9	8.5
Mornington Peninsula	(347)	79.8	36.0	33.1	33.9	61.7	6.6
East Gippsland	(74)	79.7	43.2	23.0	40.5	71.6	1.4
Greater Shepparton	(102)	79.4	44.1	32.0	49.5	61.8	3.9
Greater Geelong	(299)	79.3	35.7	29.4	34.8	58.2	5.3
Casey	(278)	79.1	37.5	24.5	33.1	66.2	8.3
Greater Bendigo	(179)	78.2	45.8	29.6	34.1	59.2	7.8
Knox	(313)	78.0	33.2	25.8	36.4	63.3	8.0
Bayside	(174)	77.6	29.9	35.6	33.3	57.5	9.7
Wellington	(62)	77.4	38.7	22.6	43.5	64.5	1.6
Glen Eira	(268)	77.2	27.6	32.3	28.3	55.4	11.9
Nillumbik	(145)	76.6	39.3	26.2	31.9	55.6	9.7
Banyule	(225)	76.4	32.7	30.2	36.0	61.3	5.8
Hobsons Bay	(129)	76.0	33.8	23.1	32.3	61.2	6.2
Wangaratta	(54)	75.9	26.4	22.6	43.4	52.8	3.8
Moreland	(303)	74.6	27.1	26.3	30.8	61.5	7.3
Yarra Ranges	(248)	74.6	35.2	27.4	34.3	61.7	6.3
Macedon Ranges	(74)	74.3	27.0	29.7	37.3	54.1	2.7
Maroondah	(170)	72.9	28.8	25.7	30.0	60.6	5.9
Campaspe	(69)	72.5	31.4	14.5	44.9	63.8	1.4
Boroondara	(319)	72.4	24.8	37.0	28.2	50.5	9.1
Darebin	(194)	72.2	29.5	19.6	28.9	54.6	12.9
Manningham	(241)	72.2	31.4	20.7	27.8	49.8	12.4
Whitehorse	(269)	71.7	29.0	22.4	25.3	55.4	7.4
Port Phillip	(121)	71.1	24.6	34.4	31.4	54.9	10.7
Stonnington	(162)	71.0	22.8	37.9	27.2	50.3	5.6
Baw Baw	(55)	65.5	26.8	25.0	20.0	47.3	3.6
Melbourne	(75)	65.3	31.6	32.9	27.6	44.0	13.2
Yarra	(120)	63.3	17.5	25.0	23.3	46.7	1.7
Surf Coast	(50)	58.0	22.0	19.6	18.0	41.2	2.0

Source: Total respondents; weighted n = 8,479.

Note: LGAs with sample sizes less than 50 have been excluded from this table. LGAs in bold are in the Melbourne metropolitan area. Percentages refer to the number of respondents per LGA who declared having participated in gambling activities in the last 12 months.

^a Activities included EGMs, race betting, scratch tickets, lotteries, Keno, table games at Crown Casino, sports betting, casino games on the Internet, self-reported other gambling (e.g. raffles, bingo).

Who gambles in Victoria?

Table 7 provides a profile of Victorian regular gamblers, non-regular gamblers and non-gamblers by socio-demographic characteristics. It also provides a useful comparison between Victorian gamblers and non-gamblers in the Productivity Commission's 1999 national survey.

Where relevant, comparisons with the 2001 ACT survey have also been considered in the discussion which follows. Although the 1999 *Seventh Survey* and the 2001 *Queensland Household Gambling Survey* utilised different classifications for the gambling population than were used in this survey, some broad comparisons and trends can be suggested.

Gender

The Victorian population surveyed in 2003 was 48.5 per cent male and 51.5 per cent female.

Non-regular gamblers and non-gamblers were slightly more likely to be females than males. This contrasts with the 2001 *Queensland Household Gambling Survey* which found that 53 per cent of non-gamblers were male.

Regular gamblers in Victoria are predominantly male (65.9 per cent) compared to 34.1 per cent females. Similar gendered patterns have been found in the *Seventh Survey* in 1999,²⁹ as well as the 2001 Queensland and ACT surveys and the national Productivity Commission survey.

Gender preferences for certain forms of gambling are also evident (Table 8). A higher proportion of male gamblers than female gamblers participate in race betting, Keno, casino table games and sports betting. Female gamblers predominate in EGM gambling, scratch tickets and lotto.

Age

The age profile of non-gamblers and non-regular gamblers in Victoria broadly reflects the sample population overall.

Regular gamblers were more likely to be in the 50–64 and over-65 age groups than the total surveyed population. This trend was also evident in the Productivity Commission's 1999 national survey, albeit less marked. It has not been possible to compare this finding with the 1999 *Seventh Survey*, as that report provided only the 'average age' for gamblers.³⁰

The youngest age group (18–24) is under-represented amongst Victorian regular gamblers in 2003. Regular gamblers had a younger demographic profile in the Productivity Commission's 1999 survey and the 2001 ACT survey.

Overall, the age profile across all forms of gambling is broadly similar (Table 8). However, EGMs attract a more even spread of age groups than other forms of gambling. A higher proportion of older gamblers (35–64) play Keno than other age groups; and a higher proportion of younger gamblers (aged 18–34) gamble on casino table games and sports betting.

²⁹ op.cit., p.50.

³⁰ op.cit., p.50.

Country of birth

Regular Victorian gamblers surveyed in 2003 are disproportionately born in Australia (78.5 per cent compared to 73.8 per cent in the overall sample).

A greater proportion of persons born overseas are found in the non-gambling group than in the overall sample. These findings mirror those in the Productivity Commission survey and the 2001 ACT Gambling Survey.

Marital status

As in the Productivity Commission’s national survey, the marital status of the three gambling segments (regular gambler, non-regular gambler and non-gambler) generally reflects the sample population in Victoria.

Married/partnered persons are under-represented amongst regular gamblers in Victoria, but these variations are minor. In the ACT survey by contrast, married/partnered persons accounted for just 51 per cent of regular gamblers and single persons were over-represented compared to their proportion of the sample.

Household type

The household profile of gamblers in Victoria is similar to that of the total survey sample on most counts.

Regular gamblers are under-represented by two parent families. Single, group and couples-without-children households are all slightly over-represented. These findings are similar to the Productivity Commission survey but are not quite as marked.

The profiles of non-regular gamblers are comparable to the Victorian sample overall; non-gamblers show a slight bias towards two parent families.

Table 7: Comparison of socio-demographic characteristics of gamblers and non-gamblers, Victoria 2003 and Australia 1999

	Sample			Non-gamblers			Non-regular gamblers			Regular gamblers		
	VIC	PC	ACT	VIC	PC	ACT	VIC	PC	ACT	VIC	PC	ACT
Gender												
Male	48.5	49.1	49.8	46.7	45.0	49.5	47.6	48.6	47.4	65.9	60.4	65.6
Female	51.5	50.9	50.2	53.3	55.0	50.5	52.4	51.4	52.6	34.1	39.6	34.4
Age												
18–24	12.7	13.3	15.8	12.7	11.2	12.0	12.8	13.2	15.8	12.1	17.8	25.4
25–34	18.9	20.4	21.1	19.4	17.4	18.6	19.1	21.4	22.4	13.6	18.2	19.8
35–49	28.8	30.1	30.8	26.9	30.0	32.2	30.0	31.0	31.3	23.0	24.0	24.0
50–64	24.6	23.3	20.8	22.4	22.7	21.3	25.0	23.2	21.0	29.2	25.4	18.5
65+	15.0	13.0	11.4	18.6	18.7	15.9	13.0	11.3	9.5	22.1	14.7	12.2
Birthplace												
Australia	73.8	76.7	77.2	70.4	70.1	71.8	74.5	77.4	78.5	78.5	80.2	83.4
Overseas	26.2	23.4	22.8	29.6	29.9	28.2	25.5	22.6	21.5	21.5	19.8	16.6
Marital status												
Married/living with partner	64.8	66.1	64.4	63.8	66.3	66.1	65.7	66.9	65.7	58.3	60.2	51.7
Separated or divorced	6.6	5.7	6.9	4.6	4.6	7.5	7.1	5.7	6.6	8.8	7.5	7.1
Widowed	4.2	4.1	2.9	4.8	6.5	4.1	3.7	3.3	2.1	7.2	5.7	4.3
Single	24.4	23.8	25.9	26.8	21.9	22.3	23.5	23.9	25.6	25.6	26.7	36.9
Household type												
Single person	9.3	8.6	9.6	9.6	10.8	12.1	9.1	7.7	8.1	11.0	11.5	12.4
Group household	13.3	11.0	9.2	12.6	9.8	6.9	13.0	11.1	9.5	19.1	12.2	13.4
Couple, no children	26.7	22.3	22.9	24.2	23.7	25.0	27.3	22.1	22.5	30.4	22.7	19.6
One parent family	5.3	4.8	6.0	4.3	4.0	5.9	5.6	5.0	5.6	5.8	5.1	8.5
Two parent family	42.5	50.0	49.1	46.1	48.5	48.3	42.4	51.2	50.7	29.1	43.9	41.2
Other	2.8	3.0	3.2	3.1	2.9	1.7	2.6	2.8	3.6	4.7	4.6	4.9

	Sample			Non-gamblers			Non-regular gamblers			Regular gamblers		
	VIC	PC	ACT	VIC	PC	ACT	VIC	PC	ACT	VIC	PC	ACT
Employment status												
Working full-time	47.7	47.2	54.7	41.9	41.9	47.4	50.1	48.2	57.8	43.7	49.7	53.8
Working part-time	17.2	15.9	14.3	16.0	15.3	14.5	17.6	16.2	14.2	17.4	13.4	14.8
Home duties	8.4	10.0	5.8	8.7	9.2	8.3	8.7	10.7	5.1	4.1	6.4	3.5
Student	6.1	5.6	7.1	12.0	6.6	7.8	4.3	5.4	6.9	3.3	5.1	6.8
Retired (self supporting)	10.4	9.6	13.2	10.1	12.8	16.2	10.2	8.5	12.0	14.0	11.8	12.9
Pensioner	7.0	7.5	2.9	8.3	9.3	2.3	5.9	6.6	2.7	14.4	10.8	5.9
Unemployed	2.3	2.8	1.2	2.2	2.4	2.4	2.3	2.9	0.8	2.8	2.6	1.3
Other	0.9	1.2	0.8	0.8	2.0	1.3	1.0	1.1	0.5	0.4	0.3	1.0
Education												
Up to Year 10/fourth from	19.6	28.6	15.0	17.8	24.6	11.5	19.0	28.1	14.5	33.7	39.3	27.4
Finished high school	28.6	27.7	27.6	24.2	24.0	21.5	29.7	28.3	28.5	33.3	30.3	37.2
TAFE/technical education	8.3	10.5	10.5	8.0	7.8	8.9	8.1	11.3	11.4	10.9	10.5	9.2
CAE/University	43.5	33.2	46.9	50.1	43.7	58.1	43.2	32.3	45.7	22.1	19.8	26.2
Main source of income												
Wage/salary	64.5	61.6	70.5	59.2	52.8	65.3	67.2	64.0	73.5	55.2	60.8	64.6
Own business	13.3	14.6	9.0	17.0	18.2	8.8	12.0	14.2	9.0	12.7	10.7	9.7
Other private income	1.6	3.2	1.6	1.8	4.4	2.3	1.5	3.0	1.2	1.7	2.8	2.2
Unemployment benefit	1.3	2.2	0.7	1.2	2.0	1.8	1.3	2.4	0.2	2.1	1.9	0.8
Retirement benefit	7.2	4.0	11.1	7.2	5.1	13.9	7.2	3.6	10.0	7.6	5.1	10.9
Sickness benefit	0.2	0.2	0.1	0.1	0.3	0.2	0.2	0.2	0.0	0.4	0.1	0.3
Supporting parent benefit	0.8	1.3	0.6	0.8	0.5	0.3	0.8	1.5	0.7	0.8	1.5	1.3
Aged/invalid pension	8.8	9.2	4.3	9.2	12.5	4.4	7.9	7.8	3.6	17.8	13.3	8.7
Other	2.3	2.5	2.1	3.5	2.1	3.9	1.9	2.5	1.8	1.7	2.7	1.4
Income level												
Less than \$10,000	16.9	19.7	10.8	21.4	21.5	13.9	15.4	19.7	9.4	15.9	17.7	11.9
\$10,000–\$24,999	23.7	24.7	16.8	25.5	27.9	17.7	22.5	24.1	15.4	29.6	23.9	23.7
\$25,000–\$34,999	16.4	18.6	15.2	14.4	16.1	14.6	17.0	18.9	14.8	16.5	20.4	19.2
\$35,000–\$49,999	18.4	18.5	23.5	15.0	15.9	18.9	19.4	19.0	25.7	19.6	18.6	20.5
\$50,000 or more	24.7	18.5	33.7	23.6	18.5	34.9	25.7	18.3	34.7	18.5	19.5	24.7

Source: Total respondents. Weighted n = 8,479.

Table 8: Gender and age distribution, by different gambling activities

	Total survey	All gamblers	EGMs	Race betting	Scratch tickets	Lotto etc	Keno	Casino table games	Sports betting
Gender									
Male	48.5	49.1	46.7	53.7	40.9	48.7	56.0	73.2	77.8
Female	51.5	50.9	53.3	46.3	59.1	51.3	44.0	26.8	22.2
Age									
18–24	12.7	12.7	17.7	15.2	13.9	7.8	19.6	37.9	28.9
25–34	18.9	18.7	16.9	22.3	17.9	18.4	20.8	27.9	27.0
35–49	28.8	29.5	24.0	29.7	28.8	31.8	27.6	24.0	26.3
50–64	24.6	25.4	26.4	23.7	25.5	27.4	21.0	7.3	13.2
65+	15.0	13.8	15.1	9.0	13.8	14.6	11.0	2.9	4.7

Source: Total respondents. Weighted n = 8,479.

Internet casino games are omitted because of the small number of cases involved in this form of gambling.

Education

Regular gamblers in Victoria have lower levels of education than for other population segments and for the sample overall. For example, just 22.1 per cent of regular gamblers have a university or CAE education in contrast to 43.5 per cent in the survey sample overall.

67 per cent of regular gamblers have no post-secondary educational attainment compared to less than half of the total survey sample. Although the surveyed Victorian population has a generally higher level of educational attainment than was reported in the Productivity Commission national survey, persons with lower education levels account for the majority of regular gamblers in both studies.

The majority of non-gamblers and non-regular gamblers in Victoria have some post-secondary education.

Income

Regular gamblers surveyed in 2003 tend to have lower incomes than non-gamblers and non-regular gamblers. Only 18.5 per cent of regular gamblers have incomes of more than \$50,000 per annum compared to nearly 25 per cent in the total surveyed Victorian sample.

In contrast, over 45 per cent of regular gamblers are in the lowest two income brackets compared to just 40 per cent of non-gamblers and non-regular gamblers. This pattern differs from the 1999 national survey which found that regular gamblers were slightly over-represented amongst high income groups.

Employment status

There is little difference in gambling participation by employed people in the Victorian survey, regardless of employment status.

However, as in the *Seventh Survey*, students and home duties are under-represented amongst regular gamblers.

Main source of income

Persons receiving aged and invalid pensions are heavily over-represented in the regular gambler segment (17.8 per cent). This is more than double the proportion of such people in the total survey sample.

This cohort was also over-represented amongst regular gamblers in the 1999 national survey and 2001 ACT gambling survey.

Gambler Behaviour

Of the 8,479 Victorian residents who originally agreed to participate in this survey, a core group of 890 persons was asked a wider range of questions. Their participation was selectively sampled according to the details outlined in Figure 1. This sample population of people is composed entirely of gamblers, including all of those who were classified as regular gamblers (n= 433), as well as a random sample of non-regular gamblers who participate in forms other than lottery products (n = 457). The following section provides an overview of the gambling behaviour reported by this cohort of respondents.

Reasons for gambling

When Victorian gamblers in the survey had identified the type of gambling on which they had spent the most money in the last 12 months, they were asked their reasons for gambling on this particular form of gambling. The reasons given vary widely (Table 9):

- For the majority of regular gamblers (70 per cent), gambling is their favourite recreational activity, in contrast to non-regular gamblers (43.6 per cent);
- 69 per cent of all surveyed gamblers nominate socialising with friends as a major reason for gambling. However, this motivation is important for more non-regular gamblers (70.8 per cent) than regular gamblers (61.5 per cent);
- Over 64 per cent of surveyed gamblers agreed that feeling lucky was a reason for their decision to gamble, with more regular gamblers (69.1 per cent) than non-regular gamblers (55.9 per cent) agreeing. However, a large majority of both gambler groups (83.5 per cent and 79.5 per cent respectively) disagreed that they gambled to prove they were lucky;

- The thrill and dream of winning was noted by over 60 per cent of Victorian regular and non-regular gamblers;
- Similarly, adding interest to a game is also reported as a motivation by a large proportion of all surveyed gamblers as a motivation, more so for non-regular gamblers (89.54 per cent) than regular gamblers (80 per cent);
- A slight majority of both gambling groups said that atmosphere and excitement was a motivation for their gambling;
- A majority of both groups of gamblers said that ‘making a quick buck’, talking risks, enhancing their social standing, contributing to worthy causes and the attractions of the venue are not motivations for their gambling;
- Although the majority of surveyed gamblers reported they do not gamble out of boredom to pass the time, more non-regular gamblers (63.1 per cent) than regular gamblers (54.5 per cent) said this was not a reason for their gambling; and
- More non-regular gamblers (76.1 per cent) than non-regular gamblers (60.5 per cent) disagreed that they gambled to test their skill. A majority of both groups also said beating the odds was not a motivation.

Table 9: Reasons for gambling: regular and non-regular gamblers

Statements	Strongly agree (%)	Agree (%)	Neither (%)	Disagree (%)	Strongly Disagree (%)	Don't know/ can't say /refused (%)
Because it's a favourite recreational activity or hobby						
Regular gamblers	24.5	44.5	6.4	20.0	4.5	0.0
Non-regular gamblers	5.0	38.6	5.8	38.3	12.0	0.3
For the thrill or dream of winning						
Regular gamblers	13.8	46.8	3.7	30.3	5.5	0.0
Non-regular gamblers	9.7	52.1	1.9	29.0	6.6	0.7
Out of boredom to pass the time						
Regular gamblers	11.8	30.9	2.7	41.8	12.7	0.0
Non-regular gamblers	6.2	26.4	3.2	50.8	12.3	1.2
Because I like to beat the odds and back a winner						
Regular gamblers	11.0	36.7	2.8	41.3	8.3	0.0
Non-regular gamblers	3.6	38.4	6.8	41.6	8.7	0.9
Because I believe I may get lucky						
Regular gamblers	11.8	47.3	2.7	32.7	5.5	0.0
Non-regular gamblers	5.9	59.0	1.7	27.4	5.8	0.3
To prove I am lucky						
Regular gamblers	2.8	10.1	2.8	67.0	16.5	0.9
Non-regular gamblers	1.4	14.5	4.0	65.2	14.3	32.7
To test my skill						
Regular gamblers	6.4	32.1	0.9	47.7	12.8	0.0
Non-regular gamblers	2.1	18.3	3.2	61.0	15.1	0.3
To make a quick buck						
Regular gamblers	10.0	30.0	1.8	45.5	12.7	0.0
Non-regular gamblers	5.4	39.6	2.2	42.3	10.1	0.4
Because I like to take risks						
Regular gamblers	5.6	25.9	3.7	54.6	10.2	0.0
Non-regular gamblers	2.7	27.6	4.3	54.5	10.3	0.6
To enhance my social standing						
Regular gamblers	0.9	5.5	2.8	64.2	26.6	0.0
Non-regular gamblers	1.3	7.4	2.2	65.1	23.4	0.7
Because money lost goes to a worthy cause						
Regular gamblers	0.9	10.0	1.8	59.1	28.2	0.0
Non-regular gamblers	0.6	5.9	3.7	58.6	30.3	0.8

Statements	Strongly agree (%)	Agree (%)	Neither (%)	Disagree (%)	Strongly Disagree (%)	Don't know/ can't say /refused (%)
For social reasons or to be with friends						
Regular gamblers	8.3	53.2	1.8	30.3	6.4	0.0
Non-regular gamblers	7.1	63.7	4.1	21.4	3.4	0.3
Because of the atmosphere and excitement — it gives me a buzz						
Regular gamblers	10.1	49.5	2.8	32.1	5.5	0.0
Non-regular gamblers	4.5	47.7	5.7	34.5	7.0	0.7
Because I am attracted to the venue itself						
Regular gamblers	4.8	36.9	2.4	45.2	10.7	0.0
Non-regular gamblers	3.5	37.2	6.1	44.2	7.9	1.0
Because it adds interest to listening to or watching the game						
Regular gamblers	20.0	60.0	0.0	0.0	20.0	0.0
Non-regular gamblers	10.5	78.9	0.0	10.5	0.0	0.0

Source. QM2. Respondents who have answered other than don't know/can't say to QM1. Weighted n = 884

Gambling as a social activity

The theme of gambling as a social activity is also identified as a factor in gambling behaviour by most Victorian gamblers surveyed (Table 10).

More than half the respondents state that they gamble with a group of friends. This is more common for non-regular gamblers (52.9 per cent) than regular gamblers (42.8 per cent)

- 45.3 per cent report gambling with family members including a partner;
- 22.3 per cent of all gamblers reported gambling alone. A significantly high proportion of regular gamblers (44.8 per cent) gamble alone.

Table 10: Gambling alone or with others

Response categories (multiple responses)	All gamblers (% yes)	Regular gamblers (% yes)	Non-regular gamblers (% yes)
Alone	22.3	44.8	19.2
With a friend	15.8	20.9	15.0
With a group of friends	51.7	42.8	52.9
With family members including your partner	45.3	41.6	45.8

Source. QF9. All gambling respondents. Weighted n = 906

Frequency of Gambling

Table 3 on page 53 shows the frequency of regular gambling by types of gambling activity. 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 sports betting, internet casino games and 'other' forms of gambling were relatively small; consequently results for those activities are only indicative.

Findings from the *Seventh Survey* are not shown as different categories for gambling have been used in that survey. Broad comparisons between the 2003 and 1999 national survey findings are discussed below.

The frequency of gambling participation in Victoria in 2003 tends to be lower than was recorded nationally by the Productivity Commission in 1999. Overall, a greater proportion of Victorian gamblers play less often than once per month on all comparable forms of gambling than was detected by the Productivity Commission. At the opposite end of the spectrum, the national survey data reported a higher proportion of persons gambling more than three times per week for all comparable forms except sports betting and internet casinos.

As in previous Victorian surveys, lotto/lottery games had the highest level of participation in 2003 (60 per cent) and the highest frequency of participation (65 per cent at least once per month). This is a decrease in regular participation in lotteries (at least once per month) from 72 per cent in 1999.

A significant proportion of Victorian lottery gamblers participate 1–3 times per week (43.5 per cent) which closely reflects the Productivity Commission's national survey findings (44.5 per cent). Despite this high proportion of very regular players, a lower proportion of Victorians participate in lotteries more than three times per week (1.7 per cent) than national levels (6.2 per cent).

Two per cent of Victorian gamblers participate more than three times per week on race betting in 2003. 22.1 per cent of Victorians surveyed bet on races at least once per month, compared with 29.9 per cent in the 1999 national survey. Although direct comparisons with race betting frequency data in the *Seventh Survey* are not possible, the decrease identified in 1999 appears to have continued.

In 2003 30.6 per cent of Victorians surveyed played EGMs at least once per month, a decrease from 33 per cent in the 1999 *Seventh Survey*. Victorian EGM gamblers participate less frequently than Australian machine gamblers overall. In 2003 8.5 per cent of regular EGM gamblers in Victoria participate more than weekly compared to 13.4 per cent nationally. Nearly 70 per cent of Victorian EGM gamblers play less than monthly compared to 62 per cent at the national level. Such findings for EGMs may reflect the generally lower levels of spatial penetration in Victoria compared to some other states.

In 2003 14.4 per cent of Victorians surveyed played casino table games at least once per month, a slight decrease from 15 per cent in the 1999 *Seventh Survey*. In 2003 1.5 per cent of Victorians gambled on casino table games at Crown Casino more than once per week.

Against the general trend, the frequency of internet gambling by a small number of Victorians is higher than the national rates. Although just 0.2 per cent of Victorians surveyed in 2003 played casino games via the internet (half of the national average participation rate of 0.4 per cent), 6.8 per cent of those Victorian internet gamblers did so more than 3 times per week, nearly double the frequency levels reported in the Productivity Commission's 1999 survey. However only 12.8 per cent of that Victorian group reported this gambling activity more than once per week in 2003 compared to 24.5 per cent in the 1999 national survey. The 1999 *Seventh Survey* does not provide frequency rates for this form of gambling.

Table 11 shows the overall frequency of gambling participation by regular and non-regular Victorian gamblers in the 12 months prior to the 2003 survey.

A large majority of regular gamblers (79.9 per cent) participate in some form of gambling at least three times per week, compared with 33 per cent of non-regular gamblers. Over 15 per cent of regular gamblers engage in gambling activity more often than three times per week; and

Almost half the surveyed non-regular gamblers (43.8 per cent) gamble less often than once a month.

Table 11: Frequency of gambling among the Victorian gambling population: regular and non-regular gamblers

Participation rate	All gamblers (%)	Regular gamblers (%)	Non-regular gamblers (%)
Less than 1 time per month	40.3	0.5	43.8
1–3 times per month	20.4	4.1	21.8
1–3 times per week	37.0	79.9	33.2
More than 3 times per week	2.3	15.4	1.2

Source: Total gambling sample. Weighted n = 6369.

Frequency of all gambling — Victorian metropolitan and non-metropolitan regions

The frequency of participation in any form of gambling is broadly similar across the metropolitan and non-metropolitan population (Table 12), although residents in Melbourne metropolitan LGAs gamble slightly less frequently than residents in non-metropolitan regions.

Table 12: Frequency of gambling among the Victorian gambling population: metropolitan and non-metropolitan regions

Frequency	Metropolitan %	Non-Metropolitan %
Less than once per month	41.4	37.3
1–3 times per month	20.5	20.1
1–3 times per week	35.8	40.2
More than 3 times per week	2.3	2.4

Source: Total gambling sample. Weighted n = 6,368.

Duration of Gambling Activities

The time normally spent on different types of gambling varies markedly. This is not surprising, given the different modality and dynamics for each type of gambling. For example, some forms of gambling (e.g. EGM gambling) are continuous and repetitive, with frequent results for players. Others involve a brief transaction (e.g. purchasing a lottery ticket) and/or a longer time between each result (e.g. horse racing, sports betting).

This survey has significant variations in gambling behaviour by Victorians within individual forms of gambling and marked differences in the durations regular and non-regular gamblers spend gambling.

The duration of EGM gambling sessions for most Victorians surveyed is less than 30 minutes (53 per cent). Nearly 20 per cent of EGM gamblers normally play for less than 10 minutes (Table 13).

A sizeable portion of EGM gamblers (over 23 per cent) usually play for more than 60 minutes at a time, with 5 per cent playing for more than 2 hours.

Regular gamblers are less likely (20.5 per cent) than non-regular gamblers (57.8 per cent) to spend short periods (e.g. less than 30 minutes) gambling on EGMs, and more likely to spend more than 90 minutes (47.3 per cent).

Table 13: Time normally spent each time on EGMs: all gamblers

How many hours and minutes do you normally spend each time you play poker machines or gaming machines?	All gamblers (%)	Regular gamblers (%)	Non-regular gamblers (%)
1–10 minutes	19.4	4.7	21.4
11–30 minutes	33.9	15.8	36.4
31–60 minutes	23.0	23.4	23.0
61–90 minutes	4.3	8.8	3.7
91–120 minutes	14.3	27.4	12.6
Above 120 minutes	5.0	19.9	3.0

Source: Respondents are those who answered 'playing poker machines or gaming machines' in response to QM1, i.e. QM6F. Weighted n = 418

Comparison between residents in metropolitan and non-metropolitan LGAs shows the normal duration of each EGM gambling session is higher in the metropolitan region (Table 14).

Over 22 per cent of gamblers in the metropolitan area normally play EGMs for longer than 90 minutes at a time, but only 13 per cent of country gamblers stay on the machines for this duration. In both metropolitan and non-metropolitan areas more than 50 per cent of EGM gamblers normally play for 30 minutes or less.

Table 14: Duration of normal EGM session, metropolitan and non-metropolitan regions

How many hours and minutes do you normally spend each time you play EGMs or gaming machines?	Metropolitan	Non-Metropolitan
1–10 minutes	20.1	18.2
11–30 minutes	32.3	36.6
31–60 minutes	21.3	26.2
61–90 minutes	3.8	5.2
91–120 minutes	15.6	12.0
Above 120 minutes	6.9	1.6

Source. Respondents are those who answered 'playing poker machines or gaming machines' in response to QM1. Weighted n = 418

Similarly divergent patterns are reported by Victorians betting on horse and greyhound racing (Table 15). A large proportion of racing gamblers spend a short amount of time each time they gamble (nearly 50 per cent spend less than 20 minutes) whilst a sizeable portion spend significant amounts of time. Of this group, non-metropolitan gamblers tend to spend less time than metropolitan residents who bet on racing.

Regular gamblers spend longer periods on race betting than non-regular gamblers. For example, 36 per cent spend more than 120 minutes each time they gamble, compared to 19.4 per cent of non-regular gamblers.

Almost 15 per cent of Victorian race bettors (16.7 per cent of metropolitan gamblers and 10 per cent of non-metropolitan gamblers) spend more than 240 minutes each time they gamble.

In 1999 the *Seventh Survey* found that gamblers spent on average 87 minutes on horse racing each (time) day they bet. People who bet on trotting spent on average 67 minutes each (time) day they bet. No information was provided on the time spent on greyhound racing.

Table 15: Time normally spent each time on race betting: all gamblers

How many hours and minutes do you normally spend each time you bet on horse or greyhound races?	All gamblers (%)	Regular gamblers (%)	Non-regular gamblers (%)
1–5 minutes	22.7	7.4	24.8
6–20 minutes	25.9	12.3	27.8
21–30	11.1	6.3	11.8
31–60	10.2	19.9	8.8
61–120 minutes	8.8	18.1	7.4
Above 120	21.5	36.0	19.4

Source. Respondents are those who answered 'betting on horse or greyhound races' in response to QM1. Weighted n = 339

In contrast to EGM gambling and race betting, where one majority group of Victorians participate for short amounts of time and another group have gambling sessions of long duration, casino gambling is characterised by consistently longer periods of gambling (Table 16). The majority of casino table gamblers surveyed (60 per cent) spend in excess of 90 minutes each time they gamble at Crown Casino. Over one third of these respondents report gambling sessions exceeding two hours.

Regular gamblers fall into two groups: those who spend up to 90 minutes each time they gamble at the casino (48.5 per cent) and those who spend over 181 minutes gambling on each occasion (47.4 per cent).

In 1999 the *Seventh Survey* found that gamblers spent on average 86 minutes on casino table games each (time) day they played.

The long duration of a normal casino gambling session is partly a factor of the nature of table games. Although some casino games (e.g. blackjack) may take only 1–2 minutes to complete, others (e.g. roulette) can take longer for all players to place their bets on each game and the results to be known.

The relatively longer periods spent on casino table games also could be related to the location of Crown Casino in central Melbourne. For the majority of Victorians accessibility to the casino is restricted by distance. Therefore the standard pattern for many Victorian casino gamblers is likely to be infrequent visits of longer duration. Such a pattern contrasts with EGMs and race betting where outlets for such activities (clubs, hotels, Tabcorp agencies) are relatively more accessible and thus can be utilised for multiple short visits.

However comparison between metropolitan and non-metropolitan survey respondents (Table 16) also shows a different pattern between non-metropolitan gamblers who play casino table games. Whereas a majority of metropolitan gamblers (57.4 per cent) reported they spent between 91–180 minutes playing casino table games, non-metropolitan gamblers reveal two distinct patterns. One majority group (72.7 per cent) spent less than 90 minutes playing casino table games; the other group (27.3 per cent) spent over 181 minutes. However, the relatively small sample size suggests these findings should be considered with caution.

Table 16: Time normally spent playing casino table games

How many hours and minutes do you normally spend each time you play casino table games, including preparation and time spent at the venue?	All gamblers (%)	Regular gamblers (%)	Non-regular gamblers (%)
1– 30 minutes	20.0	8.1	21.1
31– 90 minutes	19.9	40.4	17.9
91– 120 minutes	26.5	4.1	28.7
121–180 minutes	20.7	0.0	22.7
181–300 minutes	9.6	11.1	9.5
Above 300	3.2	36.3	0.0

Source. Respondents are those who answered 'table games at Crown Casino' in response to QM1. Weighted n = 66.
Firm conclusions cannot be drawn from this table because of small sample sizes.

In contrast to casino table games, the conformation and dynamics of Club Keno (Table 17) and sports betting (Table 18) are such that gamblers are likely to spend relatively short periods gambling on each occasion.

Thirty per cent of Victorians surveyed in 2003 report that they normally spend 1–2 minutes each time they gamble on Club Keno. A further 33 per cent spend less than 10 minutes and over 90 per cent spend less than 30 minutes.

Regular gamblers display a different pattern from non-regular gamblers who tend to gamble for periods less than 30 minutes. The majority of regular gamblers (75.5 per cent) spend more than 30 minutes each time they play Keno.

These responses contrast with the 1999 the *Seventh Survey* which found that Club Keno players spent on average 44 minutes on Club Keno each (time) day they gambled.

It is not clear whether respondents in 2003 incorporated into their calculations the full time for the game or only the time taken to lodge coupons. Indeed it is possible that a combination of both contribute to the results.

A similar situation could have affected the divergent results for sports betting where the majority of respondents in 2003 (75.1 per cent) claim to be involved for less than 15 minutes each time they gamble. A large majority of non-regular gamblers (80.1 per cent) spend less than 15 minutes gambling each time.

In contrast, 10 per cent of sports betting gamblers claim to spend more than two hours each time they participate in sports betting. Unlike each horse and greyhound race, which might take just a few minutes to be completed after the placement of a bet, most sporting events in Australia (cricket, football codes, tennis etc.) take a number of hours to complete once betting has closed for the event. This might explain the divergent responses in the 2003 survey.

In 1999 the *Seventh Survey* found that gamblers spent on average 15 minutes on Footybet each (time) day they gambled. No information was provided on the time spent on other forms of sports betting.

Table 17: Time normally spent playing Keno

How many hours and minutes do you normally spend each time you play Keno at a club, hotel, casino or other place?	All gamblers (%)	Regular gamblers (%)	Non-regular gamblers (%)
1 minute	18.2	0.0	20.1
2 minutes	13.3	24.5	12.1
10 minutes	33.3	0.0	36.7
20 minutes	14.0	0.0	15.5
30 minutes	15.9	20.0	15.5
60 minutes	1.1	11.3	0.0
120 minutes	4.2	44.2	0.0

Source. Respondents are those who answered 'Playing Club Keno at a Victorian club or hotel/Crown Casino' in response to QM1. Weighted n = 12. Firm conclusions cannot be drawn from this table because of small sample sizes.

Table 18: Time normally spent on sports betting

How many hours and minutes do you normally spend each time you gamble on a sporting event like football, cricket or tennis, including preparation and time spent at the venue?	All gamblers (%)	Regular gamblers (%)	Non-regular gamblers (%)
1-5 minutes	18.4	23.0	17.3
6-10 minutes	25.3	21.4	26.3
11-15 minutes	31.4	11.1	36.5
16-30 minutes	11.0	16.1	9.7
31-120 minutes	3.7	18.2	0.0
Above 120 minutes	10.2	10.2	10.2

Source. Respondents are those who answered 'betting on a sporting event' in response to QM1. Weighted n = 24. Firm conclusions cannot be drawn from this table because of small sample sizes.

Taking breaks and keeping track of time

Gambler respondents were asked a series of questions about their behaviour during a gambling session.

- Over 65 per cent report taking breaks during gambling (Table 19);
- The most common reason for taking a break is to drink (56.9 per cent) (Table 20);
- Other common reasons are to socialise (27.1 per cent), to eat (26.9 per cent), to smoke (22.8 per cent) and to go to the toilet (21.5 per cent);
- 5 per cent take a break to get money from the ATM;
- Of the 19.8 per cent of those who gave 'other' reasons for taking a break, race and sports gamblers and bingo gamblers appear to take advantage of defined opportunities for breaks in gambling between events;
- Several EGM gamblers take a break from the physical and mental pressure of playing the machines.

Table 19: Taking breaks when gambling: regular gamblers

Response categories	%
Yes	65.6
No	33.6
Refused	0.2
Don't know/can't remember	0.6

Source. QF14. Respondents are regular gamblers. Weighted n = 446

Table 20: Reasons for taking a break: regular gamblers

Response categories	%
Eat	26.9
Drink	56.9
Smoke	22.8
Toilet	21.5
Talk with friends	27.1
To get change, money from ATM	5.0
Other	19.8
Don't know/can't remember	0.3
Refused	0.4

Source. QF15 'Why do you usually take a break?' Respondents are regular gamblers who answered 'yes' to the previous question (F14). Weighted n = 292

When asked how they usually kept track of time when gambling (Table 21):

- 43 per cent of gamblers report they use a watch;
- 24.8 per cent refer to a clock in the room;
- Significantly, 21.3 per cent said they don't keep track of time when gambling;
- Of the 15.2 per cent who said they used 'other' ways of keeping track of time, a large majority said they used 'clocks on the machines';
- Racing and sports gamblers said that they kept track of time 'by the starting time of races' or 'from TV';
- Bingo players use 'breaks between each session so you can keep track of time';
- Several gamblers used their spending pattern to measure the time spent gambling:
 - Only spend \$20 and when that's gone, that's it;
 - By what is happening with the money. If I make a profit I leave;
 - I don't keep track. I continue gambling till my money runs out.

Table 21: Keeping track of the time when gambling: regular gamblers

Response categories	%
Clock in room	24.8
Watch	43.0
Ask someone	1.1
Other	15.2
I don't keep track	21.3
Don't know/can't remember	2.1
Refused	0.0

Source. QF16. Respondents are regular gamblers. Weighted n = 446.

Regional gambling patterns

Respondents were asked where they mainly gamble (Table 22).

- No single location dominates when examining the most common venue type for gambling
- Over 20 per cent of gamblers nominate clubs, hotels, newsagents and TAB outlets;
- Casinos (17.8 per cent) and racetracks (11 per cent) also figure relatively highly;
- More non-regular gamblers than regular gamblers mainly gamble at a casino, newsagent and racetrack;
- More regular gamblers than non-regular gamblers mainly gamble at a club, hotel, TAB agency and from home;
- A small percentage of gamblers (3.3 per cent) cite home-based gambling as their main point of interaction. The use of technology (telephone, internet) allowing home-based gambling does not appear to be having a major impact on traditional 'shop front' outlets for gambling.

Table 22: Main venue type for gambling: all gamblers

Location (multiple responses)	All gamblers (% yes)	Regular gamblers (% yes)	Non-regular gamblers (% yes)
A casino	17.8	11.0	18.7
A club	23.3	34.3	21.8
A hotel	21.2	32.7	19.6
A newsagent	22.5	7.6	24.6
A racetrack	11.0	8.3	11.4
A TAB agency	23.3	29.8	22.4
From home via the Internet	0.6	1.0	0.6
From home via telephone	2.7	9.2	1.8
Other	3.0	3.6	2.9

Source: QM5. All gambling respondents. Weighted n = 906

- Traditional TAB agencies and racetrack bookmakers are still the dominant location for placing bets in Victoria;
- Despite not being the main form of bet placement for many people, the telephone is used by more than 10 per cent of persons betting on horse and greyhound races (Table 23). Many more regular gamblers (34.4 per cent) use this location and the internet for placing bets than non-regular gamblers (8.1 per cent);
- Overall, only 1.3 per cent of racing gamblers report ever using the internet as a means to place bets;
- The preference for TAB outlets is even more pronounced for people who make sports bets (88.6 per cent). Only 1.7 per cent of this group mainly use the internet and 1.5 per cent use bookmakers (Table 24);
- No respondents reported using a TAB phone account for sports betting. However 8.5 per cent of regular sports gamblers mainly use the internet.

Table 23: Main location for racing bets: all gamblers

Location (multiple responses)	All gamblers (% yes)	Regular gamblers (% yes)	Non-regular gamblers (% yes)
At a race track	38.9	38.7	39.0
At off course venue such as TAB agency, Pub TAB or Club TAB	77.0	84.0	75.9
By phone	10.6	29.2	7.4
Via the Internet	1.3	5.2	0.7

Source: QF22. Respondents are regular and non-regular gamblers who gambled on 'horse or greyhound races at a racetrack/Horse or greyhound races at an off-course venue such as a TAB agency, Pub TAB or Club, by telephone or over the internet', according to QS4. Weighted n = 521.

Table 24: Main location for sports bets: all gamblers

Categories	All gamblers (%)	Regular gamblers (%)	Non-regular gamblers (%)
Via the Internet	1.7	8.5	0.0
TAB outlet (such as a TAB Agency, ClubTAB, PubTAB)	88.6	83.8	89.8
TAB phone account	0.0	0.0	0.0
Bookie	1.5	7.7	0.0
Can't say/don't know	8.1	0.0	10.2

Source: QM12. Respondents are those who had their largest gambling expenditure for 'betting on a sporting event', according to QM1. Weighted n = 24. Firm conclusions cannot be drawn from this table because of small sample sizes.

Location for gambling — regions

Variations exist between metropolitan and non-metropolitan regions in the favourite gambling locations by residents (Table 25):

- Clubs and hotels are the most frequent gambling locations of residents in non-metropolitan precincts, especially for regular gamblers;
- In the Melbourne metropolitan area a more uniform pattern includes Crown Casino, newsagencies, TAB outlets, clubs and hotels;
- 25.6 per cent of metropolitan residents nominate TAB outlets as one of their most frequent venues although three types of gambling with the highest participation rates (lotteries, scratchies and EGMs) are not sold via TABs;
- The non-metropolitan pattern is perhaps a reflection of the greater centrality of hotels and clubs in rural life, where they may serve as a principal location for social activities, community services and functions.

Table 25: Main gambling locations (all gamblers): metropolitan and non-metropolitan regions

In the last 12 months, have you mainly gambled at... (multiple responses)	Metropolitan %	Non-Metropolitan %
A casino	21.1	9.2
A club	18.1	36.8
A hotel	18.7	27.7
A newsagent	22.5	22.5
A racetrack	10.9	11.2
A TAB agency	25.6	17.3
From home via the Internet	0.6	0.6
From home via telephone	2.6	2.9
Other	3.2	2.6

Source: QM5. All gambling respondents. Weighted n = 906.

Expenditure

Victorian gamblers were asked a series of questions about their patterns of gambling expenditure. Results reported in this section are from those gamblers who were included in the core interview, unless otherwise reported.

A note of caution is required when considering survey responses on gambling expenditure. Self-reported expenditure data in gambling surveys have been consistently unreliable, with little relationship to real expenditure levels as recorded by official sources. For example, expenditure on EGM and casino gambling are commonly under-reported by survey respondents by as much as 30–60 per cent.³¹ For this reason, and the need to keep the survey length within practical limits, this survey did not ask questions on specific amounts spent on gambling.

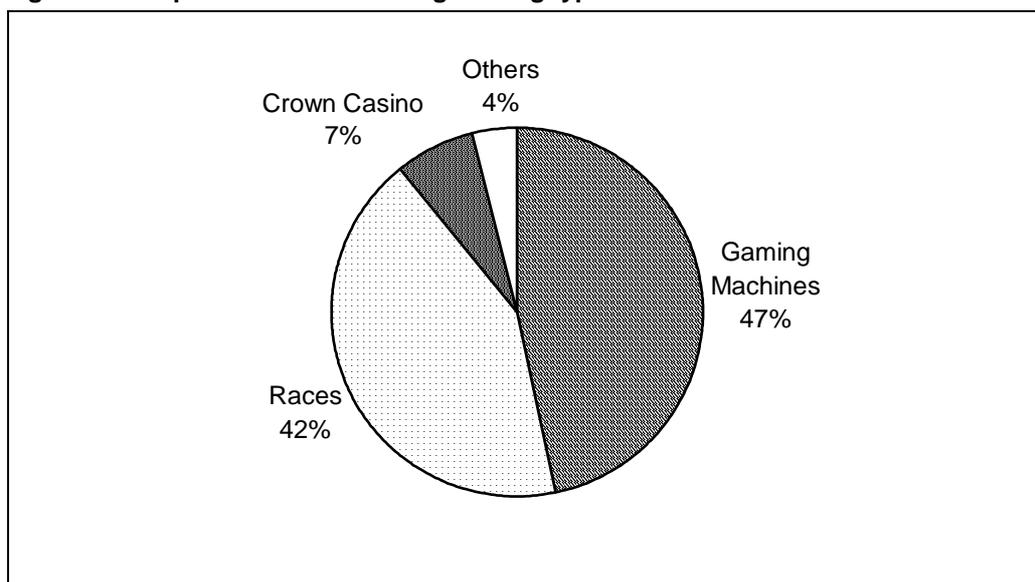
³¹ See for example, J.McMillen et al. 2001 *Survey of Gambling and Problem Gambling in the ACT*.

When the 'don't know' category is excluded and the field of gambling types is narrowed to the four major fields, EGMs and race/sports betting are reported as the main forms of gambling expenditure (Figure 5);

In 2003, 46.2 per cent of Victorian gamblers report that they spent more money on EGMs than on any other form of gambling during the previous 12 months (Table 26):

- Race betting is the favourite form of gambling, as measured by expenditure, for 38 per cent of Victorian gamblers;
- Other forms of gambling are appreciably less popular as the principal form of gambling expenditure.

Figure 5: Expenditure: combined gambling types



Source: All gambling respondents: QM1

Table 26: On which gambling activity have you spent the most money overall in the last 12 months?

Gambling activity	All gamblers (%)	Regular gamblers (%)	Non-regular gamblers (%)
Playing poker machines or gaming machines	46.2	45.7	46.2
Betting on horse or greyhound races	38.0	38.6	37.9
Playing Club Keno at a Victorian club or hotel	0.9	.8	1.0
Playing Club Keno at the Crown Casino	0.3	.2	.4
Playing table games at Crown Casino	7.3	5.3	7.5
Betting on a sporting event	2.7	4.5	2.4
Other	2.2	4.1	1.9
Don't know / Can't say	2.5	0.8	2.7

Source: QM1. All gambling respondents: Weighted n = 906.

Expenditure on gambling — regions

The survey showed variations in reported patterns of gambling expenditure by residents in metropolitan and non-metropolitan LGAs (Table 27):

- EGMs (42.7 per cent) and race betting (41.5 per cent) both rate highly amongst metropolitan gamblers in terms of reported expenditure;
- Country residents reported similar patterns with EGMs rating the highest (59.2 per cent) followed by race betting (32.6 per cent);

- All other forms of gambling are more popular with metropolitan residents than with non-metropolitan gamblers.

Table 27: Gambling expenditure: metropolitan and non-metropolitan regions

Activities (multiple response)	Metropolitan %	Non-Metropolitan %
EGMs	42.7	59.2
Race betting	41.5	32.6
Keno	1.4	1.1
Table games at casino	8.6	4.6
Sports betting	3.2	1.6
Other	2.7	1.0

Source: All gambling respondents. Weighted n = 906.

Expenditure — behaviour of gamblers

All Victorian gamblers in the core survey were asked to report on whether they spent more on gambling than intended (Table 28):

- The majority of Victorian gamblers say they never or rarely spend more than planned;
- Less than 5 per cent report that they often or always spend more than planned;
- However, 36 per cent of regular gamblers say they sometimes/always spend more than intended, compared with 3.4 per cent of non-regular gamblers.

Table 28: Spending more than planned on gambling: all gamblers

Response categories	All gamblers (% yes)	Regular gamblers (% yes)	Non-regular gamblers (% yes)
Never	48.9	26.4	52.0
Rarely	29.5	32.7	29.0
Sometimes	16.7	25.5	15.5
Often	2.5	10.0	1.5
Always	2.3	5.5	1.9

Source: QF11. All gambling respondents. Weighted n = 906. The survey question specified that this meant the maximum amount they are prepared to be out of pocket, but does not include money won and then spent.

- More than 60 per cent of Victorians say they rarely or never spend their gambling winnings during the session in which they were won (Table 29);
- 46.4 per cent of regular gamblers sometimes/always spend their winnings, compared with 37.1 per cent of non-regular gamblers;
- Whilst the results here must be taken on face value, it is possible that interpretations of what constitutes a 'winning' could influence the results. In particular, EGM players and race bettors, for example, can win many small amounts during a long gambling session and to 'reinvest' those 'winnings'. Because such wins may be small in scale and occur during a single session respondents may not have considered them as 'winnings'.

Table 29: Spending winnings: all gamblers

Response Categories	All gamblers (% yes)	Regular gamblers (% yes)	Non-regular gamblers (% yes)
Never	44.5	33.6	46.0
Rarely	17.3	20.0	16.9
Sometimes	26.8	31.8	26.1
Often	6.7	9.1	6.3
Always	4.8	5.5	4.7

Source: QF12. All gambling respondents. Weighted n = 906.

Table 30 highlights what Victorians report they would otherwise have done with money expended on gambling had they not used it for gambling. Responses by regular and non-regular gamblers are relatively similar on most statements.

- The most common response was that the money would have been saved (16 per cent). Such moneys are in effect expenditure diverted from future purposes. More regular gamblers (26 per cent) than non-regular gamblers (14.6 per cent) would have done this;
- Other categories which figure prominently — entertainment and recreation (14.6 per cent), personal items (12.7 per cent) and restaurants/takeaways (12 per cent) — can be termed discretionary expenditure items. It is such retail services that can be negatively impacted by increased gambling activity;
- More non-regular gamblers (15.3 per cent) would have spend the money on entertainment than would regular gamblers (9.1 per cent);
- Nearly 10 per cent of Victorian gamblers say they have curtailed their grocery and household expenditure to spend that money on gambling;
- Seven per cent say they have diverted money from bills and rent/mortgage payments in the past 12 months;
- These findings suggest that 17 per cent of Victorian gamblers may be depriving themselves or their families of goods and services which are considered necessities;
- A substantial majority of Victorian gamblers report that they rarely or never withdraw money before they gamble; or withdraw money from an ATM at the venue; or withdraw money at the cashier; or withdraw money using their credit card; or obtain money by cashing cheques (Table 31);
- Over 25 per cent of Victorian gamblers report they use ATMs in the venue sometimes or often when they gamble. More regular gamblers (32.8 per cent) than non-regular gamblers (24.5 per cent) do this;
- Over 8 per cent of people report using their credit cards to obtain cash when they gamble. More regular gamblers (9.1 per cent) than non-regular gamblers (6.2 per cent) do this. It is not clear if these transactions occur away from the gambling venue;

Table 30: Where gambling money would otherwise have been spent

Statements	All gamblers (% yes)	Regular gamblers (% yes)	Non-regular gamblers (% yes)
Spent it on groceries or small household items	9.8	9.9	9.8
Put it towards major household goods e.g. TV, refrigerator	3.2	1.8	3.4
Spent it on personal items e.g. clothing, footwear	12.7	11.8	12.7
Spent it on restaurant meals/takeaway food	12.0	6.3	12.8
Spent it on alcohol	6.8	10.0	6.3
Spent it on the movies or a concert	4.8	1.8	5.3
Spent it on other entertainment or recreation activities	14.6	9.1	15.3
Used it to pay bills/credit cards	5.8	6.4	5.7
Used it to pay rent/mortgage	1.3	1.8	1.1
Would spend it on children/grandchildren/family	2.7	3.6	2.6
Would spend it on petrol	1.0	0.9	1.0
Would spend it on cigarettes	1.1	1.8	1.0
Would donate it to charity	0.4	0.9	0.4
Buy magazines/books	1.0	0.0	1.0
Travel/holiday	1.1	1.8	1.0
Motor vehicle purchase/repairs	1.3	1.8	1.1
House renovations/repairs	0.7	0.9	0.6
Music/videos/DVDs	0.2	0.0	0.3
Spent it on other items (please specify)	7.4	7.2	7.4
Not spent it/saved it/put it in bank	16.0	26.4	14.6

Source: QM4. All gambling respondents. Weighted n = 906.

Table 31: Source of money when gambling

Statements	Never (%)	Rarely (%)	Sometimes (%)	Often (%)	Always (%)
Withdraw money before you gamble	47.0	5.4	21.4	7.2	19.0
Regular gamblers	40.0	7.3	23.6	12.7	16.4
Non-regular gamblers	47.9	5.2	21.1	6.4	19.4
Withdraw money from the ATM at the venue	64.7	9.8	15.5	5.8	4.2
Regular gamblers	56.4	10.9	19.1	7.3	6.4
Non-regular gamblers	65.9	9.6	15.0	5.6	3.9
Withdraw money at the cashier	83.5	5.6	7.3	1.2	2.3
Regular gamblers	79.8	9.2	6.4	2.8	1.8
Non-regular gamblers	84.0	5.1	7.5	1.0	2.4
Withdraw money using your credit card	91.8	1.7	4.1	1.3	1.1
Regular gamblers	86.4	4.5	6.4	1.8	0.9
Non-regular gamblers	92.5	1.3	3.8	1.3	1.1
Obtain money by cashing cheques	97.0	1.2	0.7	0.4	0.7
Regular gamblers	94.6	0.9	2.7	0.9	0.9
Non-regular gamblers	97.3	1.3	0.4	0.4	0.6

Source: QF13. All gambling respondents. Weighted n = 906.

Victorian gamblers were asked if they had borrowed to gamble or pay debts in the last 12 months. Possible sources for borrowing were read out (Table 32).

- The overwhelming majority of respondents reported that they had not borrowed money to gamble or pay gambling debts;
- Household money is the most common source of ready funds for gambling;
- A small percentage of gamblers indicated that had rarely/sometimes used household money (6.6 per cent), or borrowed money from spouse or partner (3.8 per cent) or other relatives or in-laws (3 per cent);
- Another small proportion of gamblers said they often/always used household money (4.9 per cent);
- Others sometimes/often borrowed money from credit cards (1.5 per cent) and banks or finance companies (1.4 per cent).

Table 32: Borrowing money to gamble or pay debts from gambling

Statements	Never (%)	Rarely (%)	Sometimes (%)	Often (%)	Always (%)	Don't know/ can't remember (%)
Household money	87.5	2.3	4.3	1.8	3.1	0.9
Your spouse or partner	95.7	1.7	2.1	0.4	0.1	0.1
Other relatives or in-laws	96.8	1.1	1.9	0.2	0.0	-
Credit cards	96.8	0.3	1.4	1.2	0.3	-
Banks or finance companies	98.1	0.5	0.3	1.1	-	-
Credit Unions or pay day lenders	98.8	0.1	1.1	-	-	-
Loan sharks	98.8	-	0.3	-	-	0.9
Other	95.6	0.1	0.4	0.5	0.1	3.3

Source. Respondents are those in the core interview except SOGS sub-sample — QX1. Weighted n = 345.

Personal impacts of gambling

When asked what effect gambling had on their enjoyment of life:

- Nearly three quarters of Victorian gamblers surveyed state that gambling has no influence on their enjoyment of life (Table 33);
- 4.4 per cent indicated that gambling had made life less enjoyable;
- On the other hand, over 20 per cent stated that life was more enjoyable because of their gambling activities;
- These responses are comparable to the findings of the 2001 *ACT Gambling Survey* and the 1999 Productivity Commission national survey.

On this issue, there is little difference between the metropolitan and non-metropolitan groups of regular gamblers (Table 34). In both cases the majority of persons reported that gambling made no difference to their lives.

Table 33: Impact of gambling on enjoyment of life (all gamblers)

Response categories	%
A lot more enjoyable	2.3
A little more enjoyable	18.7
Made no difference to your life	74.6
A little less enjoyable	2.8
A lot less enjoyable	1.4
Refusal	0.2

Source: QM3. Respondents who answered other than don't know/can't say to the previous question (M1). Weighted n = 884.

Table 34: Impact of gambling on enjoyment of life (all gamblers): metropolitan and non-metropolitan regions

Response categories	Metropolitan %	Non-Metropolitan %
A lot more enjoyable	2.6	1.4
A little more enjoyable	18.6	19.2
Made no difference to your life	74.4	75.6
A little less enjoyable	2.7	3.0
A lot less enjoyable	1.6	0.8

Source: QM3. Respondents who answered other than don't know/can't say to the previous question (M1). Weighted n = 884.

Table 35: Adverse personal impacts of gambling (all gamblers)

Has your gambling ever...	Never (%)	Rarely (%)	Sometimes (%)	Often (%)	Always (%)	Don't know/ can't remember (%)
Adversely affected how well you perform in your job	97.2	1.2	1.0	0.4	0.0	0.2
Resulted in you changing jobs	99.5	0.1	0.4	-	-	-
Resulted in your dismissal from work	99.6	0.4	-	-	-	-
Left you with not enough time to look after your family's interests	97.7	0.6	1.3	-	0.0	0.1
Resulted in you being declared bankrupt	99.3	0.2	0.0	0.5	-	-
Led to the breakup of an important relationship in your life, such as divorce or separation	98.9	0.5	0.4	-	0.2	0.0
Led you to obtain money illegally, even if you intended to pay it back	99.4	0.0	0.3	-	-	0.3
Led to trouble with the police	100.0	0.0	-	-	-	-

Source: QX2. Regular gamblers. Weighted n = 446.

Adverse personal impacts of gambling

For the majority of Victorians surveyed in 2003 gambling is an enjoyable activity. However, for a small proportion of the population gambling can become a source of harm to themselves and others. Table 35 above illustrates some of these negative impacts for Victorian gamblers in the 12 months preceding the survey.

- 2.1 per cent of Victorian gamblers report that on occasions gambling has adversely affected the time available to look after their family's interests;
- 0.6 per cent report that gambling had resulted in the breakdown of personal relationships;
- 2.6 per cent report that gambling has adversely affected their performance at work in the preceding 12 months;
- A further 2.1 per cent had experienced some adverse employment impacts from gambling.

These findings are broadly comparable to the 1999 national survey but slightly lower than reported by ACT gamblers in 2001. The adverse effects of gambling for problem gamblers in Victoria are examined later in this report.

Gambling history

Table 36 summarises when surveyed gamblers report they first became involved with the activity.

- Most Victorian gamblers first participated in the activity early in their adult years. More than half started gambling between the ages of 18 and 24 years of age;
- Nearly 20 per cent reported they were involved with gambling before they were legally entitled to;
- Betting on races is the main gambling activity that Victorians first participated in, followed by lotteries and EGMs (Table 37);
- 21 per cent of respondents cited EGMs as their first form of gambling. Whilst some of this group may have gambled on the poker machines in other states, it is likely that a proportion of this group started gambling in the last decade after EGMs were introduced to Victoria in 1992.

Table 38 shows that the majority of Victorians first gambled with friends and family members.

Table 36: Age started gambling or betting

Age Group	%	Age Group	%
under 18	19.7	50-54	1.6
18-19	29.1	55-59	0.7
20-24	23.1	60-64	0.5
25-29	9.1	65-69	0.1
30-34	7.7	70 or more	0.2
35-39	2.1	Refused	0.1
40-44	3.5	Can't say/Don't know	1.4
45-49	1.1	Refused	0.1

Source: All gambling respondents in the core interview. Q.F1— Weighted n = 906.

Table 37: First gambling activity

Response categories	%
Poker machines or gaming machines	21.3
Horse or greyhound races excluding sweeps	47.1
Instant scratch tickets, lottery tickets or any other lottery	22.7
Keno at a club, hotel casino or other places	0.4
Table games in a casino such as blackjack or roulette	2.6
Sporting event like football, cricket or tennis	1.6
Any other gambling activity excluding sweeps	3.6
Don't know/can't remember	0.7

Source: All gambling respondents in the core interview. Q.F2 — Weighted n = 906.

Table 38: Who first gambled with

Response categories	%
At school	2.9
With your friends	38.7
With your family	37.3
By yourself	18.2
Refused	0.1
Other	1.3
Don't know/can't remember	1.5

Source: QF3. All gambling respondents in the core interview. Weighted n = 906.

Changing patterns of participation

The survey findings that participation in some types of gambling (EGMs, casino table games, bingo) seem to be decreasing in Victoria are further supported by gamblers' self-assessment of their overall gambling patterns over the preceding 12 months (question QF4 of the survey).

The majority of regular gamblers have maintained their established patterns of activity. While overall participation in EGM gambling has increased, a significant proportion of people who have decreased their gambling activity have been EGM gamblers.

- The majority of Victorians surveyed (67.6 per cent) claim not to have changed their gambling activity;
- 27 per cent report they have decreased their overall gambling involvement during the previous 12 months;
- In contrast, just 5.4 per cent report they have increased their gambling activity;
- Of those persons who claimed to have increased their gambling activity, 40.6 per cent report increased race betting and 36 per cent have increased EGM gambling (Table 39);
- Of those who report they have decreased their gambling, over 50 per cent nominate EGMs (Table 40);
- Decreased participation in lottery and scratch tickets (31.8 per cent), race betting (21.1 per cent) and casino table games (11.9 per cent) are also reported.

Table 39: Gambling activities increased in the last 12 months

Response categories	Yes %
Poker machines or gaming machines	36.0
Horse or greyhound races excluding sweeps	40.6
Instant scratch tickets, lottery tickets or any other lottery game like Lotto, Powerball or OzLotto.	11.3
Keno at a club, hotel, casino or other place	0.0
Table games at a casino such as blackjack or roulette	11.9
Sporting event like football, cricket or tennis	9.9
Casino games on the Internet	0.0
Any other gambling activity excluding sweeps	0.7
No activities	0.0
Don't know/can't remember	4.4
Refused	0.5

Source: QF5. Respondents are those who answered 'increased' to the previous question (F4). Weighted n = 49.

Table 40: Gambling activities decreased in the last 12 months

Response categories	Yes (%)
Poker machines or gaming machines	50.2
Horse or greyhound races excluding sweeps	21.1
Instant scratch tickets, lottery tickets or any other lottery game like Lotto, Powerball or OzLotto.	31.8
Keno at a club, hotel, casino or other place	8.5
Table games at a casino such as blackjack or roulette	15.1
Sporting event like football, cricket or tennis	5.1
Casino games on the Internet	0.1
Any other gambling activity excluding sweeps	1.1
No activities	13.2
Don't know/can't remember	2.7
Refused	0.0

Source: QF6. Respondents are those who answered 'decreased' to the previous question (F4). Weighted n = 245.

- Relatively few people surveyed (19.7 per cent) have taken up new forms of gambling or stopped their existing activities (Table 41);
- The majority of Victorians (78.3 per cent) have not changed their range of gambling activities during the 12 months prior to the survey;
- At the same time, over 80 per cent claim they have not stopped playing any form of gambling in the past 12 months (Table 42);
- While 31.8 per cent claim to have decreased activity in lotteries, another 6.6 per cent have started gambling on lotteries in the past 12 months;
- A large proportion of surveyed gamblers report they have decreased (50.2 per cent) or stopped (5.9 per cent) their poker machine activity in the past year.

Table 41: Gambling activities started in the past 12 months

Response Categories	Yes (%)
Poker machines or gaming machines	4.2
Horse or greyhound races excluding sweeps	4.3
Instant scratch tickets, lottery tickets or any other lottery game like Lotto, Powerball or OzLotto.	6.6
Keno at a club, hotel, casino or other place	0.3
Table games at a casino such as blackjack or roulette	4.7
Sporting event like football, cricket or tennis	1.4
Casino games on the Internet	0.0
Any other gambling activity excluding sweeps	0.1
No activities	78.3
Don't know/can't remember	2.0
Refused	0.0

Source: QF7. All gambling respondents in the core interview. Weighted n = 906.

Table 42: Gambling activities stopped in the past 12 months

Response categories	Yes (%)
Poker machines or gaming machines	5.9
Horse or greyhound races excluding sweeps	2.8
Instant scratch tickets, lottery tickets or any other lottery game like Lotto, Powerball or OzLotto.	5.2
Keno at a club, hotel, casino or other place	0.7
Table games at a casino such as blackjack or roulette	3.6
Sporting event like football, cricket or tennis	0.9
Casino games on the Internet	0.0
Any other gambling activity excluding sweeps	0.3
No activities	80.5
Don't know/can't remember	2.7
Refused	0.0

Source: QF8 — All gambling respondents in the core interview. Weighted n = 906.

EGM gambling

This section relates only to persons who have gambled on EGMs in the previous 12 months, whether a regular gambler or non-regular gambler. As the major form of gambling operating in Victoria, a more extensive analysis of EGM gambling behaviour is provided than for other types of gambling.

Of persons who reported using EGMs more often than any other type of gambling:

- More than half have played EGMs at a club or hotel in the previous year (Table 43);
- Hotels/pubs were nominated as the *most common* location for EGM gambling by more than 40 per cent of EGM gamblers, compared to 26.9 per cent for the second ranked venue type, sporting clubs (Table 44);
- RSL clubs (25 per cent) and the Crown Casino (22 per cent) were the least nominated venues for EGM gambling.

Table 43: Types of venues where poker machines/EGMs played

In the last 12 months, have you mainly gambled at (multiple responses)	Yes (%)
Pub or hotel	51.3
Licensed sports club (golf, football, bowls, etc)	39.1
RSL club	25.5
Melbourne Crown Casino	22.3
Or somewhere else (specify)	2.3
Can't say/Don't know	0.2

Source: QM6a. Respondents are those who answered 'playing poker machines or gaming machines' in response to QM1. Weighted n = 418.

Table 44: Most common venue where poker machines/EGMs played

Response categories	Yes (%)
Pub or hotel	42.4
Licensed sports club (golf, football, bowls, etc)	26.9
RSL club	14.0
Melbourne Crown Casino	12.4
Or somewhere else (specify)	2.0
Can't say/Don't know	2.3

Source: QM6b. Respondents are those who answered 'playing poker machines or gaming machines' in response to QM1. Weighted n = 418.

- Reinforcing the survey finding identified earlier that people often gamble for social reasons, 75.5 per cent of EGM gamblers visit gaming venues predominately for a social outing (Table 45);
- However 13.8 per cent of EGM gamblers report visiting gaming venues specifically to gamble; another 6.8 per cent visit both socialise and to gamble. For many Victorians the presence of gambling facilities is a factor in their decision to patronise these venues;

- Linked jackpots are a relatively minor factor in determining the choice of venue for EGM gambling. 77.3 per cent of EGM gamblers never visit a venue because it has linked jackpots (Table 46);
- A further 9.9 per cent of EGM gamblers did not know what linked jackpots are.

Table 45: Main reason for visiting poker machine/EGM venues

Specifically to gamble (%)	For a social outing (%)	Both (%)	Varies (%)	Can't say/don't know (%)
13.8	75.5	6.8	1.4	2.5

Source. QM6e. Respondents are those who answered 'playing poker machines or gaming machines' in response to QM1. Weighted n = 418.

Table 46: Visit venues specifically to play machines with linked jackpots

All the time (%)	Sometimes (%)	Every now and then (%)	Never (%)	Don't know what linked jackpots are (%)
3.8	3.5	5.5	77.3	9.9

Source. QM6d. Respondents are those who answered 'pub or hotel' in response to M6b. Weighted n = 177.

The choice of EGM venue appears to be influenced by local accessibility rather than work or travel-related factors.

- More than 57 per cent of EGM gamblers travelled less than 5 kilometres to the last venue where they played machines. Most of these people (32.3 per cent) travelled less than 2.5 kilometres. (Table 47);
- Furthermore, a large majority (82.7 per cent) went to an EGM venue directly from home, whilst a further (8.2 per cent) went after work (Table 48);
- Only 8.4 per cent travelled to an EGM venue from somewhere else outside of work or home.

Table 47: Distance travelled to most recent EGM venue

Response categories	Yes (%)
Less than 2.5 kilometres	32.3
Less than 5 kilometres	25.0
5 to less than 10 kilometres	20.8
10 to less than 15 kilometres	7.6
15 to less than 20 kilometres	2.2
More than 20 kilometres	10.1
Don't know/can't say	2.0

Source. QM7. Respondents are those who answered 'pub or hotel' in response to M6b. Weighted n = 177.

Table 48: Where travelled from to get to most recent EGM venue

Response categories	Yes (%)
Home	82.7
After work	8.2
During a break from work	0.7
Somewhere else	8.4

Source. QM8. Respondents are those who answered 'pub or hotel' in response to M6b. Weighted n = 177.

Distance travelled to gamble on EGMs — regional analysis

Not surprisingly, the distance travelled to access EGMs is significantly higher in non-metropolitan LGAs than in the Melbourne metropolitan area (Table 49).

- In both cases the distance travelled by more than 50 per cent of persons is less than 5 kilometres;
- The 21 per cent of persons who travel more than 20 kilometres is likely to represent those persons living out of towns and/or persons resident in one of the LGAs with no EGM venues who travel to nearby towns.

To summarise the above survey findings on EGM behaviour, the strongest issues to emerge are:

- The majority of Victorian EGM gamblers do not travel out of their local neighbourhoods to access the machines;
- There is little evidence to suggest that EGM users actively seek out particular venues for their gambling facilities;
- Rather, the majority of people who have played EGMs did so as a part of a wider social outing, usually to a pub or club in their immediate neighbourhood.

Table 49: Distance travelled for gambling on EGMs: metropolitan and non-metropolitan regions

Last time you played at a club or pub, how far did you travel?	Metropolitan %	Non-Metropolitan %
Less than 2.5 km	39.7	14.4
Less than 5 km	19.3	42.7
5 to less than 10 km	24.7	11.9
10 to less than 15 km	7.9	7.3
15 to less than 20 km	2.0	2.8
More than 20 km	6.5	21.0

Source: Respondents are those who answered 'playing poker machines or gaming machines' in response to QM1. Weighted n = 418.

EGM gambling behaviour

In response to survey questions about more detailed use of specific machine features, it appears that the smaller denomination machines are most popular with Victorian gamblers, particularly 5 cent machines.

- 39.2 per cent of EGM gamblers favour 5c machines (Table 50);
- A further 35 per cent tend to use machines of a lower denomination;
- The majority of Victorian EGM gamblers (86.4 per cent) play more than one line at a time (Table 51);
- However, fewer people increase their stakes on each spin via multiple credits. Less than half report doing so, approximately the same number who play only one credit per line (Table 52).

Table 50: Denomination of EGMs usually played

Response categories	%
1 cent machine	13.3
2 cent machine	21.7
5 cent machine	39.2
10 cent machine	7.4
20 cent machine	4.6
50 cent machine	.1
\$1 machine	3.4
\$2 machine	.3
Higher than \$2 machine	.8
Combination of the above	5.6
Don't know/Can't say	3.6

Source: QF17. Respondents are regular and non-regular gamblers who answered 'poker machines or gaming machines' to QS4. Weighted n = 572.

Table 51: Number of lines played on EGMs

Response categories	%
More than one line	86.4
One line only	10.7
Don't know/can't remember	2.8

Source: Respondents are regular and non-regular gamblers who answered 'poker machines or gaming machines' to QS4. Weighted n = 572.

Table 52: Betting more than one credit per line

Response categories	%
More than one	47.9
One	46.5
Don't know/can't remember	5.6

Source. QF19. Respondents are regular and non-regular gamblers who answered 'poker machines or gaming machines' to QS4. Weighted n = 572.

The last two issues in this section deal with gaming machine and venue features which have come under criticism from anti-gambling lobbyists — note acceptors and venue loyalty cards.

- The largest proportion of Victorian EGM users state that they never use note acceptors on EGMs (39 per cent) (Table 53);
- However 49.2 per cent report use note acceptors sometimes; and
- Over 22 per cent of EGM gamblers use them often or always;
- Nearly 75 per cent of regular gamblers use note acceptors at least sometimes compared to less than 45 per cent of non-regular gamblers.

These responses suggest that note acceptors are accepted by a majority of Victorian EGM gamblers (60.9 per cent).

In contrast:

- Loyalty cards do not appear to be popular amongst Victorian EGM players with just 20 per cent claiming to make use of them (Table 54);
- The Crown Casino loyalty scheme has a higher level of involvement, but the majority of Victorians who mostly play EGMs at Crown Casino (62.4 per cent) report that they do not use this facility (Table 55).

Table 53: Use of note acceptors in EGMs/poker machines

	All gamblers	Regular gamblers	Non-regular gamblers
Do you insert notes into poker machines?			
Never	39.0	16.9	42.8
Rarely	11.7	8.0	12.3
Sometimes	26.6	28.2	26.3
Often	7.7	18.1	5.9
Always	14.9	28.0	12.7

Source. QF20. Respondents are regular and non-regular gamblers who answered 'poker machines or gaming machines' to QS4. Weighted n = 572.

Table 54: Use loyalty card in EGMs

Response categories	%
Do use loyalty card	20.2
Don't use loyalty card	79.3
Don't know/can't remember	0.5

Source. QF21. Respondents are regular and non-regular gamblers who answered 'poker machines or gaming machines' to QS4. Weighted n = 572.

Table 55: Are you a member of Crown loyalty club?

Yes (%)	No (%)	Don't know (%)
32.7	62.4	4.9

Source. QM6c. Respondents are those who answered 'Melbourne Crown Casino' in response to M6b: And which of (READ OUT OPTIONS) do you mostly play poker machines) at? Weighted n = 52.

Problem Gambling

As outlined earlier, the 2003 *Victorian Community Attitudes Survey* used three different screens to measure the prevalence of problem gambling among regular gamblers. Each screen was assigned randomly to approximately the same weighted numbers of regular gamblers — SOGS (n = 150), CPGI (n = 141) and VGS (n = 155) (see Figure 1).

We have then compared the results of the survey using each of the three screens. This has allowed comparison with the findings of previous Victorian surveys, the Productivity Commission *National Survey*, the 2001 ACT *Gambling Survey* and the 2001 *Queensland Household Survey*.

This survey also incorporated a range of other questions including:

- questions about the possible harmful impacts of gambling (such as the effects on employment and relationships) in the past 12 months;
- self-perception questions about the extent of gambling problems; and
- questions about the need for and attempts to obtain help for gambling problems.

However, this survey did not utilise the HARM prevalence measure which was formulated for the Productivity Commission's 1999 survey and replicated in the 2001 ACT survey.

Problem gambling and the 2003 Victorian gambling survey

The prevalence rates for problem gambling in the general population measured by the three screens ranged from 0.74 per cent (VGS 21+), 0.97 per cent (CPGI) to 1.12 per cent (SOGS 5+).

Note: In the companion publication, Validation of the Victorian Gambling Screen 2003, the VGS estimated a one-year prevalence of 0.74 per cent with a cut-off of 21+ (standard error of estimate 0.18 per cent with a 95 per cent confidence interval of 0.42 - 1.06 per cent) and 1.22 per cent with a cut-off score of 15+ (standard error of estimate 0.21 per cent with a 95 per cent confidence interval of 0.82 - 1.62 per cent).

Overall the survey findings suggest an estimated problem gambling prevalence rate of approximately 1 per cent in Victoria's adult population. This is higher than the SOGS prevalence rate found in the 1999 *Seventh Survey* (0.8 per cent), but lower than the SOGS prevalence rate for Victoria in the Productivity Commission's 1999 national survey (2.01 per cent).

A further estimated 1 per cent of Victoria's adult population are moderate-risk gamblers. Non-problem and low-risk gamblers make up the rest of Victoria's adult population (approximately 98 per cent).

Statistical tests determined that the breakdown of socio-demographic characteristics associated with problem and non-problem gambling in the surveyed Victorian population did not significantly differ between the three screens.

These findings were obtained in the following manner. Out of the 8,479 initial survey participants, 525 (or 6.2 per cent) of the weighted sample were classified as regular gamblers, on the basis of an initial assessment of their gambling involvement. These regular gamblers were investigated further by one of three problem gambling screens — VGS, CPGI and SOGS.

The three screens differ in their composition of questions, their response formats and thus their coding and cut-off scores. These screens were used in parallel with separate survey cohorts to assess and compare their measurement qualities (Figure 1). Comparative analysis of the merits and limitations of the three screens is discussed in detail in the separate *Gambling Screen Validation Report* for this study. For the present purpose in this report, the focus is to estimate the one-year prevalence rate of problem gambling and to define a problem gambling group for further profiling and analysis.

In addition to those Victorian respondents who scored on the screens as 'problem gamblers', the various screening instruments have been used to identify other 'at risk' groups of gamblers, thus allowing a more graded classification of gamblers into different risk groups.

- Authors of the SOGS suggested a distinction, on the basis of SOGS scores, between 'non-pathological' gamblers (SOGS score of 0 to 2), possible pathological gamblers (3–4) and probable pathological gamblers (5+).³² In the original version of the SOGS the questions were framed in 'lifetime' terms ('have you ever ...?'). Since that time, most Australian prevalence surveys, including the Productivity Commission national study and the 2001 ACT gambling survey, have defined problem gambling as a score of 5 or more on a 12 month version of the SOGS. Often also a group of severe 'pathological' gamblers is defined as having a SOGS score of 10+;
- Likewise, the CPGI is designed to distinguish four gambler groups: non-problem gamblers (CPGI score of 0), low-risk gamblers (1–2), moderate-risk gamblers (3–7) and *problem gamblers* (8–27).³³ This screen was developed specifically for application to the general population, in contrast to SOGS which was developed for a clinical population in treatment;
- Finally, in development of the VGS, interviewers identified 'borderline gamblers' on the brink of problem gambling.³⁴ Taking interview outcomes as valid criteria, the authors of the VGS determined cut-off points on the screen for three categories of gamblers: non-problem gamblers (VGS score of 0 to 8), borderline problem gamblers (9–20), *problem gamblers* (21+).

Following the methodology of previous surveys in Victoria and elsewhere, screens were administered to regular gamblers to obtain the prevalence rates for all forms of gambling among those respondents.

To estimate the prevalence of problem gambling groups among the general population, based upon this survey population, further assumptions are required:

- Namely, it is assumed that high-risk problem gamblers are only found among regular gamblers, but not among non-regular gamblers;
- Likewise, it is reasonable to assume that moderate-risk gamblers are also only found among people who gamble regularly;
- The number of problem gamblers and moderate-risk gamblers identified in the sub-sample of regular gamblers is thus assumed to be equal to the number of moderate-risk gamblers that would have been found in the unrestricted total sample.

³² Lesieur and Blume 1987. 'The South Oaks Gambling Screen. A new instrument for identification of pathological gamblers'. *American Journal of Psychiatry*, 144 (9), pp.1184-8.

³³ Ferris & Wynne, 2001. *The Canadian Problem Gambling Index: User Manual*. Report to the Canadian Inter-Provincial Task Force on Problem Gambling.

³⁴ Ben Tovim, D., Esterman, A., Tolchard, M. 2001. *The Victorian Gambling Screen*. Gambling Research Panel: Melbourne.

Based on these assumptions and the 2003 survey data, the Victorian adult population prevalence rates can be estimated as in Table 56.

Table 56: Prevalence estimates for the three problem gambling screens

Screen	Group label	Score	Prevalence among regular gamblers	Estimated population prevalence
VGS	Non-problem gamblers	0-8	72.7%	98.36%
	Borderline gamblers	9-20	14.5%	0.90%
	Problem gamblers	21+	12.0%	0.74%
CPGI	Non-problem gamblers	0	37.9%	} 98.13%
	Low-risk gamblers	1-2	31.9%	
	Moderate-risk gamblers	3-7	14.7%	0.91%
	Problem gamblers	8+	15.6%	0.97%
SOGS	Non-pathological gamblers	0-2	66.4%	97.93%
	Possible pathological gamblers	3-4	15.4%	0.95%
	Probable pathological gamblers	5-9	13.3%	0.82%
	Severe problem gamblers	10+	4.9%	0.30%

Source: Respondents are regular gamblers. Weighted n = 446.

Among the regular gambler population surveyed, the VGS identified 12.0 per cent, the CPGI identified 15.6 per cent and the SOGS identified 18.2 per cent as problem gamblers, based on the cut-off conventions for the three screens (i.e. scores of 21+ for VGS, 8+ for CPGI and 5+ for SOGS).

Multiplying these rates with the probability of being a regular gambler (0.062) yields the following estimated one-year prevalence rates of problem gambling in the Victorian adult population:

- VGS (score of 21+): 0.74 per cent problem gamblers;
- CPGI (score of 8+): 0.97 per cent problem gamblers;
- SOGS (score of 5+): 1.12 per cent problem gamblers.

That is, with some variation between the screens:

- About 15 per cent of regular gamblers in the 2003 Victorian survey are identified as problem gamblers, translating to an estimated one-year prevalence rate of about 1 per cent in Victoria's adult population;
- Another estimated 15 per cent of regular gamblers in the surveyed population could be borderline cases with a moderate risk of having (or possibly developing) a gambling problem. These are classified as moderate-risk gamblers in CPGI terms, or borderline problem gamblers [VGS] or 'possible pathological' gamblers [SOGS5+]. This again translates to an estimated one-year prevalence rate of about 1 per cent in Victoria's adult population;
- Non-problem and low-risk gamblers (or non-pathological gamblers) make up the rest of Victoria's adult population (approximately 98 per cent);
- Across all three gambling screens, it is estimated that around 70 per cent of regular gamblers in Victoria did not have a gambling problem over the one-year period of the survey.

As measured by SOGS 5+ the overall figures (assuming problem gambling prevalence rate of 1 per cent, a severe problem gambling rate of 0.3 per cent and an adult Victorian population of 3,475,197) suggest that in 2003 approximately 34,751 adults in the Victorian population could have gambling problems, with 10,425 of them experiencing severe problems (SOGS 10+).

In the US it is suggested that people scoring SOGS 3–4 are also at risk of gambling problems. In this Victorian survey this would account for 33,015 being at-risk of gambling problems. However this lower threshold would likely generate an unacceptable number of false positives amongst the problem gambling population.

We emphasise, however, that the application of such screens in population surveys can only provide a broad tentative indication of the prevalence of gambling problems in the community. As noted by the Chairman of the Productivity Commission: ‘all survey gambling screens are likely to underestimate the extent of problem gambling — however they may choose to define it — simply because people have a natural reluctance to reveal the facts about such matters’.³⁵

It is likely that the inherent downward bias of survey data is particularly marked with ‘problem gamblers’. In the Commission’s 1999 survey of self-confessed problem gamblers in counselling, ‘only 29 per cent said they would have responded to a survey honestly; one-third said they would have concealed their problems, and some 24 per cent said they would have refused to answer the survey!’.³⁶

If that response pattern has been replicated in this 2003 survey, the problem gambling prevalence data presented here is merely symptomatic of a much larger problem in the Victorian community.

Comparisons — Victoria and other surveys

Comparison of the 2003 Victorian problem gambling prevalence results with previous Australian surveys can provide different outcomes, depending on the screen being compared. The time lapse between surveys also can affect the comparative results. Factors such as policy change, population trends and changes in the type and availability of gambling opportunities between surveys can all influence the incidence and prevalence of problem gambling.

- Because the VGS has not been used previously in a population survey, no comparisons can be made with that particular screen;
- The CPGI has been utilised only once previously in Australia — in the 2001 *Queensland Household Survey* — where a similar result was reported (0.83 per cent score of 8+);
- However, comparison of the 2003 Victorian results with the 2001 ACT and 1999 Productivity Commission national surveys — which both used SOGS — reveals a lower rate of problem gambling in Victoria than in either of the other studies. At the SOGS 5+ level, the ACT (1.91 per cent) and the Productivity Commission national (2.07 per cent) and Victorian (2.14 per cent) findings (2.07 per cent) are all notably higher than the 1.12 per cent prevalence rate reported in this survey;³⁷
- At the severe level (SOGS 10+) the 2003 prevalence rate recorded in Victoria (0.3 per cent) was closer to, but lower than scores for the ACT (0.45 per cent) and Productivity Commission national (0.33 per cent) and Victoria (0.82 per cent).

³⁵ G. Banks 2002. ‘The Productivity Commission’s gambling inquiry: 3 years on’. Paper presented to the 12th Annual Conference of the National Association for Gambling Studies (NAGS), Melbourne, p.4.

³⁶ *ibid*, p. 4.

³⁷ State prevalence estimates from the Productivity Commission’s *National Gambling Survey* are less reliable than the national estimates due to smaller sample sizes.

Who are the problem gamblers?

This question has been pursued in two steps:

- First, we investigated what characterises problem gamblers among the group of regular gamblers. In other words, on which attributes do Victorian problem gamblers differ from other regular gamblers? This analysis is important in order to get an indication of which factors and social conditions lead to problems with gambling, while not ignoring the base rates of these factors and conditions among regular gamblers in general. That is, certain socio-demographic variables are likely to be over or under-represented among regular gamblers generally; but which are the variables that characterise problem gamblers more specifically?;
- Second, the characteristics of problem gamblers were compared with the gambling and non-gambling parts of the Victorian adult population in general (as represented in our study).

Regular gamblers with and without gambling problems

In this survey, three problem gambling screens were used for the primary purpose of their validation under equivalent conditions.³⁸ This raises the problem that the criteria for problem gambling may differ between the instruments. While there are some similarities in the screens, they use different questions, different response formats and different cut-off scores. Thus not one group, but three different groups of problem gamblers would need to be investigated. In a first step, it was therefore tested statistically whether the three groups of problem gamblers (as identified by the three screens) vary in their socio-demographic characteristics.

Statistical tests were undertaken to determine whether the breakdown of problem and non-problem gambling for the various characteristics as displayed in Table 57 was significantly different between the three screens. Log-linear models were applied for this purpose with the three factors — gambling group, screen and characteristic. According to the chi-square statistic, the type of screen did not affect the relation between problem gambling and any of the characteristics, except for education (see the Note to Table 57). On this basis, it was decided to disregard the type of screen as a factor.

It is important for public policy to know whether there are any sub-groups in the general population with specific socio-demographic characteristics who may record a higher prevalence of problem gambling.

Table 57 shows the relationship between having a gambling problem or not and the main socio-demographic variables. In the two left-hand columns, it can be seen how the respective variable is distributed *within* each gambling group (adding up to 100 per cent for each group); In the two right-hand columns, it can be seen how each instance of the characteristic is distributed *across* the two gambling groups (adding up to 100 per cent for each characteristic);

For example, on gender, 61.2 per cent of problem gamblers were male and 38.8 per cent were female, while 65.5 per cent of non-problem (regular) gamblers were male and 34.5 were female. Conversely, 14.2 per cent of regularly gambling males had a gambling problem and 85.8 per cent did not; and 16.7 per cent of regularly gambling females had a gambling problem and 83.3 per cent did not.

³⁸ The results of the screen validation tests are provided in a separate *Gambling Screen Validation Report*.

The distribution did not differ significantly between males and females (both had a one-year prevalence rate of close to the overall average of 15 per cent among regular gamblers). That is, while males are more strongly represented among problem gamblers, this is because they are already more strongly represented among regular gamblers. Regular gambling males are not more prone to having a gambling problem than regular gambling females.

The socio-demographic variables that showed a significant relationship with problem gambling (among regular gamblers in Victoria) were:

- Age and gender. Problem gambling is more prevalent among Victorian males aged between 30–60 than younger or older adults;
- Born overseas or of non-English-speaking background (NESB). Problem gambling is more prominent among Victorian adults who were born outside Australia, whose mother was born outside Australia, whose father was born outside Australia and whose main language at home is not English. These variables partly overlap;
- Employment status. A higher proportion of Victorians who were unemployed (and to some degree those with home duties) had gambling problems than gamblers with a different employment status;
- Metropolitan residence. Problem gambling was more prevalent among Victorians living in metropolitan areas than among those living in rural areas;
- Income source. Problem gambling tended to be more frequent among those Victorians who derived their main income from social security payments (other than age pension);
- Marital status was marginally significant. Problem gambling tended to be more prevalent among divorced or separated adults in Victoria.

Table 57: Problem gambling among regular gamblers and socio-demographic variables

Characteristic	Distribution of characteristic among ...		Distribution within groups of ...	
	Problem gamblers %	Non-problem gamblers %	Problem gamblers % (overall 15%)	Non-problem gamblers % (overall 85%)
Gender				
Male	61.2	65.5	14.2	85.8
Female	38.8	34.5	16.7	83.3
Age**				
18–24	4.9	14.9	6.7	93.3
25–34	17.6	14.1	18.5	81.5
35–49	33.8	21.8	21.9	78.1
50–64	36.8	27.9	19.2	80.8
65+	5.9	21.5	4.7	95.3
Born overseas**				
Yes	33.8	19.3	24.0	76.0
No	66.2	80.7	12.9	87.1
Mother Australian**				
Yes	50.0	70.0	11.4	88.6
No	50.0	30.0	23.1	76.9
Father Australian**				
Yes	47.1	68.0	11.1	88.9
No	52.9	32.0	22.9	77.1
English spoken at home**				
Yes	86.6	97.9	13.6	86.4
No	13.4	2.1	52.9	47.1
Indigenous Australian				
Yes	1.5	2.4	10.0	90.0
No	98.5	97.6	15.4	84.6

Characteristic	Distribution of characteristic among ...		Distribution within groups of ...	
	Problem gamblers %	Non-problem gamblers %	Problem gamblers % (overall 15%)	Non-problem gamblers % (overall 85%)
Marital status[†]				
Married or living with partner	52.9	59.8	13.7	86.3
Separated or divorced	16.2	7.4	28.2	71.8
Widowed	4.4	7.7	9.4	90.6
Single	26.5	25.1	15.9	84.1
Household type				
Single person	15.9	10.2	21.3	78.7
Group (related or unrelated)	15.9	20.5	11.9	88.1
Couple, no children (at home)	20.6	34.1	9.6	90.4
One parent family	9.5	5.5	23.1	76.9
Two parent family	38.1	29.6	18.3	81.7
Employment status^{***}				
Working full-time	53.0	42.3	18.0	82.0
Working part-time	16.7	17.8	14.1	85.9
Home duties	6.1	4.0	21.1	78.9
Student	0.0	3.7	0.0	100.0
Retired (self supporting)	3.0	16.0	3.2	96.8
Pensioner	12.1	14.6	12.7	87.3
Unemployed	9.1	1.6	50.0	50.0
Education^a				
Up to Year 10/fourth from	37.9	33.2	16.9	83.1
Finished high school	31.8	33.5	14.5	85.5
TAFE/technical education	7.6	11.1	10.9	89.1
CAE/University	22.7	22.2	15.5	84.5
Main source of income[†]				
Wage/salary	60.6	56.7	16.3	83.7
Own business	15.2	12.9	17.5	82.5
Superannuation/Aged pension	12.1	24.0	8.4	91.6
Social security payment	12.1	6.3	25.8	74.2
Income level				
Less than \$10,000	8.6	17.0	8.3	91.7
\$10,000–\$24,999	31.0	29.0	16.1	83.9
\$25,000–\$34,999	24.1	15.1	22.2	77.8
\$35,000–\$49,999	17.2	20.4	13.2	86.8
\$50,000–\$69,999	10.3	8.6	17.6	82.4
\$70,000 or more	8.6	9.9	13.5	86.5
Location[†]				
Metropolitan	82.4	70.4	17.4	82.6
Rural	17.6	29.6	9.7	90.3

Note: For each characteristic, chi-square tests were conducted to establish whether the distribution of problem and non-problem gambling cases differed significantly as a function of the characteristic. It is indicated when distributions differed significantly at the †10 per cent, *5 per cent, **1 per cent, or ***0.1 per cent level of error probability, based on the weighted sample of 446 regular gamblers.

^a For education level, the statistical results differed significantly between the three problem gambling screens. This was mainly due to differences between the screens in identifying problem gamblers among people with TAFE/technical education. According to VGS and CPGI there were no problem gamblers among this group, whereas according to SOGS 41.7 per cent of them were problem gamblers. However, the sample size of the TAFE/technical education subgroup was generally very low and the results may be a chance event.

Prevalence of problem gambling across types of gambling

The following section examines the distribution of problem gamblers participating in different modes of gambling. Many Victorians have low exposure to gambling, even if they participate from time to time. It is therefore appropriate to calculate prevalence rates for people based on the frequency and type of gambling participation.

The overall sample of ‘problem gamblers’ in this analysis include problem gambling respondents identified across all three screens. However, the number of problem gamblers recorded for each mode reflects responses to the question ‘on which gambling activity have you spent the most money

overall in the last 12 months?’ Those particular samples therefore do not indicate the total number of problem gamblers who participated in that gambling mode.

Regular (on average weekly) gambling on EGMs, racing and casino table games is a significant indicator of an increased likelihood of problem gambling.

- As found in previous Australian surveys, the large majority of problem gamblers (84.2 per cent) report they spent most money on EGMs in the preceding 12 months (Table 58, Figure 6);
- Betting on races and/or a sports event is the preferred type of gambling for 8.8 per cent of Victorian problem gamblers; and
- Casino gambling, both table games and playing Club Keno at Crown Casino, is the favourite type of gambling for 5.1 per cent of problem gamblers in this survey.

EGMs in particular are associated with problem gambling for a significant proportion of Victorian regular gamblers. More than one in five regular EGM players score 5 or more on the SOGS5+ screen.

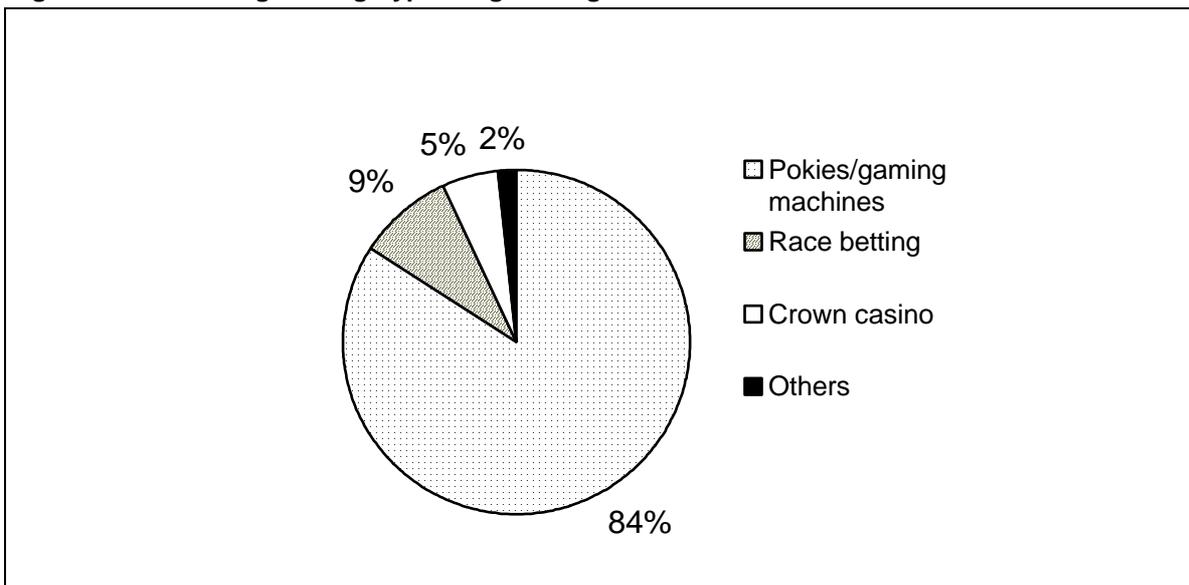
- As shown in Table 59, the proportion of problem gamblers who prefer EGMs (27.8 per cent) is substantially higher than the average for all forms of gambling (15 per cent);
- 13 per cent of Victorian problem gamblers prefer casino gambling, a significantly lower rate than EGMs and below the average for gambling overall; and
- Betting on horse or greyhound races or a sporting event was the third favourite type of gambling among problem gamblers (8.8 per cent).

Table 58: Favourite of types of gambling among problem gamblers

Gambling activity	%
Playing poker machines or gaming machines	84.2
Betting on horse or greyhound races/Betting on a sporting event	8.8
Playing table games at Crown Casino	5.1
Other	1.8

Source: QM1. All problem gamblers. Weighted n = 68.

Figure 6: Problem gambling: types of gambling



Source: Problem gamblers. The 'favourite' mode is defined as the gambling activity respondents said they spent most money on in the last 12 months, QM1.

As suggested above, regular gambling on EGMs, casino games and, to some extent, racing present a specific risk for problem gambling in Victoria. A comparison of socio-demographic characteristics of problem gamblers, by their favourite type of gambling, is presented in Table 60. Due to the relatively small sample size, only broad indications of socio-demographic trends can be made.

Table 59: Proportion of problem gamblers among regular gamblers by favourite type of gambling

Favourite mode of gambling	Percentage of problem gamblers (average 15%)
EGM/poker machines	27.8
Race betting	3.5
Keno	0.0
Table games at casino	13.0
Sport betting	0.0
Other	6.3

Source: Problem gamblers (weighted n = 68). Consistent with the Productivity Commission 1999 national survey and ACT 2001 gambling survey, the 'favourite' mode is defined as the gambling activity respondents said they spent most money on in the last 12 months, QM1.

Table 60: Socio-demographic profile of problem gamblers by favourite type of gambling

Profiling variables	Types of gambling			
	Pokies/gaming machines	Betting	Crown Casino Table games & Keno	Other*
Gender				
Male	33	5	3	1
Female	24	1	1	1
Age				
18-24	1	0	3	0
25-34	11	1	0	0
35-49	20	2	0	1
50-64	22	2	1	1
65+	3	1	0	0
Born overseas				
Yes	18	2	2	0
No	39	4	1	1
Main language English				
Yes	49	6	2	1
No	8	0	2	0
Employment status				
Working full-time	27	6	3	0
Working part-time	9	0	1	1
Home duties	3	0	0	0
Student	0	0	0	0
Retired (self supporting)	2	0	0	1
Pensioner	8	0	0	0
Unemployed	6	0	0	0
Other	0	0	0	0
Income level (Respondent)				
Less than \$10,000	5	0	0	1
\$10,000-\$24,999	17	0	1	1
\$25,000-\$34,999	10	3	2	0
\$35,000-\$49,999	9	1	0	0
\$50,000 or more	9	2	1	0
Income level (Household)				
Less than \$20,000	4	0	0	0
\$20,000-\$39,999	6	1	0	0
\$40,000-\$59,999	6	3	2	1
\$60,000-\$79,999	6	0	0	0
\$80,000-\$99,999	10	0	0	0
\$100,000 or more	5	1	1	0
Household type				
Single person	9	0	0	1
Group household	10	0	0	0
Couple, no children	7	4	2	0

Profiling variables	Types of gambling			
	Pokies/gaming machines	Betting	Crown Casino Table games & Keno	Other*
One parent family	5	0	0	0
Two parent family	22	1	0	1
Other	0	0	0	0
Education				
Up to Year 10/4 th form	21	2	1	1
Finished high school	17	3	1	0
TAFE/technical education	3	0	2	0
CAE/University	14	1	0	0
Location				
Metropolitan	49	3		1
Rural	8	3	1	0

Source: Problem gamblers. Weighted, n = 68. Consistent with the Productivity Commission 1999 national survey and ACT 2001 gambling survey, the favourite mode of gambling was based on the question 'On which gambling activity have you spent the most money overall in the last 12 months?' (QM1).

* Includes bingo, sports betting other than TAB, cards and raffles and sweeps

Pokies/gaming machines

Playing EGMs/pokies was the favourite type of gambling among problem gamblers (84.2 per cent). The distinguishing socio-demographic attributes of problem gamblers who preferred playing EGMs are:

- Male;
- 35–64 years old;
- Australian born;
- English as main language at home;
- Working full-time;
- Personal income from \$10,000 to \$24,999 per annum;
- Household income more than \$79,999 per annum;
- Two-parent family with dependent children;
- Educated up to high school; and
- Living in metropolitan area.

In general, middle-aged Australian born men with lower personal income and no post-secondary education were more likely to experience difficulties with pokies/gaming machines. The most prominent factor is the location of these gamblers. Eighty-six per cent of this sample were from a metropolitan area. Half of these problem gamblers had full-time employment and more than one-third of them were from two-parent families with dependent children.

Betting on races or sports

Betting on horse or greyhound races or a sporting event was the second favourite type of gambling among problem gamblers (8.8 per cent). The key socio-demographic characteristics of this sample are:

- Male;
- 35–64 years old;
- Australian born;
- English as main language at home;

- Working full-time;
- Personal income more than \$25,000 per annum;
- Household income from \$40,000 to \$59,999 per annum;
- Couple with no children (couple with no children and/or two parent family with children not at home); and
- Educated up to high school.

As opposed to EGMs/poker machines, the main characteristics for problem gamblers who spent most money on betting are:

- All respondents are English speaking at home and working full-time;
- The majority of the respondents were male (83 per cent);
- Couples with no children (80 per cent);
- Educated up to high school (83 per cent);
- Earning between \$25,000 and \$34,999 (60 per cent) per annum; and
- Having family income between \$40,000 to \$59,999 (60 per cent) per annum.

There are no differences in their residential location (metro, non-metro) among these problem gamblers.

Crown Casino gambling

Playing table games and Club Keno at the Crown Casino were reported as the third highest favourite type of gambling by problem gamblers in this survey. The key socio-demographic profiles of this sub-population are:

- Male;
- Between 18 to 24 years old;
- Born outside Australia;
- Working full-time;
- Personal income between \$10,000 and \$34,999 per annum;
- Household income from \$40,000 to \$59,999 per annum;
- Couples with no children;
- Educated up to TAFE/technical education; and
- Living in metropolitan area.

Problem gamblers who preferred 'playing Club Keno at the Crown Casino/playing table games at Crown Casino' emerged as a distinct group from gamblers who prefer EGMs/poker machines and betting. Problem gamblers in this subgroup were more likely to be younger (between 18 to 24 years) with a foreign-born background. However, there was no difference between the groups in the language used at home, which suggests that a proportion of casino problem gamblers may be second generation immigrants.

In summary, across the three types of gambling:

- Problem gamblers were more likely to be male with an English speaking background at home. But men are also over-represented in the groups of regular gamblers, from which problem gamblers in this survey were drawn;
- Most problem gamblers across the modes are working full-time; and
- Problem gamblers were also more likely to have relatively low levels of education (less than tertiary degrees) and low personal incomes.

However, problem gamblers in Victoria differ in terms of other variables. For example:

- Those who play pokies/gaming machines were most likely from two-parent households, whereas those who prefer either betting or Crown Casino games were most likely from a 'couple with no children' household;
- In contrast to the problem gamblers who play pokies and/or betting, the Crown Casino gamblers were younger³⁹ and were born overseas;⁴⁰ and
- No regional difference was found for problem gamblers who prefer betting, whereas problem gamblers who prefer EGMs or casino gambling were more likely to live in the metropolitan area.

Gambling participation by problem gamblers — regional patterns

Table 61 shows that the pattern of gambling participation is relatively similar for problem gambler residents in both metropolitan and non-metropolitan regions. Note that this table represents participation rates, not favourite form of gambling.

- In both cases EGMs stand out as the most frequent form of gambling followed by lotteries/scratch tickets and race betting;
- There are higher participation rates in casino games amongst problem gamblers resident in metropolitan areas; and
- Nearly 29.1 per cent of non-metropolitan problem gamblers have bet on sporting events compared to 19.8 per cent of the metropolitan cohort.

A number of metropolitan problem gamblers also use internet casinos whilst no survey respondents in the country areas nominated this form of gambling.

Table 61: Gambling activities of problem gamblers in the last 12 months: metropolitan and non-metropolitan regions

Activities (multiple response)	Metropolitan	Non-Metropolitan
EGMs	94.3	86.6
Race betting	48.9	58.8
Scratch tickets	40.5	47.7
Lotteries	76.3	81.2
Keno	19.1	14.5
Table games at casino	23.5	11.4
Sports betting	19.8	29.1
Casino games on Internet	1.8	0.0

Source: Problem gamblers. Weighted n = 68.

³⁹ This is similar to the 2001 ACT study which found that casino table game players were more likely to be under 25 years of age.

⁴⁰ This is in contrast to the 2001 ACT study which reported that casino table game players were mostly Australia-born.

Gambler Groups: Problem Gambling Continuum

As found by the Productivity Commission, problem gambling occurs along a continuum, ranging from severe gambling problems to moderate levels of risk to low risk gambling. Each of the three prevalence screens used in this survey incorporate that principle into their measures. Based on the survey responses, social profiles of three gambling groups along the problem gambling continuum have been identified (Table 62).

Problem gamblers

- About 1 per cent of the Victorian population are estimated to be problem gamblers;
- 61.2 per cent of problem gamblers are male, which is significantly more than the proportion of males in the general population (48.5 per cent). However, this is partly due to a greater share of regular gamblers being male (64.9 per cent). Among male regular gamblers, 14.2 per cent have a gambling problem, which is about the same as the ratio of problem gamblers among female regular gamblers (16.7 per cent);
- Regular gamblers between 35 and 49 years old are over-represented among problem gamblers. Generally, problem gamblers are disproportionately found among the age groups 50–64 (36.8 per cent) and 35–49 (33.8 per cent), compared to their shares in the general population (28.8 per cent and 24.6 per cent, respectively);
- 24 per cent of regular gamblers of non-English speaking background have a gambling problem. Similarly, 28.2 per cent of regular gamblers who are separated or divorced and 25.0 per cent of regular gamblers on social security benefits have a gambling problem;
- A large majority of problem gamblers spent most of their money on electronic gaming machines (85.1 per cent);
- Problem gambling appears to be related to other problems such as a family history of gambling (36.8 per cent of problem gamblers report a family history of problem gambling), alcohol and drug consumption while gambling (43.6 per cent), serious feelings of depression (59.0 per cent) and suicidal tendencies (11.1 per cent);
- 52.9 per cent of problem gamblers wanted help in the last 12 months for problems related to their gambling, and 37 per cent had sought counselling or some other form of assistance.

Moderate-risk gamblers

- Approximately another 1 per cent of the Victorian population are moderate-risk gamblers;
- Overall, an estimated 15.2 per cent of regular gamblers in Victoria are at moderate risk;
- 59.7 per cent of moderate-risk gamblers are male, and 40.1 per cent are female. However, relative to the overall proportion of females among regular gamblers (35.1 per cent), females are slightly over-represented among the moderate-risk gamblers;
- A disproportionate number of 18–24 year-olds (23.3 per cent) are moderate-risk gamblers, compared with the 25–34 age group (6.1 per cent);
- Moderate risk gamblers are also, disproportionately, separated or divorced (20.5 per cent), or in two-parent families (20.8 per cent);
- Only a small number of moderate-risk gamblers seek help (4.5 per cent), reflecting the fact that this groups tends not to self-assess that they have a problem (a mean of 3.01 on a scale from 1 to 10, compared to 5.66 for problem gamblers);

- 22.1 per cent of moderate risk gamblers report a history of gambling problems in their immediate family; 16.2 per cent say they have the urge to gamble when something painful happens in their life; and 52.9 per cent report that they gamble under the influence of alcohol or drugs. The latter figure is not only higher than for low-risk regular gamblers but also higher than for problem gamblers (44.1 per cent);
- Compared to other regular gamblers, more moderate-risk gamblers (16.4 per cent) elect table games in casino as their favourite gambling activity.

Low-risk gamblers

- 66.8 per cent of low-risk gamblers are male, reflecting the greater base rate of males among Victorian regular gamblers generally;
- Low-risk gamblers tend to be 65+ years (83.5 per cent), widowed (78.1 per cent), live on superannuation or aged pension as their main income source (79.2 per cent), live in group households (77.4 per cent) or living as a couple with no children (78.7 per cent).

Table 62: Regular gamblers: Problem gamblers, moderate-risk gamblers and low-risk gamblers (%)

Characteristic	Problem gamblers	Moderate-risk gamblers	Low-risk gamblers	All regular gamblers
Gender				
Male	61.2	59.7	66.8	64.9
Female	38.8	40.3	33.2	35.1
Age				
18–24	5.9	20.9	13.5	13.5
25–34	17.6	6.0	16.1	14.8
35–49	33.8	28.4	20.3	23.5
50–64	36.8	29.9	27.3	29.1
65+	5.9	14.9	22.8	19.1
Born overseas				
Yes	33.8	20.9	19.0	21.5
No	66.2	79.1	81.0	78.5
Marital status				
Married or with partner	52.9	57.4	60.3	58.7
Separated or divorced	16.2	11.8	6.5	8.7
Widowed	4.4	5.9	8.1	7.2
Single	26.5	25.0	25.2	25.3
Household type				
Single person	15.9	11.5	10.0	11.1
Group	15.9	14.8	21.7	19.9
Couple, no children	20.6	26.2	35.8	32.2
One parent family	9.5	3.3	6.0	6.1
Two parent family	38.1	44.3	26.4	30.7
Main source of income				
Wage/salary	60.6	54.0	56.8	57.0
Own business	15.2	17.5	12.0	13.3
Super/Aged pension	12.1	19.0	25.2	22.3
Social security payment	12.1	9.5	6.0	7.4
Location				
Metropolitan	82.4	74.6	69.5	72.2
Rural	17.6	25.4	30.5	27.8
Favourite gambling^a				
EGM	85.1	41.8	39.5	46.8
Race betting	9.0	35.8	46.1	38.8
Keno	0.0	3.0	0.7	0.9
Table games at casino	4.5	16.4	3.0	5.3
Sport betting	0.0	1.5	6.3	4.6
Other	1.5	1.5	4.6	3.7

^a The 'favourite' mode of gambling is defined as the gambling activity that respondents said they spent most money on in the last 12 months.

The people affected by problem gamblers

The 2003 Victorian survey found that approximately 13 per cent of the surveyed problem gamblers in Victoria live alone; most live with others who could be affected on a daily basis. Just under half (43 per cent) of problem gamblers in the Victoria live with a child under the age of eighteen in the household (7.5 per cent as a one-parent family with children and 35.5 per cent as a couple with children).

Consequently, the Victorian survey found that there would be many children living in the same household as a problem gambler. The 2001 ACT survey and the 1999 national survey came to similar conclusions.

The Victorian survey also found that 18.2 per cent of the surveyed population had someone in their immediate family who had 'ever had a gambling problem' (Table 76). Problem gamblers are much more likely to report that someone else in their family has, or has had, a gambling problem (36.8 per cent). The 1999 national survey and 2001 survey of ACT residents found similar results.

Comparison with previous surveys

It is difficult to compare the prevalence of problem gambling identified in this survey (estimated at approximately 1 per cent of the general population, across all three screens) with those measured in previous Victorian surveys.

The 1999 *Seventh Survey* used the SOGS screen which was first utilised in the Victorian survey series in 1997.

- Results for Victorians who scored in the 'at risk' category (SOGS score 5+) has varied from 0.7 per cent (1997), to 1.3 per cent (1998) to 0.8 per cent (1999); and
- Those Victorian findings contrast with the Productivity Commission's 1999 finding that 2.14 per cent of Victorian regular gamblers were at risk of gambling problems (also measured by the SOGS score 5+).

To a large extent, the different findings can be explained by the fact that the surveys based their calculations on different sample populations. For example, the *Seventh Survey* measured problem gambling among people who had gambled in the last 6 months; the Productivity Commission survey (and this survey) measured problem gambling scores among people who had gambled regularly (i.e. weekly) over the previous 12 months.

However, the sample size for the Victorian population in the Productivity Commission's survey was relatively small, resulting in such a small number of problem gamblers that meaningful analysis was limited.

Thus it is only possible to present the problem gambling prevalence results of each survey without inferring direct comparisons between them.

Self-assessed problem gambling

For comparative purposes, however, as well as using SOGS, CPGI and VGS measures, this Victorian survey also examined the nature and extent of gambling problems in Victoria using self-assessment questions similar to the Productivity Commission's 1999 national survey and the 2001 *ACT Gambling Survey*.

Victorian regular gamblers were asked to rate the degree of problems they experienced with gambling from 1 (being no problem at all) to 10 (a serious problem) (Table 63). In response:

- The proportion of Victorians who have experienced no gambling problems in the past 12 months is substantially lower (75.2 per cent) than the findings of the Productivity Commission (93.68 per cent) and the 2001 ACT survey (95.53 per cent);
- Moreover, the proportion of Victorian regular gamblers who report they have experienced gambling problems is higher than reported in the Productivity Commission and ACT surveys;
- 21.1 per cent of Victorian gamblers report gambling problems rated at relatively low levels (2–5);
- 3.6 per cent claimed to have a moderate to serious problem related to gambling (i.e. scored at 6–10). This is higher than the levels of self-rated problem gambling in both the Productivity Commission national survey or 2001 ACT survey;
- At the extreme end of the scale, 0.4 per cent of regular gamblers reported they had experienced a serious gambling problem in the previous 12 months.

Table 63: Gamblers' self-rating of the degree of problem they face: 2003 Victorian survey compared with Productivity Commission and ACT surveys^a

Rating of Problem	Share of regular gamblers (%)		
	VIC 2003	ACT 2001	PC 1999
1 — Not at all a problem	75.2	95.53	93.68
2	9.6	1.67	2.81
3	6.0	1.22	1.25
4	2.3	0.44	0.67
5	3.2	0.42	0.47
6	0.8	0.23	0.34
7	1.1	0.26	0.36
8	1.0	0.07	0.13
9	0.3	0.04	0.03
10 — A serious problem	0.4	0.06	0.12
Can't say	0.00	0.05	0.15

Source: QX3 — Regular gamblers; ACT Gambling Survey 2001; Productivity Commission 1999, p. 6.47 (Table 6.12).

^a Although the question was asked of regular gamblers in all three surveys, the Productivity Commission's presentation of data could be interpreted to suggest that the findings are for the entire adult gambling population.

Comparison of gambling segments — regional patterns

Based on this survey, we can compare the regional residential location of the four gambler segments identified in the Victorian population — non-gamblers, non-regular gamblers, regular gamblers and problem gamblers (Table 64).

- A higher proportion of both problem gamblers and non-gamblers reside in Melbourne. This regional difference may reflect the more diverse population living in the metropolitan area; and
- Little difference exists between the metropolitan/non-metropolitan regions in terms of the proportion of regular gamblers and non-regular gamblers who reside there.

Table 64: Residential location of gambling groups: metropolitan and non-metropolitan regions

Gambling groups	Metropolitan	Non-Metropolitan
Non-gamblers	25.1	23.6
Non-regular gamblers	68.9	69.7
Regular gamblers	6.0	6.7
Problem gamblers	1.04	0.65

Source: Total respondents. Weighted n = 8,479.

Within the regular gambling segment of the Victorian population (Table 65):

- The metropolitan area again stands out with higher levels of both problem gamblers and moderate risk gamblers in residence; and
- Regular gamblers in the metropolitan area are more likely to be problem gamblers than their counterparts in non-metropolitan areas.

Table 65: Residential location of sub-groups of regular gamblers: metropolitan and non-metropolitan regions

Regular gamblers	Metropolitan	Non-Metropolitan
Non-problem regular gamblers	67.0	76.5
Moderate-risk gamblers	15.7	13.9
Problem gamblers	17.3	9.7

Source: Regular gamblers. Weighted n = 446.

Table 66 provides a picture of the gambling population in each LGA, ranked by regular gamblers. As outlined earlier (Table 6), LGAs with fewer than 50 respondents have been excluded from the analysis below.

- Only one LGA (Baw Baw) has more than 10 per cent of its sample population identified as regular gamblers;
- At the other end of the spectrum, only one LGA (Campaspe) records no regular gamblers in their populations;
- Melbourne LGA has the lowest proportion of regular gamblers in the Melbourne metropolitan area at 1.3 per cent;
- Kingston is the highest ranked metropolitan LGA with 9.2 per cent of the population identified as regular gamblers;
- Bass Coast LGA is notable because it has one of the highest rates of gamblers but a very low rate of regular gamblers;
- In contrast, Baw Baw, which has the highest rate of regular gamblers, has a relatively low proportion of gamblers overall. Only three LGAs have a lower proportion of total gamblers (Melbourne, Yarra and Surf Coast).

Table 66: Gambling involvement groups, local government areas ranked by percentage of regular gamblers.

LGAs	(n)	Non-gamblers	Non-regular gamblers	Regular Gamblers
Baw Baw	(55)	35.7	53.6	10.7
Ballarat	(156)	20.4	70.1	9.6
Kingston	(229)	21.0	69.9	9.2
Wyndham	(133)	18.0	72.9	9.0
Greater Shepparton	(102)	21.6	69.6	8.8
Mildura	(80)	21.3	70.0	8.8
Knox	(313)	24.0	67.4	8.6
Moreland	(303)	27.0	64.5	8.5
Casey	(278)	21.6	70.1	8.3
La Trobe	(124)	20.2	71.8	8.1
Greater Geelong	(299)	22.0	70.3	7.7
Hume	(168)	20.2	72.0	7.7
Nillumbik	(145)	24.3	68.1	7.6
Mornington Peninsula	(347)	23.0	69.5	7.5
Moonee Valley	(192)	20.2	72.5	7.3
Warrnambool	(55)	14.5	78.2	7.3
Frankston	(196)	19.0	73.8	7.2

LGAs	(n)	Non-gamblers	Non-regular gamblers	Regular Gamblers
Bayside	(174)	24.1	69.0	6.9
Whittlesea	(158)	21.4	71.7	6.9
Greater Bendigo	(179)	21.9	71.3	6.7
Manningham	(241)	29.5	63.9	6.6
Maribyrnong	(122)	19.7	73.8	6.6
Brimbank	(219)	21.0	72.6	6.4
Surf Coast	(50)	42.0	52.0	6.0
Darebin	(194)	28.4	66.0	5.7
Melton	(89)	19.1	75.3	5.6
Macedon Ranges	(74)	28.8	65.8	5.5
Banyule	(225)	26.7	68.4	4.9
Wellington	(62)	29.0	66.1	4.8
Boroondara	(319)	29.4	65.9	4.7
Hobsons Bay	(129)	25.4	70.0	4.6
Yarra Ranges	(248)	26.6	68.8	4.6
Glen Eira	(268)	23.8	71.7	4.5
Greater Dandenong	(155)	22.6	72.9	4.5
Monash	(352)	24.1	71.3	4.5
East Gippsland	(74)	21.6	74.3	4.1
Cardinia	(99)	23.2	72.7	4.0
Stonnington	(162)	32.7	63.6	3.7
Whitehorse	(269)	31.2	65.1	3.7
Port Phillip	(121)	34.4	62.3	3.3
Yarra	(120)	36.7	60.0	3.3
Maroondah	(170)	30.6	66.5	2.9
Bass Coast	(53)	17.0	81.1	1.9
Wangaratta	(54)	26.4	71.7	1.9
Melbourne	(75)	34.7	64.0	1.3
Campaspe	(69)	29.0	71.0	0.0

Source: Total respondents; weighted n = 8479. Note: LGAs with sample sizes less than 50 have been excluded from this table. LGAs in bold are in the Melbourne metropolitan area.

For the purposes of policy and service provision it is important to recognise that the three most favoured modes of gambling (EGMs, casino table games and racing) each attracted different sub-populations of problem gamblers. All of the socio-demographic characteristics discussed above showed marked leanings towards specific sub-groups in the Victorian population, particularly in relation to gender, age, education, language spoken at home, place of birth and metropolitan residence.

These findings suggest that problem gambling treatment services, specific education campaigns and provision of harm minimisation strategies should be designed to focus on populations where the key socio-demographic attributes predominate.

Personal impacts of problem gambling

The following sections examine the personal motivations and impacts of problem gambling in more detail. Problem gamblers in the survey were asked their reasons for gambling on favourite form of gambling — i.e. the type of gambling on which they had spent the most money in the last 12 months. The reasons given are in some cases similar to those given by Victorian regular gamblers (Table 67); but there are also notable differences (Table 68).

Note that the sample of 'problem gamblers' in this survey include problem gambling respondents identified across all three screens.

Table 67: Problem gamblers' reasons to gamble for different favourite gambling activities: Absolute frequencies^a

Reason to gamble	Agree ^b	Neither	Disagree ^b
Because it's a favourite recreational activity or hobby			
poker machines	23	5	29
race betting	6		
table games (casino)	4		
For the thrill or dream of winning			
poker machines	44	1	12
race betting	5	1	
table games (casino)	3		
Out of boredom to pass the time			
poker machines	47	2	8
race betting	5		1
table games (casino)	1		2
Because I like to beat the odds and back a winner			
poker machines	28	2	27
race betting	4		2
table games (casino)	2	1	1
Because I believe I may get lucky			
poker machines	43	1	13
race betting	5		1
table games (casino)	3		
To prove I am lucky			
poker machines	11	3	40
race betting	4		2
table games (casino)			3
To test my skill			
poker machines	10	1	48
race betting	6		
table games (casino)	1		2
To make a quick buck			
poker machines	35	3	19
race betting	5		1
table games (casino)			3
Because I like to take risks			
poker machines	19	4	34
race betting	5		1
table games (casino)	3		
To enhance my social standing			
poker machines	5	2	50
race betting	2		4
table games (casino)		1	2
Because money lost goes to a worthy cause			
poker machines	4		53
race betting			6
table games (casino)			4
For social reasons or to be with friends			
poker machines	21	4	32
race betting	3		3
table games (casino)	2	1	1
Because of the atmosphere and excitement — it gives me a buzz			
poker machines	39	4	14
race betting	5		
table games (casino)	4		

^a Source: Problem gamblers. Weighted n = 68

^b The response categories 'strongly agree' and 'agree' have been combined; similarly for response options 'strongly disagree' and 'disagree'.

- Whereas 69 per cent of non-problem gamblers nominated socialising with friends as a major reason for gambling, this was not a priority for the majority of EGM problem gamblers;

- Like other Victorian regular gamblers, a majority of problem gamblers (except casino table gamblers) said that feeling lucky was a reason for their decision to gamble;
- Problem casino gamblers also did not gamble 'to make a quick buck', whereas this is a motive for the majority of EGM and racing gamblers;
- As with the general Victorian gambling population, a large number of problem gamblers, including EGM players, indicated that they were not motivated to test their skill, enhance social standing and or because money lost goes to a good cause;
- However, testing skill and taking risks were motivations for problem gamblers who prefer racing and casino games, respectively;
- The thrill and dream of winning was a reason reported by a majority of problem gamblers, especially by EGM gamblers. This was also a reason given by 60 per cent of non-problem EGM gamblers (Table 68);
- A large majority of EGM problem gamblers also said they gambled 'out of boredom', a reason not commonly given by other regular EGM gamblers.

Table 68: Reasons for gambling by problem and non-problem gamblers who nominate EGMs as their favourite gambling activity

Gambling activity	Non-problem regular gamblers (Mean)	Problem gamblers (Mean)
Out of boredom to pass the time	3.00	1.93
For the thrill or dream of winning	2.77	2.16
Because I believe I may get lucky	2.72	2.20
Because of the atmosphere and excitement — it gives me a buzz	3.09	2.46
To make a quick buck	3.45	2.62
Because I like to beat the odds and back a winner	3.53	2.90
Because it's a favourite recreational activity or hobby	2.77	3.06
Because I am attracted to the venue itself	3.19	3.22
For social reasons or to be with friends	2.49	3.35
Because I like to take risks	3.60	3.38
To prove I am lucky	3.82	3.70
To test my skill	3.97	3.96
To enhance my social standing	4.10	4.25
Because money lost goes to a worthy cause	3.91	4.48

Source: Regular gamblers who answer 'poker machines in pubs and clubs' to QM1. Weighted n = 205.

Expenditure impacts of problem gambling

Using similar methods as the 1999 national survey and 2001 *ACT Gambling Survey* this survey examined the adverse financial impacts of gambling for all adult gamblers. The survey asked several questions on financial issues including whether or not gamblers had borrowed money, obtain money by illegal means, or spent in excess of their budget.

As previously noted in this report, we have not asked for specific estimates of expenditure on gambling over the last 12 months. Previous surveys have shown that respondents tend to significantly underestimate gambling expenditure for some forms of gambling (such as gaming machines and table games at a casino) and overestimate expenditure for lotteries and scratch-its. Thus we are unable to explore relationships between the level of expenditure by particular groups of gamblers or the problem gambling share of losses.

However, when asked more broadly about their control over gambling expenditure, a significantly large proportion (89.7 per cent) of Victorian problem gamblers surveyed in 2003 said they had spent more than they had planned on gambling in the past 12 months (Table 69).

- Of this group, 22.8 per cent said this had occurred sometimes (compared with 14.5 per cent nationally), while 41.7 per cent said it had happened often (compared with 20.5 per cent nationally);
- 25.2 per cent of Victorian problem gamblers claimed to always spend more than they could afford on gambling, a substantial increase on 9.4 per cent of Australian problem gamblers surveyed in the Productivity Commission's national study;
- This response also compares with 2.4 per cent of *all* Victorian gamblers in this survey, and with the overall gambling population findings of 1.8 per cent in the ACT and 2.9 per cent nationally;
- By further comparison, 68 per cent of all Victorian gamblers surveyed said they never/rarely spend more on gambling than they plan, a marked contrast with problem gamblers;
- Moreover, a significant proportion of Victorian problem gamblers (34.5 per cent) report that they plan to spend large amounts (between \$101–5000) each time they gamble. Only 12.4 per cent of problem gamblers say they plan to spend between \$1–20 on each occasion;
- Also in contrast to non-problem Victorian gamblers, 78.6 per cent of problem gamblers report they spend their winnings in the same gambling session (Table 70). More than 60 per cent of Victorians say they rarely or never spend their gambling winnings during the session in which they were won.

Table 69: Spending more than planned on gambling: problem gamblers

Response categories	%
Never	3.1
Rarely	7.3
Sometimes	22.8
Often	41.7
Always	25.2

Source: QF11. Problem gamblers. Weighted n = 68.

Table 70: Spending winnings in same session, problem gamblers

Response Categories	%
Never	15.3
Rarely	6.1
Sometimes	28.6
Often	33.7
Always	16.3

Source: QF12. Problem gamblers. Weighted n = 68.

Sources of money for gambling

Table 71 compares the reported sacrifices made by Victorian problem gamblers and non-problem gamblers in order to fund their gambling in the last 12 months. The Victorian survey reinforces the findings of the 1999 national survey that 'problem gamblers tend to give up spending on personal items (such as clothing) and paying bills, much more than non-problem gamblers'.⁴¹

- The most common response by Victorian problem gamblers (25.4 per cent) was that the money would have been used to pay bills or credit cards, compared with only 3.2 per cent of non-problem gamblers. This could also suggest that problem gamblers are more concerned about their current debts than other gamblers;

⁴¹ Productivity Commission *ibid.*, p. 7.56.

- Whereas non-problem gamblers said they would have saved the money (28.5 per cent), a significantly smaller proportion of problem gamblers do so, suggesting that they might sacrifice their savings to finance gambling activity;
- Moreover, problem gamblers said they would have spent the money on household and family essentials, such as groceries, household items, clothing, rent/mortgage payments and motor vehicle purchase/repairs;
- For example, in marked contrast to the 1.8 per cent of non-problem gamblers who reported foregoing rent and mortgage payments in order to fund their gambling habits, 4.4 per cent of Victorian problem gamblers reported not paying their rent or mortgage in order to gamble;
- Non-problem gamblers are more inclined than problem gamblers to spend the money on discretionary expenditure items such as entertainment and recreation, travel and alcohol. This could mean that problem gamblers sacrifice spending on other forms of recreation and entertainment in order to gamble, or that their financial ability to enjoy such activities is negatively impacted by problem gambling activity;
- These findings suggest that a significant number of Victorian problem gamblers may be depriving themselves or their families of goods and services which others consider necessities.

Table 71: Where gambling money would otherwise have been spent: Problem gamblers and other regular gamblers

Think about the amount of money you used for gambling in the last week. If you hadn't spent the money on gambling, in what other ways might you have used it? (multiple responses)	Non-problem gamblers (% Yes)	Problem gamblers (% yes)
Spent it on groceries or small household items	8.7	14.7
Put it towards major household goods (e.g., TV)	1.1	7.5
Spent it on personal items e.g. clothing, footwear	10.6	20.6
Spent it on restaurant meals/takeaway food	6.6	2.9
Spent it on alcohol	11.4	2.9
Spent it on the movies or a concert	2.1	0.0
Spent it on other entertainment or recreation activities	10.1	4.4
Used it to pay bills/credit cards	3.2	25.4
Used it to pay rent/mortgage	1.8	4.4
Would spend it on children/grandchildren/family	3.2	5.9
Would spend it on petrol	1.0	0.0
Would spend it on cigarettes	1.3	0.0
Would donate it to charity	0.8	0.0
Buy magazines/books	0.0	1.5
Travel/holiday	1.1	4.4
Motor vehicle purchase/repairs	1.1	7.4
House renovations/repairs	1.3	0.0
Music/videos/DVDs	0.0	0.0
Spent it on other items (please specify)	6.9	7.4
Not spent it/saved it/put it in bank	28.5	14.7

Source: QM4. Respondents are regular gamblers. Weighted n = 446.

Borrowing money: problem gamblers

As in the 1999 national survey and ACT survey, a relatively large proportion of problem gamblers in Victoria reported adverse financial impacts from gambling compared with other groups of gamblers. Using questions in each of the three screens (VGS, CPGI and SOGS), problem gamblers were asked if they had borrowed money for their gambling. Although the screen questions vary slightly, they are comparable.

- 26.7 per cent of Victorian problem gamblers (34.4 per cent measured by VGS item, 41.4 per cent by CPGI item, and only 9.5 per cent by the SOGS item) reported that they had borrowed money for gambling purposes in the past 12 months;
- These patterns are an increase on 4 per cent found in the 1999 Productivity Commission national survey and 6.4 per cent in the ACT survey;
- In response to a separate survey question (QX1), 64 per cent Victorian problem gamblers also reported that they had borrowed to gamble or pay debts.

Survey responses from Victorian problem gamblers on whether they had borrowed to gamble or pay debts in the last 12 months were further analysed to compare the responses for men and women and different age groups (Table 72).

- A higher proportion of female problem gamblers reported that they had borrowed money to gamble or pay gambling debts, from all sources except credit cards and banks and finance companies;
- Household money is the most common source of 'borrowing' for problem gamblers, except for males who nominated credit cards (46.3 per cent) as their most common source of borrowing;
- Older problem gamblers (aged 35–65+) tend to spend from household money; younger problem gamblers (aged 18–49) use credit cards as the main source of money borrowed for gambling;
- A high proportion of problem gamblers aged 18–24 (75 per cent) also borrow from relatives or in-laws;
- On the other hand, no problem gambler in either this youngest age group (18–24) or the oldest age group (65+) borrowed money for gambling from banks or finance companies in the last 12 months;
- However 50 per cent of the 18–24 age group and 20 per cent of the 65+ age group had borrowed from credit cards;
- Only one female problem gambler (aged 35–49) said she had borrowed from loan sharks.

Table 72: Borrowing among problem gamblers: age and gender

In the last 12 months, have you borrowed to gamble or pay debts from ...	No	Yes	% yes
Household money			
Male	26	16	38.1
Female	13	13	50.0
Age			
18–24	3	1	25.0
25–34	11	1	8.3
35–49	11	12	52.2
50–64	14	11	44.0
65+	1	4	80.0
Your spouse or partner			
Male	30	12	28.6
Female	18	9	33.3
Age			
18–24	3	1	25.0
25–34	8	4	33.3
35–49	14	9	39.1
50–64	21	4	16.0
65+	2	2	50.0
Other relatives or in-laws			
Male	29	12	29.3
Female	18	9	33.3

In the last 12 months, have you borrowed to gamble or pay debts from ...	No	Yes	% yes
Age			
18-24	1	3	75.0
25-34	9	2	18.2
35-49	14	9	39.1
50-64	19	6	24.0
65+	4	1	20.0
Credit cards			
Male	22	19	46.3
Female	21	6	22.2
Age			
18-24	2	2	50.0
25-34	7	5	41.7
35-49	13	10	43.5
50-64	17	8	32.0
65+	4	1	20.0
Banks or finance companies			
Male	33	8	19.5
Female	22	5	18.5
Age			
18-24	4	--	0.0
25-34	8	3	27.3
35-49	15	8	34.8
50-64	23	2	8.0
65+	4	--	0.0
Loan sharks			
Male	41	--	0.0
Female	25	1	3.8
Age			
18-24	4	--	0.0
25-34	12	--	0.0
35-49	22	1	4.3
50-64	25	--	0.0
65+	4	--	0.0

Source: QX1. Problem gamblers. Weighted n = 68.

Use of note-acceptors: problem gamblers

The survey responses of problem gamblers were analysed to see if they had inserted bank notes when they gambled on EGMs or other gaming machines (Table 73).

- The majority of problem gamblers who responded to this question reported that they had used note-acceptors when gambling on EGMs;
- The majority of this group had done so in a pub or hotel. Almost all of them said they often or always inserted notes when playing gaming machines;
- Only one problem gambler reported using note-acceptors at Crown Casino; this gambler always did so when gambling.

Table 73: Use of note-acceptors in poker machines among problem gamblers

Which venue do you mostly play poker machines at?	Do you insert notes in poker machines?				
	Never	Rarely	Sometimes	Often	Always
Pub or hotel	3	3	5	14	18
Licensed sport club	--	2	2	1	3
RSL club	--	--	--	2	3
Melbourne Crown Casino	--	--	--	--	1
All Venues	3	5	7	17	25

Source: QF20 and QM6b. Problem gamblers – absolute frequencies. Weighted n = 68.

Private impacts of problem gambling

This section deals with some of the positive and adverse personal impacts that gambling can have for some people, as proposed by the Productivity Commission.⁴² However caution is essential when reviewing these self-reported data. It is not possible from this survey to determine whether an individual's gambling problems are a cause or a consequence of other personal difficulties. For example, while there may be linkages between gambling and relationship problems, or between gambling and depression, causal relationships are often multi-directional and complex.

Limitations of this survey have not enabled us to examine if problem gamblers had a higher or lower experience of some given adverse impact than non-problem gamblers. Even if there were a link, holding all other possible influences constant, simple correlations between problem gambling and adverse personal impacts, by themselves, can be misleading. The Productivity Commission's extensive inquiry suggested that adverse impacts such as divorce, crime and depression were typically symptoms rather than causes of problem gambling.

Even so the findings of the 2003 Victorian survey suggest that problem gambling is having profound negative impacts on the lives and well-being of some Victorians. The responses by Victorians surveyed indicate that adverse gambling impacts may be experienced at more severe levels than were found in either the 1999 Productivity Commission national survey or the 2001 ACT survey.

As in previous sections, the sample of 'problem gamblers' in this analysis include problem gambling respondents identified across all three screens.

In contrast to the enjoyment that gambling holds for most non-problem gamblers, participation in gambling diminishes the enjoyment of life for Victorians who experience gambling problems (Table 74).

- Gambling made the lives of a large majority (69.1 per cent) of Victorian problem gamblers less enjoyable. For most of these (45.6 per cent) gambling has made their lives a lot less enjoyable. In contrast, only 3.7 per cent on non-problem regular gamblers felt that gambling had adversely affected their enjoyment of life;
- On the other hand, a proportion of Victorian problem gamblers (14.7 per cent) reported that gambling made their 'life a little more enjoyable';
- 16.2 per cent of problem gamblers reported that their participation in gambling 'made no difference' to their enjoyment of life, compared to 45.9 per cent of non-problem gamblers;
- A much larger percentage of Victorian problem gamblers reported that gambling had made their life less enjoyable in the last 12 months, compared to the 1999 national figures (50.1 per cent) and ACT problem gamblers (35.3 per cent).

Table 74: Enjoyment of gambling: Problem gamblers and other regular gamblers

Looking back over the last 12 months, how would you rate your experience of gambling	Non-problem gamblers (%)	Problem gamblers (%)
A lot more enjoyable	11.5	0.0
A little more enjoyable	38.9	14.7
Made no difference to your life	45.9	16.2
A little less enjoyable	3.2	23.5
A lot less enjoyable	0.5	45.6

Source: QM3, based on responses to QM1 or QS4. All regular gamblers. Weighted n = 446

⁴² Productivity Commission op.cit. p. 7.9.

Table 75 provides a breakdown of those Victorian problem gamblers who have suffered personally as a result of gambling activities. The 2003 Victorian survey shows problem gamblers experienced higher rates of all adverse impacts than Victorian gamblers overall. The Victorian findings are also higher than results for the 1999 national survey and 2001 ACT *Gambling Survey*.

Victorian problem gamblers surveyed for the adverse effects of gambling in the past 12 months are more likely than non-problem regular gamblers to:

- Experience problems finding time to look after their family's interests (37 per cent);
- Experience problems at work due to gambling (54 per cent compared to 2.6 per cent of all Victorian gamblers surveyed);
- Change jobs in the last year due to gambling (6 per cent compared to 0.5 per cent)
- File for bankruptcy (6 per cent compared to 0.7 per cent for gamblers overall);
- Commit crime to obtain money (4 per cent compared to 0.3 per cent); and
- Experience relationship breakdown (11 per cent compared to 1.1 per cent of all Victorian gamblers).

The Victorian survey found differences between the effects of problem gambling for males and females, and for different age groups.

- A larger proportion of male problem gamblers (40.5 per cent) than female (29.6 per cent) reported that gambling had impacted on the amount of time spent with families during the previous 12 months. A large proportion of problem gamblers aged 25–49 experienced these problems;
- A substantially higher proportion of males (48.8 per cent) than females (11.5 per cent) had experienced problems at work. Importantly, these problems were most common with problem gamblers aged 25–49, when people often have family responsibilities;
- However female problem gamblers in Victoria are more likely to lose a job due to their gambling (3.7 per cent);
- A much higher proportion of females (15.4 per cent), especially in two age groups (18–24, 35–49) had also experienced problems with relationships than had male problem gamblers (7.1 per cent);
- Only male gamblers reported that gambling problems had resulted in bankruptcy in the last 12 months (9.8 per cent) or led to illegal activities (7.3 per cent). Whereas younger men (18–34) had experienced bankruptcy, older men (35–64) reported they had obtained money illegally; and
- Only male problem gamblers (2.3 per cent of all problem gamblers) reported that gambling had resulted in problems with police.

Table 75: Adverse consequences of gambling among problem gamblers: age and gender

Consequence	No	Yes	% yes
Adverse effect on job performance?			
Male	21	20	48.8
Female	23	3	11.5
Age			
18–24	3	1	25.0
25–34	4	8	66.7
35–49	14	8	36.4
50–64	19	6	24.0
65+	4	--	0.0

Consequence	No	Yes	% yes
Resulted in changing jobs?			
Male	38	3	7.3
Female	25	1	3.8
Age			
18-24	4	--	0.0
25-34	11	1	8.3
35-49	19	4	17.4
50-64	25	--	0.0
65+	4	--	0.0
Resulted in dismissal from work?			
Male	41	--	0.0
Female	26	1	3.7
Age			
18-24	4	--	0.0
25-34	12	--	0.0
35-49	22	1	4.3
50-64	25	--	0.0
65+	4	--	0.0
Let you with not enough time to look after family's interests?			
Male	24	17	40.5
Female	19	8	29.6
Age			
18-24	3	--	0.0
25-34	4	8	66.7
35-49	13	10	43.5
50-64	18	7	28.0
65+	4	--	0.0
Resulted in being declared bankrupt?			
Male	37	4	9.8
Female	26	--	0.0
Age			
18-24	3	1	25.0
25-34	9	3	25.0
35-49	23	--	0.0
50-64	25	--	0.0
65+	4	--	0.0
Led to the breakup of important relationship?			
Male	38	3	7.1
Female	22	4	15.4
Age			
18-24	3	1	25.0
25-34	11	1	8.3
35-49	19	3	13.6
50-64	24	1	4.0
65+	4	--	0.0
Led you to obtain money illegally, even if you intended to pay it back?			
Male	38	3	7.3
Female	26	--	0.0
Age			
18-24	4	--	0.0
25-34	12	--	0.0
35-49	21	1	4.5
50-64	23	2	8.0
65+	4	--	0.0
Led to trouble with police?			
Male	40	2	4.8
Female	26	--	0.0

Consequence	No	Yes	% yes
Age			
18-24	2	2	50.0
25-34	12	--	0.0
35-49	23	--	0.0
50-64	25	--	0.0
65+	4	--	0.0

Source: QX2. Problem gamblers. Weighted n = 68.

Correlates of problem gambling

To further explore the relationship between gambling and adverse consequences, Victorian gamblers surveyed were also asked a number of self-assessment questions about activities and events associated with gambling, including the experience of alcohol, drug and psychological problems (Table 76). This analysis also examined responses from the three problem gambling screens (VGS, CPGI and SOGS) that relate to correlates of problem gambling. Responses by surveyed problem gamblers were then compared to non-problem regular gamblers (Table 77) and responses of problem gamblers were analysed in more detail (Tables 78, 79). As in previous sections, the sample of 'problem gamblers' in this analysis include problem gambling respondents identified across all three screens.

Comparisons with the Productivity Commission and ACT survey findings are limited because these surveys did not ask questions on many of the correlates investigated in this Victorian survey. Comparisons with the *Queensland Household Gambling Survey* are also limited because that survey used only the CPGI and different sampling procedures.

The 2003 Victorian survey found evidence that problem gambling is having profound impacts on the personal and psychological well-being of some gamblers. On all measures, a greater proportion of problem gamblers experience these adverse impacts than non-problem regular gamblers. The survey also revealed significant gender and age differences for those who experience adverse behaviours associated with gambling. Small sample sizes suggest that caution should be used when interpreting the findings for problem gambler groups, however (Table 78).

Table 76: Correlates of problem gambling: all regular gamblers

Statements	Yes (%)	No (%)	Don't know/ Can't remember/refused (%)
Has anyone in your immediate family ever had a gambling problem?	18.2	81.7	0.1
In the last 12 months, have you gambled while under the influence of alcohol or legal or illegal drugs?	29.5	70.2	0.3
In the last 12 months, if something painful happened in your life, did you have the urge to gamble?	4.4	95.5	0.2
In the last 12 months, have you been under a doctor's care because of physical or emotional problems brought on by stress?	6.1	93.9	0.0
In the last 12 months, have you felt seriously depressed?	10.3	89.6	0.1
Have you seriously thought about or attempted suicide as a result of your gambling?	0.9	99.1	-
Have you thought like that in the last 12 months? ^a	51.8	48.2	-

Source: QG6 to CO5. Weighted n = 906.

^a Respondents (weighted n = 8) are those who answered 'Yes' in response to the previous question CO4: 'Have you seriously thought about or attempted suicide as a result of your gambling?' For other statements in the table, respondents are those gamblers included in the core interview.

Table 77: Correlates of problem gambling: problem gamblers and non-problem regular gamblers

	Non-problem gamblers (% Yes)	Problem gamblers (% Yes)
Has anyone in your immediate family ever had a gambling problem?	16.1	36.8
In the last 12 months, have you gambled while under the influence of alcohol or legal or illegal drugs?	36.3	43.6
In the last 12 months, if something painful happened in your life, did you have the urge to gamble?	6.9	41.8
In the last 12 months, have you been under doctor's care because of physical or emotional problems brought on by stress?	8.6	27.0
In the last 12 months, have you felt seriously depressed?	13.1	59.0
Have you seriously thought about or attempted suicide as a result of your gambling?	1.1	11.5

Source: QG6 to C05. Regular gamblers. Weighted n = 906.

Family history of gambling problems

- 18.2 per cent of surveyed Victorian gamblers said they had experienced a gambling problem in their immediate family (Table 76);
- 36.8 per cent of *problem gamblers* report that somebody in their immediate family had a gambling problem, while only 16.1 per cent of non-problem regular gamblers claimed this was the case (Table 77);
- 41.5 per cent of problem gamblers who have had a gambling problem in their immediate family are males, a higher proportion than female problem gamblers (30.8 per cent) (Table 78);
- This is more common among problem gamblers aged 35–49 (50 per cent) and 18–24 (50 per cent) but less common among problem gamblers in the older (65+) age group (Table 78).

Using alcohol and drugs while gambling

- More *problem gamblers* report they consume alcohol or drugs while gambling (43.6 per cent) than non-problem regular gamblers (36.3 per cent) (Table 77). The majority of problem gamblers aged between 18–34 did so (Table 78);
- A significantly larger proportion of male problem gamblers (53.7 per cent) than women (29.6 per cent) reported they had gambled while under the influence of alcohol or legal or illegal drugs (Table 78);

Gambling as escapism

- 4.4 per cent of Victorian gamblers said they had experienced the urge to gamble when/if something painful happened in their lives (Table 76);
- A significantly larger proportion of *problem gamblers* (41.8 per cent) feel the urge to gamble when something painful happens in their lives, compared to non-problem regular gamblers (6.9 per cent) (Table 77);
- Women with gambling problems are more likely than male problem gamblers to turn to gambling in such circumstances, as are problem gamblers aged 35–64 (Table 77).

Depression

- When Victorian gamblers were asked whether they had felt seriously depressed due to gambling, 10.3 per cent of the surveyed gambling population in Victoria said they had experienced this during the 12 months prior to the survey (Table 76);
- A majority of *problem gamblers* (59.0 per cent) report having felt seriously depressed in the last 12 months, compared to 13.1 per cent of non-problem regular gamblers (Table 77);

- This experience was slightly more common among male problem gamblers (59.5 per cent) than females (57.7 per cent) (Table 78). It was high for all age groups, but most pronounced among problem gamblers aged 25–34 (83.3 per cent), 18–24 (75 per cent) and 50–64 (60 per cent);
- The experience of gambling-related depression reported by Victorian problem gamblers is higher than the findings for both Australian and ACT problem gamblers (approximately 50 per cent and 45.5 per cent respectively).

Stress

- 6.1 per cent of Victorian gamblers surveyed have been under a doctor's care because of physical or emotional problems brought on by stress in the last 12 months (Table 76);
- A greater proportion of *problem gamblers* report being under doctor's care for stress related health issues, compared to non-problem regular gamblers (8.6 per cent) (Table 77);
- A larger number of women (34.6 per cent) than men (21.4 per cent) and problem gamblers aged 35–64 had sought medical help for these problems (Table 78);
- It must be noted that the survey did not explore any causal relationship between stress and gambling.

Suicidal tendencies

- In the surveyed Victorian gambling population, 0.9 per cent had 'seriously thought about or attempted suicide due to gambling' during the previous 12 months (Table 76);
- In marked contrast, 11.5 per cent of *problem gamblers* surveyed had contemplated suicide due to gambling at some stage, compared with 1.1 per cent in the non-problem gambling population. The majority (51.8 per cent) had felt like this in the last 12 months (Table 77). This was considerably higher than the 1999 national survey finding of 9.2 per cent;
- 14.8 per cent of female and 9.8 per cent of male Victorian problem gambling respondents reported that they had seriously thought about or attempted suicide due to gambling in the previous year (Table 78). This problem appears to be more prevalent for people in the 50–64 age group (24 per cent).

Help for gambling and other problems

- 54 per cent of problem gamblers surveyed had wanted help for problems related to their gambling in the last 12 months. More women (57.7 per cent) than men (51.2 per cent) had wanted help (Table 78). Problem gamblers aged 25 years and above are more inclined to seek help than young problem gamblers. This issue will be discussed in more detail below;
- That pattern differs in some respects from the help-seeking behaviour for other problems. Only 26 per cent of Victorian problem gamblers had sought assistance for other problems in the preceding 12 months (Table 78);
- Women again were more likely to seek help (38.5 per cent) than men (15 per cent) (Table 78). As with respondents who sought medical assistance, people wanting help with problems other than gambling is more evenly spread across 25–49 age groups, contrasting with those seeking help for gambling issues.

Feelings of guilt about gambling

- Based on responses to the three problem gambling screens, 93.5 per cent of Victorian *problem gamblers* surveyed in 2003 experienced guilt related to their gambling activities in the last 12 months compared to 88.9 per cent of Australian problem gamblers in 1999;

- When estimated separately, the results across the three screens are as follows: 100 per cent of problem gamblers measured through the VGS item experienced guilt, 91.3 per cent through SOGS items, and 87.3 per cent through the CPGI item.

First experience of gambling

Compared to males, female problem gamblers reported they had first started gambling at a later age (Table 79). Male problem gamblers are more likely to have started gambling before the age of 25, with many reporting that they gambled underage.

Table 78: Correlates of problem gambling: problem gamblers by age and gender

Statements	Male %(n)	Female %(n)	18-24 %(n)	25-34 %(n)	35-49 %(n)	50-64 %(n)	65+ %(n)
In the last 12 months, have you gambled while under the influence of alcohol or legal or illegal drugs?	53.7 (22)	29.6 (8)	50.0 (2)	58.3 (7)	47.8 (11)	32.0 (8)	40.0 (2)
In the last 12 months, have you been under doctor's care because of physical or emotional problems brought on by stress?	21.4 (9)	34.6 (9)	0.0 (0)	16.7 (2)	26.1 (6)	40.0 (10)	20.0 (1)
In the last 12 months, have you felt seriously depressed?	59.5 (25)	57.7 (15)	75.0 (3)	83.3 (10)	47.8 (11)	60.0 (15)	25.0 (1)
Have you seriously thought about or attempted suicide as a result of your gambling?	9.8 (4)	14.8 (4)	0.0 (0)	8.3 (1)	4.3 (1)	24.0 (6)	0.0 (0)
In the last 12 months, have you wanted help for problems related to your gambling?	51.2 (21)	57.7 (15)	25.0 (1)	66.7 (8)	65.2 (15)	40.0 (10)	50.0 (2)
Have you sought assistance from any source for other problems? (collapsed multiple responses)	15.0 (6)	38.5 (10)	25.0 (1)	33.3 (4)	19.0 (4)	20.0 (5)	25.0 (1)
Has anyone in your immediate family ever had a gambling problem?	41.5 (17)	30.8 (8)	50.0 (2)	50.0 (2)	50.0 (11)	28.0 (7)	0.0 (0)
<i>In the last 12 months, if something painful happened in your life, did you have the urge to gamble?</i>	33.3 (14)	57.7 (15)	25.0 (1)	50.0 (6)	47.8 (11)	44.0 (11)	0.0 (0)

Source: QH1, QH17, QG6-QC04. Problem gamblers. Weighted n = 68. Firm conclusions cannot be drawn from this table because of small sample sizes.

Table 79: First experience of gambling: problem gamblers by age and gender

Response Categories	Male (%)	Female (%)
under 18	81.0	19.0
18-19	55.6	44.4
20-24	90.0	10.0
25-29	14.3	85.7
30-34	50.0	50.0
35-44	37.5	62.5
45 or more	33.3	66.7

Source: QF1. Problem gamblers. Weighted n = 68.

Problem gambling and help seeking

To further explore the help-seeking behaviour of Victorian gamblers, this survey included several questions on help-seeking derived from questions asked in the Productivity Commission's *Survey of Clients of Counselling Agencies* and from the *ACT Gambling Survey* designed for a more general gambling population.

Regular gamblers (i.e. all gamblers in the core survey) were first asked whether they have or had experienced a problem with their gambling. Respondents who indicated that they tried to get help for their self-assessed gambling problems (Table 80) in the last 12 months were then asked:

- What prompted them to seek help for their gambling problems;
- Whether they received counselling in the last year, and if so, with whom; and
- Whether they were satisfied with the help that they received from that organisation.

A small proportion of the total problem gambling group in Victoria have either tried to self-exclude from gambling or sought other forms of help during the past 12 months (Table 80). Help-seeking increased according to the severity of gambling problem being experienced. The small sample sizes indicate that these figures should be treated with caution, however, and can only be used to suggest trends.

- 2.4 per cent of Victorian regular gamblers surveyed said they have wanted help for problems related to their gambling in the last 12 months;
- Almost half of that group (49.3 per cent) said they had tried to exclude themselves from a gambling venue;
- 28.7 per cent had sought professional or personal help for their gambling problems;
- Only 2.4 per cent had talked to a person at a gambling venue regarding gambling support services.

Table 80: Help-seeking behaviour for gambling problems

Statements	Yes (%)
In the last 12 months, have you ever talked to a person at a gambling venue regarding gambling support services?	2.4
In the last 12 months, have you ever tried to exclude yourself from a gambling venue?	49.3
In the last 12 months, have you tried to get any sort of help for problems related to your gambling, such as professional or personal help?	28.7

Source: QH2-H4. Respondents (n = 48) are those who answered 'yes' in response to QH1: 'In the past 12 months, have you wanted help for problems related to your gambling?' — except the SOGS sub-sample.

Of those Victorians with a self-assessed gambling problem who had sought help for their gambling problems in the last 12 months (Table 81):

- 94.8 per cent reported that financial problems relationship problems had prompted them to seek help. This is significantly higher than the findings for the national survey and ACT survey (32.4 per cent);
- 70.2 per cent of Victorians who sought help were urged to do so by someone else;
- 39.7 per cent reported that they had felt depressed or worried;
- Less common motivations included relationship problems (17.9 per cent), employment and legal problems;
- No respondents in this survey had been referred to help services by either the courts or other counsellors.

Table 81: Motive to seek help for gambling problems

Response categories (multiple responses)	Vic 2003 (%)	ACT 2001
Financial problems	94.8	32.4
Relationship problems	17.9	65.3
Legal problems	3.7	1.9
Work employment problems	5.5	3.7
Someone urged you to go	70.2	35.0
Felt depressed/worried	39.7	43.7
Court ordered you to go for counselling	0.0	N/A
Referral from other counsellors	0.0	N/A
Other (please specify)	0.0	4.5
Don't know/can't remember	0.0	N/A

Source: QH6. Respondents (n = 14) are those who answered 'yes' in response to H4: 'In the last 12 months, have you tried to get any sort of help for problems related to your gambling, such as professional or personal help?' Proportions may sum to more than 100 because some respondents gave more than one reason.

Those Victorian gamblers who had not sought help for their self-assessed problem were asked why they had not done so (Table 82).

- Almost half of the respondents (49.2 per cent) said they did not seek help because they had not considered they had a problem;
- Similarly, a common reason given for not seeking help was that gamblers (41.9 per cent) thought they could resolve the problem themselves;
- Others (7.6 per cent) were too embarrassed to see a counsellor; or said that the help they wanted was not available in their local area (5.7 per cent);
- Despite the wide community awareness campaigns in Victoria, 1.5 per cent of the surveyed gamblers who had a self-assessed problem did not know where to go for help.

Table 82: Reason for not seeking help for problems

Response categories (Multiple responses)	Yes (%)
Didn't know where to go	1.5
Too embarrassed to see a counselor	7.6
The kind of help I wanted wasn't available locally	5.7
Thought I could beat the problem on my own	41.9
I didn't consider I had a problem	49.2
Other	24.6
Don't know/can't remember	0.0

Source. QH5. Respondents (n = 34) are those who answered 'no' in response to H4: 'In the last 12 months, have you tried to get any sort of help for problems related to your gambling, such as professional or personal help?' Proportions may sum to more than 100 because some respondents gave more than one reason.

There appears to be a substantial difference in help-seeking behaviour between people who self-identify as having gambling problems and wanting help, and those identified as 'problem gamblers' by the problem gambling screens (SOGS, CPGI and VGS).

- The majority of problem gamblers *identified by screens* in this survey (SOGS, CPGI, VGS) have not sought help for their gambling problems (70.8 per cent). Only 29.2 per cent of problem gamblers have tried to get help. Allowing for difference in the survey design, this is comparable with findings in the Productivity Commission (32 per cent) and higher than in the Queensland survey (19 per cent). As indicated above, however, these figures should be treated with caution because of the small sample size;
- When asked questions from the core survey to self-assess on gambling problems, 89.1 per cent of that group of problem gamblers also self-reported that they felt they have a problem with gambling;
- Most of the screen-identified problem gambler group (51.3 per cent) self-rated their gambling problems on a scale as relatively minor (2–4 on the rating scale) or moderate (5–7 on the rating scale);
- However 37.9 per cent reported having a severe problem with gambling (8–10 on the rating scale).

A much larger proportion (70.8 per cent) of the Victorian problem gamblers who self-assessed as having a problem with gambling tried to get help for problems related to gambling. This is a much larger proportion than self-assessed problem gamblers in the ACT survey (28 per cent).

- The large majority of these Victorian gamblers (64.5 per cent) first sought help from family and friends (Table 83);

- Another significant proportion (14.1 per cent) first sought help from crisis referral services such as Gambling Help Line or from Gamblers Anonymous (12.4 per cent);
- Other first sources of help include ‘my psychiatrist’ and ‘a hypnotist’;
- However, relatively few Victorians with a self-assessed gambling problem reported ever seeking help from a person at a gambling venue regarding gambling support services;
- Significantly, no respondent first turned to staff at a gambling venue for help;
- It is also notable that no respondents said they first sought help from their spouse or partner, or from their doctor or church.

Table 83: First request for help: self assessed problem gamblers

Response categories	Yes (%)
Spouse or partner	-
Family or friends	64.5
Doctor (physician)	-
Church or religious worker	-
Gambling Help Line or other crisis service line such as Gamblers' Help, Lifeline	14.1
Social worker	-
Indigenous or ethnic community worker	-
Gamblers Anonymous	12.4
Staff member at a gambling venue	-
Other	9.0
Don't know/can't remember/refused	-

Source: QH9. Respondents (n = 14) are those who answered 'yes' in response to H4: 'In the last 12 months, have you tried to get any sort of help for problems related to your gambling, such as professional or personal help?'

The survey also sought gamblers' opinions on what would encourage early help-seeking behaviour. Their responses also provide useful indications of barriers to help-seeking (Table 84).

- 92.2 per cent of Victorians with a self-assessed gambling problem said they would have sought help earlier if they were more confident that the service would help or if others had recommended it (84.5 per cent);
- A large majority of respondents indicated they would have sought help earlier if support services had been more accessible locally (90.2 per cent), available in the gaming venue (80.8 per cent), around the clock (82.7 per cent) and advertised more widely;
- Anonymity was also a factor that respondents (86.1 per cent) commonly said would encourage early help-seeking behaviour;
- The stigma associated with being a 'problem gambler' appears to discourage early help-seeking. A significant proportion of these gamblers indicated preference for services that did not were not specifically designated for problem gambling.

Table 84: Would you have sought help earlier if the following had been the case?

Statements (multiple responses)	Yes (%)
A service had been available in the gaming venue	80.8
You were more confident about anonymity	86.1
The service did not regard you as a problem gambler	68.4
The service was provided under another guise so people would not know why you were going there	78.7
The service was more easily accessible in respect to location	90.2
The service was available around the clock	82.7
You were more confident they would help	92.2
Others could tell you if the service was helpful	84.5
You had seen it advertised more widely	80.7
Other (please specify)	0.0
Don't know/can't say	7.8

Source. QH7. Respondents (n = 14) are those who answered 'yes' in response to H4: 'In the last 12 months, have you tried to get any sort of help for problems related to your gambling, such as professional or personal help?' Proportions sum to more than 100 because some respondents gave multiple answers.

Only a minority of Victorians who wanted help for their gambling problems over the last 12 months have sought help from counsellors or other professional sources (Table 85).

- The majority (58.1 per cent) have not done so;
- 31 per cent sought help from Gamblers Anonymous, a finding comparable to the 2001 ACT survey (35 per cent);
- In the past 12 months a relatively small proportion of Victorians who wanted help with gambling problems have utilised the support services funded by the Victorian government — a Gamblers Help agency (6 per cent) and the Gambling Help Line (10.2 per cent);
- Apart from those designated gambling support services, 7.7 per cent of Victorian gamblers with self-assessed problems have turned to other people for help in the last year, such as their GP (4 per cent), welfare agencies (3.7 per cent) and church organisations (1.5 per cent).

Table 85: Source of counselling or other forms of professional assistance

Statements	Yes (%)
Gamblers Anonymous	31.0
Gamblers Help agency	6.0
Your GP	4.0
Gamblers Helpline telephone service	10.2
Welfare group e.g. Emergency relief organisation	3.7
Church organisations e.g. Salvation Army, Centacare, Wesley	1.5
Family relationships organisation e.g. Relationships Australia	0.5
Specialised university or hospital research unit	0.0
Hospital or clinic	0.4
Community Health Centre	1.6
Indigenous or ethnic community agency	0.0
None	58.1
Other	0.0
Don't know/can't say	0.0
Refused	2.0

Source. QHi. Respondents (n = 48) are those who answered 'yes' in response to H1: 'In the past 12 months, have you wanted help for problems related to your gambling?'

These findings suggest that there is little participation by Victorians in support services based solely on designated gambling services. It may be that individual gamblers and families would be more likely to access general community services that are already known, trusted and used by them.

The possible stigma of being labelled a 'problem gambler' and the tendency by many gamblers not to recognise that they have a problem are also disincentives to seeking help and early intervention. When problem gamblers do seek help, many are dissatisfied with the services that are available.

Those Victorian gamblers who have received help for their gambling problems were asked how they found out about the services available (Table 86).

- Despite the relatively low use of the Gambling Help Line and Gamblers Help agencies, the large majority of Victorian gamblers with self-assessed problems (84.7 per cent) found out about Victorian help services through television advertising;
- Informal mechanisms such as word of mouth (71.6 per cent) and asking someone for help (54.4 per cent) are also important sources of information;
- Only three other sources of help information were reported by gamblers: signs at a gambling venue (30.6 per cent), pamphlets at a gambling venue (21.1 per cent) and the telephone directory (16.4 per cent);
- These findings are substantially higher than reported in either the 1999 national survey or the ACT survey, indicating a significant improvement in provision of community information about gambling support services in Victoria.

Table 86: Source of information about help services

Statements (multiple responses)	Yes (%)
Signs at a gambling venue	30.6
Pamphlets available at a gambling venue	21.1
Cards, signs or pamphlets available elsewhere (e.g. GP's surgery)	3.7
Telephone directory	16.4
TV advertising	84.7
Radio	3.7
Newspaper and media articles on gambling	19.3
Referral by a GP	1.9
Referral by a financial adviser	0.0
Referral by a community service agency	2.0
Referral from other counselors	1.9
Employees assistance program	0.0
Word of mouth	71.6
Asked for help from someone	54.4
Other	2.6
Didn't/couldn't find out any ways of help	0.0
Can't say/Don't know	0.0
Refused	0.0

Source: QH8. Respondents (n = 14) are those who answered 'yes' in response to H4: 'In the last 12 months, have you tried to get any sort of help for problems related to your gambling, such as professional or personal help?' Proportions may sum to more than 100 because some respondents received information from more than one source.

Respondents were asked what type of assistance they had received and whether they were satisfied with it (Table 87). As with all findings in the help-seeking section of the 2003 Victorian survey, these figures must be treated with extreme caution because of the small sample size.

Table 87: Type of assistance sought

Response categories	%
Financial assistance/material aid	57.4
Counselling	40.8
Other	1.9
Don't know/can't remember/refused	-

Source: QH10. Respondents (n = 14) are those who answered 'yes' in response to H4: 'In the last 12 months, have you tried to get any sort of help for problems related to your gambling, such as professional or personal help?'

- The most common form of help being provided to those Victorian gamblers who reported they have sought help for their self-assessed gambling problems in the last 12 months is financial assistance/material aid (57.4 per cent);
- 40.8 per cent of those Victorian gamblers who reported they have sought help for their self-assessed gambling problems in the last 12 months are currently seeing a counsellor;
- This indicates a significant difference from the 1999 national survey and 2001 ACT survey, in which counselling was by far the dominant form of assistance to problem gamblers;
- Although a majority of Victorian self-assessed problem gamblers who had tried to get help in the last 12 months from counselling and other sources (70.6 per cent) were satisfied with the help that they received, more than 25 per cent expressed dissatisfaction (Table 88). However the number of respondents is very small and the findings must therefore be treated with caution.

Table 88: Level of satisfaction with assistance

Response categories	%
Very satisfied	55.9
Satisfied	14.7
Neither satisfied nor dissatisfied	3.7
Dissatisfied	19.7
Very dissatisfied	6.0

Source. QH11. Respondents (n = 14) are those who answered 'yes' in response to H4: 'In the last 12 months, have you tried to get any sort of help for problems related to your gambling, such as professional or personal help?'

Regional help-seeking — problem gamblers

Proportionately, a much lower percentage of problem gamblers in non-metropolitan areas (1 per cent) wanted help for their gambling in the previous 12 months than in the metropolitan area (3.1 per cent), although both figures are very low. This is a reflection of the lower proportion of persons in rural areas identified as problem gamblers.

Pathways for help-seeking

A large majority of Victorian gamblers (67.5 per cent) who had sought help for their self-assessed problems indicated that they had attended a problem gambling service in the last 12 months but stopped going. Statements giving possible reasons for stopping were read out to respondents for their response (Table 89).

- The most common reason for stopping professional help (75.1 per cent) was that they felt they had overcome the problem;
- 11.8 per cent indicated that the services were 'not helping';

Although the findings from such a small sample are only indicative, responses suggest that existing gambling support services in Victoria do not meet the needs of the whole community. More needs to be known about the specific needs of Victorians with a gambling problem, and the needs of families and friends, so that appropriate and accessible support services can be developed.

Table 89: Reasons for stopping help

Response categories	Yes (%)
Felt you had overcome the problem	75.1
Felt they were not helping	11.4
No time	0.0
Did not like the way they operated	3.3
Could not be bothered	0.0
Found some other way to handle the problem	0.0
Other	16.8
Don't know/can't say/refused	0.0

Source: QH13b. Respondents (n = 7) are those who answered 'yes' in response to the previous question H13a: 'Have you attended a problem gambling service but stopped going?'

Victorian gamblers in the core survey were also asked if they had sought help for problems other than gambling (Table 90) and which services they had used (Table 91).

- 92.2 per cent said they had not sought help for problems;
- A larger number had sought help for relationship and family problems (4.7 per cent) than for gambling;
- A small proportion had sought help for smoking (2.3 per cent), alcohol and drug problems (1.1 per cent);
- Those who had sought help turned mainly to GPs, community health centres and relationship organisations, as well as church and welfare agencies;
- Other sources of assistance include:
 - Family and friends;
 - Quitline;
 - Private counsellors, health consultants;
 - Social worker;
 - Psychiatric services;
 - Family Court.

These patterns of help-seeking behaviour seem to be specific to the particular problems being experienced by the respondents, with no apparent relationship to gambling problems. However, they do indicate agencies which are acceptable to sections of the Victorian community and which could be integrated into an holistic support network for people with gambling related problems.

Table 90: Help seeking behaviour for other problems

Response categories	Yes (%)
Relationship or family problem	4.7
Financial problem	0.5
Alcohol problem	0.5
Drug problem	0.6
Smoking	2.3
None	92.2
Other	0.1
Don't know / Can't say	0.3
Refused	0.1

Source: QH17. All gambling respondents. Weighted n = 906

Table 91: Source of help or assistance sought for other problems

Response categories	Yes (%)
Your GP	24.8
Welfare group e.g. Emergency relief organisation	6.8
Church organisations e.g. Salvation Army, Centacare, Wesley	6.4
Family relationships organisation e.g. Relationships Australia	10.6
Specialised university or hospital research unit	0.0
Hospital or clinic	2.4
Community Health Centre	8.7
Indigenous or ethnic community agency	0.0
Other	46.6
Don't know/can't remember	3.6
Refused	0.0

Source: QH18. Respondents (weighted n = 71) are those who answered at least in one category in response to the previous question H17: 'Have you sought assistance from any source for other problems such as a ...?'

Survey responses of Victorian problem gamblers who had reported experiencing psychological problems such as stress, depression and suicidality (Table 77) were further analysed to explore their help-seeking behaviour. Although the sample size is too small for meaningful conclusions about the general Victorian population, this analysis suggests that Victorians with gambling and psychological problems do not always seek help; nor do they continue to attend support services even if they do.

The unpredictable pathway of help-seeking behaviour by problem gamblers is illustrated in Table 92. As before, the small sample size means that these findings are only indicative.

- Of those eighteen problem gamblers who were under doctor's care due to stress, thirteen wanted help; only four of them tried to get help. Of that group two respondents attended a problem gambling service but stopped going;
- Of those 40 problem gamblers who felt depressed, 29 wanted help. Only thirteen of them tried to get help. Ultimately five gamblers attended a problem gambling service but stopped going;
- Of those eight problem gamblers who thought about suicide, seven wanted help; only three of them tried to get help. All these three gamblers attended a problem gambling service but stopped going.

With regard to the need for prevention strategies, this survey has identified several risk factors that have precipitated problem gambling in Victoria:

- Personal problems such as stress over a personal crisis, psychological problems, consumption of alcohol, boredom;
- Industry practices such as the easy access to gaming machines, access to cash outlets in gaming venues, advertising and promotions;
- Aspects of industry regulation such as availability of note acceptors;
- Lack of appropriate and accessible support services to meet the specific needs of the whole community.

Table 92: Problem gamblers' help-seeking behaviour for different psychological problems

Problem	Help-seeking behaviour (n)		
a. Under doctor's care due to stress?	(a) <i>Have you wanted help?</i>	No	Yes
		26	23
		5	13
		(b) <i>Have you tried to get help?</i>	
	No	No	Yes
		14	9
	Yes	9	4
		(c) <i>Have you attended problem gambling service but stopped going?</i>	
	No	Yes	No
		3	7
Yes	2	2	
	b. Feeling depressed?	(a) <i>Have you wanted help?</i>	No
20			7
		11	29
		(b) <i>Have you tried to get help?</i>	
No		No	Yes
		7	--
Yes		15	13
		(c) <i>Have you attended problem gambling service but stopped going?</i>	
No		Yes	No
		--	--
Yes	5	9	
	c. Thought about suicide?	(a) <i>Have you wanted help?</i>	No
31			29
		1	7
		(b) <i>Have you tried to get help?</i>	
No		No	Yes
		19	10
Yes		4	3
		(c) <i>Have you attended problem gambling service but stopped going?</i>	
No		Yes	No
		2	8
Yes	3	1	

Source: Problem gamblers. Weighted n = 68. Note: The slight discrepancy between 'yes' responses to question b (n = 13) and the number of responses for question c (n = 14) is due to rounding errors in the weighting process.

Conclusion

Despite the scope and rigour of the research, it is not entirely clear from this survey whether problem gambling and its associated impacts have moderated since the 1999 *Seventh Survey*. The important finding of this survey is that large numbers of Victorians continue to experience problems associated with their gambling. Consequently problem gambling remains an important issue for public policy.

Whether the prevalence rate of Victorian problem gamblers equates to 1.12 per cent or 0.8 per cent is, as expressed by the Chair of the Productivity Commission, '... a nicety, with little bearing on the need for effective policy action'.⁴³

We emphasise that the application of such screens in population surveys can only provide a broad estimate of the prevalence of gambling problems in the community. If anything, such prevalence measures underestimate the extent of problem gambling in the community. As noted by the Chairman of the Productivity Commission: 'all survey gambling screens are likely to underestimate

⁴³ G. Banks 2002. 'The Productivity Commission's gambling inquiry: 3 years on'. Paper presented to the 12th Annual Conference of the National Association for Gambling Studies (NAGS), Melbourne, p.4.

the extent of problem gambling — however they may choose to define it — simply because people have a natural reluctance to reveal the facts about such matters'.⁴⁴

The problem gambling prevalence rates found in this survey are helpful for policy development in a number of ways:⁴⁵

- They have estimated what proportion of the Victorian population need active intervention, and thus can be used to guide allocation of support services or inform other intervention strategies;
- Second, they help identify the number of Victorian gamblers with public health or other risks which are significantly higher than the average. People identified in this at-risk group may experience harms from gambling, but not at levels which justify specific individual interventions. However, such groups may have considerable policy significance as the target for public health campaigns, information provision and preventative strategies — designed either to reduce the number of people in this moderate-risk group or to prevent the likelihood of gamblers moving to the problem gambling group which do need individual interventions;
- They may also be used to discriminate between people within a particular group who do not need 'treatment' and those who probably do;
- Finally, the findings may be used to help estimate the costs of problem gambling. As with all public health problems which lie on a continuum, the costs need to be assessed by looking at the magnitude of problem gambling for all Victorians who are adversely affected by gambling, not just those people whose risks identify them as a 'problem gambler'.

⁴⁴ *ibid.*

⁴⁵ Adapted from Lattimore, R. and R. Phillips 2000. 'The Impacts of legal gambling and the prevalence of problem gambling in Australia'. Paper presented to the *Eleventh International Conference on Gambling and Risk-taking*, Las Vegas, June 12-16 2000.

Community Attitudes

Notwithstanding high participation rates in gambling activities amongst Australian adults, the Productivity Commission's *National Gambling Survey* reported substantial unease within the community about the broader impacts of gambling. Similarly, Victorian surveys from 1996–99 reported increasing community concern that the adverse effects of gambling outweighed the benefits. Replicating these earlier studies, and introducing a number of issues identified in consultations prior to this survey, Victorian residents surveyed in 2003 were asked to agree or disagree with a series of statements on the impacts of gambling in the community.

The three broad issues for consideration are community attitudes towards gambling in general, perceptions of the effects of gambling both statewide and on the local community, and government policies on gambling.

Results reported in this section are from those respondents who were randomly selected (from total sample) for general interview and were willing to continue, unless otherwise reported. The interview segment on gambling and policy attitudes involved, on a random basis, one-in-three non-gamblers, one-in-six non-regular gamblers and all regular gamblers. Respondents were read a series of statements of attitudes towards gambling and asked to indicate their level of agreement with each statement.

As well as the overall response by surveyed Victorians, responses by surveyed gamblers were then compared to non-gamblers, and attitudes of metropolitan and non-metropolitan residents compared.

In summary, Victorian residents surveyed in 2003 are more disapproving of the impacts of gambling than the average Australian was in 1999, although strong opinions on some issues have moderated and stabilised since the *Seventh Survey*.

- Fewer Victorian residents than Australians as a whole believe that gambling has an overall positive effect on society;
- A substantial majority of Victorians (85.1 per cent) consider that gambling is a serious social problem in Victoria;
- Victorians in 2003 strongly disagree with the statement that poker machines in clubs and hotels do more good than harm for the Victorian community;
- On average, Victorian residents are also less convinced than Australians were in 1999 as to one of the advantages most often cited in relation to gambling — increased recreational enjoyment;
- Victorian residents are more inclined to prefer a reduction in the number of EGMs/gaming machines than was indicated in the 1999 national survey;
- There is moderate support in the Victorian community for gambling taxes in preference to other forms of taxation.

Perceptions of gambling in Victoria

The Productivity Commission's 1999 national survey found that around 70 per cent of Australians (including a substantial majority of regular gamblers) consider that gambling does more harm than good to the community. Conversely, in 1999 only 15 per cent of Australians felt gambling does more

good than harm. These negative community attitudes and prejudices have been reflected in previous Victorian surveys and in a subsequent study conducted in the ACT (78 per cent).⁴⁶

Table 93 and Figure 7 provide a summary of Victorians' attitudes to gambling in Victoria in 2003. Respondents were read out a series of statements concerning attitudes towards gambling and asked to indicate their level of agreement with each statement.

Overall, there were high levels of agreement with the following statements:

- Gambling is a serious social problem in Victoria;
- Gambling is too widely accessible in Victoria; and
- The number of poker machines in Victoria should be reduced.

There were moderate levels of agreement with the following statements:

- There is more gambling in your local community than three years ago;
- Gambling and gambling venues should not be allowed to be advertised; and
- Raising revenue from gambling taxes is preferred to increasing other State taxes such as payroll tax, land tax, stamp duties.

Overall, there were high levels of disagreement with the following statements:

- On the whole poker machines in clubs do more good for the Victorian community than harm; and
- On the whole poker machines in hotels do more good for the community than harm.

There were moderate levels of disagreement with the following statements:

- Australians should be allowed to gamble at home using the internet;
- Hotels and clubs should be free to decide how many poker machines they should have; and
- On the whole the Crown Casino Complex does more good than harm for the Victorian community.

The pattern of agreement/disagreement is broadly similar for Victorian gamblers and non-gamblers. However, the strength of attitudes in the two groups differs on some issues.

- On all eleven issues, non-gamblers held stronger opinions. A higher proportion of non-gamblers 'strongly agreed' or 'strongly disagreed' than did the gambler sample;
- A higher proportion of non-gamblers surveyed also shared similar opinions than did the gambler sample;
- Notable differences of opinion occurred between the two population groups:
 - On whether 'raising revenue from gambling taxes is preferred to increasing other State taxes such as payroll tax, land tax, stamp duties'. Opinions on this statement were more divided than any other, with 56.9 per cent of gamblers agreeing, compared with 41.3 per cent of non-gamblers;
 - The three statements about whether poker machines in clubs, hotels and Crown Casino do more good for the community than harm also revealed differences of opinion. While a large majority of both gamblers and non-gamblers disagreed, 9–13 per cent more non-gamblers disagreed with those statements compared to gamblers.

⁴⁶ McMillen, J. *et al.* 2001. *op.cit.*

Attitudes and perceptions of gambling in Victoria — regions

Interpretation of the survey results in this section focuses on any discernable differences in attitudes towards gambling in general between the metropolitan and non-metropolitan populations of Victoria.

Metropolitan areas tend to have a greater proportion of residents with a much stronger opinion in either direction (Table 94).

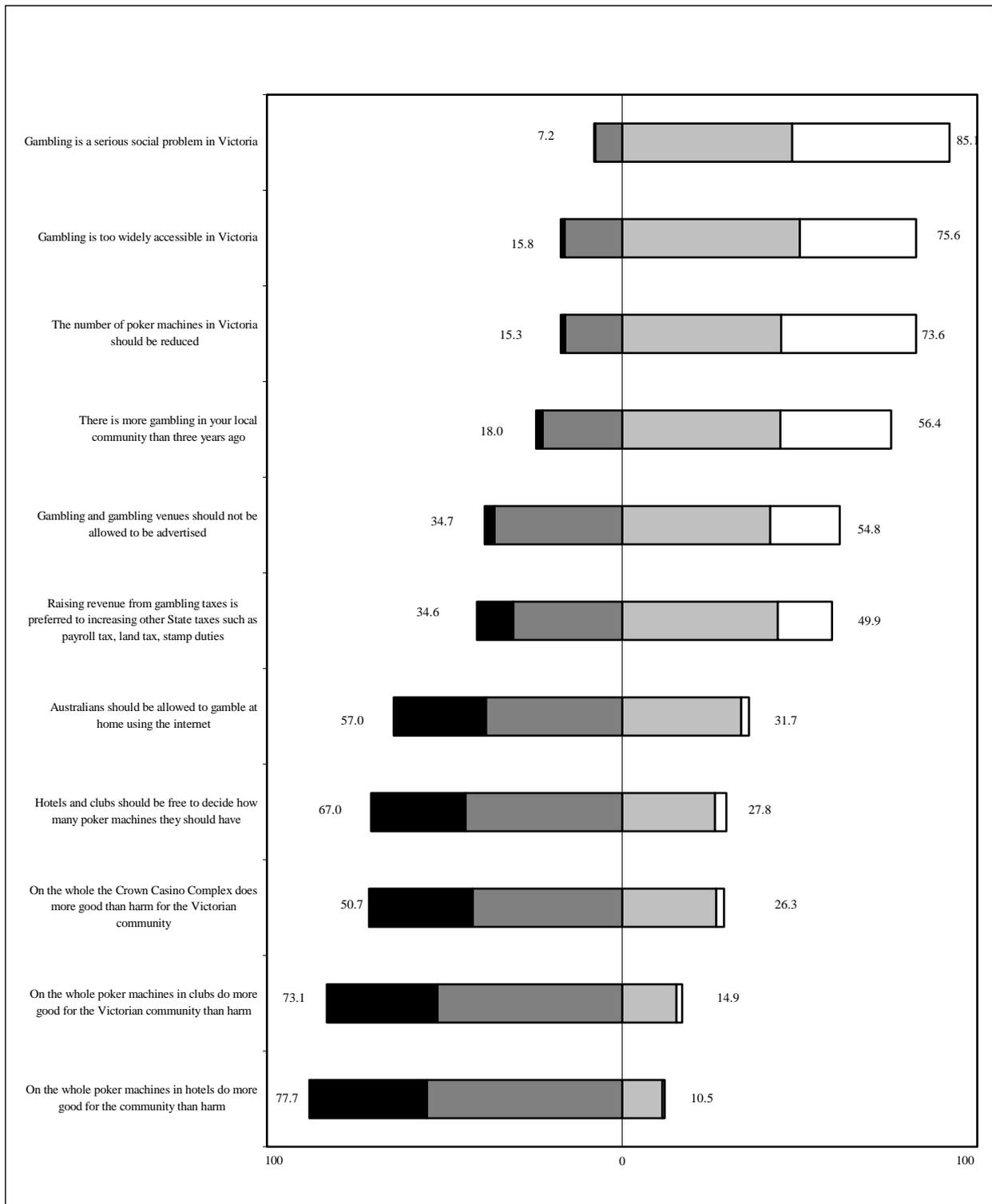
The greatest difference of opinion occurs on whether there is more gambling in the local community than three years ago. Over 29 per cent of non-metropolitan residents disagreed with this statement compared to just 18 per cent of metropolitan Victorians. This finding indicates that more Melbourne residents perceive that gambling continues to expand in their area than do country residents.

Table 93: Attitudes and perceptions of gambling in Victoria: Gamblers and non-gamblers

Statements	Strongly agree (%)	Agree (%)	Neither agree nor disagree (%)	Disagree (%)	Strongly Disagree (%)
Gambling is too widely accessible in Victoria					
Gamblers	28.4	45.8	8.0	16.6	1.1
Non-gamblers	35.5	48.2	5.9	9.9	0.5
Gambling and gambling venues should not be allowed to be advertised					
Gamblers	16.9	35.8	9.5	34.9	2.8
Non-gamblers	19.5	43.4	10.4	24.8	1.9
There is more gambling in your local community than three years ago					
Gamblers	27.7	38.6	11.2	21.0	1.4
Non-gamblers	27.0	40.8	14.9	15.2	2.0
Gambling is a serious social problem in Victoria					
Gamblers	40.1	45.5	5.7	8.5	0.2
Non-gamblers	47.5	44.2	5.0	3.1	0.2
On the whole the Crown Casino Complex does more good than harm for the Victorian community					
Gamblers	3.8	27.9	17.2	30.9	20.3
Non-gamblers	1.7	15.9	18.4	36.2	27.8
On the whole poker machines in clubs do more good for the Victorian community than harm					
Gamblers	1.6	16.2	10.5	46.0	25.7
Non-gamblers	0.7	6.6	8.2	49.6	
On the whole poker machines in hotels do more good for the community than harm					
Gamblers	0.6	12.1	9.5	49.2	28.6
Non-gamblers	0.2	5.2	7.8	52.3	34.4
Hotels and clubs should be free to decide how many poker machines they should have					
Gamblers	3.3	26.2	3.5	43.1	23.9
Non-gamblers	2.3	22.0	5.4	40.0	30.4
The number of poker machines in Victoria should be reduced					
Gamblers	32.2	40.8	9.7	16.2	1.1
Non-gamblers	41.8	40.2	7.6	9.5	0.9
Raising revenue from gambling taxes is preferred to increasing other State taxes such as payroll tax, land tax, stamp duties					
Gamblers	14.8	42.1	10.1	25.7	7.3
Non-gamblers	10.4	31.3	10.1	33.0	15.2
Australians should be allowed to gamble at home using the internet					
Gamblers	2.1	29.6	9.6	34.4	24.3
Non-gamblers	1.9	32.3	9.4	35.8	20.5

Source: QB1. All respondents. Weighted n = 1,767.

Figure 7: Attitudes and perceptions of gambling in Victoria



Strongly agree
 Agree
 Disagree
 Strongly disagree

Source: QB1. All respondents. Weighted n = 1,767

Table 94: Community attitudes towards gambling in general: metropolitan and non-metropolitan regions

Statement	Strongly Agree (%)	Agree (%)	Neither (%)	Disagree (%)	Strongly Disagree (%)
Gambling is too widely accessible in Victoria.					
Metropolitan	31.7	44.7	7.6	14.7	1.2
Non-Metropolitan	25.9	50.8	7.2	15.6	0.4
Gambling and gambling venues should not be allowed to be advertised.					
Metropolitan	20.0	36.8	8.9	31.6	2.6
Non-Metropolitan	11.0	40.0	11.9	34.8	2.4
There is more gambling in your local community than three years ago.					
Metropolitan	28.7	39.2	14.1	16.8	1.2
Non-Metropolitan	24.8	39.0	7.1	26.9	2.3
Gambling is a serious problem in Victoria					
Metropolitan	43.8	43.2	5.7	7.0	0.3
Non-Metropolitan	36.7	50.7	5.0	7.6	0.0
On the whole the Crown Casino Complex does more good than harm for the Victorian community.					
Metropolitan	4.0	25.3	17.6	29.5	23.6
Non-Metropolitan	1.2	24.0	17.0	39.6	18.2
On the whole EGMs in clubs do more good for the Victorian community than harm.					
Metropolitan	1.4	13.5	9.7	44.7	30.8
Non-Metropolitan	1.5	14.6	10.5	52.9	20.5
On the whole EGMs in hotels do more good for the Victorian community than harm.					
Metropolitan	0.6	10.3	9.2	47.4	32.5
Non-Metropolitan	0.3	10.5	8.8	56.9	23.6
Hotels and clubs should be free to decide how many EGMs they should have.					
Metropolitan	3.5	26.4	4.5	39.0	26.6
Non-Metropolitan	1.9	21.9	2.5	51.1	22.6
The number of EGMs in Victoria should be reduced.					
Metropolitan	37.4	38.2	9.4	13.8	1.2
Non-Metropolitan	27.1	47.2	8.5	16.6	0.6
Raising revenue from gambling taxes is preferred to increasing other State taxes such as payroll tax, land tax, stamp duties.					
Metropolitan	15.6	39.0	9.6	25.9	9.9
Non-Metropolitan	8.6	40.6	11.4	31.8	7.5
Australians should be allowed to gamble at home using the Internet.					
Metropolitan	2.5	31.1	9.6	31.3	25.5
Non-Metropolitan	0.7	28.1	9.5	43.8	17.9

Source: QB1. All respondents. Weighted n = 1,767.

Perceptions of the effects of gambling

In 1999 the *Seventh Survey* identified profound concerns in the Victorian community about the effects of gambling. That survey found that most Victorians thought that gambling is a serious social problem (83 per cent), that gambling-related problems had got worse in the previous four years (84 per cent) and that gambling was too widely accessible (78 per cent).

Table 95 and Figure 8 provide a summary of community attitudes towards the effects of gambling in Victoria in 2003. Respondents heard a series of statements and were asked to indicate the extent to which they agree with each statement.

Overall, there were high levels of agreement with the following statements:

- Gambling-related problems have got worse in Victoria over the last three years;
- Poker machines should be removed from suburban/local shopping strips.

There were moderate levels of agreement with the following statements:

- The increased availability of gambling opportunities has significantly increased the number of problem gamblers in your local community;
- Taxing gambling is preferable to raising other taxes;
- Gambling is a serious social problem in your local community.

Responses concerning agreement and disagreement were evenly divided on the following statements:

- Wider availability of gambling in recent years has provided more opportunities for recreational enjoyment;
- Gambling has increased employment in your suburb or local community.

Overall, there were high levels of disagreement with the following statements:

- Gambling has improved social life in your suburb or local community;
- Overall, gambling does more good for the Victorian community than harm;
- Poker machine have been good for your suburb or local community.

There were moderate levels of disagreement with the following statements:

- People in your local community gamble at the club or hotel because there are few other leisure facilities available;
- Victoria needs gambling activities to attract tourists.

Some differences in the pattern of agreement/disagreement were found for Victorian gamblers and non-gamblers. Moreover, the strength of attitudes in the two groups differs on some issues; non-gamblers tended to hold stronger opinions.

- A higher proportion of non-gamblers agreed with the following statement than did the gambler sample:
 - Gambling-related problems have got worse in Victoria over the last three years.
- A higher proportion of non-gamblers disagreed with the following statements than did the gambler sample:
 - Gambling has improved social life in your suburb or local community;
 - Wider availability of gambling in recent years has provided more opportunities for recreational enjoyment;
 - Overall, gambling does more good for the Victorian community than harm;
 - Poker machine have been good for your suburb or local community;
 - Wider availability of gambling in recent years has provided more opportunities for recreational enjoyment;

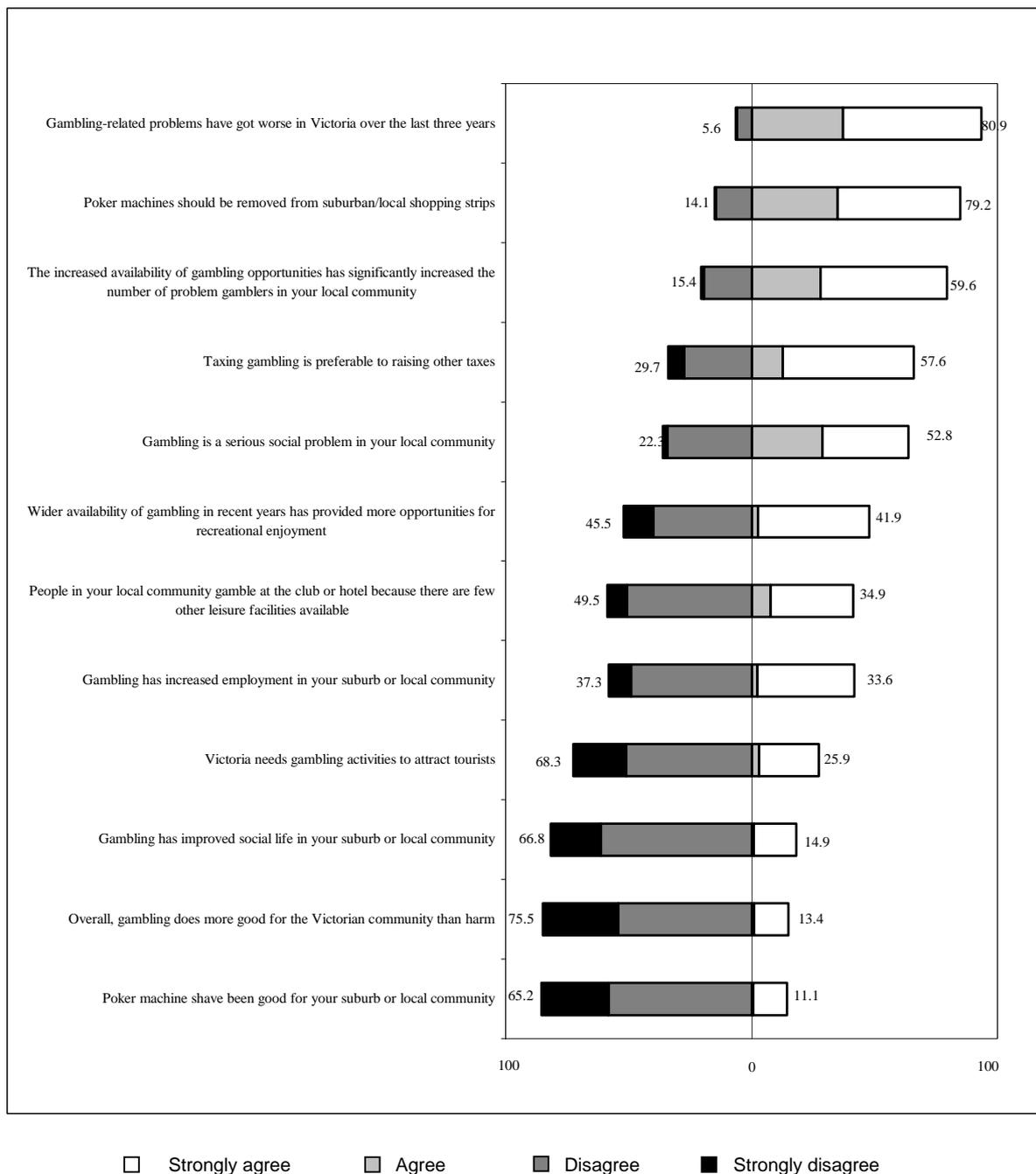
- Gambling has increased employment in your suburb or local community;
- Victoria needs gambling activities to attract tourists;
- Taxing gambling is preferable to raising other taxes.
- The greatest similarity of opinion between the two population groups occurs on the following statements:
 - Poker machines should be removed from suburban/local shopping strips;
 - The increased availability of gambling opportunities has significantly increased the number of problem gamblers in your local community.

Table 95: Perceptions of the effects of gambling in Victoria: Gamblers and non-gamblers

Statement	Strongly Agree (%)	Agree (%)	Neither (%)	Disagree (%)	Strongly Disagree (%)
Overall, gambling does more good for the Victorian community than harm					
Gamblers	1.0	14.5	10.1	49.7	24.8
Non-gamblers	0.7	7.5	6.4	47.4	38.0
Poker machines have been good for your suburb or local community					
Gamblers	0.8	13.6	17.3	47.5	20.8
Non-gamblers	0.3	5.3	11.5	53.4	29.5
Gambling has increased employment in your suburb or local community					
Gamblers	2.2	38.7	17.0	35.7	6.4
Non-gamblers	0.6	32.4	18.6	40.1	8.3
Gambling has improved social life in your suburb or local community					
Gamblers	0.7	17.9	12.6	52.1	16.7
Non-gamblers	0.8	7.3	9.4	60.5	22.0
Gambling-related problems have got worse in Victoria over the last three years					
Gamblers	34.5	52.5	6.3	6.2	0.6
Non-gamblers	36.5	54.2	5.3	3.8	0.3
Wider availability of gambling in recent years has provided more opportunities for recreational enjoyment					
Gamblers	2.9	45.2	8.6	33.1	10.3
Non-gamblers	1.2	29.2	8.8	46.8	14.0
Gambling is a serious social problem in your local community					
Gamblers	18.4	40.6	13.5	26.0	1.5
Non-gamblers	26.0	37.9	16.4	18.3	1.3
The increased availability of gambling opportunities has significantly increased the number of problem gamblers in your local community					
Gamblers	23.6	45.0	13.0	17.4	0.9
Non-gamblers	26.4	43.3	14.3	15.2	0.8
Poker machines should be removed from suburban/local shopping strips					
Gamblers	31.7	48.3	4.4	14.3	0.8
Non-gamblers	38.4	45.1	5.6	10.5	0.5
Victoria needs gambling activities to attract tourists					
Gamblers	3.5	25.5	5.2	47.9	17.9
Non-gamblers	0.9	16.8	2.8	51.3	28.2
Taxing gambling is preferable to raising other taxes					
Gamblers	11.7	51.2	9.8	22.7	4.6
Non-gamblers	11.2	39.9	7.2	31.3	10.5
People in your local community gamble at the club or hotel because there are few other leisure facilities available					
Gamblers	7.5	32.4	8.2	45.9	6.1
Non-gamblers	5.5	26.0	8.8	48.1	11.7

Source: QB2. All respondents. Weighted n = 1,767.

Figure 8: Perceptions of the effects of gambling in Victoria



Source: QB2. All respondents. Weighted n = 1,767.

Community attitudes towards the effects of gambling in the Victorian survey are broadly consistent with the results of the *Seventh Survey*, the 1999 national survey and the 2001 ACT *Gambling Survey*. However there are indications that the Victorian community's attitudes to gambling in some respects are significantly more disapproving than in 1999 at the Australian level. Further, the opinions of Victorian non-gamblers on the effects of gambling in the community are more negative than those of gamblers.

Victorian opinions appear to be shifting and between the three gambling segments surveyed (regular gamblers, non-regular gamblers and non-gamblers), there are also greater disparities of opinion than before.

- The majority of Victorians in 2003 (80.9 per cent) feel strongly that problems related to gambling have worsened in the state over the last three years. This is a slight decline from the proportion of Victorians (84 per cent) who expressed the same view in the *Seventh Survey* (Figure 8);
- Only 0.9 per cent of all Victorian respondents strongly agreed with the statement that ‘overall gambling does more good than harm’. This is a substantially less than the 1999 national findings (3.8 per cent) and 2001 ACT results (2.7 per cent);
- Of the 11.9 per cent of surveyed Victorians who agreed that overall, gambling does more good for the Victorian community than harm (Table 95), most were gamblers (Table 96). However, of the 76 per cent who disagreed, 60 percent were also gamblers;
- On the other hand, 27.4 per cent of Victorians surveyed strongly disagreed with the statement (compared with 33.2 per cent nationally in 1999).

Table 96: Perception of the net benefits of gambling, by gambler segment

Response categories	Regular gamblers (%)	Non-regular gamblers (%)	Non-gamblers (%)
Strongly agree (0.9%)	56.5	26.1	17.4
Agree (11%)	37.2	42.9	19.9
Neither agree nor disagree (8.3%)	33.1	43.1	23.8
Disagree (48.5%)	24.3	41.8	33.9
Strongly disagree (31.4%)	17.1	36.4	46.5

Source: QB2: ‘Overall, gambling does more good for the Victorian community than harm’. All respondents. Weighted n = 1,767.

Perceptions of the net benefit of gambling — regions

As was the case with attitudes towards gambling in general, attitudes towards the net community benefit of gambling are very similar between Victorian country and city residents. However, while the overall perception of Victorian residents is negative, those in the city tend towards slightly stronger, more positive views (Table 97).

- 13.7 per cent of metropolitan residents agree that gambling does more good for the community than harm, as do 13.6 per cent of non-metropolitan residents;
- 1.2 per cent of metropolitan residents strongly agree with this statement compared to just 0.1 per cent of non-metropolitan respondents.

Table 97: Perceptions of the effects of gambling: metropolitan and non-metropolitan regions

Statements	Strongly Agree (%)	Agree (%)	Neither (%)	Disagree (%)	Strongly Disagree (%)
Overall, gambling does more good for the Victorian community than harm.					
Metropolitan	1.2	12.5	8.8	47.8	29.6
Non-Metropolitan	0.1	13.5	10.1	52.6	23.7
EGMs have been good for your suburb or local community					
Metropolitan	0.5	8.7	17.1	48.5	25.2
Non-Metropolitan	1.1	19.0	12.5	50.2	17.1
Gambling has increased employment in your suburb or local community					
Metropolitan	1.7	33.6	20.2	37.6	6.9
Non-Metropolitan	2.3	46.3	10.3	34.2	6.9
Gambling has improved social life in your suburb or local community.					
Metropolitan	0.7	15.5	13.1	52.1	18.6
Non-Metropolitan	0.8	14.9	8.4	59.2	16.7
Gambling-related problems have got worse in Victoria over last three years.					
Metropolitan	36.5	51.8	6.1	5.1	0.6
Non-Metropolitan	30.9	55.8	6.1	7.0	0.2
Wider availability of gambling in recent years has provided more opportunities for recreational enjoyment					
Metropolitan	2.8	40.5	9.4	35.0	12.3
Non-Metropolitan	1.4	43.8	6.7	40.1	8.0

Statements	Strongly Agree (%)	Agree (%)	Neither (%)	Disagree (%)	Strongly Disagree (%)
Gambling is a serious social problem in your local community					
Metropolitan	21.8	38.7	15.9	22.0	1.6
Non-Metropolitan	16.4	43.4	10.0	29.3	0.9
The increased availability of gambling opportunities has significantly increased the number of problem gamblers in your local community					
Metropolitan	25.8	43.2	14.1	15.8	1.1
Non-Metropolitan	20.2	48.3	11.2	19.9	0.4
EGMs should be removed from suburban/local shopping strips					
Metropolitan	34.0	46.3	5.0	13.9	0.8
Non-Metropolitan	31.9	50.9	3.6	13.3	0.3
Victoria needs gambling activities to attract tourists					
Metropolitan	3.2	22.7	4.9	48.2	21.0
Non-Metropolitan	2.1	24.9	4.1	50.0	18.9
Taxing gambling is preferable to raising other state taxes.					
Metropolitan	12.8	47.0	9.0	24.4	6.8
Non-Metropolitan	8.2	52.0	9.8	26.0	4.0
People in your local community gamble at the club or hotel because there are few other leisure facilities available.					
Metropolitan	7.4	27.8	8.7	47.9	8.2
Non-Metropolitan	6.0	38.6	7.4	42.7	5.2

Source: QB2. All respondents. Weighted n = 1,767.

Perceptions of gambling policy in Victoria

To investigate community perceptions and prejudices on Victorian gambling policy, survey respondents were initially asked a general question about their attitude to policy change: 'Would you like to see any changes to gambling policy in Victoria?'

- A substantial majority (65.7 per cent) answered 'yes';
- 25.3 per cent answered 'no', and 9 per cent either refused or answered 'don't know'. These respondents did not continue with questions in this section of the survey.

A series of statements reflecting attitudes towards specific gambling policies were then read out to those respondents who answered 'yes'. They were asked to indicate their level of agreement with each statement.

Victorians expressed strong views on certain aspects of gambling policy in Victoria, with community support for specific policy changes. A large majority of those surveyed agreed with all statements about possible changes to gambling policy in the state (Table 98, Figure 9).

The strongest levels of support were expressed for the following statements:

- There should be more clubs and hotels without poker machines (90.8 per cent overall). 45.5 per cent strongly agreed with this statement. More non-gamblers (50 per cent) expressed support than gamblers (41.3 per cent);
- The Victorian Government should reduce the number of poker machines (89.4 per cent). This statement had the highest proportion overall who strongly agreed (45.9 per cent), with stronger agreement from non-gamblers (51.8 per cent) than gamblers (43.3 per cent);
- ATMs at clubs, hotels and casinos should have a withdrawal limit of \$200 per day (87.3 per cent);
- School education programs should include education about responsible gambling (86.8 per cent);

- There should be trained people in gambling venues to offer assistance to gamblers who display problem behaviour (86.7 per cent);
- Banknote acceptors should be removed from gaming machines (86.7 per cent).

There was moderate level of agreement with the following statement:

- Local government authorities should make the final decision about whether more poker machines are allowed in your local community (62.4 per cent agreed overall).

Figure 9 provides a summary of how Victorian residents view each of the suggested policy changes concerning gambling.

It must be stressed that this survey was conducted following a period of intense community debate about the need for policy change to address the effects of gambling on individuals, families and the community as a whole. A number of policy proposals nominated in the survey statements were receiving wide media publicity both before and during the time that the survey was being administered. It is likely that those public debates affected responses by Victorian citizens to the survey statements, although the exact nature and direction of that impact is unknown.

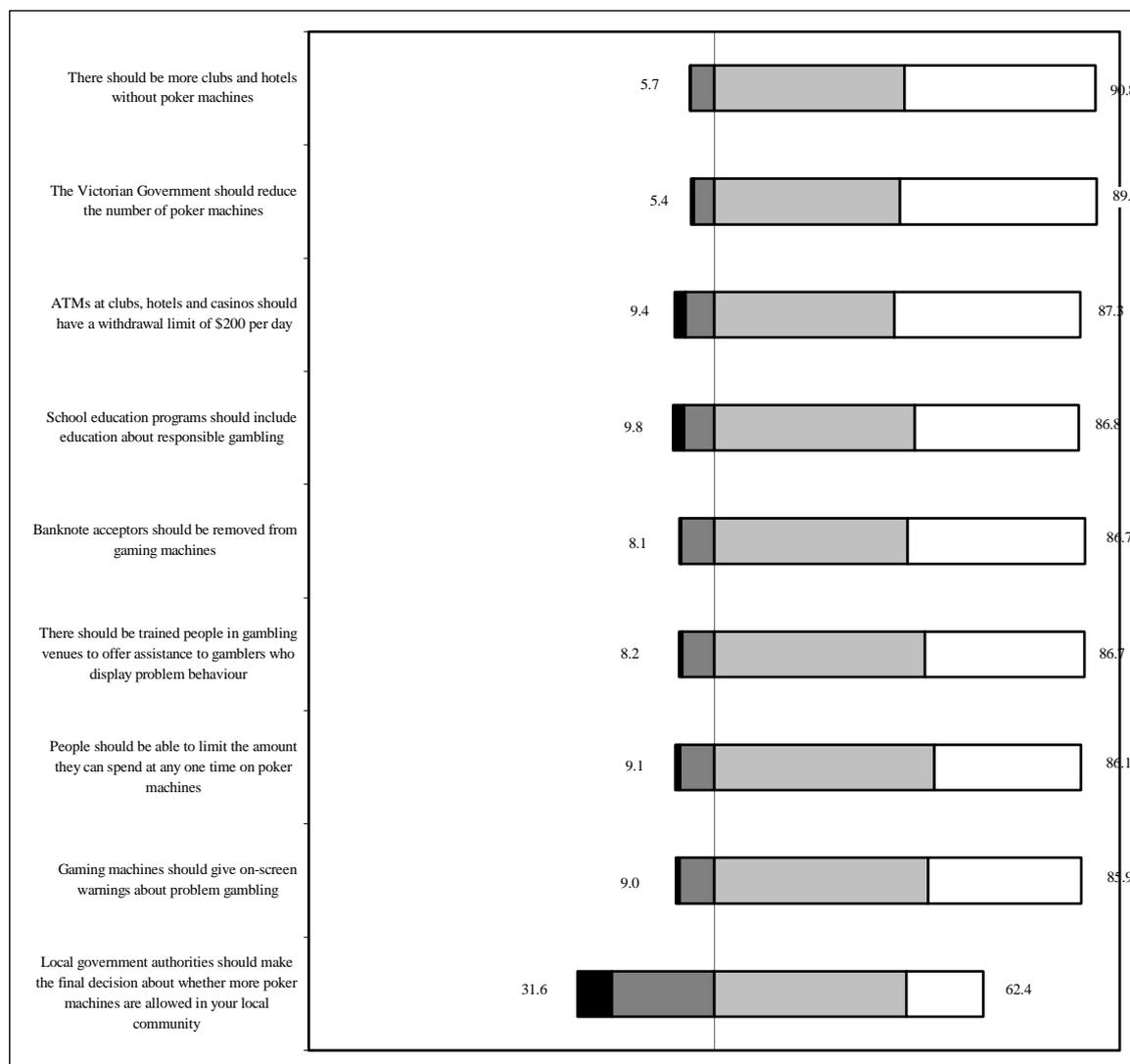
In the period of survey data analysis, the Victorian Government has introduced or proposed several policy reforms. Those policy changes and their possible impacts have not been considered in this analysis.

Table 98: Attitudes towards gambling policy changes: Gamblers and non-gamblers

Statements	Strongly Agree (%)	Agree (%)	Neither (%)	Disagree (%)	Strongly Disagree (%)
There should be more clubs and hotels without poker machines					
Gamblers	41.3	44.2	4.6	9.2	0.6
Non-gamblers	50.0	44.7	2.8	2.6	0.0
Local government authorities should make the final decision about whether more poker machines are allowed in your local community					
Gamblers	17.3	41.4	4.6	27.6	9.1
Non-gamblers	20.3	43.5	5.2	23.6	7.3
People should be able to limit the amount they can spend at any one time on poker machines					
Gamblers	33.5	50.6	3.4	10.9	1.6
Non-gamblers	36.4	52.8	3.5	6.3	0.9
ATMs at clubs, hotels and casinos should have withdrawal limit of \$200 per day					
Gamblers	44.7	41.5	2.0	8.7	3.1
Non-gamblers	42.1	44.7	3.1	8.2	1.9
Banknote acceptors should be removed from gaming machines					
Gamblers	41.4	43.6	3.4	10.4	1.3
Non-gamblers	41.3	49.5	3.8	4.9	0.5
Gaming machines should give on-screen warnings about problem gambling					
Gamblers	32.0	49.1	4.6	12.3	2.0
Non-gamblers	38.2	51.3	4.2	5.9	0.5
School programs should include education about responsible gambling					
Gamblers	37.6	49.1	2.5	7.8	3.0
Non-gamblers	37.4	49.8	4.4	5.6	2.8
There should be trained people in gambling venues to offer assistance to gamblers who display problem behaviour					
Gamblers	34.6	49.1	4.6	9.7	1.9
Non-gamblers	38.2	51.9	3.1	6.4	0.5
The Victorian Government should reduce the number of poker machines					
Gamblers	43.3	42.2	4.8	8.3	1.5
Non-gamblers	51.8	41.9	2.8	3.5	0.0

Source: QC3. Respondents are those who answered 'yes' to the previous question C2. Weighted n = 1,125

Figure 9: Attitudes towards gambling policy changes



Strongly agree
 Agree
 Disagree
 Strongly disagree

Source: QC3a. Respondents are those who answered 'yes' to the previous question C2. Weighted n = 1,125.

Attitudes towards gambling policy changes — regions

In most cases there is little variation in community attitudes toward gambling policies across Victorian regions.

- On most policy statements, as was the case in the other attitudinal measures, there is a high level of uniformity in responses across metro/non-metropolitan regions. This is despite some notable differences evident in gambling activity between the two populations;
- Both metropolitan and non-metropolitan residents are heavily in favour of all of the policy statements put forward (around 85 per cent either agree or strongly agree);
- While approximately 60 per cent of both regional groups agreed that local governments should have the final decision on new EGMs in the community, support for this proposition is slightly higher in the metropolitan area.

Increasing or reducing the number of EGMs

The *Seventh Survey* and the Productivity Commission had identified the number of EGMs and their impact in the community as important issues for Victorians in 1999, and as noted above, the question had remained a matter for continued policy debate and community concern.

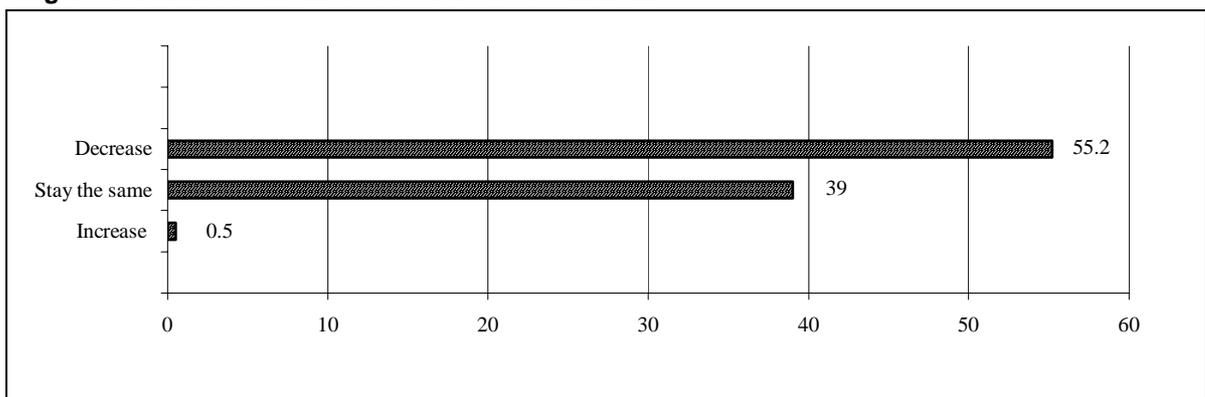
This survey sought to further elicit attitudes of residents to policies related specifically to reduction in the number of EGMs. This section of the report analyses the responses on those issues and, where relevant, draws a comparison with findings from the *Seventh Survey*.

- As shown in Figure 9, a large majority of survey respondents (89.4 per cent) agreed that the Victorian government should reduce the number of EGMs. The relative strength of this attitude is significant, with 45.9 per cent of Victorians strongly agreeing with the statement (a further 43.5 per cent agreed). This is a substantially stronger response than in 1999 (73 per cent) and suggests robust community support for policy change;
- In addition, a majority of the respondents (55.2 per cent) agreed with the statement that the number of EGMs currently available in their local community should be decreased (Figure 10);
- 39 per cent of the respondents indicated that the number of EGMs should remain the same, while only 0.5 per cent was in favor of increasing the number of those machines;
- Significantly, 67 per cent of respondents disagreed that '*hotels and clubs should be free to decide how many poker machines they should have*', suggesting community support for regulation on this issue.

The majority of respondents were in favor of decreasing the number of EGMs located in Victoria.

- Support for a decrease in the number of EGMs in Victorian hotels was highest at 91.4 per cent (Figure 11);
- 88.4 per cent of Victorians agreed that the number of EGMs in Victorian clubs should be decreased;
- 63.7 per cent agreed that the number of EGMs in Crown Casino should be decreased.

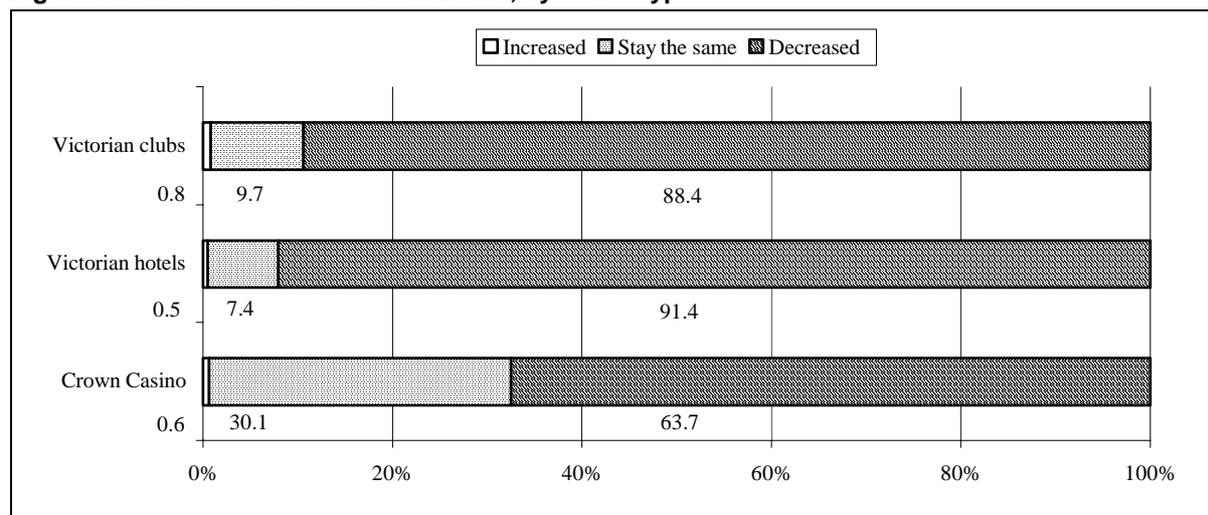
Figure 10: Attitudes to increase or decrease in EGMs



Source: QB4. 'Do you think the number of poker machines and gaming machines in your local community should be increased, decreased or stay the same?' All respondents. Weighted n = 1,767.

Note that 'large increase' and 'small increase' categories are collapsed into an 'increase' category whereas 'small decrease' and 'large decrease' categories are collapsed into a 'decrease' category. This is consistent with the following Figure (QB5). For details about percentages on every response category, see Table 98.

Figure 11: Increase or decrease in EGMs, by venue type



Source: QB5. Do you think the number of poker machines and gaming machines (located in Victorian clubs, hotels and Crown Casino) should be increased, decreased or stay the same? Respondents are those who answered either 'large increase' or 'small increase' or 'small decrease' or 'Large decrease' to the previous question (QB4).

Responsibility for reducing gambling

When asked to nominate who is responsible for reducing gambling, Victorians appear to see reduction in gambling as a shared responsibility (Table 99):

- A large majority (88 per cent) of Victorian residents agreed (41.4 per cent strongly agreed and 46.6 per cent agreed) that each individual has responsibility for gambling reduction (Table 99). This is a significant increase on Victorians response when 77 per cent held this view;
- More gamblers (43.6 per cent) than non-gamblers (39.2 per cent) strongly agreed with this proposition;
- 78.7 per cent of respondents were of the view that State government is also responsible. This view was held more strongly by non-gamblers (84.2 per cent in total, with 33.7 per cent in strong agreement) than gamblers (47.2 per cent agreed and 27.4 per cent strongly agreed);
- 66.9 per cent see local government authorities as responsible. Non-gamblers again agreed more strongly with this position (55 per cent agreed and 21.2 per cent strongly agreed) than gamblers (42.2 per cent and 20.4 per cent respectively);
- 61.6 per cent agreed that the gambling providers are also responsible. This response was the greatest difference in the strength of opinion between non-gamblers (45.7 per cent agreed, 24.3 per cent strongly agreed) and gamblers (37.8 per cent agreed, 17.8 per cent strongly agreed).

Table 99: Responsibility for reducing gambling: gamblers and non-gamblers

	Strongly agree (%)	Agree (%)	Neither (%)	Disagree (%)	Strongly disagree (%)
Individuals					
Gamblers	43.6	45.3	2.5	6.9	1.7
Non-gamblers	39.2	48.6	3.3	7.1	1.8
The gambling providers					
Gamblers	17.8	37.8	4.3	32.3	7.8
Non-gamblers	24.3	45.7	5.0	21.9	3.2
Local government authorities					
Gamblers	20.4	42.2	3.1	28.9	5.4
Non-gamblers	21.2	55.0	3.5	16.8	3.5
State government					
Gamblers	27.4	47.2	1.9	18.6	5.0
Non-gamblers	33.7	50.5	2.8	10.1	2.8

Source: Q1: 'Would you say that you strongly agree, agree, neither agree nor disagree, disagree or strongly disagree that (INSERT OPTION) is/are responsible for reducing gambling?'. All respondents. Weighted n = 1,767.

Trends in Victorian attitudes to gambling

Table 100 shows a time-series summary of Victorians' attitudes to gambling. Overall, the 2003 survey found that Victorians continue to hold negative views towards gambling, in particular EGM gambling, and to gambling impacts on the community.

As occurred in the 1999 *Seventh Survey*, a general trend in Victorian attitudes towards gambling can also be identified. More respondents strongly agreed with negative attitudinal statements and strongly disagreed with positive attitudinal statements about gambling than in earlier Victorian surveys.

Even so, while the 2003 survey found more respondents with strongly negative attitudes on some issues than in 1999, on others the overall tenor of opinion appears to have stabilised.

More negative attitudes towards gambling and gambling-related problems are suggested by increases in the proportion of Victorians who strongly agreed/agreed with statements on:

- Gambling and gambling venues should not be allowed to be advertised (up 6.8 per cent);
- Gambling is a serious social problem in your local community (up 2.1 per cent);
- Victoria needs gambling activities to attract tourists (up 1.3 per cent).

This is reinforced by an increase in the proportion of respondents who strongly disagreed/disagreed with the statement: 'Australians should be allowed to gamble at home using the Internet' (up by 16 per cent). It should be noted that previous surveys included pay TV in this question.

A steadying of community opinion is suggested by a shift from strongly held attitudes, to more moderate 'agree' or 'disagree' responses to statements:

- Gambling-related problems have got worse in the last three years;
- The onus is on the individual to reduce gambling;
- Gambling is too widely accessible in Victoria;
- The number of poker machines in Victoria should be reduced;
- Wider availability of gambling in recent years has provided more opportunities for recreational enjoyment;
- The increased availability of gambling opportunities has significantly increased the number of problem gamblers in your local community.

There continues to be doubt among Victorians about the economic benefits of gambling with declining agreement for statements such as:

- Gambling has increased employment in your suburb or local community.

Table 100: Victorian Attitudes to Gambling — Time Series^a

	Total %	Strongly disagree	Slightly Disagree	Neither	Slightly Agree	Strongly Agree	Can't Say
Gambling-related problems have got worse in the last four years							
1996	100	3	4	6	17	67	4
1997	100	3	3	2	17	67	7
1998	100	2	5	4	32	50	7
1999	100	3	4	3	28	56	6
2003	100	0.4	5.2	5.6	48.7	32.2	7.8
Gambling is a serious social problem							
1996	100	5	6	4	29	55	1
1997	100	4	10	2	22	60	3
1998	100	3	10	5	32	48	2
1999	100	3	7	4	32	51	3
2003	100	0.2	7.0	5.4	44.2	40.9	2.2
The onus is on the individual to control themselves when gambling by knowing what he or she can afford							
1996	100	10	7	2	19	61	0
1997	100	8	8	2	24	57	2
1998	100	7	9	4	40	39	1
1999	100	7	10	4	33	44	2
2003	100	1.3	7.2	2.9	46.6	41.4	0.6
Gambling is too widely accessible in Victoria							
1996	100	8	12	4	19	56	0
1997	100	6	13	3	22	54	2
1998	100	4	16	5	34	39	2
1999	100	3	13	4	33	45	2
2003	100	1.0	14.8	7.4	45.8	29.8	1.3
The introduction of poker machines ('pokies') in Victoria has resulted in more jobs							
1996	100	12	8	8	40	30	3
1997	100	12	10	3	45	23	8
1998	100	8	12	7	51	14	9
1999	100	8	14	8	51	10	9
2003	100	5.9	31.4	14.9	32.0	1.6	14.2
The number of poker machines ('pokies') operating in Victoria should be reduced							
1996	100	9	15	17	15	42	2
1997	100	6	17	7	18	47	4
1998	100	5	13	11	27	41	4
1999	100	3	12	9	22	51	3
2003	100	1.0	14.3	8.9	39.7	33.8	2.3
The Crown Entertainment Complex is good for the community							
1996	100	N/A	N/A	N/A	N/A	N/A	N/A
1997	100	27	14	8	30	14	6
1998	100	26	21	13	28	7	6
1999	100	26	22	14	28	5	5
2003	100	20.7	30.0	16.3	23.3	3.0	6.6
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
1999	100	8	33	9	25	23	2
2003	100	2.5	32.2	9.7	37.4	17.4	0.8
Victoria needs gambling activities to attract tourists							
1996	100	38	18	3	21	19	1
1997	100	32	21	2	29	15	2
1998	100	29	27	5	28	9	3
1999	100	28	29	5	29	6	3
2003	100	20.2	48.1	4.6	23.0	2.9	1.2

	Total %	Strongly disagree	Slightly Disagree	Neither	Slightly Agree	Strongly Agree	Can't Say
Now that Victoria has a greater variety of gambling available, there are more opportunities for recreational enjoyment							
1996	100	34	17	8	26	11	2
1997	100	31	22	4	30	10	3
1998	100	21	23	7	37	7	5
1999	100	21	28	7	35	5	4
2003	100	10.7	34.8	8.3		2.3	4.3
Gambling at home, either over the Internet or via 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
1999	100	48	25	6	17	2	2
2003	100	23.0	34.0	9.4	29.7	2.0	2.0
Increased availability of gambling opportunities has not significantly increased the number of problem gamblers ^b							
1996	100	44	24	7	10	10	4
1997	100	56	20	1	10	5	7
1998	100	40	33	5	12	4	7
1999	100	45	31	4	9	4	7
2003	100	21.0	38.6	11.5		0.8	13.6
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
1999	100	47	32	7	8	2	4
2003	100	27.4	48.1	9.0	12.5	0.9	2.0

Source: QB1, QB2 of this survey. All respondents. VCGA 2000. *Seventh Survey of Community Attitudes and Perceptions*, pp.84-87.

- ^a This survey has been unable to ask all questions asked in previous surveys in the Victorian series. Slight changes in wording have also occurred in some cases. Where changes in phrasing may have affected the response rates, those questions have not been compared.
- ^b In 2003 this question was rephrased as a positive statement. To adjust for this change, and thus allow comparison with previous findings, the results for agree/disagree have been inverted in this Table.

Future Research

There is a need to research issues raised by the *2003 Community Attitudes and Perceptions Survey*. In broad terms, many of the survey findings confirm the results of the 2001 *Queensland Household Survey*, the *ACT Gambling Survey* and the 1999 national survey conducted by the Productivity Commission. Thus the recommendations for future research in those reports continue to be highly relevant. To avoid repetition, we have not canvassed those suggestions here but recommend their detailed consideration by the Gambling Research Panel.

A note of caution is required when considering survey methodologies and the role of surveys in the overall research program. The response rate for this survey, while within acceptable limits, could be indicative of 'survey fatigue' in the Victorian population. Moreover, self-report survey data are notoriously unreliable in some respects (e.g. on expenditure and gambling frequency). Importantly for prevalence studies, it also appears likely that someone with a severe gambling problem may be more inclined to refuse to participate in any survey. For these reasons, we recommend that surveys be utilised sparingly and in a timely manner to maximise their research benefits.

If survey methodologies are used in the future, specific difficulties experienced with this survey are instructive to avoid their recurrence.

- A major problem was that the survey attempted to address too many issues, thus preventing detailed exploration/probing of any theme;
- The scope and length of the survey also may have discouraged some respondents from continuing the interviews;
- The inclusion of more open-ended questions would limit the imposition of predetermined responses, allowing respondents their own 'voice' to express their understanding of the issues;
- The wording of some survey questions used in 2003 need clarification. For example:
 - Responses on the duration of gambling (e.g. Club Keno) contrast with the 1999 the *Seventh Survey*. It is not clear whether respondents in 2003 incorporated into their calculations the full time for the game or only the time taken to lodge coupons. Indeed it is possible that a combination of both contribute to the results;
 - A similar situation could have affected the divergent results for sports betting (ranging from 15 minutes to more than 2 hours each time they gamble);
 - Questions on whether respondents spend their gambling winnings during the session in which they were won. It is possible that interpretations of what constitutes a 'winning' could influence the results;
 - Results for withdrawal of money before gambling are also unclear, perhaps a problem with the wording of the questions. Alternatively the findings may indicate that most people gamble with money they have on them at the time rather than accessing additional money specifically to gamble.

Building on the survey findings about help-seeking, key research objectives could be:

- A needs analysis to better understand the help-seeking behaviour of Victorian residents (gamblers and their families), including specific sub-populations such as women, indigenous and culturally diverse groups;
- To assess the current level of overall demand for problem gambling services, including any unsatisfied demand;
- To obtain a better understanding of help-seeking pathways;
- To identify 'best practice' interventions (prevention, support services and treatment) that demonstrate efficacy and effectiveness; and
- To discern the particular needs of local communities for gambling-related support services and policies.

Other factors particular to the Victorian gambling environment, such as the impacts of the spatial distribution of EGMs in Victoria and the location of large numbers of EGMs in hotels on gambling behaviour, clearly warrant specific research attention. In this regard I refer the Panel to the *Methodology Project Report* prepared for the Victorian Local Governance Association.⁴⁷ Questions of gambling accessibility and patterns of use are complicated and the implications are not yet understood. However, it is becoming clear that the relationship involves more than the density of machine distribution per capita and gambling expenditure.⁴⁸ It is difficult to capture all of the multi-dimensional aspects of accessibility in single measures. This complicates assessments of establishing any association with regular or problem gambling, or the direction of causality.

The prevalence and incidence of problem gambling have complex causes and appear to be experienced in many and varied ways by different people in Victoria. Incidence measures are poorly developed and are constrained by problems associated with survey methodology to convincingly address causal factors and relationships.

Problem gambling also seems to affect men and women in different ways. An understanding of the gender and cultural risk factors, patterns and impacts is central to the provision of effective services and programs that are appropriate and acceptable.

Hence services to assist people affected by problem gambling (individual gamblers, their families, friends and communities) need to address the multitude of contributing factors which precipitate problem gambling, while also accommodating immediate individual needs and experiences. Surveys tend to limit the scope of inquiry and predefine problems and issues within the questionnaire design; a more open-ended exploratory research approach seems required to allow the gamblers and people affected by gambling to contribute meaningfully to knowledge on the issue.

⁴⁷ Jan McMillen et al. 2001. *Methodology Project*. Report to the Victorian Local Governance Association. Australian Institute for Gambling Research, UWS.

⁴⁸ See for example K. Tremayne et al. 2000. *Distribution and Social Consequences of EGMs in Sydney Clubs*. Working Paper No. 1. Australian Institute for Gambling Research; and D. Marshall, 2003. *EGM gambling patterns in Victoria: continuity and change*, Paper presented to the 13th Annual Conference of the National Association for Gambling Studies, Canberra.

The provision of prevention programs and treatment services for 'problem gamblers' and their families in Victoria will be greatly assisted by the following research:

- Further clarification of the nature and extent of problem gambling, including co-morbidities and 'dual diagnosis';
- Improved data on problem gambling impact indicators (bankruptcy, depression, suicide, crime, job loss, etc) and examination of attribution and causality;
- An understanding of the risk factors, patterns and impacts for different social groups (by gender, cultural background, social advantage/vulnerability, etc);
- Longitudinal studies of gamblers to identify causal pathways relating to apparent adverse outcomes for problem gamblers;
- Development of a consistent and uniform client data set on problem gambling in Victoria, training of all service providers in its application and the provision of necessary resources to ensure its consistent application;
- Identification and compilation of the data needed to give a reliable indication of the 'need' for services and programs;
- Ethnographic studies and comparative community studies to reveal the meaning and practices of gambling in different cultural communities, and identify their particular needs for support services and prevention programs; and
- Evaluation of harm minimisation programs and policies introduced to Victoria since 2000.

This list is far from exhaustive. Indeed, further consultation with community and industry representatives to revise and coordinate the Panel's research strategy will assist the Panel and researchers to clarify research needs and priorities arising from the survey findings.

Appendix A: Victorian Context

Victorian social profile

Population

The total population of Victoria in the 2001 Census of Population and Housing was 4,644,950 of which the population of adults aged 18 years and above was 3,474,506.⁴⁹ The Victorian population has increased by 6.2 per cent since the 1996 Census and 9.4 per cent since the 1991 Census.⁵⁰ In contrast, growth in the same period Australia wide has been 6.0 per cent and 12.6 per cent respectively.⁵¹ Although the growth rate in the past decade has been lower than in Australia overall, recent population growth has been greater in Victoria than has occurred nationally.

Approximately 25 per cent of Australia's population resides in Victoria despite the state's 227,590 square kilometres representing less than 3 per cent of the area of Australia.⁵² This renders Victoria the most densely populated of all the states and territories other than the ACT. Most Victorians live in urban areas, the majority (68 per cent) in Melbourne (pop. 3,160,171).⁵³ As is evident in Table 101 other major centres have significantly smaller populations than Melbourne.

Table 101: Major population centres in Victoria, 2001

	Population	% of Total Population
Melbourne	3,160,171	68.0%
Geelong	130,194	2.8%
Ballarat	72,999	1.6%
Bendigo	68,715	1.5%
Shepparton-Mooroopna	35,828	0.8%
Mildura	28,062	0.6%
Wodonga	27,732	0.6%
Warrnambool	26,843	0.6%
Balance	1,094,406	23.5%

Age

The Victorian population's median age in 2001 was 35 years, the same as it was nationally.⁵⁴ By comparison, in the 1996 Census the median age in Victoria was 33 years, while in 1991 it was 32 years, indicating an aging population in the state.⁵⁵ This reflects the national trend which has also seen the median age rise — from 34 years in 1996 and 32 in 1991.⁵⁶ Adults (persons aged 18 years or older) accounted for 75.3 per cent of the population in Victoria compared to 74.9 per cent nationally⁵⁷, a figure reflecting a slightly older population profile in Victoria than Australia wide. Within Victoria, greater age differences are evident than are evident between Victoria and Australia overall. The median age is somewhat older outside Melbourne (37 years) than for the Melbourne metropolitan area (35 years).⁵⁸

Ethnicity

Victoria's population is ethnically diverse with 23 per cent of the population born somewhere other than Australia.⁵⁹ Within Victoria a country/city difference is evident with just 10 per cent of residents outside Melbourne born overseas compared to 28 per cent of those living in Melbourne.⁶⁰ Of those born overseas, the five main countries of birth are highlighted in Table 102.

⁴⁹ ABS: 2002, Census of Population and Housing

⁵⁰ ABS: 2002, Census of Population and Housing

⁵¹ ABS: 2002, Census of Population and Housing

⁵² ABS: 2002, Census of Population and Housing

⁵³ ABS: 2002, Census of Population and Housing

⁵⁴ ABS: 2002, Census of Population and Housing

⁵⁵ ABS: 2002, Census of Population and Housing

⁵⁶ ABS: 2002, Census of Population and Housing

⁵⁷ ABS: 2002, Census of Population and Housing

⁵⁸ ABS: 2002, Census of Population and Housing

⁵⁹ ABS: 2002, Census of Population and Housing

⁶⁰ ABS: 2002, Census of Population and Housing

Table 102: Top five countries of overseas birth, Victoria, 2001

	Number of Persons	% of Total Population
United Kingdom	205,542	4.5%
Italy	90,056	2.0%
Greece	57,595	1.2%
Vietnam	56,563	1.2%
New Zealand	55,238	1.2%

English is the only language spoken at home by 3,474,068 people (75.3 per cent).⁶¹ This compares with 77.1 per cent in the 1996 Census and 77.8 per cent in the 1991 Census.⁶² The three most common languages spoken at home other than English in the 2001 Census are Italian (3.2 per cent), Greek (2.7 per cent) and Chinese (2.5 per cent).⁶³ Religious diversity is also evident with some 64 per cent of the population adhering to Christianity, with Catholicism followed by Anglicanism dominant.⁶⁴ Buddhism (2.4 per cent), Islam (2.0 per cent), Judaism (0.8 per cent) and Hinduism (0.5 per cent) are the main non-Christian religions.⁶⁵

ATSI

Indigenous persons comprise just 0.5 per cent (25,078 persons) of the Victorian population.⁶⁶ This is by far the lowest percentage for any state or territory, the next closest being ACT with 1.2 per cent indigenous persons in the population.⁶⁷ Nationally 2.2 per cent of the population has indigenous ancestry.⁶⁸ This pattern varies within Victoria, with just 0.4 per cent of the population in Melbourne but over 1 per cent of the non-Melbourne population of indigenous background.⁶⁹

Income

The median household income in Victoria of \$800–\$999 per week is on a par with NSW and the Northern Territory, lower than the ACT, and higher than all other states and territories as well as the national FIGURE of \$700–\$799.⁷⁰ Income differences are evident within Victoria, with Melbourne's median household income of \$800–\$999 per week far exceeding the \$600–\$699 for the rest of the state.⁷¹

Labour Force

At the time of the 2001 Census 6.8 per cent of the Victorian labour force was unemployed in contrast to the 7.4 per cent national rate at the same time.⁷² Whilst the industry profile of employed persons in Victoria approximately reflects the national picture (see Table 103), the manufacturing sector stands out with 15.3 per cent of the workforce (compared to 12.2 per cent nationally), the highest FIGURE for any state or territory. Victoria also has a relatively lower proportion of workers involved in mining.

Table 103: Industry of employment, Victoria and Australia 2001

	Victoria		Australia	
	n	%	n	%
Agriculture, Forestry and Fishing	72,639	3.5	330,782	4.0
Mining	4,472	0.2	75,178	0.9
Manufacturing	318,218	15.3	1,010,179	12.2
Electricity, Gas and Water Supply	12,916	0.6	60,692	0.7
Construction	136,454	6.6	558,582	6.7
Wholesale Trade	115,909	5.6	437,134	5.3
Retail Trade	307,419	14.8	1,211,332	14.6
Accommodation, Cafes and Restaurants	90,302	4.3	410,589	4.9
Transport and Storage	79,010	3.8	355,874	4.3
Communication Services	41,826	2.0	148,480	1.8
Finance and Insurance	81,986	3.9	312,396	3.8

⁶¹ ABS: 2002, Census of Population and Housing

⁶² ABS: 2002, Census of Population and Housing

⁶³ ABS: 2002, Census of Population and Housing

⁶⁴ ABS: 2002, Census of Population and Housing

⁶⁵ ABS: 2002, Census of Population and Housing

⁶⁶ ABS: 2002, Census of Population and Housing

⁶⁷ ABS: 2002, Census of Population and Housing

⁶⁸ ABS: 2002, Census of Population and Housing

⁶⁹ ABS: 2002, Census of Population and Housing

⁷⁰ ABS: 2002, Census of Population and Housing

⁷¹ ABS: 2002, Census of Population and Housing

⁷² ABS: 2002, Census of Population and Housing

	Victoria		Australia	
Property and Business Services	237,123	11.4	920,331	11.1
Government Administration and Defence	62,253	3.0	369,855	4.5
Education	147,473	7.1	595,398	7.2
Health and Community Services	202,226	9.7	806,171	9.7
Cultural and Recreational Services	53,251	2.6	202,456	2.4
Personal and Other Services	69,531	3.3	300,658	3.6
Non-classifiable economic units	11,681	0.6	47,906	0.6
Not stated	37,527	1.8	144,613	1.7
Total	2,082,216	100	8,298,606	100

Education

The level of educational achievement is slightly higher in Victoria than is evident nationally, with 14.2 per cent holding university qualifications compared to 12.9 per cent nationally.⁷³ Once again however, there is a large regional difference with just 8.9 per cent of non-Melbourne residents holding university degrees compared to 16.1 per cent in the Victorian capital.⁷⁴ In terms of secondary education, whilst Victoria has a higher proportion of persons who completed year 12 than nationally, the state also has a higher percentage of persons who dropped out at an early age (Table 104). There is also a significant difference between metropolitan and regional Victoria, the latter having a much lower year 12 completion rate, for example.

Table 104: School level achieved, Australia, Victoria and Melbourne 2001

	Melbourne	Non-Melbourne Victoria	Victoria	Australia
Year 8 or below	10%	13%	11%	9%
Year 9 or equivalent	6%	10%	8%	7%
Year 10 or equivalent	14%	20%	16%	24%
Year 11 or equivalent	13%	17%	14%	10%
Year 12 or equivalent	43%	28%	39%	38%
Still at school	4%	4%	4%	3%
Did not go to school	2%	1%	1%	1%
Not stated	8%	8%	8%	8%

Structure and distribution of Victorian gambling industries

The Victorian gambling industry offers a wide range of gambling products through thousands of individual outlets, many of which offer multiple forms of gambling. Each type of gambling on offer is itemised separately here with special attention paid to the dominant form of gambling in Victoria, electronic gaming machines (EGMs).

Electronic Gaming Machines

As of June 2003 there were 27,260 EGMs operating in 532 Victorian hotels and licensed clubs.⁷⁵ A further 2,500 operate at Crown Casino. The Melbourne metropolitan area contains 340 (64 per cent) of the venues and 19,921 (73 per cent) of the machines. Expenditure on the machines was \$2,334,294,514 in 2002–03 of which nearly 80 per cent was in Melbourne.⁷⁶

Victoria's non-casino EGMs accounted for nearly 14.8 per cent of the national total as of June 2001 (see Figure 12). Victoria's share of EGM venues nation-wide is however relatively low, with fewer venues than either Queensland or South Australia despite having a larger population than both states (Figure 13). The Productivity Commission reports that just 20–25 per cent of clubs and hotels in Victoria contain EGMs, a figure well below that of the other states.⁷⁷ The low level of penetration of EGM venues in Victoria is likely to be related to the state's distinctive regulatory and operating systems.⁷⁸ As discussed below, a unique duopoly of EGM owner/operators (Tattersalls and Tabcorp) in conjunction with the government's policy of allocating an equal number of EGMs to clubs and hotels, as well as statewide and regional 'caps' restricting overall machine numbers, has meant that operators have tended to place EGMs in venues on the basis of revenue performance.⁷⁹

⁷³ ABS: 2002, Census of Population and Housing

⁷⁴ ABS: 2002, Census of Population and Housing

⁷⁵ Office of Gaming Regulation 2003, <http://www.ogr.vic.gov.au>, accessed 25.08.03.

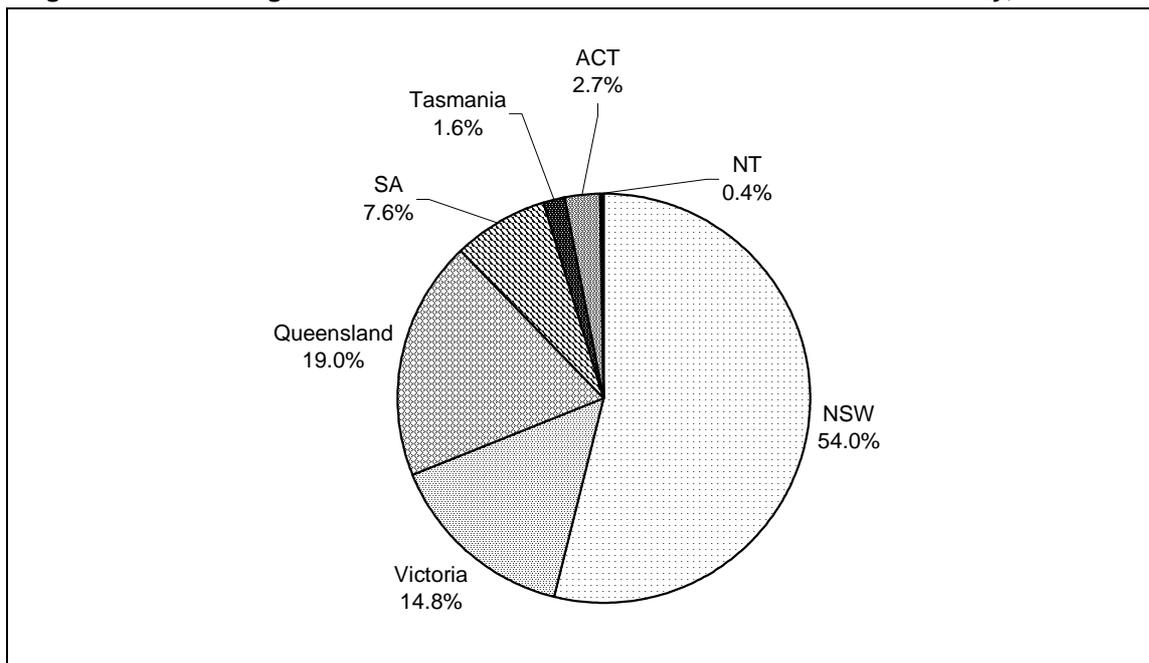
⁷⁶ Office of Gaming Regulation 2003, <http://www.ogr.vic.gov.au>, accessed 25.08.03.

⁷⁷ Productivity Commission 1999, Australia's Gambling Industries Report No. 10, Ausinfo, Canberra.

⁷⁸ Marshall, D. 2002, *A Geography of Gambling*, unpublished PhD thesis, University of New England; Doughney, J. 2003. *The Poker Machine State. Dilemmas in Ethics, Economics and Governance*. Common Ground, Melbourne.

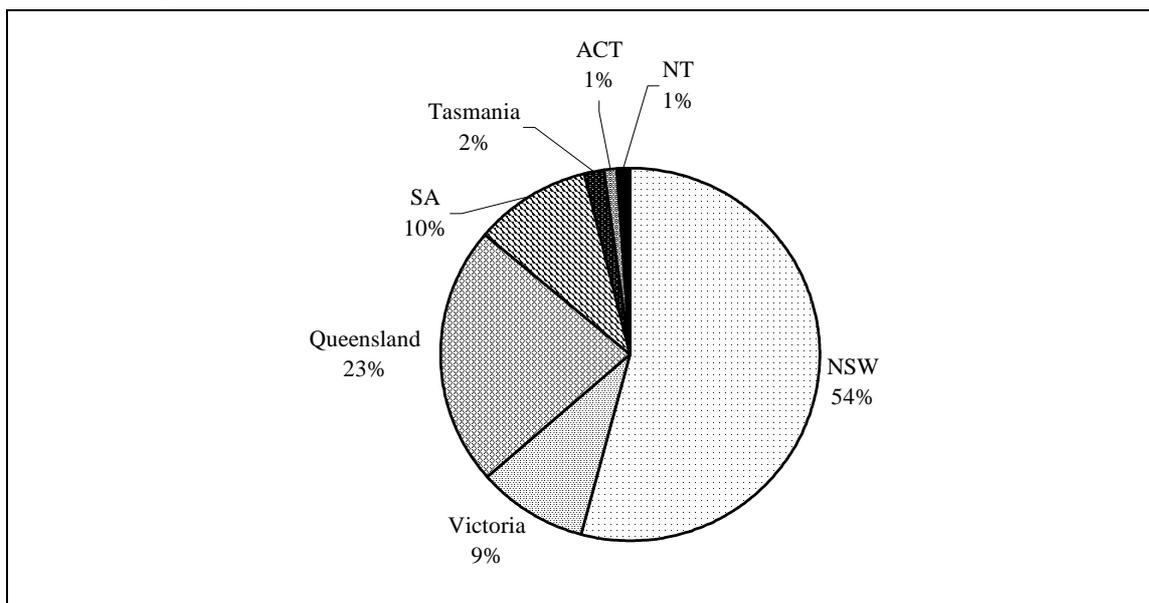
⁷⁹ Productivity Commission 1999, *Australia's Gambling Industries*. Report No. 10, Ausinfo, Canberra.

Figure 12: Percentage of Australia's non-casino EGMs in each state and territory, 2000-01



Source: Australian Gaming Council, 2001.

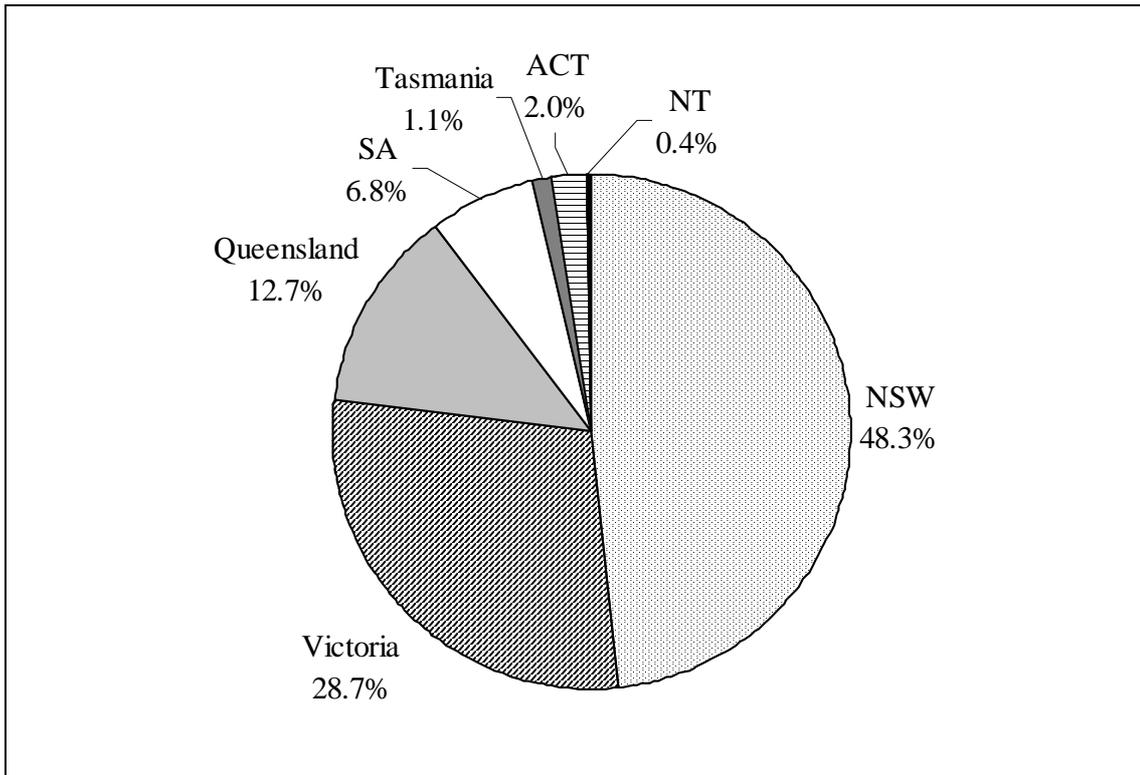
Figure 13: Percentage of Australia's non-casino EGM venues in each state and territory, 2000-01



Source: Australian Gaming Council, 2002

Despite the low penetration rate of EGMs into clubs and hotels in Victoria, total expenditure on gaming machines is second only to NSW, amounting to nearly 29 per cent of the national total (Figure 14). Aggregate EGM expenditure is partly a reflection of the population sizes in each state, however. Therefore a better indication of the relative size of the EGM industry is given by the use of a per capita indicator. On this measure Victoria, with 7.5 EGMs per 1000 adult residents in 2001-02, has a smaller EGM industry than all jurisdictions other than the Northern Territory (Figure 15).

Figure 14: Percentage of Australia's non-casino EGM expenditure in each state and territory, 2001–02



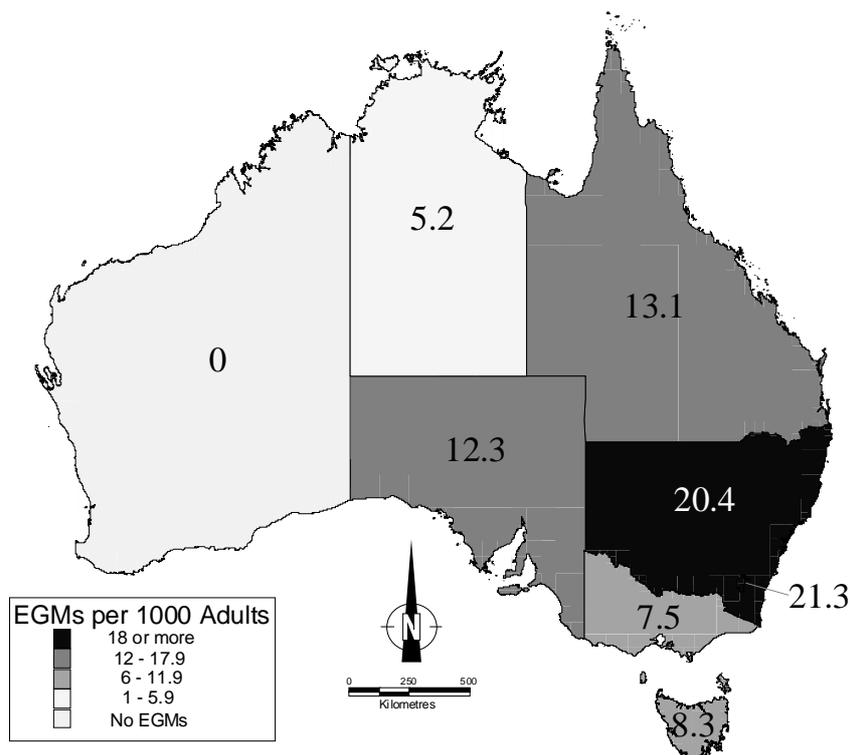
Source: Tasmanian Gaming Commission, 2003

Yet Victoria's relatively high rate of expenditure per adult compared to other states and territories is significant given the much lower levels of EGM concentrations and venue penetration (Figure 16). As noted previously, the regulatory environment in Victoria appears to have encouraged commercial operators to affect a spatial distribution of individual machines that will maximise revenue.

The Victorian EGM industry is characterised by a high level of internal spatial variation.⁸⁰ Some areas have higher numbers and concentrations of EGMs whilst others have none. The Victorian Government has addressed this issue by introducing 'regional caps' in an attempt to prevent increases in machine numbers in disadvantaged areas. Table 105 highlights the situation at June 2003 with several LGAs having no EGMs whilst others have over 1000. On the per capita measure, there are wide regional variations ranging from Boroondara (1.4 EGMs per 1000 adult residents) to Maribyrnong (with almost 12 EGMs per 1000 adult residents).

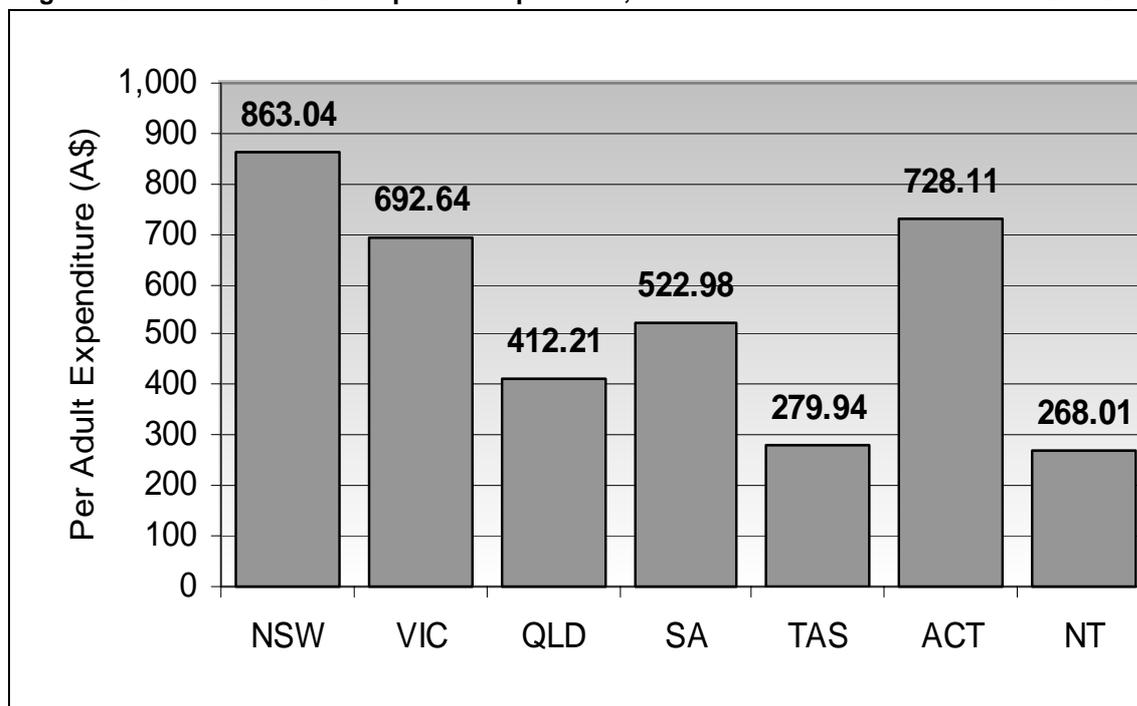
⁸⁰ See for example, Doughney and Kelleher, 1999; Doughney, 2003; Livingstone, 2001; Marshall and Baker, 2001a; 2001b; 2002; Productivity Commission, 1999.

Figure 15: Non-casino EGMs per 1000 adults, Australian states and territories, 2000–01



Source: Australian Gaming Council, 2002.

Figure 16: Non-casino EGM expenditure per adult, Australian states and territories 2001–02



Source: Tasmanian Gaming Commission, 2003.

Table 105: Victorian LGAs and Selected EGM Data, ranked by EGMs per 1000 adults, June 2003

LGA	EGM Venues	EGMs	EGMs/1000 Persons	EGMs/1000 Adults (18+)
Shire of Buloke	0	0	0.0	0.0
Shire of Gannawarra	0	0	0.0	0.0
Shire of Golden Plains	0	0	0.0	0.0
Shire of Hindmarsh	0	0	0.0	0.0
Shire of Indigo	0	0	0.0	0.0
Shire of Loddon	0	0	0.0	0.0
Shire of Moyne	0	0	0.0	0.0
Shire of Pyrenees	0	0	0.0	0.0
Shire of West Wimmera	0	0	0.0	0.0
Shire of Yarriambiack	0	0	0.0	0.0
City of Boroondara	6	230	1.5	2.0
Shire of Moira	1	38	1.5	2.0
Shire of Murrindindi	1	20	1.5	2.1
Shire of Towong	1	10	1.7	2.3
Shire of Mount Alexander	1	30	1.9	2.5
Shire of Macedon Ranges	3	81	2.3	3.3
Shire of Nillumbik	4	142	2.4	3.5
City of Bayside	7	230	2.7	3.6
Shire of Moorabool	2	60	2.5	3.6
Shire of Strathbogie	1	27	2.9	3.9
City of Stonnington	7	285	3.3	4.0
Shire of Yarra Ranges	8	402	2.9	4.1
Shire of Campaspe	3	117	3.4	4.7
Shire of Corangamite	2	57	3.4	4.8
Shire of Hepburn	2	50	3.6	4.9
City of Whitehorse	7	549	3.9	5.0
Shire of Alpine	3	70	3.9	5.4
Shire of Baw Baw	3	140	4.0	5.7
City of Port Phillip	10	404	5.0	5.9
Rural City of Wodonga	3	130	4.2	5.9
Shire of South Gippsland	5	110	4.5	6.2
Shire of Southn. Grampians	2	75	4.5	6.2
Rural City of Wangaratta	4	125	4.9	6.6
Shire of Cardinia	4	212	4.7	6.8
Shire of Melton	4	242	4.7	6.8
City of Yarra	10	404	5.9	7.0
City of Casey	12	856	4.9	7.1
City of Banyule	11	625	5.5	7.1
Shire of Surf Coast	4	101	5.1	7.2
City of Manningham	8	600	5.6	7.2
Rural City of Swan Hill	4	107	5.2	7.3
City of Frankston	10	589	5.3	7.3
City of Moreland	15	773	5.9	7.4
City of Whittlesea	9	616	5.4	7.5
Shire of Colac-Otway	5	113	5.6	7.7
City of Brimbank	16	945	5.8	7.9
Shire of Glenelg	4	113	5.9	8.1
City of Hume	13	739	5.6	8.2
City of Knox	11	845	6.0	8.2
Shire of Delatite	4	128	5.9	8.3
Rural City of Mildura	7	290	6.0	8.4
City of Greater Bendigo	11	534	6.2	8.5
City of Glen Eira	13	792	6.7	8.5
City of Greater Shepparton	7	339	6.1	8.6
City of Moonee Valley	11	752	7.1	9.0
Shire of Morn. Peninsula	20	864	6.9	9.2
Shire of Mitchell	5	178	6.5	9.4
Shire of North. Grampians	3	88	6.9	9.5

LGA	EGM Venues	EGMs	EGMs/1000 Persons	EGMs/1000 Adults (18+)
City of Monash	16	1,191	7.6	9.6
City of Hobsons Bay	10	584	7.3	9.6
City of Wyndham	10	571	6.7	9.7
City of Kingston	17	964	7.5	9.7
City of Darebin	16	986	8.0	10.0
City of Greater Geelong	27	1,392	7.6	10.1
Rural City of Ararat	2	88	7.9	10.5
Rural City of Horsham	4	141	7.9	10.7
City of Maroondah	11	774	8.0	10.8
Shire of Wellington	10	320	8.1	11.3
City of Ballarat	16	674	8.4	11.5
City of Greater Dandenong	16	1,131	9.1	12.0
City of Warrnambool	6	252	8.8	12.1
Shire of East Gippsland	10	345	9.1	12.2
Shire of Central Goldfields	2	114	9.3	12.3
Borough of Queenscliffe	1	30	9.7	12.3
Shire of La Trobe	15	615	9.2	12.8
Shire of Bass Coast	8	237	9.8	12.8
City of Maribyrnong	13	734	12.3	15.4
City of Melbourne	15	890	13.1	16.5

Source: ABS, CData 2001; OGR, 2003. Baseline Database Mapping System, Victoria.

Casino

Casino gaming in Victoria is limited to the Crown Casino in central Melbourne. Crown operates 2,500 EGMs and 350 table games (20 different games), more than any other casino in Australia on both counts.⁸¹ In addition, other facilities include some 22 restaurants, nightclubs and retail outlets all of which render Crown Casino Australia's largest entertainment complex.⁸² Crown generated casino revenue of \$1,113.2 million for the 2001–02 financial year, a figure slightly down on the previous year but still amounting to nearly half of casino expenditure Australia wide.⁸³ Located in central Melbourne, Crown Casino is relatively easily accessible to the majority of Victorians who live in or close to Melbourne. A study of the impacts of gaming machines on tourism in Victoria also found that Crown Casino and EGMs in Melbourne's clubs and hotels have attracted day-trippers and visitors from regional Victoria to Melbourne.⁸⁴

Racing (gallops, harness and greyhounds)

In Victoria bets can be placed on racing through two modes:

- through licensed bookmakers at trackside or on the telephone; and
- with Tabcorp which has a licensed totalisator monopoly.⁸⁵

Bets can be made through the statewide network of more than 650 Tabcorp outlets (which include stand-alone premises as well as agencies in licensed liquor outlets), over the telephone and via the internet.⁸⁶

Victorians can also place wagers on race meetings through interstate totalisator outlets via internet and telephone methods. There is no significant variation between Victoria and other Australian jurisdictions in how wagering on racing is conducted. The large network of Tabcorp retail outlets coupled with the telephone and internet options render this form of gambling accessible to most Victorians.

Sports Betting

Wagers can be placed on major sporting events through national sportsbetting agencies operating in Australia including Tabcorp.⁸⁷ Through Tabcorp, bets can be placed through the same channels as racing, including the 650 retail outlets. Transactions with non-Victorian outlets can be made through internet or telephone methods. Accessibility is therefore almost identical to that offered for racing.

⁸¹ Crown Limited 2003, <http://www.crowncasino.com.au/home.asp>, accessed 23.6.03

⁸² Crown Limited 2003, <http://www.crowncasino.com.au/home.asp>, accessed 23.6.03

⁸³ PBL Ltd. 2002, Concise Annual Report.

⁸⁴ Australian Institute for Gambling Research 2000. *The Impact of the Expansion of Gaming on the Tourism, Entertainment and Leisure Industries*. Victorian Casino and Gaming Authority.

⁸⁵ Office of Gaming Regulation 2003, <http://www.ogr.vic.gov.au>, accessed 23.6.03.

⁸⁶ Keck, T. 2003. 'Who's who and who does what in the world of TABs?'. *Australasian Gaming Magazine*, Vol. 5 No. 20.

⁸⁷ Office of Gaming Regulation 2003, <http://www.ogr.vic.gov.au>, accessed 23.6.03.

Lotteries

Lotteries in Victoria are run by Tattersalls, a private company licensed to conduct a wide range of different games including Super 66, Oz Lotto, Powerball and a range of instant scratch tickets.⁸⁸ Tattersalls products are available through newsagencies and also in other accredited outlets across the state.

Keno

Club Keno is operated through the same outlets as EGMs, namely clubs and hotels across the state. Keno is administered by Tattersalls but is available through both Tattersalls and Tabcorp outlets by joint agreement.⁸⁹ Approved venues are the same as those which are permitted to operate EGMs.⁹⁰

Footy Tipping

'Tipstar' footy tipping is another product offered by Tattersalls based around the results of AFL football games. This product involves participants selecting the results of football games throughout a season with weekly and annual prizes. Participation is through Tattersalls lottery outlets as well as through the associated website.⁹¹

Minor Gaming

Other forms of gambling are largely charitable in nature and include raffles, small bingo operations, lucky envelopes and small scale lotteries.⁹² These are generally run by charitable and community organisations such as sporting clubs and schools for fund-raising purposes and are organised on a small scale. Permits are required to conduct all forms of minor gambling and conditions govern the size and frequency of such operations.⁹³

Non-charitable trade promotions (designed to promote a business) also fall under this category and tend to be run through point-of-sale, telephone or mail order methods. A permit is required when such an event offers prizes in excess of \$5,000.⁹⁴

Gambling trends in Victoria

An understanding of the recent growth and magnitude of the Victorian gambling industry is obtained by analysis of national and state statistics with particular emphasis on machine gambling. Trends in gambling expenditure and gambling-related government revenue also provide important indicators at the state level.

In 2001–02 real per capita expenditure on gambling in Victoria was \$1,179.59, an increase from \$347 in 1991–92. This is the third highest per capita expenditure (after Northern Territory and NSW) of any Australian state or territory and represents an average increase of 13.5 per cent per annum over this period, compared to a national average rate of increase in real gambling expenditure of 8 per cent for the same period. The growth in real per capita expenditure on gaming, racing and sports betting is illustrated in Figure 17.

⁸⁸ McMillen, J., Woolley, R. and Laker, L. 2000, *Gambling Regulatory Regimes*, Australian Institute for Gambling Research, University of Western Sydney.

⁸⁹ Keck, T. 2003, Whos who and who does what in the world of TABs?, *Australasian Gaming Magazine*, Vol. 5 No. 20.

⁹⁰ Office of Gaming Regulation 2003, <http://www.ogr.vic.gov.au>, accessed 23.6.03.

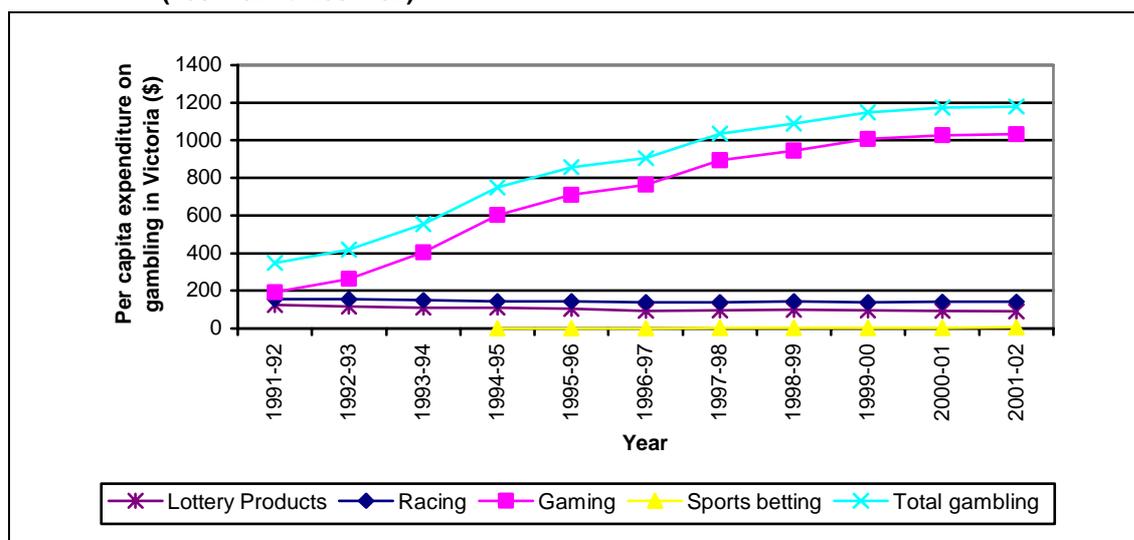
⁹¹ Tatt's Tipstar 2003, <http://www.tipstar.com.au/memberservices/home.asp>, accessed 23.6.03.

⁹² Office of Gaming Regulation 2003, <http://www.ogr.vic.gov.au>, accessed 23.6.03.

⁹³ Office of Gaming Regulation 2003, <http://www.ogr.vic.gov.au>, accessed 23.6.03.

⁹⁴ Office of Gaming Regulation 2003, <http://www.ogr.vic.gov.au>, accessed 23.6.03.

Figure 17: Real per capita expenditure (or loss) on different forms of gambling in Victoria (1991–92 to 2001–02)



Source: Tasmanian Gaming Commission (2003).

Gaming has been the principal area of growth in the period shown in Figure 17. The average rate of growth in real per capita expenditure on gaming in Victoria has been 19.7 per cent per annum from 1991–92 (\$186.47) to 2001–02 (\$998.75). This is approximately twice the national rate of growth in real per capita expenditure on gaming (9.2 per cent) over the period. This reflects the expansion of gaming through the introduction of gaming machines to clubs and hotels since 1992 and the opening of Crown Casino in 1994.

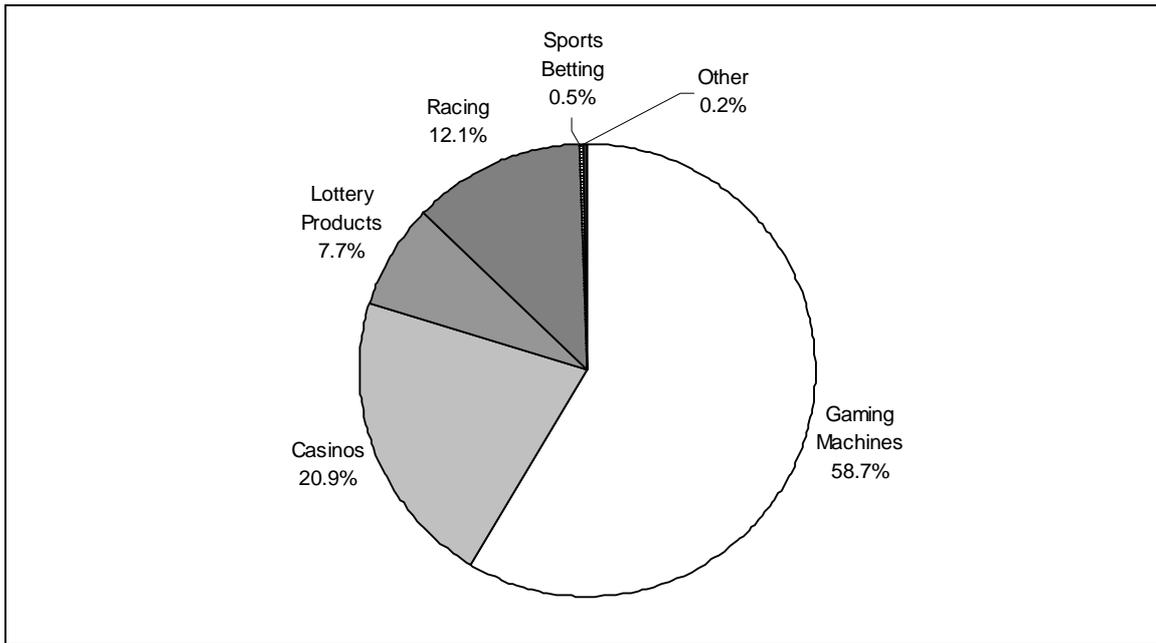
The majority (67 per cent) of gaming expenditure in 2001–02 was on gaming machines in clubs and hotels (\$692.64 per capita), followed by casino gaming expenditure of \$246.26 per capita (23.9 per cent). Total expenditure on gaming machines in clubs and hotels in Victoria in 2001–02 was \$2.563 billion, compared to NSW (\$4.307 billion) and Queensland (\$1.129 billion).

In the same period real per capita expenditure on racing declined by an average of 0.08 per cent per annum, compared to an average national decline of 0.36 per cent. Real sports betting expenditure in Victoria also had a higher average rate of growth (39.2 per cent) than the national average (32 per cent) between 1994–95 and 2001–02. Starting from a very small base, real per capita expenditure on sports betting in Victoria grew from \$0.80 in 1994–95 to \$6.20 in 2001–02. Indeed sports betting grew by over 77 per cent in the latest financial year.

In 2001–02, total gambling expenditure in Victoria was \$4.365 billion, second only to NSW (\$6.047 billion) and represents 29.1 per cent of total gambling expenditure in Australia. A breakdown of total gambling expenditure in Victoria in 2001–02, among all forms of gambling, is illustrated in Figure 18.

In 2001–02 gaming machines (\$2.563 billion) and casino gaming (\$911.2 million) comprised 79 per cent of total gambling expenditure in Victoria. In the same period expenditure on racing was \$526.8 million; expenditure on Lotto and Tattsлото was \$305.3 million; on instant lotteries \$22.4 million; on other lotteries \$5.5 million and on Pools \$1 million. Gambling expenditure on sports betting was \$22.9 million and on Keno \$6.6 million.

Figure 18: Expenditure on different forms of gambling as a proportion of total gambling expenditure in Victoria (2001–02)



Source: Tasmanian Gambling Commission (2003).

The ten-year trend in expenditure on different forms of gambling as a proportion of total gambling expenditure in Victoria is illustrated in Table 106:

- although 2000–01 was the first year that gaming machines did not increase their share of the gambling market since the introduction of the machines, 2001–02 saw a return to growth in market share;
- racing has suffered the most substantial decline in market share over the past decade, a trend which although continuing to decline appears to have slowed;
- casino gambling appears to have stabilised in the low 20 per cents; and
- expenditure on sports betting reveals the greatest in-roads to market share, although it remains a small portion of the overall industry.

Table 106: Expenditure on different forms of gambling as a proportion of total gambling expenditure in Victoria (1991–92 to 2001–02)

	Gaming Machines	Lottery Products	Casino Gaming	Racing	Sports Betting	Other
1991–92	3.59	36.01	-	44.70	-	15.69
1992–93	22.95	27.68	-	37.24	-	12.14
1993–94	45.06	20.10	-	27.13	-	7.70
1994–95	42.94	14.71	16.92	19.38	0.11	5.94
1995–96	48.95	12.45	19.28	16.81	0.15	2.36
1996–97	52.81	10.45	21.00	15.35	0.13	0.26
1997–98	53.53	9.35	23.22	13.49	0.19	0.22
1998–99	56.54	9.04	20.88	13.16	0.17	0.21
1999–00	57.38	8.33	21.78	12.12	0.21	0.18
2000–01	56.78	7.97	22.69	12.08	0.31	0.16
2001–02	58.72	7.66	20.88	12.07	0.53	0.15

Source: Tasmanian Gaming Commission (2003).

*' Lottery products' include lotteries, lotto, pools and instant scratch-its. Gaming machines refers to machines in clubs and hotels. 'Casino gaming' includes wagers on table games, gaming machines and keno systems in the casino. 'Other' includes sports betting, Keno and minor gaming.

Tax revenue and household disposable income (HDI)

In 2001–02 the increased real per capita gambling expenditure in Victorian contributed to:

- increased real government revenue of \$1.368 billion from all gambling of which \$1.27 billion came from gaming; \$97.5 million came from racing; \$1.9 million from sports betting; and
- increased gambling expenditure as a proportion of HDI from 1.60 per cent in 1992–93 to 3.81 per cent in 2001–02. The growth trend in gambling expenditure as a proportion of HDI over the last decade is shown in Table 107 below.

Table 107: Victoria gambling expenditure as a percentage of HDI (1992–93 to 2001–02)

Year	1992–93	1993–94	1994–95	1995–96	1996–97	1997–98	1998–99	1999–00	2000–01	2001–02
% of HDI	1.60	2.11	2.77	3.11	3.22	3.58	3.62	3.73	3.76	3.81

Source: Tasmanian Gaming Commission (2003).

The impacts of gambling

In 1999 the Productivity Commission's *Inquiry into Australia's Gambling Industries* (1999) conducted three surveys that considerably added to previous research on gambling.⁹⁵ These surveys and the Productivity Commission's associated analysis of available data demonstrated that the costs and impacts of gambling can be far-reaching. Subsequently the Productivity Commission's report has been a catalyst for policy reform in all Australian states and territories, including Victoria. As the Productivity Commission's report is the most comprehensive analysis of Australian gambling, we have used that analysis as a starting point to identify issues for consideration in this study.

The Productivity Commission found that about 82 per cent of adult Australians participated in at least one gambling activity in the previous 12 months. Some 40 per cent of adults could be described as 'regular' gamblers (at least once a week), but only 20 per cent are regular non-lottery gamblers. On average, adult Australians currently spend (lose) about \$760 each year on gambling. That makes Australians among the heaviest gamblers in the world, spending at least twice as much on average on legalised gambling as people in North America and Europe.

However just 10 per cent of gamblers accounted for around 70 per cent of total Australian gambling expenditure in 1997–98. Of the \$760 average 'spend' on gambling in 1997–98, about \$420 was lost on gaming machines. This helps explain the considerable gap in per capita spending between some jurisdictions — New South Wales, Victoria, the ACT and Northern Territory — where gaming machines are more established, and the other jurisdictions such as Western Australia, where gaming machines are restricted to Perth's Burswood Resort Casino.

For the purposes of this study, the Productivity Commission found significantly high patterns of EGM participation in Victoria. For example, 45 per cent of Victorians played gaming machines compared with 39 per cent of Australians; and Victorians comprised 29 per cent of all Australians who played EGMs, in excess of Victoria's representation in the national population (25 per cent).⁹⁶

Otherwise the Productivity Commission's 1999 survey found that the socio-demographic profile of gamblers generally reflected that of the Australian population. However, regular gamblers (i.e. those who gamble weekly on forms of gambling other than lotteries) are more likely to be:

- males;
- aged between 18–24;
- have lower levels of education;
- age and invalid pensioners; and
- live in non-metropolitan regions.

Non-gamblers are more likely to be:

- female;
- over 65;
- have higher levels of education; and
- live in metropolitan areas.

⁹⁵ The Productivity Commission conducted a *National Gambling Survey*, a *Survey of Clients of Counselling Agencies*, and a *Survey of Counselling Service* in addition to secondary research, stakeholder consultations, roundtable discussions, as well as public hearings and submissions.

⁹⁶ Productivity Commission 1999, op. cit. B1-5.

Motivations for gambling differ according to the form of gambling. The Productivity Commission found that primary motivations for most Australian gamblers are 'the dream of winning' and social reasons. Other motivations are the excitement/atmosphere, a belief in luck, to pass the time, to 'beat the odds' and to support charity.

However, motivations for people with gambling problems differ and can include:

- 'chasing' losses;
- loneliness and social isolation;
- depression; and
- escape from stress or other problems such as grief or loss.

Identifying problem gamblers

Lack of precision in the definition of problem gambling poses difficulties for the identification of those affected. In particular, the Productivity Commission found that no single existing test instrument is ideal for measuring the extent ('prevalence') of problem gambling in the population. The dominant tool used in Australian and Victorian research to date has been the South Oaks Gambling Screen (or SOGS as it is commonly known), first devised in a clinical setting in the United States. However the SOGS has deficiencies that have prompted attempts to replace it, for example with the CPGI and VGS.

The Productivity Commission nevertheless saw value in using the SOGS in its surveys, buttressed by self-assessment questions and other indicators of harm. This three-way approach provided a more robust basis for assessing the prevalence of problem gambling. On the basis of that research:

- The Productivity Commission argued that problem gambling is a continuum ranging from social gamblers at one end, people who experience moderate problems in the middle and those experiencing severe problems or excessive gambling on the other end;⁹⁷
- The Commission estimated that about 1 per cent of Australia's adult population (130,000 people) have severe problems with their gambling, with another 1.1 per cent (163,000) experiencing moderate problems. Among a range of public health concerns, this prevalence rate is lower than the rates for excessive smoking or alcohol consumption, but greater than that for use of illicit injection drugs;
- While 163,000 people were estimated to have moderate problems which may not seek or require 'treatment', they do warrant policy concern. The Productivity Commission found it is important to distinguish between those people with gambling problems who require treatment, those who require but do not seek/want treatment and those whose level of problem do not warrant formal treatment or counselling;
- About 0.8 per cent of those surveyed (equating to 111,000 adults Australia-wide) indicated that they wanted help for gambling-related problems;
- The Productivity Commission found that problem gamblers are an 'heterogeneous group' and gambling problems 'emanate from a multiplicity of environmental, social and psychological factors';
- There appear to be few socio-demographic factors that significantly affect the likelihood of someone being a problem gambler: neither gender, ethnicity, education nor income appear to be significant predictors. The main exception is age, with younger people being significantly more highly represented, although less so among those in counselling;

Even so, the Commission's national survey found that people with gambling problems were more likely to:

- be younger than the average gambler;
- be male;
- have few differences with other gamblers on the basis of education; and
- have slightly lower incomes.

The Productivity Commission found the most significant risk factors affecting problem gambling are:

- the degree of accessibility to gambling, particularly gaming machines;
- the regular playing of a continuous form of gambling such as gaming machines, casino table games and race betting; and
- age — gamblers under 25 are twice as likely to develop problems as older gamblers.

⁹⁷ Productivity Commission. 1999. *Australia's Gambling Industries*. Report No. 10, AusInfo, Canberra, Ch. 6, p.20.

Although the Productivity Commission identified other factors which could have an affect on problem gambling (such as non-English speaking background; people who are separated or divorced; unemployed people; and people living in single-person households) it hesitated to place much emphasis on these particular factors. They suggested that these characteristics could be the result of problem gambling, rather than risk factors themselves.

'Problem gamblers' were estimated to account for around one-third of total expenditure on gambling in Australia — about \$3.6 billion. In 1999 their annual losses average \$12,200, compared with just under \$650 for other gamblers.

The prevalence of problem gambling was found to vary by mode. Problem gambling was highest for gaming machines and racing, and lowest for lotteries. The popularity and widespread availability of gaming machines has meant that this mode of gambling was found to be associated with 65 to 80 per cent of those problem gamblers who were receiving counselling.

The extent of problem gambling varied across the states and territories, with New South Wales having the highest rates and Western Australia the lowest — probably reflecting the relative accessibility of gaming machines. The Commission's review of the evidence also suggested that problem gambling is significantly greater in Australia than in North America. Some participants disputed these findings on the basis of perceived flaws in the screening instruments or other aspects of the survey. However, the Commission considered that its estimates are more likely to understate than overstate the number of people in Australia with severe gambling problems.

Using a similar survey methodology and the SOGS measure for problem gambling, subsequent statewide surveys in the ACT and in South Australia have found comparable results.⁹⁸

As described by the Productivity Commission,⁹⁹ the health and social costs of gambling can include:

- financial costs (family debts and bankruptcy);
- effects on productivity and employment;
- crime (theft, court cases and imprisonment);
- personal and family impacts (divorce and separation, depression and suicide); and
- treatment costs.

The Productivity Commission's Survey of Clients of Counselling Agencies found a low age entry point for people seeking help with gambling problems: 24 per cent of gamblers in counselling indicated they had gambled regularly before the age of 18; 5 per cent indicated that they had developed problems when under-age. There was also a marked difference between males and females, with many more males gambling at a younger age than females, and developing problems earlier.

The Productivity Commission's findings suggest that a range of different policies and multiple strategies are required to ameliorate the risks of problem gambling. The Productivity Commission's inquiry concluded that existing policies for reducing the costs of problem gambling were 'deficient', and that existing arrangements for consumer protection, harm minimisation and prevention were 'inadequate'.¹⁰⁰ The next section describes some of the policies and strategies that have subsequently been implemented in Victoria in an attempt to minimise the harm associated with gambling.

The Victorian policy environment

The regulatory and policy context for gaming machine operations in Victoria has some fundamental similarities with other Australian states. Venues must have an approved liquor licence (clubs, hotels) granted by the Liquor Licensing Commissioner, before they can apply for gaming machine licences. As in Queensland, a separate application for a gaming licence must then be made to the licensing authority (the Victorian Casino and Gaming Authority [VCGA]) and different tests apply.

Historically, however, the Victorian policy framework for gambling has been characterised by a number of distinctive features.

The Victorian gaming machine industry is uniquely operated by the commercial duopoly of Tattersalls and Tabcorp, licensed to own and lease gaming machines to approved clubs and hotels and to operate the centralised monitoring systems (CMS) for those machines. Under Ministerial direction, 50 per cent of the machines must be operated by Tattersalls and 50 per cent operated by Tabcorp. Management agreements between these two gaming operators and the venues have been akin to a performance driven franchise

⁹⁸ McMillen, J. *et al.* 2001. *Survey of Gambling and Problem Gambling in the ACT*. Report to the ACT Gambling and Racing Commission. Sydney: Australian Institute for Gambling Research, UWS; Taylor, A. *et al.* 2001. *Gambling Patterns of South Australians and Associated Health Indicators*. Report prepared for Strategic Planning and Policy Division, Department of Human Services.

⁹⁹ *ibid*, Chapter 9, pp. 1-2.

¹⁰⁰ Productivity Commission 1999, *op.cit.*, Key Findings, p.3; Chapter 11.

arrangement. This arrangement has been criticised by several analysts, including the National Competition Council.

Unlike other Australian states, a 'cap' restricting the number of gaming machines in Victoria operates on three tiers: at the level of venues, specified regions and statewide. The maximum number of gaming machines permitted throughout the state (excluding Crown Casino) is limited by Ministerial direction to 27,500. The Minister can also determine specific regions within the state that can be subject to a regional limit on gaming machine numbers. The Minister specifies the criteria to be used in calculating the limit that is then determined by the VCGA.

Ministerial directions also require that not less than 20 per cent of the machines are to be located in venues outside Melbourne and its surrounding areas.

Victorian clubs and hotels are permitted an equal share of the gaming machine market, with each venue restricted to 105 machines. In other states/territories except South Australia, not-for-profit clubs are allowed a far larger number of machines on the understanding that they will return greater benefit to their members and the community than privately owned hotels.¹⁰¹ Thus the Victorian regulatory environment has allowed privately owned hotels to operate gaming machines to a greater extent than in other states.

In 2001 an Office of Gambling Regulation (OGR) was established as a unit of Treasury; in 2003 OGR was relocated to the Department of Justice. The OGR provides support for the Minister for Gaming, the VCGA, the Director of Gaming and Betting and the Director of Casino Surveillance in carrying out their statutory functions of regulating the gaming industry in Victoria.

Following public criticism of the harmful impacts of gaming machines, reinforced by evidence from the Productivity Commission of a strong association between gaming machines and problem gambling, governments in three states (Queensland, Victoria and NSW) introduced a range of harm minimisation policies.

Harm minimisation initiatives in Victoria

In 2000 legislation was introduced in Victoria requiring a social and economic impact assessment by applicants who sought permits/licences for gaming machines in new or existing venues. Victoria is the only state that has legislated for a formal submission on community impacts by local councils, although the application process in Queensland and NSW does allow for local authority objections to be heard.¹⁰²

The VCGA decides on applications for gaming machines and considers the impact assessment. By legislation applicants are required to address 'the net economic and social benefit that will accrue to the community'.¹⁰³ Victorian local governments must be notified of applications within their municipality and are given 28 days to make a submission in response using the designated VCGA Submission Form for Local Councils (the Submission Form).¹⁰⁴

A number of additional harm minimisation measures have been introduced to Victoria since the 1999 Productivity Commission inquiry.¹⁰⁵ New initiatives include:

- Smoking is banned in gaming areas (effective from 1 September 2002);
- \$100 note acceptors are banned on gaming machines (effective on new machines from 1 January 2003; on previously approved machines from 1 January 2008);
- Autoplay facilities are banned on all new games approved after 1 January 2003, and on existing games after 1 January 2008;
- Gaming machine spin rates are not to be reduced below current levels (2.14 seconds);
- A maximum bet limit of \$10 applies to new machines from 1 January 2003, and existing machines from 1 January 2008;
- The operation of loyalty card schemes regulated from 1 July 2003. Among other provisions, players can set time and spend limits, and self-excluded players are unable to access gaming machines;
- Venues are required to make available printed and electronic information on the odds of winning;
- Limits have been imposed on withdrawals from ATM and EFTPOS facilities at gaming venues, and cash advances from credit accounts within the venue prohibited;

¹⁰¹ The Australian Capital Territory restricts gaming machines to community clubs: i.e., hotels and Canberra Casino are not permitted any gaming machines.

¹⁰² In Queensland, local councils are provided with a copy of the applicant gaming venue's community impact statement for comment or objection to the application. In NSW, local councils can object to the application in the Liquor Licensing Court.

¹⁰³ State of Victoria 2001. *Gaming Machine Control Act 1991*, 12B 3(a)c.

¹⁰⁴ VLGA 2000. *Submission Form for Local Councils to Make an Economic and Social Impact Submission*.

¹⁰⁵ See *Evaluation of Self-Exclusion Programs in Victoria (2002), Part B: Summary of Self-Exclusion Programs in Australian States and Territories*. The South Australian Centre for Economic Studies. Gambling Research Panel, pp.201-212

- Winnings in excess of \$2,000 are to be paid by cheque. Venues are also prohibited from cashing 'winnings' cheques issued by the venue;
- Restrictions have been introduced on inappropriate advertising;
- All gaming machines in use must display the time of day;
- All new gaming machines must display the credit meter in both dollars and cents. National Standards also require the approved Return to Player to be met within a reasonable period of time;
- Clubs and hotels that operate gaming machines must lodge an audited annual Community Benefit Statement with the VCGA;
- The Government launched a public awareness and community education program for 2001–3, using television, radio and print media to broadcast messages and advice to assist Victorians with gambling-related problems;
- The Government's support services strategy has been enhanced; and
- Reporting and accountability by the gambling industry have been improved;
- Development of a social and economic benefit test for all new gaming venue applications or for increases in gaming machines at an existing venue;
- Limits on the number of 24-hour gaming venues;
- Reform of the Victorian Casino and Gaming Authority to make it more accountable and transparent;
- Requirement for all poker machine advertisements to carry warnings about the dangers of excessive gambling;
- Creation of an independent Gambling Research Panel to conduct, monitor and publish research into the social and economic impact of gambling, causes of problem gambling and strategies to minimise harm from gambling;
- Banning poker machines where children are present;
- Requirement for proper lighting in all gaming rooms;
- Targeting services to all problem gamblers through the Problem Gambling Services Strategy; and
- Reform of the Community Support Fund (CSF) to ensure a higher funding priority for problem gambling programs.

In combination, it is likely that these new harm minimisation strategies have altered the gambling environment in Victoria in particular ways. To date, apart from the *Evaluation of Self-Exclusion Programs (2003)* there has been no research to systematically examine the effects of mediating issues such as policy practices and general environmental factors on gambling behaviour and perceptions. Although those questions are outside the brief of this project, the research team has taken the new policy environment into account in designing the questionnaire and in analysis of the survey data.

Appendix B:

Methodology and Technical Report

The objectives and scope as outlined in by the Gambling Research Panel (GRP) have guided all aspects of this research. The research team aimed to address these issues through the use of telephone interviewing research methodology. Research also included consultation on changes to the VCGA's *Seventh Community Survey of Community Gambling Patterns and Perceptions* 2000 survey instrument with researchers conducting the GRP's *Scoping Study*, relevant stakeholders and the Panel.

In conducting the research, the research team had a clear understanding of the project objectives:

- to identify and report on changing patterns of gambling participation and perceptions in Victoria since the *Seventh Community Survey of Community Gambling Patterns and Perceptions* was conducted for the Victorian Casino and Gaming Authority (VCGA) in November 1999;
- to identify and report on the prevalence of problem gambling in Victoria and changes since 1999 and community perceptions of the consequences of problem gambling;
- to incorporate three problem gambling screens — South Oaks Gambling Screen (SOGS5+), the Canadian Problem Gambling Index (CPGI) and Victorian Gambling Screen (VGS) — into the community survey to allow cross-validation tests of the three screens. The findings of the *Validation Study* of the Victorian Gambling Screen (VGS) are presented in a separate report;
- to compare statewide and regional patterns where relevant;
- to track relevant new dimensions and influences including possible prejudices;
- to identify other issues and implications that might need to be addressed by government, community groups, venue operators and others; and
- to offer recommendations to guide future research into gambling patterns and community perceptions.

In order to meet the objectives of the Panel, a large-sample telephone survey was conducted to determine community gambling patterns, perceptions of gambling and problem gambling in the state of Victoria. The 2002–03 survey updated previous surveys conducted by the VCGA and particularly utilise baseline information regarding patterns and perceptions of gambling. Moreover, drawing on the findings of the *Scoping Study*, the survey incorporated three problem gambling screens (SOGS5+, CPGI and VGS) to allow cross-validation tests of the three screens. This research strategy will maintain continuity with previous Victorian surveys, while allowing comparative testing of the VGS screen and possible progression to a new screen, the CPGI. The CPGI screen has been utilised in a large statewide prevalence survey in Queensland (2001) and many Canadian provinces. The VGS was developed by Flinders Technologies Pty Ltd for application in large population surveys but it has not previously been tested on a large population sample.

Therefore the 2002–03 survey combined a modified version of the most recent VCGA survey questionnaires (1999, 2000) that is informed by the experience of the National Gambling Survey commissioned by the Productivity Commission for its inquiry into *Australia's Gambling Industries* and more recent surveys in the ACT and Queensland. The research team submitted a revised research design that incorporates the essential core elements from previous VCGA community attitude surveys combined with elements from more recent survey instruments. This allowed the desired level of replication and continuity from these important studies.

At the request of the GRP, and following discussions with stakeholders in Victoria, the survey questionnaire was also modified to gain a more representative and in-depth understanding of gambling in Victoria to determine the prevalence of problem gambling and a sensitive appraisal of how social factors may influence community perceptions of gambling and problem gambling.

A significantly enlarged sample was required to achieve an adequate sample of people with gambling problems for cross-validation analysis of the three screening instruments (SOGS5+, CPGI and VGS).

Secondary Data Analysis

A literature review provided background information on Victorians and on relevant gambling issues identified in the GRP's tender brief. This included development of a profile of the socio-demographic composition of the population including the frequency, duration of visits and gambling patterns of Victorians aged 18+; the types and availability of gambling venues and products; patterns of gambling participation; and the types of and demand for service providers. This information provided background details as to the unique nature of the Victorian community and the various communities within Victoria, and assist with development of relevant questions for the telephone survey.

Analysis of relevant overseas and Australian research on community gambling patterns and perceptions with regard to findings, methodology and report presentation also informed the design of the telephone survey and the issues raised in this final report.

Telephone survey

ACNielsen conducted a telephone survey in excess of 8,000 Victorian residents that gave consideration to provision of an adequate sample of problem gamblers. As agreed with the GRP, the methodology used was a modified version of the 2001 *ACT Gambling Study* designed to achieve a higher response rate without necessarily increasing the total sample size.

The ACT study utilised a screening process to determine gambling status and interviewed a random selection of those qualifying in the two most populous groups: non gamblers and non-regular gamblers, with over-sampling being applied to interviewing regular gamblers. The methodology for this Victorian survey has been based on the definitions of non-gamblers, non-regular gamblers and regular gamblers as defined by the screener used in that ACT study.

This study differs from previous Victorian surveys in that a critical aim was to undertake sufficient interviews with a minimum of 150 problem gamblers (assuming a prevalence rate at between 1 per cent and 2 per cent). However if the sampling methodology used in the ACT study was used without modification, the experience from previous gambling studies indicates that to achieve a sample of 150 problem gamblers would incur prohibitive costs in terms of the amount of screening required.

Through an assessment of alternative means of locating problem gamblers the most cost effective solution proposed by ACNielsen was to increase the screening of respondents whilst at the same time reducing the number of interviews conducted with the most populous segments. This enabled robust sample sizes to be obtained in all of the segments and resulted in a sample size of *regular gamblers* which enabled the capture of sufficient *problem gamblers* for analysis purposes. However, although the methodology was driven by the desire to achieve 150 problem gamblers based on a 2 per cent incidence in the population (of those aged 18+), this target was not achieved.

For comparability, the survey replicated core areas from questionnaires utilised in previous Victorian community gambling patterns and perceptions reports, providing complementary questions to enhance data collection and extending the *Seventh Community Survey of Community Gambling Patterns and Perceptions* 2000 to meet the GRP's research objectives. All changes to the survey instrument were developed in consultation with the GRP and various stakeholders. A list of people consulted is attached — Appendix C.

Pilot test

For a survey of this scale and sensitivity pilot testing was essential. The main benefits of the pilot phase were:

- to test the interview length (and in particular, average time taken to obtain each completed interview);
- to refine questionnaire text and field procedures to optimise the response rate;
- to provide feedback about the performance of the questionnaire, in terms of its reception by respondents, whether the questions are readily understood;
- to check that all the CATI programming is working as intended; and
- to test the training package, and to identify areas that will need additional attention in the training for the main survey.

The pilot test also gave an opportunity to assess the introduction, deciding for example whether it should be referred to as a survey concerning leisure activities or gambling. Following the pilot study in September 2002, refinements were made to the questionnaire design in consultation with the GRP

Statewide survey

The statewide survey was conducted by ACNielsen in April–May 2003 and provided a random sample of responses from 8,479 Victorian residents on their attitudes to gambling, its perceived impact on the community and the prevalence of problem gambling. Over-sampling of gamblers gathered more specific data on the experiences and perceptions of people who gamble regularly and/or who experience problems with their gambling.

It was not considered necessary to over-sample for different ethnic or cultural groups within the Victorian population due to the high proportion of varying ethnic groups within the population. The process of randomisation ensured that a proportionate sample of these respondents were initially sampled, however crucial to their inclusion were the strategies employed by ACNielsen at the initial point of contact to ensure that they participated in the process. ACNielsen's strategy for dealing with various ethnic groupings and to ensure they were not under-represented was to facilitate their inclusion when they do not possess the language skills to participate in English. This strategy is detailed in the 'Multilingual interviewers and interviewees' section.

The data obtained from the telephone survey have statistical reliability and validity. The interviewing was conducted using ACNielsen's CATI system (Computer Assisted Telephone Interviewing), which offers a range of benefits including:

- rotation of survey responses to remove any ordering effect;
- automated sequencing, so that questions are asked in their correct order;
- range and logic checks are built in to the program to ensure data validity;
- Validation is ongoing. Ten percent of all interviews are monitored by the supervisor listening in to the interview on-line as it is being conducted, to ensure quality standards are being maintained.
- Callback times are easily programmed, and these appointments are honoured which encourages respondent co-operation.
- Detailed daily CATI reports allow continual monitoring of all aspects of fieldwork.

The overall result is a very closely monitored and controlled survey process resulting in high quality data.

Sample source

Households were selected randomly from residential telephone numbers in the latest Electronic White Pages for the state of Victoria. The survey sample reflects the general metropolitan-rural distribution of the Victorian population. The GRP also requested that analysis of results be provided on a geographic basis. Prior consultation with the GRP and local government determined the specific approach used for geographical analysis of data (e.g. using metropolitan and non-metropolitan definitions).

The distribution of the sample across Victoria and metropolitan/non-metropolitan areas was roughly in proportion to population, using the latest available 1996 census data reported by the Australian Bureau of Statistics (ABS).¹⁰⁶ In common with most surveys of this kind, the sample design had some limitations in its coverage. It excluded the homeless, people in institutions (treatment settings, hospitals and prisons) and people without a telephone or with an unlisted number. Overall, while random digit dialling (or variants of this approach) reduces the bias of omitting unlisted numbers, it does so at higher cost and greater likelihood of refusals. On balance, the research team opted for random selection from residential telephone numbers in the latest Electronic White Pages directory.

Basic geographic analysis of the survey data has been possible by utilising key identifiers such as Local Government Area (LGA) and a breakdown of non-metropolitan/metropolitan location based on the Electronic White Pages (EWP) which have been sorted and categorised in the data processing stage. LGA identifiers were attached to each case in the sample initially drawn. This information was supplemented by a non-metropolitan/metropolitan breakdown based on the EWP (Electronic White Pages) collected in the interview process. This allowed the final results to be sorted by groups of LGAs and any geographic analysis on groupings where sample sizes permitted. The natural distribution of the Victorian population allowed for any differences to be analysed where the population groups in the various questionnaire and population segments are sufficient in size.

Maximising the contact rate

The following procedures were used to achieve as high a contact rate as possible:

- generally calling in the evening or at weekends when individuals are more likely to be at home;
- allowing the phone to ring at least 10 times before hanging up;
- making up to four callbacks (that is, five contact attempts) to achieve an initial contact;
- allowing a further five callbacks to achieve an interview, once contact was made and a respondent identified;
- varying the time of day and day of week for callbacks, to increase the chance of catching gamblers who might be out during the evening; and
- allowing fieldwork phase of sufficient duration (at least four weeks) to ensure that the proportion of numbers dialled that did not have their full number of callbacks completed was minimal.

Selection of respondents

Once a household was contacted, the respondent selected was the adult (aged 18+) normally living in that household whose birthday is closest to the date of the telephone call (the nearest birthday method). Details of the number of householders aged 18+ were also collected to enable population weighting to be applied.

¹⁰⁶ Data from the 2001 Census was not publicly available before commencement of the survey.

Maximising participation

ACNielsen established protocols to maximise the participation rate once a respondent is contacted, including:

- wording the survey introduction to encourage participation by stressing:
 - the importance of the survey;
 - the importance of the respondent's participation in the survey; and
 - the confidentiality of the information provided by the participants;
- making a special effort to schedule callbacks at the convenience of the respondent;
- having foreign language interviewing capability; and
- having specially prepared responses for interviews in case a respondent indicated any reservation about participating.

Sampling approach

The selected sample approach was used rather than a strict random sample approach; that is, the same method was adopted as in the 2001 ACT gambling survey. This method means that regular gamblers were over-sampled, providing reasonable numbers for analysis purposes. At the same time selecting only a proportion of non-gamblers and non-regular gamblers means costs were contained.

Key assumptions about the sampling were as follows:

- All respondents were screened to establish gambling status.
- Then,
 - One-in-three non-gamblers were interviewed;
 - One-in-six non-regular gamblers were interviewed;
 - All regular gamblers were interviewed, using the five gambling segments used in the *Seventh Community Survey of Community Gambling Patterns and Perceptions 2000* report;
- Selections for non-regular gamblers and non-gamblers were by random methods.

The survey was undertaken using a two-phase strategy. In the first phase, an initial screening process determined respondents' gambling status (non-gambler, non-regular gambler, regular gambler):

- Gamblers were classified as 'regular gamblers' if they had participated at least weekly (i.e. 52 times a year) in any of the activities referred to in Question S4 of the survey (other than lottery games or instant scratch tickets) in the previous 12 months;
- If respondents had gambled less than once a week in only one activity, or if their overall frequency of gambling was less than 52 times a year, they were classified as 'non-regular gamblers'.

In the second phase, a more detailed questionnaire was completed by respondents on the basis of a selective (random) interview strategy:

- A selected sample of those qualifying in the two most populous groups — non-gamblers (1:3) and non-regular gamblers (1:6) — were interviewed for the core survey.¹⁰⁷ Similar to the 2001 ACT gambling survey, people who had gambled only on lotto, lotteries and scratch tickets were excluded from the selected sample for the core interview following evidence from the Productivity Commission survey that they were not closely associated with problem gambling;
- Regular gamblers were randomly divided into three cohorts; and
- Each cohort was asked the specific questions for one of the three problem gambling screens (SOGS5+, CPGI, VGS). The screens themselves are provided in Appendix E: Problem Gambling Screens.

In arriving at these sampling ratios, estimates of the proportions of non gamblers, non-regular gamblers and regular gamblers likely to be obtained from the Phase 1 screener were based on the approach used in Productivity Commission national survey and the 2001 ACT gambling survey.

Privacy Considerations

Research was bound by the National Privacy Principles (NPPs) which were introduced into the *Privacy Act 1988* (Cth) by the *Privacy Amendment (Private Sector) Act 2000*. ACNielsen also abides by the Market Research Society of Australia's Code of Professional Behaviour.

¹⁰⁷ These sampling ratios were similar to those used in the PC's national survey and the 2001 ACT gambling survey.

The introduction of amendments to the *Privacy Act* has a number of implications in the conduct of such research in terms of obligations to participants and how to deal with the information collected. We were required to provide mandatory information to all potential respondents, including:

- identifying the topic of the research;
- indicating that the information and opinions provided will be only used for research purposes;
- indicating the length of the survey; and
- notifying them how long we will keep their information (identified information).

At the termination of the interview we were also obliged to:

- mention that as this is market research it is carried out in compliance with the Privacy Act;
- restate that the information provided will be used for research purposes only; and
- provide them with contact details as to where they may seek further information relating to privacy.

The impact of providing the privacy information was a slight increase in the time required for questionnaire introductions and conclusions. The need to inform participants precisely in terms of questionnaire length potentially has the ability to impact on response rates negatively when a questionnaire is lengthy, as was this survey.

Interviewing team and training

All ACNielsen interviewers are comprehensively trained and their performance is monitored on an ongoing basis. ACNielsen is a founding member of the Interviewer Quality Control Australia Scheme. Regular external checks of quality procedures by independent auditors are an integral part of this scheme to ensure high interviewing standards. A team of 22 interviewers were trained for this project. The training addressed the following issues and procedures:

- survey objectives and background, including the sensitivity of the topic, and the importance of maximising the participation rate;
- respondent selection procedures;
- callback procedures;
- procedures with NESB respondents;
- communication skills to minimise refusals;
- communication skills to capture minimum data set on refusals; and
- detailed review of the questionnaire.

Multilingual interviewers and interviewees

ACNielsen has extensive experience in conducting research in languages other than English and conducting studies amongst NESB groups and those who require research to be conducted in a language other than English. ACNielsen actively recruits NESB interviewing staff and those who have fluency in languages other than English.

Due to the demographic profile of Victoria we anticipated that Italian, Greek, Arabic, Turkish, Chinese (Mandarin and Cantonese) and Vietnamese would be the language groups most likely requiring translation services. ACNielsen has in-house capacity to conduct interviews in these languages. Additionally ACNielsen has in-house multilingual interviewers for the following languages:

- | | | | |
|-------------|------------|-------------|--|
| • Afrikaans | • Japanese | • Lebanese | • Swedish |
| • Danish | • Korean | • Norwegian | • Tagalog (and all other Filipino languages) |
| • Dutch | • German | • Sinhalese | • Tamil |
| • French | • Hindi | • Spanish | • Tetum |

Depending on the interviewer's fluency levels the questionnaire was translated by the interviewers for several of the key language groups expected, with the translation checked by another person speaking the same language. This process confirmed that the concepts and terms have been accurately translated.

As households and respondents with language barriers were identified, the numbers and details were recorded and 'stockpiled' until such time as there are a number of interviews to be done in a particular language. For example, when there a batch of 8–10 Vietnamese households/numbers were to be contacted, the selected Vietnamese interviewer made contact and conducted the interviews. The process was centralised, with for example all the Vietnamese language interviews being conducted from Melbourne, if that is the location of the best Vietnamese interviewer.

Interviews with disabled respondents

ACNielsen has access to TTY facilities to ensure respondents with a hearing impairment were not disadvantaged in terms of participation.

Quality Standards

ACNielsen is certified as a Quality Endorsed Company (QEC) under the Quality Endorsed Program of Standards Australia ISO9001: 1994; Model for Quality Assurance in design, Development, Production, Installation and Servicing. ACNielsen is also a founding member of the Interviewer Quality Control Scheme (IQCA) and a member of the Association of Market Research Organisation (AMRO).

Data checking procedures

The CATI system has considerable capacity for applying edits during the interview. ACNielsen used a combination of edit checks which maximised data quality without costing too much time. The quality and consistency of the data collected was largely dependent on the methods used to collect data, management of the interviewing process and refinements from the piloting of the questionnaire.

Validation

The survey data were subjected to a series of statistical analyses in order to explore the internal structure of the problem gambling measurement screens (SOGS5+, CPGI and VGS) and the patterns of inter-relationships with the other screens. The analysis provides an operational and measurement quality 'test' of the performance of the three screens and their validity. We note that both SOGS and the CPGI previously have been subject to comprehensive validity tests in several jurisdictions. This part of the research is reported in a separate *Validation Study Report* which draws on the comprehensive content analysis of the three screens reported in the *Scoping Study*.

Operational results

Contact and response rates

The contact rate achieved was 79.7 per cent — that is, almost 80 per cent of the phone numbers that were eligible were successfully contacted. Out of these successful contacts, 41.8 per cent (i.e. 8,479 of 20,274 contacts) resulted in a completed screener interview (participation rate). This translates to a total response rate of 34.2 per cent.

The contact rate is comparable to the ACT survey and the Productivity Commission's national survey. However, the response rate is lower relative to 41.7 per cent in the ACT study and 47 per cent in the Productivity Commission study. It appears that the lower response rate in this study was largely due to a greater number of outright refusals to participate when the contact was established (51.7 per cent in the present study, compared to 41.7 per cent in the ACT study and 39.5 per cent in the Productivity Commission study). Reasons for this lower willingness to participate are unclear, but suggest a degree of 'survey fatigue' in the Victorian population.

People who terminated during the core interview (n=215) comprised:

- 65 regular gamblers;
- 110 non-regular gamblers;
- 40 non-gamblers.

Response sample

Table 108 gives details of the final sample achieved. A total of 8,479 Screener interviews were conducted, resulting in 1,758 core interviews (see Figure 1).

A brief part of the questionnaire was designed mainly to identify regular gamblers, non-regular gamblers and non-gamblers (Table 109).

In the next, selected respondents were interviewed to gather information in detail. Based on the classification question at SQ4, the selection strategy was as followed: (a) all regular gamblers were interviewed; (b) one-in-six respondents classified as non-regular gamblers were interviewed; and (c) one-in-three respondents classified as non-gamblers were interviewed.

Table 108: Response rates — 2003 Longitudinal Community Attitudes Survey

Response Analysis: Longitudinal Community Attitudes Survey and Validation of the Victorian Gambling Screen		Total Sample Frame	
		Numbers	%
Total Numbers Dialed		31,799	100%
Out of coverage		6,348	20%
Ineligible — business number (519), fax number (600), paging service (7), disconnected/out of order (4458)		5,584	
Ineligible — no one of correct age		91	
Ineligible — not available during survey period		673	
Coverage not yet determined — not finalised		5,177	16%
Engaged number		28	
No answer, but less than 4 calls backs		746	
No answer, more than 4 callbacks		4261	
Answering machine		142	
In scope — finalised		20,274	64%
Appointment made (soft)		473	
Appointment made (hard)		33	
Unsuitable, language etc		491	
A) Screener Questionnaire:			
1)	Refuses	10,479	
2)	Agrees and starts screener	8,798	
3)	Terminates during screener (REFUSE OR DK at QS2/QS4)	104	
4a)	Completes screener total	8,694	
4b)	Completes screener NON GAMBLER	2,167	
4c)	Completes screener NON REGULAR GAMBLER	5,956	
4d)	Completes screener REGULAR GAMBLER	571	
B) Core Questionnaire:			
1a)	Selected total	2,265	
1b)	Selected NON GAMBLER	729	
1c)	Selected NON REGULAR GAMBLER	965	
1d)	Selected REGULAR GAMBLER	571	
2a)	Refuses to continue	292	
2b)	Refuses NON GAMBLER	81	
2c)	Refuses NON REGULAR GAMBLER	138	
2d)	Refuses REGULAR GAMBLER	73	
3)	Agrees and starts interview	1973	
4)	Terminates during interview	215	
5a)	Completes interview total	1758	
5b)	Completes interview NON GAMBLER	608	
5c)	Completes interview NON REGULAR GAMBLER	717	
5d)	Completes interview REGULAR GAMBLER	433	
Subsections of these groups completed the following parts:			
C) Problem Gambling Screens			
1a)	Total: regular gamblers only	433	
1b)	Victorian Gambling Screen (VGS)	149	
1c)	Canadian Problem Gambling Index (CPGI)	141	
1d)	South Oaks Gambling Screen (SOGS)	143	
D) Core interview (gambling experience)			
1a)	Total:	890	
1b)	Non-regular gamblers (excluding scratch tickets & lotteries) ^a	457	
1c)	Regular gamblers	433	

Source: Table provided by ACNielsen.

^a At QM1 Non-regular gamblers who had only chosen instant scratch tickets or Tattsлото or other lotto games proceeded to Demographic section (QR1, n = 260).

Table 109: Sample for screening for core interviews

Survey segments	Screener section	General interview
Non gamblers	2,127	608
Non regular gamblers	5,846	717
Regular gamblers	506	433
Total interviews	8,479	1,758

Different questions were relevant to different groups of respondents in the survey. A summary of the main sections of the questionnaire asked to the different groups is given in Table 110. For details on screening of respondents for different parts of the survey, readers are referred to the flow chart (Figure 2) in the main report.

Outliers

Most questions in this survey involved closed response categories. The exceptions are questions on time spent on different gambling activities and on the amount of money respondents plan to spend each time they gamble. However, even for these questions responses have been categorised into discrete response categories.

Outliers are usually a problem for responses that have no range limits, so that extreme response can unduly affect the average response. In this study, closed response categories are used, and frequencies instead of means are reported. Outliers are, therefore, not considered as a problem in the present study.

Table 110: Categories of questions asked of three survey segments groups

Non-gamblers	Non-regular gamblers	Regular gamblers
Gambling participation	Gambling participation	Gambling participation
Perceptions about gambling issues	Perceptions about gambling issues	Perceptions about gambling issues
Effects of gambling	Effects of gambling	Effects of gambling
Policy-related	Policy-related	Policy-related
Socio-demographics	Socio-demographics	Socio-demographics
	Gambling activities/patterns	Gambling activities/patterns
	Reasons for gambling	Reasons for gambling
	Opinion/experience about gambling	Opinion/experience about gambling
		Help-seeking, etc
		VGS
		CPGI
		SOGS

Weighting procedure

Generally, weighting of data aims to increase the representativeness of findings for the target population. In this study, the target population are all adults (18+ years old) living in Victoria.

There are three different factors that may reduce representativeness in the present study, and a weighting procedure is meant to correct for these as much as possible:

1. First, there is the problem of potential sampling errors and self-selection biases, for instance due to imperfections of the sampling frame or non-response to the survey. As a consequence, the sample may differ from the target population on socio-demographic characteristics and other variables. The weighting procedure here used Census information on the distribution of three such characteristics in the target population in order to create a sample that better represents the population at least on these selected variables; namely, gender, age and metro/non-metropolitan location.

Specifically, for each combination of gender, age category and location, a weight was obtained by dividing the relative number of people in the population that fall into one such gender/age/location cell by the relative number of respondents in the present sample that fell into the same cell:

$$Weight1_i = (size\ of\ population\ cell_i / population\ size) / (size\ of\ sample\ cell_i / sample\ size)$$

Note: i is the respondent; $cell_i$ is thus the gender/age/location cell in that the respondents belongs, and $weight1_i$ is the weight given to respondent i 's data.

2. Second, the survey procedure involved that only one adult per household was to be interviewed (that adult was determined by the birthday method). This implies that, for each household contacted, people living in a larger household had a lower probability of being selected for the interview than people living in smaller households. An adult living in a single-person household was selected with a probability of 100 per cent, whereas a person living in a two-adult household had only a 50 per cent chance of being selected, and so on. The weighting procedure here corrects for this bias by weighting cases by the relative size of their household.

$$Weight2_i = size\ of\ household / average\ household\ size\ in\ the\ sample$$

Note: i is the respondent; $household_i$ is thus the number of adults in the household in that respondent i lives, and $weight2_i$ is the weight given to respondent i 's data.

3. Third, while these two weights in combination were appropriate and sufficient for the total sample of respondents, it further needed to be taken into account that the different parts of the survey involved only selections of the different gambling groups identified in the initial screener (non-gamblers, non-regular gamblers and regular gamblers). That is, the general interview involved, on a random basis, only one-in-three non-gamblers, one-in-six non-regular gamblers and one-in-one regular gamblers. Non-regular gamblers were thus under-represented compared to both other groups, and non-gamblers were in turn under-represented compared to regular gamblers. This procedure was applied to make the survey more economical.
4. Similarly, the interview segment about gambling experience only involved one-in-three non-regular gamblers (excluding those who were only involved in lotteries and scratch tickets) and one-in-one regular gamblers. Again, as a consequence, the sample did not represent the two groups of gamblers in their true proportions. The weighting procedure needed to correct this if findings were to be representative across the involved gambling groups. Note that for this specific segment the target population is different, namely it is adult 'gamblers' in Victoria.
5. Weights were derived by dividing the relative number of respondents of the relevant gambling group in the total effective sample by the relative number of respondents who belonged to that gambling group and who participated in the interview segment in question:

$$\text{Weight}_{3;j} = (\text{size of gambling group}_i / \text{sample size}) / (\text{size of gambling group}_i \text{ in segment}_j / \text{sample size of segment}_j).$$

Note: i is the respondent; j is the interview segment in question. Gambling group i is thus the gambling group in that respondent i falls; segment j is the interview segment in question; and $\text{weight}_{3;j}$ is the weight given to respondent i 's data in segment j .

Relevant weights are combined by multiplication. For example, for the overall sample (e.g., initial screener questions) the appropriate weight is:

$$\text{Weight}_{1\cdot 2;i} = \text{weight}_{1;i} \cdot \text{weight}_{2;i}$$

This weight maintains the original sample size of 8,479. Next to the original sample composition, this report also refers to the 'weighted n' of certain subgroups, which are based on $\text{weight}_{1\cdot 2}$.

General information on output tables

In reporting survey results, most tables present percentages of the response categories for the total number of respondents. When there is only a yes/no response, tables present the percentage for the yes category. For questions which were answered by a very small number of selected respondents following some filtering criteria (e.g., most tables deriving from QX2 to QCO5), tables present the absolute number of respondents instead of percentages to provide a clearer picture. Sample size is important for establishing whether the cross tabulation is a reasonable representation of reality for the population. Because statistical power can be increased by increasing sample size, we recommend that future studies obtain data from a larger sample particularly concerning problem gamblers.

Finally, the question numbering in the tables refers to the question numbers that appear in the survey questionnaire.

The demographics and their grouping categories for non-gamblers, non-regular gamblers and regular gamblers are given in table 111.

Table 111: Demographic grouping categories

Demographic variables	Collapsed categories
Age	18-24
	25-34 (includes 25-29, 30-34)
	35-49 (includes 35-39, 40-44, 45-49)
	50-64 (includes 50-54, 55-59, 60-64)
	65+ (includes 65-69, 70+)
Gender	Male
	Female
Country of birth	Australia
	Other
Language	English
	Other
Employment status	Working full-time
	Working part-time
	Home duties
	Student
	Retired (self supporting)
	Pensioner
	Unemployed
	Other

Demographic variables	Collapsed categories
Income level (Respondent)	Less than \$10,000 \$10,000–\$24,999 (includes \$10,000–\$14,999, \$15,000–\$19,999, \$20,000–\$24,999) \$25,000–\$34,999 (includes \$25,000–\$29,999, \$30,000–\$34,999) \$35,000–\$49,999 (includes \$35,000–\$39,999, \$40,000–\$49,999) \$50,000 or more (includes \$50,000–\$59,999, \$60,000–\$69,999, \$70,000–\$89,999, \$90,000–\$119,000, \$120,000+)
Household type	Single person Group household Couple, no children (includes couple with no children, 2 parent family with children not at home) One parent family Two parent family Other
Education	Up to Year 10/4th form (includes primary school, some secondary school, Year 10/ 4th form) Finished high school (includes Year 11/ 5th form/ leaving certificate, Year 12/ HSC/ VCE) TAFE/technical education (includes some technical/commercial, finished technical school, commercial college/TAFE) CAE/University (includes diploma from CAE, diploma, some university/CAE, degree from university/CAE)
Marital status	Married/living with partner Separated or divorced Widowed Single
Main source of income	Wage/salary Own business (includes own business, other private income) Benefits (includes retirement benefit, superannuation, aged pension) Other (includes unemployment benefit, sickness benefit, supporting parent benefit, invalid/disability pension, student allowance/scholarship)

Main Survey Gambling Questionnaire Sections

QS1 – QS3 Information about household, age and gender
(ALL RESPONDENTS)

QS4 – QS6 Participation in gambling activities
(ALL RESPONDENTS)

QB1 – QB5 Attitude toward gambling
(RANDOMLY SELECTED NON-GAMBLERS, NON-REGULAR GAMBLERS AND REGULAR GAMBLERS)

QC1 – QC3 Policy relevant questions
(RANDOMLY SELECTED NON-GAMBLERS, NON-REGULAR GAMBLERS AND REGULAR GAMBLERS)

VGS (ONE THIRD OF THE REGULAR GAMBLERS)

CPGI (ONE THIRD OF THE REGULAR GAMBLERS)

SOGS (ONE THIRD OF THE REGULAR GAMBLERS)

QM1 – QX1 Causes and other details of gambling
(ALL REGULAR GAMBLERS AND THOSE NON-REGULAR GAMBLERS WHO PLAYED OTHER THAN LOTTERIES/SCRATCHIES)

QX2 – QCO5 Consequences of gambling
(SELECTED SUB-SAMPLE FROM ALL REGULAR GAMBLERS AND THOSE NON-REGULAR GAMBLERS WHO PLAYED OTHER THAN LOTTERIES/SCRATCHIES)

QR1 – QR12 Demographics
(RANDOMLY SELECTED NON-GAMBLERS, NON-REGULAR GAMBLERS AND REGULAR GAMBLERS)

Appendix C: The Victorian survey questionnaire

CONFIDENTIAL – All work conducted on behalf of ACNielsen is confidential under the National Privacy Principles, the Market and Social Research Privacy Principles and the Code of Professional Behaviour of the Market Research Society of Australia. No information about this project, questionnaire or respondents should be disclosed to any third party.

Good (...), my name is (...) from ACNielsen – the market research company. Today we are conducting important social research on behalf of the Gambling Research Panel which is an independent research body established and funded by the Victorian Government. We would like to know about people's attitudes to gambling and we'd appreciate your help. All responses will be completely confidential.

To make sure that our sample represents everyone in the community we randomly select people on the basis of their date of birth. Would I please be able to speak to the person aged 18 years or over in your household who had the last birthday?

IF RESPONDENT CHANGES REPEAT INTRODUCTION

IF SELECTED PERSON IS NOT AVAILABLE ARRANGE A SUITABLE TIME TO CALLBACK.
RECORD FIRST NAME AND DETAILS FOR CALL BACK

IF LAST BIRTHDAY PERSON IS AWAY FOR THE DURATION OF THE SURVEY) ASK FOR THE NEXT PERSON IN THE HOUSEHOLD WHO HAD THE LAST BIRTHDAY

The survey will take between 10–25 minutes. Is now a convenient time?

IF YES, then read: the information and opinions you provide will be used for research purposes only.

IF NO — Would it be possible to conduct the interview at a more convenient time? MAKE AN APPOINTMENT

QUES Q S1 — HOUSEHOLDERS 18+

Q.S1 First, could you please tell me how many people aged 18 or over usually live in this household?
(RANGE 1–99)

99 Don't know/can't say **DO NOT READ OUT**

97 Refused **DO NOT READ OUT**

QUES Q S2 – RESPONDENT AGE

Q.S2 For demographic purposes, could you tell me your age please?

IF UNWILLING TO GIVE AGE, READ OUT THE AGE RANGES:

1 Under 18:

Thank you for your time, but for this survey we only wish to speak to people 18 and over and CLOSE.

2 18 – 24

3 25 – 29

4 30 – 34

5 35 – 39

6 40 – 44

7 45 – 49

8 50 – 54

9 55 – 59

10 60 – 64

11 65 – 69

12 70+

97 REFUSED THANK AND CLOSE

QUES Q S3 – RESPONDENT GENDER

1 Male 2 Female

QUES Q S4 – PARTICIPATION IN GAMBLING ACTIVITIES

Q.S4 I'm going to read out a list of popular gambling activities. Could you please tell me which of these you have participated in during the last 12 months? READ OUT

QS6 In the last 12 months, how many times per week OR per month OR per year have you
(INSERT OPTION CHOSEN AT QS4)?

ENTER FREQUENCY THEN RECORD WEEK/MONTH/YEAR. IF CAN'T SAY, ENCOURAGE BEST GUESS FOR THIS AND ALL SUBSEQUENT QUESTIONS WHICH ASK FOR FREQUENCIES.

REPEAT FOR EACH OPTION CHOSEN AT QS4 WITH THE EXCEPTION OF:

IF QS4 = CODE 5,6 OR 7 INSERT OPTION OF played Keno at a Victorian club, hotel, casino?

IF QS4=CODE 2A OR 2B INSERT OPTION OF bet on horse or greyhound races

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ROTATE		QS4			QS6					
		Yes	No	Don't know/ Can't say	Refused	Per Week	Per Month	Per Year	Don't know/ Can't say	Refused
1	Played poker machines or gaming machines	1	2	99	97				99	97
2a	Bet on horse or greyhound races at a racetrack	1	2	99	97					
2b	Bet on horse or greyhound races at an off course venue such as a TAB agency, Pub TAB or Club TAB, by telephone or over the Internet	1	2	99	97				99	97
3	Bought INSTANT scratch tickets, in TOTAL, for yourself or for someone else	1	2	99	97				99	97
4	Played lotto or ANY OTHER lottery game like Tattslotto, Powerball, the Pools or Tattskeno, alone, in a group, or for someone else	1	2	99	97				99	97
5	Played Club Keno at a Victorian club or hotel	1	2	99	97					
6	Played Club Keno at the Crown Casino	1	2	99	97				99	97
7	Played table games at Crown Casino such as Blackjack or Roulette	1	2	99	97				99	97
8	Bet on a sporting event like football, cricket or tennis with a TAB outlet such as a TAB agency, ClubTAB, PubTAB or other bookmakers	1	2	99	97				99	97
9	Played casino games on the Internet, FOR MONEY rather than points	1	2	99	97				99	97
	Played any other gambling activity EXCLUDING raffles or sweeps.								99	97
93	Please specify									
94	FIRST OTHER MENTION									
95	SECOND OTHER MENTION									
	THIRD OTHER MENTION									
	(RECORD EACH MENTION IN SEPARATE FIELD)									
96	No gambling in last 12 months DO NOT READ OUT									
97	Refused DO NOT READ OUT									
99	Don't know/can't say DON'T READ OUT IF QS4=CODE 3 ASK QS4A									
QUES	Q S4A SCREENER – SCRATCH TICKETS									
Q.S4A	Were those scratch tickets bought for yourself or for someone else?									
	1 Yes – some or all were bought for self									
	2 No – all bought for someone else									
	IF QS4=CODE 4 ASK QS4B									
QUES	Q S4B – LOTTERY TICKETS									
Q.S4B.	Were those lotto or lottery tickets bought for yourself or for someone else?									
	1 Yes – some or all were bought for self									
	2 No – all bought for someone else									
	IF QS4 = CODE 98 WITH MORE THAN ONE 'OTHER' RESPONSE MENTIONED ASK QS5									
	IF QS4 = CODE 98 WITH ONE OTHER MENTION ONLY ASK QS6									
QUES	Q S5 – MOST OFTEN 'OTHER' GAMBLING ACTIVITY LAST 12 MONTHS									
Q.S5.	Of those 'other' gambling activities you just mentioned (READ OUT THOSE SELECTED AT QS4 CODES 93, 94 AND 95), which one have you done the most in the last 12 months? SINGLE RESPONSE – IF RESPONDENT HAS DIFFICULTY DECIDING SAY – WE NEED TO CHOOSE ONE SO WHICH ONE DO YOU THINK IS THE ONE YOU DO MOST OFTEN									
99	Don't know/Can't say DO NOT READ OUT									
97	Refused DO NOT READ OUT									
	IF QS5=CODE 99 OR 97 GO TO QS6									
	ELSE ASK Q6 FOR OPTION MENTIONED									
	IF QS4=CODE 10 SKIP TO QS7A									
	IF QS4=CODE 97 OR 99 TERMINATE									
	ELSE CONTINUE									
	IF QS4 = CODE 3 AND QS4A = CODE 1 ONLY THEN ASK QS6 FOR THAT OPTION									
	IF QS4 = CODE 4 AND QS4B = CODE 1 ONLY THEN ASK QS6 FOR THAT OPTION									
QUES	Q S7A – CLASSIFICATION FOR GAMBLING STATUS PRIOR TO RANDOM SELECTION									
Q.S7A	CLASSIFICATION PRIOR TO RANDOM SELECTION. CLASSIFICATION FOR GAMBLING STATUS QUOTAS. THE COMPUTER WILL CALCULATE THE ANNUAL FREQUENCY OF GAMBLING AT Q.S6.									

- 1 REGULAR
- 2 NON REGULAR
- 3 NON GAMBLERS

Non-Gamblers

IF RESPONDENT DOES NOT PARTICIPATE IN GAMBLING (if QS4 = CODE 11), THEY ARE CLASSIFIED AS NON-GAMBLERS.

Non-Regular Gamblers

IF RESPONDENT PARTICIPATES LESS THAN ONCE A WEEK IN ONLY ONE TYPE OF GAMBLING ACTIVITY, OR THEIR OVERALL FREQUENCY OF PARTICIPATION IN GAMBLING ACTIVITIES IS LESS THAN WEEKLY i.e. LESS THAN 52 TIMES A YEAR, THEY ARE CLASSIFIED AS NON-REGULAR GAMBLERS.
DERIVED FROM Q6

Regular Gamblers

IF RESPONDENT PARTICIPATES AT LEAST ONCE A WEEK IN ONLY ONE GAMBLING ACTIVITY OTHER THAN LOTTERY GAMES OR INSTANT SCRATCH TICKETS, OR

THEIR OVERALL PARTICIPATION IN GAMBLING ACTIVITIES OTHER THAN LOTTERY GAMES OR INSTANT SCRATCH TICKETS IS AT LEAST WEEKLY i.e. 52 TIMES A YEAR, THEY ARE CLASSIFIED AS REGULAR GAMBLERS

DERIVED FROM Q6

THE COMPUTER WILL SELECT ONE IN THREE NON-GAMBLERS; ONE-IN SIX NON-REGULAR GAMBLERS TO CONTINUE WITH THIS SURVEY. ALL REGULAR GAMBLERS WILL CONTINUE.

IF THE PROGRAM SELECTS THIS INTERVIEW TO BE TERMINATED, THANK & CLOSE.

QUES Q S7B SCREENER – SAMPLE AFTER RANDOM SELECTION

Q.S7B SAMPLE AFTER RANDOM SELECTION – (DISPLAY ON SCREEN)

- 1 OVERALL REGULAR
- 2 OVERALL NON REGULAR
- 3 OVERALL NON GAMBLERS

IF RESPONDENT IS A GAMBLER (Q.S7B = CODE 1 OR 2) SAY:

As you participate in gambling we're keen to hear your views in the rest of the survey. It will take between 10 and 20 minutes, and your assistance would be really appreciated.

IF RESPONDENT IS NON GAMBLER SAY (QS7B = CODE 3):

Although you don't gamble we are also keen to hear your views about gambling. It will take between 5 and 10 minutes of your time, and your assistance would be really appreciated.

IF RESPONDENT IS UNWILLING TO PARTICIPATE SAY:

I know I'm intruding on your time, but this is important research and if we can include you the results will be more accurate. It won't take long, and your assistance would be really appreciated.

- 1 Agrees to participate
- 2 Agrees to callback RECORD DETAILS
- 7 Refuses to continue THANK & CLOSE

IF RESPONDENT IS RANDOMLY CHOSEN CONTINUE TO SECTION B

QUES Q B1 STATEMENTS ABOUT GAMBLING IN VICTORIA

Q.B1 I'm now going to read out some statements about gambling in Victoria. Would you tell me how strongly you agree or disagree with each statement.

Firstly, (STATEMENT), would you say that you strongly agree, agree, neither agree nor disagree, disagree or strongly disagree with that statement? (REPEAT FOR EACH STATEMENT)

ROTATE		Strongly Agree	Agree	Neither agree nor disagree	Disagree	Strongly Disagree	Can't say/ Don't Know	Refused
A	Gambling is too widely accessible in Victoria	1	2	3	4	5	99	97
B	Gambling and gambling venues should not be allowed to be advertised	1	2	3	4	5	99	97
C	There is more gambling in your local community than three years ago	1	2	3	4	5	99	97
D	Gambling is a serious social problem in Victoria	1	2	3	4	5	99	97
E	On the whole the Crown Casino Complex does more good than harm for the Victorian community	1	2	3	4	5	99	97
F	On the whole poker machines in clubs do more good for the Victorian community than harm	1	2	3	4	5	99	97
G	On the whole poker machines in hotels do more good for the Victorian community than harm	1	2	3	4	5	99	97
H	Hotels and clubs should be free to decide how many poker machines they should have	1	2	3	4	5	99	97
I	The number of poker machines in Victoria should be reduced	1	2	3	4	5	99	97

ROTATE		Strongly Agree	Agree	Neither agree nor disagree	Disagree	Strongly Disagree	Can't say/ Don't Know	Refused
J	Raising revenue from gambling taxes is preferred to increasing other State taxes such as payroll tax, land tax, stamp duties	1	2	3	4	5	99	97
K	Australians should be allowed to gamble at home using the Internet	1	2	3	4	5	99	97

QUES Q B2 STATEMENTS ON EFFECTS OF GAMBLING

Q.B2 I'm now going to read out some statements regarding the effects of gambling in Victoria. Would you tell me how strongly you agree or disagree with each statement.
 Firstly, (STATEMENT), would you say that you strongly agree, agree, neither agree nor disagree, disagree or strongly disagree with that statement? (REPEAT FOR EACH STATEMENT)

ROTATE		Strongly Agree	Agree	Neither agree nor disagree	Disagree	Strongly Disagree	Can't say/ Don't Know	Refused
A	Overall, gambling does more good for the Victorian community than harm.	1	2	3	4	5	99	97
B	Poker machines) have been good for your suburb or local community	1	2	3	4	5	99	97
C	Gambling has increased employment in your suburb or local community	1	2	3	4	5	99	97
D	Gambling has improved social life in your suburb or local community.	1	2	3	4	5	99	97
E	Gambling-related problems have got worse in Victoria over the last three years.	1	2	3	4	5	99	97
F	Wider availability of gambling in recent years has provided more opportunities for recreational enjoyment	1	2	3	4	5	99	97
G	Gambling is a serious social problem in your local community	1	2	3	4	5	99	97
H	The increased availability of gambling opportunities has significantly increased the number of problem gamblers in your local community	1	2	3	4	5	99	97
I	Poker machines should be removed from suburban/local shopping strips	1	2	3	4	5	99	97
J	Victoria needs gambling activities to attract tourists	1	2	3	4	5	99	97
K	Taxing gambling is preferable to raising other state taxes.	1	2	3	4	5	99	97
I	People in your local community gamble at the club or hotel because there are few other leisure facilities available.	1	2	3	4	5	99	97

IF QB2 STATEMENT L= CODES 1 OR 2 CONTINUE
 ELSE SKIP TO QB4

QUES Q B3 – OTHER LEISURE ACTIVITIES

Q.B3 What other leisure activities would you like to see in your local community?
 (Briefly describe one or two of your main preferences)

QUES Q B4 SCREENER – OTHER LEISURE ACTIVITIES

Q.B4 Do you think the number of poker machines and gaming machines currently available in your local community should be increased, decreased or stay the same?

PROBE: And do you think that (increase/decrease) should be small or large?

- 1 Large increase
- 2 Small increase
- 3 Stay the same
- 4 Small decrease
- 5 Large decrease
- 99 Have no opinion/can't say **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**

IF QB4=CODE 1,2,4 OR 5 CONTINUE
 ELSE SKIP TO QC1

QUES Q B5 LEVEL OF GAMING MACHINES IN CLUBS, HOTELS, CASINO

Q.B5 Poker machines and gaming machines are located in Victorian clubs, hotels and Crown Casino.
 Do you think the number of poker machines and gaming machines should be increased, decreased or stay the same in ... ?
 READ OUT

ROTATE	Increased	Stay the same	Decreased	Don't know	Refused
Victorian clubs	1	2	3	99	97
Victorian hotels	1	2	3	99	97
Crown Casino	1	2	3	99	97

READ OUT

Some people think that individuals should be responsible for dealing with gambling problems. Others say it is the responsibility of the gambling providers or the responsibility of Governments.

QUES Q C1 RESPONSIBILITY FOR REDUCING GAMBLING

Q.C1 I'M NOW GOING TO READ A LIST OF OPTIONS OF WHOSE RESPONSIBILITY IT IS TO REDUCE GAMBLING. Would you tell me how strongly you agree or disagree with each option.

Firstly, would you say that you strongly agree, agree, neither agree nor disagree, disagree or strongly disagree that (INSERT OPTION) is/are responsible for reducing gambling

READ OUT

ROTATE	Strongly Agree	Agree	Neither agree nor disagree	Disagree	Strongly Disagree	Don't Know/ Not Sure	Refused
Each individual	1	2	3	4	5	99	97
The gambling providers	1	2	3	4	5	99	97
Local Government authorities	1	2	3	4	5	99	97
State Government	1	2	3	4	5	99	97

QUES Q C2 CHANGES TO GAMBLING POLICY IN VICTORIA

Q.C2 Would you like to see any changes to gambling policy in Victoria? **SINGLE RESPONSE**

1 Yes

2 No

99 Don't know **DO NOT READ OUT**

97 Refused **DO NOT READ OUT**

IF QC2= CODE 1 CONTINUE

ELSE APPLY SKIPS BELOW

IF QS7B = CODE 1 (REGULAR GAMBLER):

1 OF EVERY 3 CONTINUE TO QN/A1 (VGS SCREEN)

1 OF EVERY 3 SKIP TO QN/B1 (CPGI SCREEN)

1 OF EVERY 3 SKIP TO QN/C1 (SGS SCREEN)

IF QS7B = CODE 2 (NON-REGULAR GAMBLER) QM1

IFQS7B = CODE 3 (NON-GAMBLER) SKIP TO QR1

QUES Q C3A GAMBLING POLICY CHANGES

Q.C3A With regard to possible changes to gambling in Victoria, I'm now going to read out some statements. Would you tell me how strongly you agree or disagree with each statement.

Firstly, (STATEMENT), would you say that you strongly agree, agree, neither agree nor disagree, disagree or strongly disagree with that statement? (REPEAT FOR EACH STATEMENT)

ROTATE	Strongly Agree	Agree	Neither agree nor disagree	Disagree	Strongly Disagree	Can't say/ Don't Know	Refused
There should be more clubs and hotels without poker machines)	1	2	3	4	5	99	97
Local government authorities should make the final decision about whether more poker machines) are allowed in your local community.	1	2	3	4	5	99	97
People should be able to limit the amount they can spend at any one time on poker machines (e.g. through the purchase of player cards with spend limits).	1	2	3	4	5	99	97
ATMs at clubs, hotels and casinos should have a withdrawal limit of \$200 per day.	1	2	3	4	5	99	97
Banknote acceptors should be removed from gaming machines.	1	2	3	4	5	99	97
Gaming machines should give on-screen warnings about problem gambling.	1	2	3	4	5	99	97
School education programs should include education about responsible gambling.	1	2	3	4	5	99	97
There should be trained people in gambling venues to offer assistance to gamblers who display problem behaviour	1	2	3	4	5	99	97
The Victorian Government should reduce the number of poker machines	1	2	3	4	5	99	97

QUES Q C3B DESCRIPTION OF MAIN POLICY CHANGES

QC3B Are there any other policy changes you would like to see?

IF QS7B = CODE 1 (REGULAR GAMBLER):

1 OF EVERY 3 CONTINUE TO QN/A1 (VGS SCREEN)

1 OF EVERY 3 SKIP TO QN/B1 (CPGI SCREEN)

1 OF EVERY 3 SKIP TO QN/C1 (SOGS SCREEN)
IF QS7B = CODE 2 (NON-REGULAR GAMBLER) SKIP TO QM1
IF QS7B = CODE 3 (NON-GAMBLER) SKIP TO QR1

VGS QUESTIONS

READ OUT

I am now going to read out some questions about what people do when they gamble. As I read out each statement, please tell me whether it has applied to you personally in the last 12 months. Remember that all the information you provide is anonymous and confidential so I'd like you to give honest answers.

Please answer the following questions using the scale 'Never, rarely, sometimes, often, always'

Thinking about your gambling for the last 12 months

Q.N/A1 Has gambling been a good hobby for you? **SINGLE RESPONSE**

- 1 Never
- 2 Rarely
- 3 Sometimes
- 4 Often
- 5 Always

99 Don't know/can't remember **DO NOT READ OUT**

97 Refused **DO NOT READ OUT**

Q.N/A2 Nowadays, when you gamble, is it fun? **SINGLE RESPONSE**

- 1 Never
- 2 Rarely
- 3 Sometimes
- 4 Often
- 5 Always

99 Don't know/can't remember **DO NOT READ OUT**

97 Refused **DO NOT READ OUT**

Q.N/A3 Have you gambled with skill? **SINGLE RESPONSE**

- 1 Never
- 2 Rarely
- 3 Sometimes
- 4 Often
- 5 Always

99 Don't know/can't remember **DO NOT READ OUT**

97 Refused **DO NOT READ OUT**

Q.N/A4 Nowadays, when you gamble, do you feel as if you are on a slippery slope and can't get back up again? **SINGLE RESPONSE**

- 1 Never
- 2 Rarely
- 3 Sometimes
- 4 Often
- 5 Always

99 Don't know/can't remember **DO NOT READ OUT**

97 Refused **DO NOT READ OUT**

Q.N/A5 Has your need to gamble been too strong to control? **SINGLE RESPONSE**

- 1 Never
- 2 Rarely
- 3 Sometimes
- 4 Often
- 5 Always

99 Don't know/can't remember **DO NOT READ OUT**

97 Refused **DO NOT READ OUT**

Q.N/A6 Has gambling been more important than anything else you might do? **SINGLE RESPONSE**

- 1 Never
- 2 Rarely
- 3 Sometimes
- 4 Often
- 5 Always

98 Don't know/can't remember **DO NOT READ OUT**

99 Refused **DO NOT READ OUT**

Q.N/A7 Have you felt that after losing you must return as soon as possible to win back any losses? **SINGLE RESPONSE**

- 1 Never
- 2 Rarely
- 3 Sometimes
- 4 Often
- 5 Always

99 Don't know/can't remember **DO NOT READ OUT**

97 Refused **DO NOT READ OUT**

Q.N/A8 Has the thought of gambling been constantly on your mind? **SINGLE RESPONSE**

- 1 Never
- 2 Rarely
- 3 Sometimes
- 4 Often
- 5 Always

- 99 Don't know/can't remember **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
 Q.N/A9 Have you lied to yourself about your gambling? **SINGLE RESPONSE**
 1 Never
 2 Rarely
 3 Sometimes
 4 Often
 5 Always
 99 Don't know/can't remember **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
 Q.N/A10 Have you gambled in order to escape from worry or trouble? **SINGLE RESPONSE**
 1 Never
 2 Rarely
 3 Sometimes
 4 Often
 5 Always
 99 Don't know/can't remember **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
 Q.N/A11 Have you felt bad or guilty about your gambling? **SINGLE RESPONSE**
 1 Never
 2 Rarely
 3 Sometimes
 4 Often
 5 Always
 99 Don't know/can't remember **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
 Q.N/A12 Have you thought you shouldn't gamble or should gamble less? **SINGLE RESPONSE**
 1 Never
 2 Rarely
 3 Sometimes
 4 Often
 5 Always
 99 Don't know/can't remember **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
 Q.N/A13 How often has anyone close to you complained about your gambling? **SINGLE RESPONSE**
 1 Never
 2 Rarely
 3 Sometimes
 4 Often
 5 Always
 99 Don't know/can't remember **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
 Q.N/A14 How often have you lied to others to conceal the extent of your involvement in gambling? **SINGLE RESPONSE**
 1 Never
 2 Rarely
 3 Sometimes
 4 Often
 5 Always
 99 Don't know/can't remember **DO NOT READ OUT**
 97 Refused
 Q.N/A15 How often have you hidden betting slips, Lotto tickets, gambling money or other signs of gambling from your spouse, partner, children or other important people in your life? **SINGLE RESPONSE**
 1 Never
 2 Rarely
 3 Sometimes
 4 Often
 5 Always
 99 Don't know/can't remember **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
READ OUT
 Again, thinking about the past 12 months ...
 Q.N/A16A Have you and your partner put off doing things together? **SINGLE RESPONSE**
 1 YES
 2 NO
 99 Don't know/can't remember **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
IF QN/A16A = CODE 1 CONTINUE
ELSE SKIP TO QN/A17A
 Q.N/A16B Was this made worse by your gambling? **SINGLE RESPONSE**
 1 YES
 2 NO
 99 Don't know/can't remember **DO NOT READ OUT**

- 97 Refused **DO NOT READ OUT**
- Q.N/A17A Have you and your partner criticised one another? **SINGLE RESPONSE**
- 1 YES
- 2 NO
- 99 Don't know/can't remember **DO NOT READ OUT**
- 97 Refused
- IF QN/A17A = CODE 1 CONTINUE**
- ELSE SKIP TO QN/A18A**
- Q.N/A17B Was this made worse by your gambling? **SINGLE RESPONSE**
- 1 YES
- 2 NO
- 99 Don't know/can't remember **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
- Q.N/A18A Has your partner had difficulties trusting you? **SINGLE RESPONSE**
- 1 YES
- 2 NO
- 98 Don't know/can't remember **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
- IF QN/A18A = CODE 1 CONTINUE**
- ELSE SKIP TO QN/A19**
- Q.N/A18B Was this made worse by your gambling? **SINGLE RESPONSE**
- 1 YES
- 2 NO
- 99 Don't know/can't remember **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
- READ OUT**
- Please use the scale as before to answer the next questions: 'Never, rarely, sometimes, often, always'.
In the past 12 months
- Q.N/A19 How often have you spent more money on gambling than you can afford? **SINGLE RESPONSE**
- 1 Never
- 2 Rarely
- 3 Sometimes
- 4 Often
- 5 Always
- 99 Don't know/can't remember **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
- Q.N/A20 How often has your gambling made it harder to make money last from one payday to the next? **SINGLE RESPONSE**
- 1 Never
- 2 Rarely
- 3 Sometimes
- 4 Often
- 5 Always
- 99 Don't know/can't remember **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
- Q.N/A21 How often have you had to borrow money to gamble with? **SINGLE RESPONSE**
- 1 Never
- 2 Rarely
- 3 Sometimes
- 4 Often
- 5 Always
- 99 Don't know/Can't remember **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
- ALL SKIP TO QM1**
- CPGI QUESTIONS**
- I am now going to read out some questions about what people do when they gamble. As I read out each statement, please tell me whether it has applied to you personally in the last 12 months. Remember that all the information you provide is anonymous and confidential so I'd like you to give honest answers.
- Q.N/B1 In the last 12 months, have you bet more than you could really afford to lose, would you say never, rarely, sometimes, often or always? **SINGLE RESPONSE**
- 1 Never
- 2 Rarely
- 3 Sometimes
- 4 Often
- 5 Always
- 99 Don't know/can't remember **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
- Q.N/B2 In the last 12 months, have you needed to gamble with larger amounts of money to get the same feeling of excitement, would you say never, rarely, sometimes, often or always? **SINGLE RESPONSE**
- 1 Never
- 2 Rarely
- 3 Sometimes
- 4 Often

- 5 Always
99 Don't know/can't remember **DO NOT READ OUT**
97 Refused **DO NOT READ OUT**
- Q.N/B3 In the last 12 months, when you gambled, did you go back another day to try to win back the money you lost, would you say never, rarely, sometimes, often or always? **SINGLE RESPONSE**
- 1 Never
2 Rarely
3 Sometimes
4 Often
5 Always
99 Don't know/can't remember **DO NOT READ OUT**
97 Refused **DO NOT READ OUT**
- Q.N/B4 In the last 12 months, have you borrowed money or sold anything to get money to gamble, would you say never, rarely, sometimes, often or always? **SINGLE RESPONSE**
- 1 Never
2 Rarely
3 Sometimes
4 Often
5 Always
99 Don't know/can't remember **DO NOT READ OUT**
97 Refused **DO NOT READ OUT**
- Q.N/B5 In the last 12 months, have you felt that you might have a problem with gambling, would you say never, rarely, sometimes, often or always? **SINGLE RESPONSE**
- 1 Never
2 Rarely
3 Sometimes
4 Often
5 Always
99 Don't know/can't remember **DO NOT READ OUT**
97 Refused **DO NOT READ OUT**
- Q.N/B6 In the last 12 months, has gambling caused you any health problems, including stress or anxiety, would you say never, rarely, sometimes, often or always? **SINGLE RESPONSE**
- 1 Never
2 Rarely
3 Sometimes
4 Often
5 Always
99 Don't know/can't remember **DO NOT READ OUT**
97 Refused **DO NOT READ OUT**
- Q.N/B7 In the last 12 months, have people criticised your betting or told you that you had a gambling problem, regardless of whether or not you thought it was true, would you say never, rarely, sometimes, often or always? **SINGLE RESPONSE**
- 1 Never
2 Rarely
3 Sometimes
4 Often
5 Always
99 Don't know/can't remember **DO NOT READ OUT**
97 Refused **DO NOT READ OUT**
- Q.N/B8 In the last 12 months, has your gambling caused any financial problems for you or your household, would you say never, rarely, sometimes, often or always? **SINGLE RESPONSE**
- 1 Never
2 Rarely
3 Sometimes
4 Often
5 Always
99 Don't know/Can't remember **DO NOT READ OUT**
97 Refused **DO NOT READ OUT**
- Q.N/B9 In the last 12 months, have you felt guilty about the way you gamble or what happens when you gamble, would you say never, rarely, sometimes, often or always? **SINGLE RESPONSE**
- 1 Never
2 Rarely
3 Sometimes
4 Often
5 Always
99 Don't know/can't remember **DO NOT READ OUT**
97 Refused **DO NOT READ OUT**
- Q.N/B10 In the last 12 months, have you lied to family members or others to hide your gambling, would you say never, rarely, sometimes, often or always? **SINGLE RESPONSE**
- 1 Never
2 Rarely
3 Sometimes
4 Often

5 Always
 99 Don't know/can't remember **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
 Q.N/B11 In the last 12 months, have you bet or spent more money than you wanted to on gambling, would you say never, rarely, sometimes, often or always? **SINGLE RESPONSE**
 1 Never
 2 Rarely
 3 Sometimes
 4 Often
 5 Always
 99 Don't know/can't remember **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
 Q.N/B12 In the last 12 months, have you wanted to stop betting money or gambling, but didn't think you could, would you say never, rarely, sometimes, often or always? **SINGLE RESPONSE**
 1 Never
 2 Rarely
 3 Sometimes
 4 Often
 5 Always
 99 Don't know/Can't remember **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
END OF CPGI SCREEN
ALL SKIP TO QM1

SOGS QUESTIONS

I am now going to read out some questions about what people do when they gamble. As I read out each statement, please tell me whether it has applied to you personally in the last 12 months. Remember that all the information you provide is anonymous and confidential so I'd like you to give honest answers.

Q.N/C1 In the last 12 months, when you gambled, how often did you go back another day to win back money you lost? Would you say... **READ OUT – SINGLE RESPONSE**
 1 Never
 2 Rarely
 3 Sometimes
 4 Often
 5 Always
 99 Can't say **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
 Q.N/C2 In the last 12 months, have you claimed to be winning money from gambling when in fact you lost? Would you say.. **READ OUT – SINGLE RESPONSE**
 1 Never
 2 Rarely
 3 Sometimes
 4 Often
 5 Always
 99 Can't say **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**

READ OUT

For the next set of questions, please just initially answer yes or no.

Q.N/C3a In the last 12 months, have you gambled more than you intended to? **SINGLE RESPONSE**
 1 Yes No
 99 Can't say **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
IF QNC3A = CODE 1 SKIP TO QNC3C
IF QNC3A = CODE 2 CONTINUE
ELSE SKIP TO QNC4A
 Q.N/C3b Do you mean rarely or not at all? **SINGLE RESPONSE**
 1 Rarely
 2 Not at all
 99 Can't say **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
ALL SKIP TO QN/C4a
 Q.N/C3c Is that rarely, sometimes, often or always? **SINGLE RESPONSE**
 1 Rarely
 2 Sometimes
 3 Often
 4 Always
 99 Can't say **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
 Q.N/C4a In the last 12 months, have people criticised your gambling or told you that you have a gambling problem, regardless of whether or not you thought it was true? **SINGLE RESPONSE**
 1 Yes
 2 No

- 99 Can't say DO NOT READ OUT
97 Refused DO NOT READ OUT
IF QNC4A = CODE 1 SKIP TO QNC4C
IF QNC4A = CODE 2 CONTINUE
ELSE SKIP TO QNC5A
- Q.N/C4b Do you mean rarely or not at all? SINGLE RESPONSE
1 Rarely
2 Not at all
99 Can't say DO NOT READ OUT
97 Refused DO NOT READ OUT
ALL SKIP TO QNC5a
- Q.N/C4c Is that rarely, sometimes, often or always? SINGLE RESPONSE
1 Rarely
2 Sometimes
3 Often
4 Always
99 Can't say DO NOT READ OUT
97 Refused DO NOT READ OUT
- Q.N/C5a In the last 12 months, have you felt guilty about the way you gamble or what happens when you gamble? SINGLE RESPONSE
1 Yes
2 No
99 Can't say DO NOT READ OUT
97 Refused DO NOT READ OUT
IF QNC5A = CODE 1 SKIP TO QNC5C
IF QNC5A = CODE 2 CONTINUE
ELSE SKIP TO QNC6A
- Q.N/C5b Do you mean rarely or not at all? SINGLE RESPONSE
1 Rarely
2 Not at all
99 Can't say DO NOT READ OUT
97 Refused DO NOT READ OUT
ALL SKIP TO QN/C6A
- Q.N/C5c Is that rarely, sometimes, often or always? SINGLE RESPONSE
1 Rarely
2 Sometimes
3 Often
4 Always
99 Can't say DON'T READ OUT
97 Refused DO NOT READ OUT
- Q.N/C6a In the last 12 months, have you felt that you would like to stop gambling but didn't think you could? SINGLE RESPONSE
1 Yes
2 No
99 Can't say DO NOT READ OUT
97 Refused DO NOT READ OUT
IF QNC6A = CODE 1 SKIP TO QNC6C
IF QNC6A = CODE 2 CONTINUE
ELSE SKIP TO QNC7A
- Q.N/C6b Do you mean rarely or not at all? SINGLE RESPONSE
1 Rarely
2 Not at all
99 Can't say DO NOT READ OUT
97 Refused DO NOT READ OUT
ALL SKIP TO QNC7A
- Q.N/C6c Is that rarely, sometimes, often or always? SINGLE RESPONSE
1 Rarely
2 Sometimes
3 Often
4 Always
99 Can't say DO NOT READ OUT
97 Refused DO NOT READ OUT
- Q.N/C7a In the last 12 months, have you hidden betting slips, lottery tickets, gambling money or other signs of gambling from your spouse/partner, children, or other important people in your life? SINGLE RESPONSE
1 Yes
2 No
99 Can't say DO NOT READ OUT
97 Refused DO NOT READ OUT
IF QNC7A = CODE 1 SKIP TO QNC7C
IF QNC7A = CODE 2 CONTINUE
ELSE SKIP TO QNC8A
- Q.N/C7b Do you mean rarely or not at all? SINGLE RESPONSE
1 Rarely

- 2 Not at all
99 Can't say DO NOT READ OUT
97 Refused DO NOT READ OUT
ALL SKIP TO QN/C8A
- Q.N/C7c Is that rarely, sometimes, often or always? SINGLE RESPONSE
1 Rarely
2 Sometimes
3 Often
4 Always
99 Can't say DO NOT READ OUT
97 Refused DO NOT READ OUT
- Q.N/C8a In the last 12 months, have you argued with people you live with over how you handle money? SINGLE RESPONSE
1 Yes
2 No
99 Can't say DO NOT READ OUT
97 Refused DO NOT READ OUT
IF QNC8A = CODE 1 SKIP TO QNC8C
IF QNC8A = CODE 2 CONTINUE
ELSE SKIP TO QNC9A
- Q.N/C8b Do you mean rarely or not at all? SINGLE RESPONSE
1 Rarely
Not at all
99 Can't say DO NOT READ OUT
97 Refused DO NOT READ OUT
ALL SKIP TO QNC9A
- Q.N/C8c Is that rarely, sometimes, often or always? SINGLE RESPONSE
1 Rarely
2 Sometimes
3 Often
4 Always
99 Can't say DO NOT READ OUT
97 Refused DO NOT READ OUT
ALL CONTINUE
- Q.N/C8d Have these money arguments centred on your gambling? Would you say: SINGLE RESPONSE
1 Rarely
2 Sometimes
3 Often
4 Always
99 Can't say DO NOT READ OUT
97 Refused DO NOT READ OUT
- Q.N/C9a In the last 12 months, have you borrowed from someone and not paid them back as a result of your gambling? SINGLE RESPONSE
1 Yes
2 No
99 Can't say DO NOT READ OUT
97 Refused DO NOT READ OUT
IF QNC9A = CODE 1 SKIP TO QNC9C
IF QNC9A = CODE 2 CONTINUE
ELSE SKIP TO QNC10A
- Q.N/C9b Do you mean rarely or not at all? SINGLE RESPONSE
1 Rarely
Not at all
99 Can't say DO NOT READ OUT
97 Refused DO NOT READ OUT
ALL SKIP TO QN/C10A
- Q.N/C9c Is that rarely, sometimes, often or always? SINGLE RESPONSE
1 Rarely
2 Sometimes
3 Often
4 Always
99 Can't say DO NOT READ OUT
97 Refused DO NOT READ OUT
- Q.N/C10a In the last 12 months, have you lost time from work or study because of your gambling? SINGLE RESPONSE
1 Yes
2 No
99 Can't say DO NOT READ OUT
97 Refused DO NOT READ OUT
IF QNC10A = CODE 1 SKIP TO QNC10C
IF QNC10A = CODE 2 CONTINUE
ELSE SKIP TO QNC11A
- Q.N/C10b Do you mean rarely or not at all? SINGLE RESPONSE

- 1 Rarely
Not at all
- 99 Can't say **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
ALL SKIP TO QN/C11A
- Q.N/C10c Is that rarely, sometimes, often or always? **SINGLE RESPONSE**
- 1 Rarely
2 Sometimes
3 Often
4 Always
- 99 Can't say **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
READ OUT
- Next are some ways people have obtained money to gamble or to pay gambling debts. Again, please answer honestly and tell me if any of the following questions applied to you personally.
- Q.N/C11a In the last 12 months, have you borrowed from household money to gamble or to pay gambling debts? **SINGLE RESPONSE**
- 1 Yes
2 No
- 99 Can't say **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
IF QNC11A = CODE 1 SKIP TO QNC11C
IF QNC11A = CODE 2 CONTINUE
ELSE SKIP TO QNC12A
- Q.N/C11b Do you mean rarely or not at all? **SINGLE RESPONSE**
- 1 Rarely
Not at all
- 99 Can't say **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
ALL SKIP TO QN/C12A
- Q.N/C11c Is that rarely, sometimes, often or always? **SINGLE RESPONSE**
- 1 Rarely
2 Sometimes
3 Often
4 Always
- 99 Can't say **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
- Q.N/C12a In the last 12 months, have you borrowed from your spouse or partner to gamble or to pay gambling debts? **SINGLE RESPONSE**
- 1 Yes
2 No
- 99 Can't say **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
IF QNC12A = CODE 1 SKIP TO QNC12C
IF QNC12A = CODE 2 CONTINUE
ELSE SKIP TO QNC13A
- Q.N/C12b Do you mean rarely or not at all? **SINGLE RESPONSE**
- 1 Rarely
Not at all
- 99 Can't say **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
ALL SKIP TO QN/C13A
- Q.N/C12c Is that rarely, sometimes, often or always? **SINGLE RESPONSE**
- 1 Rarely
2 Sometimes
3 Often
4 Always
- 99 Can't say **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
- Q.N/C13a In the last 12 months, have you borrowed from other relatives or in-laws to gamble or to pay gambling debts? **SINGLE RESPONSE**
- 1 Yes
2 No
- 99 Can't say **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
IF QNC13A = CODE 1 SKIP TO QNC13C
IF QNC13A = CODE 2 CONTINUE
ELSE SKIP TO QNC14A
- Q.N/C13b Do you mean rarely or not at all? **SINGLE RESPONSE**
- 1 Rarely
Not at all
- 99 Can't say **DO NOT READ OUT**

- 97 Refused DO NOT READ OUT
ALL SKIP TO QN/C14A
- Q.N/C13c Is that rarely, sometimes, often or always? SINGLE RESPONSE
- 1 Rarely
 2 Sometimes
 3 Often
 4 Always
- 99 Can't say DO NOT READ OUT
 97 Refused DO NOT READ OUT
- Q.N/C14a In the last 12 months, have you obtained cash advances using your credit cards to gamble or to pay gambling debts? This does not include using cards to make cash withdrawals from savings or cheque accounts. SINGLE RESPONSE
- 1 Yes
 2 No
- 99 Can't say DO NOT READ OUT
 97 Refused DO NOT READ OUT
IF QNC14A = CODE 1 SKIP TO QNC14C
IF QNC14A = CODE 2 CONTINUE
ELSE SKIP TO QNC15A
- Q.N/C14b Do you mean rarely or not at all? SINGLE RESPONSE
- 1 Rarely
 Not at all
- 99 Can't say DO NOT READ OUT
 97 Refused DO NOT READ OUT
ALL SKIP TO QN/C15A
- Q.N/C14c Is that rarely, sometimes, often or always? SINGLE RESPONSE
- 1 Rarely
 2 Sometimes
 3 Often
 4 Always
- 99 Can't say DO NOT READ OUT
 97 Refused DO NOT READ OUT
- Q.N/C15a In the last 12 months, have you arranged a personal loan from a bank, finance company or credit union to gamble or to pay gambling debts? SINGLE RESPONSE
- 1 Yes
 2 No
- 99 Can't say DO NOT READ OUT
 97 Refused DO NOT READ OUT
IF QNC15A = CODE 1 SKIP TO QNC15C
IF QNC15A = CODE 2 CONTINUE
ELSE SKIP TO QNC16A
- Q.N/c15b Do you mean rarely or not at all? SINGLE RESPONSE
- 1 Rarely
 Not at all
- 99 Can't say DO NOT READ OUT
 97 Refused DO NOT READ OUT
ALL SKIP TO QN/C16A
- Q.N/C15c Is that rarely, sometimes, often or always? SINGLE RESPONSE
- 1 Rarely
 2 Sometimes
 3 Often
 4 Always
- 99 Can't say DO NOT READ OUT
 97 Refused DO NOT READ OUT
- Q.N/C16a In the last 12 months, have you borrowed from loan sharks to gamble or to pay gambling debts? SINGLE RESPONSE
- 1 Yes
 2 No
- 99 Can't say DO NOT READ OUT
 97 Refused DO NOT READ OUT
IF QNC16A = CODE 1 SKIP TO QNC16C
IF QNC16A = CODE 2 CONTINUE
ELSE SKIP TO QNC17A
- Q.N/C16b Do you mean rarely or not at all? SINGLE RESPONSE
- 1 Rarely
 Not at all
- 99 Can't say DO NOT READ OUT
 97 Refused DO NOT READ OUT
ALL SKIP TO QN/C17A
- Q.N/C16c Is that rarely, sometimes, often or always? SINGLE RESPONSE
- 1 Rarely
 2 Sometimes
 3 Often

4 Always
 99 Can't say DO NOT READ OUT
 97 Refused DO NOT READ OUT
 Q.N/C17a In the last 12 months, have you cashed in shares, bonds or other securities to gamble or to pay gambling debts? SINGLE RESPONSE
 1 Yes
 2 No
 99 Can't say DO NOT READ OUT
 97 Refused DO NOT READ OUT
 IF QNC17A = CODE 1 SKIP TO QNC17C
 IF QNC17A = CODE 2 CONTINUE
 ELSE SKIP TO QNC18A
 Q.N/C17b Do you mean rarely or not at all? SINGLE RESPONSE
 1 Rarely
 Not at all
 99 Can't say DO NOT READ OUT
 97 Refused DO NOT READ OUT
 ALL SKIP TO QN/C18A
 Q.N/C17c Is that rarely, sometimes, often or always? SINGLE RESPONSE
 1 Rarely
 2 Sometimes
 3 Often
 4 Always
 99 Can't say DO NOT READ OUT
 97 Refused DO NOT READ OUT
 Q.N/C18a In the last 12 months, have you sold personal or family property to gamble or to pay gambling debts? SINGLE RESPONSE
 1 Yes
 2 No
 99 Can't say DO NOT READ OUT
 97 Refused DO NOT READ OUT
 IF QNC18A = CODE 1 SKIP TO QNC18C
 IF QNC18A = CODE 2 CONTINUE
 ELSE SKIP TO QNC19A
 Q.N/C18b Do you mean rarely or not at all? SINGLE RESPONSE
 1 Rarely
 Not at all
 99 Can't say DO NOT READ OUT
 97 Refused DO NOT READ OUT
 SKIP TO QN/C19A
 Q.N/C18c Is that rarely, sometimes, often or always? SINGLE RESPONSE
 1 Rarely
 2 Sometimes
 3 Often
 4 Always
 99 Can't say DO NOT READ OUT
 97 Refused DO NOT READ OUT
 Q.N/C19a In the last 12 months, have you written a cheque knowing there was no money in your account to gamble or to pay gambling debts? SINGLE RESPONSE
 1 Yes
 2 No
 99 Can't say DO NOT READ OUT
 97 Refused DO NOT READ OUT
 IF QNC19A = CODE 1 SKIP TO QNC19C
 IF QNC19A = CODE 2 CONTINUE
 ELSE SKIP TO QNC20A
 Q.N/C19b Do you mean rarely or not at all? SINGLE RESPONSE
 1 Rarely
 Not at all
 99 Can't say DO NOT READ OUT
 97 Refused DO NOT READ OUT
 ALL SKIP TO QN/C20A
 Q.N/C19c Is that rarely, sometimes, often or always? SINGLE RESPONSE
 1 Rarely
 2 Sometimes
 3 Often
 4 Always
 99 Can't say DO NOT READ OUT
 97 Refused DO NOT READ OUT
 Q.N/C20a In the last 12 months, have you spent more money on gambling than you can afford? SINGLE RESPONSE
 1 Yes GO TO Q.N/C20c
 2 No GO TO Q.N/C20b
 99 Can't say DO NOT READ OUT

- 97 Refused DO NOT READ OUT
 IF QNC20A = CODE 1 SKIP TO QNC20C
 IF QNC20A = CODE 2 CONTINUE
 ELSE SKIP TO QNC21A
- Q.N/C20b Do you mean rarely or not at all? SINGLE RESPONSE
- 1 Rarely
 Not at all
- 99 Can't say DO NOT READ OUT
- 97 Refused DO NOT READ OUT
 ALL SKIP TO QN/C21A
- Q.N/C20c Is that rarely, sometimes, often or always? SINGLE RESPONSE
- 1 Rarely
 2 Sometimes
 3 Often
 4 Always
- 99 Can't say DO NOT READ OUT
- 97 Refused DO NOT READ OUT
- Q.N/C21a Do you feel you've ever had a problem with your gambling? SINGLE RESPONSE
- 1 Yes
 2 No
- 99 Can't say DO NOT READ OUT
- 97 Refused DO NOT READ OUT
 IF QN/C21A=CODE 1 CONTINUE
 ELSE SKIP TO QN/C24
- Q.N/C21b Would you say READ OUT SINGLE RESPONSE
- 1 Yes, I had a problem in the past but not now
 2 Yes, I feel this way now
 3 No I haven't got a problem with gambling
- 99 Can't say DO NOT READ OUT
- 97 Refused DO NOT READ OUT
 IF QN/C21B=CODE 1 CONTINUE
 IF QN/C21B=CODE 2 SKIP TO QN/C23
 ELSE SKIP TO QN/C24
- Q.N/C22 And for how long did you have a problem with your gambling? SINGLE RESPONSE
 ENTER AMOUNT OF YEARS. ROUND TO NEAREST YEAR – IF LESS THAN 6 MONTHS, ENTER 0.
- 1 Number of years _____
- 99 Can't say DO NOT READ OUT
- 97 Refused DO NOT READ OUT
 ALL SKIP TO QN/C24
- Q.N/C23 So for how long do you feel you have had a problem with your gambling? SINGLE RESPONSE
 ENTER AMOUNT OF YEARS. ROUND TO NEAREST YEAR – IF LESS THAN 6 MONTHS, ENTER 0.
- 1 Number of years _____
- 99 Can't say DO NOT READ OUT
- 97 Refused DO NOT READ OUT
- Q.N/C24 Now on a scale of 1 to 10, where 1 means you feel your gambling is NOT AT ALL a problem and 10 means you feel your gambling IS A SERIOUS PROBLEM, how would you rate your gambling right now? SINGLE RESPONSE
 Record rating _____
- 99 Can't say DO NOT READ OUT
- 97 Refused DO NOT READ OUT
 END OF SOGS SCREEN
 ALL CONTINUE TO QM1
 SECTION M _ GAMBLING PARTICIPATION
 IF QS4 = ONLY ONE CODE SELECTED SKIP TO QM2
 ELSE CONTINUE
 READ OUT
- The following questions are about your gambling activity.
- Q.M1 On which gambling activity have you spent the most money overall in the last 12 months?
 SINGLE RESPONSE
 READ OUT ALL CODES (ACTIVITIES) MENTIONED AT QS4 –
 IF AT QS4A CODES 2A OR 2B MENTIONED SUBSTITUTE WITH bet on horse or greyhound races
 IF BOTH CODES 2A AND 2B MENTIONED ONLY ASK ONCE
 Don't know/Can't say DO NOT READ OUT
- 97 Refused DO NOT READ OUT
 IF QM1=CODE 99 OR 97 SKIP TO QM4
 IF QM1=CODE 3 AND QS4A=CODE 2 SKIP TO QM4
 IF QM1=CODE 4 AND QS4B=CODE 2 SKIP TO QM4
 ELSE CONTINUE
- Q.M2 I'm now going to read out a series of reasons for playing/entering/betting on (INSERT ACTIVITY AT QM1 or QS4). Would you tell me how strongly you agree or disagree that each is a reason you play/enter/bet on (INSERT ACTIVITY AT QM1 OR QS4).
 Firstly, (STATEMENT), would you say that you strongly agree, agree, neither agree nor disagree, disagree or strongly disagree with that reason? (REPEAT FOR EACH STATEMENT)

ROTATE	Strongly Agree	Agree	Neither agree nor disagree	Disagree	Strongly Disagree	Can't say/ Don't Know	Refused
Because it's a favourite recreational activity or hobby		2	3				
For the thrill or dream of winning	1	2	3	4	5	99	97
Out of boredom to pass the time	1	2	3	4	5	99	97
Because I like to beat the odds and back a winner	1	2	3	4	5	99	97
Because I believe I may get lucky	1	2	3	4	5	99	97
To prove I am lucky	1	2	3	4	5	99	97
To test my skill	1	2	3	4	5	99	97
To make a quick buck	1	2	3	4	5	99	97
Because I like to take risks	1	2	3	4	5	99	97
To enhance my social standing	1	2	3	4	5	99	97
Because money lost goes to a worthy cause	1	2	3	4	5	99	97
For social reasons or to be with friends	1	2	3	4	5	99	97
Because of the atmosphere and excitement – it gives me a buzz	1	2	3	4	5	99	97
IF QM1 = CODE 1, 2A, 5, 6, OR 7 ASK CODE N							
n)	Because I am attracted to the venue itself						
IF QM1 = CODE 8 ASK CODE O							
o)	Because it adds interest to listening to or watching the game						
Q.M3	Looking back over the last 12 months, how would you rate your experience of gambling on (IF QM1 ACTIVITY OR QS4 ACTIVITY). IF AT QS4 CODES 2A OR 2B MENTIONED SUBSTITUTE WITH bet on horse or greyhound races						
	Would you say it has made your life ... READ OUT						
1	A lot more enjoyable						
2	A little more enjoyable						
3	Made no difference to your life						
4	A little less enjoyable						
5	A lot less enjoyable						
9	Don't know/can't say (DON'T READ OUT)						
99	Refusal (DON'T READ OUT)						
Q.M4	Think about the amount of money you used for gambling in the last (FOR REGULAR GAMBLERS INSERT week) (FOR NON-REGULAR GAMBLERS INSERT month). If you hadn't spent the money on gambling, in what other ways might you have used it?						
DO NOT READ OUT. IF MENTIONS 'SPENT IT ON OTHER ITEMS' ASK FOR DETAILS. MULTIPLE RESPONSE.							
1	Spent it on groceries or small household items						
2	Put it towards major household goods e.g. TV, refrigerator						
3	Spent it on personal items e.g. clothing, footwear						
4	Spent it on restaurant meals/takeaway food						
5	Spent it on alcohol						
6	Spent it on the movies or a concert						
7	Spent it on other entertainment or recreation activities						
8	Used it to pay bills/credit cards						
9	Used it to pay rent/mortgage						
10	Would spend it on children/grandchildren/family						
11	Would spend it on petrol						
12	Would spend it on cigarettes						
13	Would donate it to charity						
14	Buy magazines/books						
15	Travel/holiday						
16	Motor vehicle purchase/repairs						
17	House renovations/repairs						
18	Music/videos/DVDs						
19	Spent it on other items (please specify)						
20	Not spent it/saved it/put it in bank						
99	Don't know/can't remember DO NOT READ OUT						
97	Refused DO NOT READ OUT						
Q.M5	In the last 12 months, have you mainly gambled at – READ OUT						
MULTIPLE RESPONSES							
1	A casino						
2	A club						
3	A hotel						
4	A newsagent						
5	A racetrack						
6	A Tab agency						
7	From home via the Internet						
8	From home via telephone						
98	Other (please specify)						
99	Don't know/cant remember (DON'T READ OUT)						

- 97 Refused (DON'T READ OUT)
 IF QS4=MULTIPLE CODES SKIPS FROM QM3 APPLY
 IF QM1= CODE 1 ASK QUESTION SET QM6A TO QM8
 IF QM1= CODE 2A OR CODE 2B ASK QM9
 IF QM1= CODES 5 OR 6 ASK QM10 IF QM1=CODE 7 ASK QM11
 IF QM1=CODE 8 ASK QM12 AND QM13
 IF QM1= CODE 9 ASK QM14
 IF QM1 = CODE 98 ASK QM15
- Q.M6a Which types of venues do you play poker machines) at? MULTIPLE RESPONSES
- 1 Pub or hotel
 2 Licensed sports club ((golf, football, bowls, etc)
 3 RSL club
 4 Melbourne Crown Casino
 5 Or somewhere else (specify)
 99 Can't say/Don't know (DON'T READ OUT)
 97 Refused (DON'T READ OUT)
- Q.M6b And which of (READ OUT OPTIONS MENTIONED AT QM6A) do you mostly play poker machines) at? SINGLE RESPONSE
- 1 Pub or hotel
 2 Licensed sports club ((golf, football, bowls, etc)
 3 RSL club
 4 Melbourne Crown Casino
 5 Or somewhere else (specify)
 99 Can't say/Don't know DO NOT READ OUT
 97 Refused DO NOT READ OUT
 IF QM6B=CODE 4 CONTINUE
 IF QM6B=CODE 1 SKIP TO QM6D
 ELSE SKIP TO QM6E
- Q.M6c Are you a member of Crown loyalty club? SINGLE RESPONSE
- 1 Yes
 2 No
 99 Cant say/don't know DO NOT READ OUT
 97 Refused DO NOT READ OUT
 ALL SKIP TO QM6E
- Q.M6d Some hotels and clubs have machines with linked jackpots. Do you specifically go to these venues so you can play machines with linked jackpots?
- 1 All the time
 2 Sometimes
 3 Every now and then
 Never
 Do not know what linked jackpots are
 99 Can't say/don't know DO NOT READ OUT
 97 Refused
- Q.M6e Do you mostly visit poker machine) venues specifically to play the machines or as part of a social outing. READ OUT
- 1 Specifically to gamble
 2 For a social outing
 3 Both
 4 Varies
 99 Can't say/don't know DO NOT READ OUT
 97 Refused DO NOT READ OUT
- Q.M6f How many hours and minutes do you normally spend each time you play poker machines or gaming machines?
- Hours
 Minutes
 Don't know/can't remember
 97 Refused)
 IF QM6B=CODE 1 CONTINUE
 ELSE SKIP TO NEXT SECTION
- Q.M7 Think about the last time you played poker machines at a club or pub (not including Crown Casino). How far did you travel to get there?
- Less than 2.5 kilometres
 Less than 5 kilometres
 5 to less than 10 kilometres
 10 to less than 15 kilometres
 15 to less than 20 kilometres
 99 Don't Know/can't say DO NOT READ OUT
 97 Refused DO NOT READ OUT
- Q.M8 Where did you travel from to this place? (READ OUT)
- Home
 After Work
 3 During a break from work
 Somewhere else
 99 Can't say/don't know DO NOT READ OUT

- 97 Refused **DO NOT READ OUT**
- Q.M9 How many hours and minutes do you normally spend each time you gamble on horse or greyhound racing, including preparation and time spent at the venue?
- 1 Hours
Minutes
- 99 Don't know/can't remember **(DO NOT READ OUT)**
- 97 Refused **(DO NOT READ OUT)**
- Q.M10 How many hours and minutes do you normally spend each time you play keno at a club, hotel, casino or other place?
- 1 Hours
Minutes
- 99 Don't know/can't remember **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
- Q.M11 How many hours or minutes do you normally spend gambling at table games at a casino such as blackjack or roulette, including preparation and time spent at the venue?
- 1 Hours
Minutes
- 99 Don't know/can't remember **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
- Q.M12 Do you mainly bet on sports via the Internet or with a TAB outlet such as a TAB Agency, ClubTAB, PubTAB or a bookie?
READ OUT SINGLE RESPONSE
- 1 Via the Internet
2 TAB outlet (such as a TAB Agency, ClubTAB, PubTAB)
3 TAB phone account
Bookie
- 99 Can't say/don't know **DO NOT READ OUT**
- 97 Refusal **DO NOT READ OUT**
- Q.M13 How many hours and minutes do you normally spend each time you gamble on a sporting event like football, cricket or tennis, including preparation and time spent at the venue or on the net?
- 1 Hours
Minutes
- 99 Don't know/can't remember **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
- Q.M14 How many hours and minutes do you normally spend each time you play casino games on the internet including preparation and time spent gambling?
- 1 Hours
Minutes
- 99 Don't know/can't remember **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
- Q.M15 How many hours and minutes do you normally spend each time you (INSERT OTHER ACTIVITY FROM QM1), including preparation and time spent, but excluding sweeps or raffles?
- 1 Hours
Minutes
- 99 Don't know/can't remember **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
- READ OUT**
- The next few questions relate to your past experiences of gambling.
- Q.F1 At what age did you start gambling or betting? **SINGLE RESPONSE**
- 1 under 18
2 18-19
3 20-24
4 25-29
5 30-34
6 35-39
7 40-44
8 45-49
9 50-54
10 55-59
11 60-64
12 65-69
13 70 or more
- 99 Can't say/Don't know **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
- Q.F2 On what activity did you first bet or gamble? **READ OUT**
- Poker machines or gaming machines
Horse or greyhound races excluding sweeps
Instant scratch tickets, lottery tickets or any other lottery game like Lotto, Powerball, Oz Lotto, Tatts Keno, Tipstar FootyTipping, the Pools
Keno at a club, hotel, casino or other place
Table games at a casino such as blackjack or roulette
Sporting event like football, cricket or tennis
Casino games on the Internet
- 98 Any other gambling activity excluding sweeps (please specify)

- 99 Don't know/can't remember **DO NOT READ OUT**
97 Refused **DO NOT READ OUT**
Q.F3 Did you first start betting or gambling **SINGLE RESPONSE**
READ OUT CODES 1-3
1 At school
2 With your friends
3 With your family
98 Other (please specify)
99 (Don't know/can't remember) **DO NOT READ OUT**
97 Refused **DO NOT READ OUT**
Q.F4 In the last 12 months, would you say that overall, your gambling has increased, decreased or stayed the same?
SINGLE RESPONSE – READ OUT CODES 1-3
1 Increased
2 Decreased
3 Stayed the same
99 (Don't know/can't remember) **DO NOT READ OUT**
97 Refused **DO NOT READ OUT**
IF QF4=CODE 1 CONTINUE
IF QF4=CODE 2 SKIP TO QF6
ELSE SKIP TO QF7
Q.F5 Which gambling activities, if any, have increased? **READ OUT CODES (ACTIVITIES) MENTIONED AT QS4 – MULTIPLE RESPONSE**
Poker machines or gaming machines
Horse or greyhound races excluding sweeps
Instant scratch tickets, lottery tickets or any other lottery game like
Lotto, Powerball, Oz Lotto, Tatts Keno, Tipstar FootyTipping, the Pools
Keno at a club, hotel, casino or other place
Table games at a casino such as blackjack or roulette
Sporting event like football, cricket or tennis
Casino games on the Internet
Any other gambling activity excluding sweeps (please specify)
No activities
99 Don't know/can't remember **DO NOT READ OUT**
97 Refused **DO NOT READ OUT**
Q.F6 Which gambling activities, if any, have decreased? **READ OUT CODES (ACTIVITIES) MENTIONED AT QS4 – MULTIPLE RESPONSE**
Poker machines or gaming machines
Horse or greyhound races excluding sweeps
Instant scratch tickets, lottery tickets or any other lottery game like
Lotto, Powerball, Oz Lotto, , Tatt's Keno, Tipstar FootyTipping, the Pools
Keno at a club, hotel, casino or other place
Table games at a casino such as blackjack or roulette
Sporting event like football, cricket or tennis
Casino games on the Internet
Any other gambling activity excluding sweeps (please specify)
No activities
96 No activities
99 Don't know/can't remember **DO NOT READ OUT**
97 Refused **DO NOT READ OUT**
Q.F7 In the last 12 months, which gambling activities have you started playing? **READ OUT CODES (ACTIVITIES) MENTIONED AT QS4 – MULTIPLE RESPONSE**
Poker machines or gaming machines
Horse or greyhound races excluding sweeps
Instant scratch tickets, lottery tickets or any other lottery game like
Lotto, Powerball, Oz Lotto, , Tatt's Keno, Tipstar FootyTipping, the Pools
Keno at a club, hotel, casino or other place
Table games at a casino such as blackjack or roulette
Sporting event like football, cricket or tennis
Casino games on the Internet
Any other gambling activity excluding sweeps (please specify)
No activities
96 No activities
99 Don't know/can't remember **DO NOT READ OUT**
97 Refused **DO NOT READ OUT**
Q.F8 In the last 12 months, which gambling activities have you stopped playing? **READ OUT CODES (ACTIVITIES) MENTIONED AT QS4 – MULTIPLE RESPONSE**
Poker machines or gaming machines
Horse or greyhound races excluding sweeps
Instant scratch tickets, lottery tickets or any other lottery game like
Lotto, Powerball, Oz Lotto, , Tatt's Keno, Tipstar FootyTipping, the Pools
Keno at a club, hotel, casino or other place
Table games at a casino such as blackjack or roulette
Sporting event like football, cricket or tennis
Casino games on the Internet

- Any other gambling activity excluding sweeps (please specify)
 No activities
 99 Don't know/can't remember **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
 Q.F9 Do you gamble... **READ OUT. MULTIPLE RESPONSES**
 1 By yourself
 2 With a friend
 3 With a group of friends
 4 With family members including your partner
 99 Don't know/can't say **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
 QF10 Each time you gamble, how much money do you plan to spend? This means the maximum amount you are prepared to be out of pocket, but does not include money won and then spent.
RECORD IN WHOLE DOLLARS ONLY (RANGE 1-100,000)
 1
 99 Don't know/can't remember **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
 Q.F11 How often do you spend more than you had planned, would you say never, rarely, sometimes, often or always? **SINGLE RESPONSE**
 1 Never
 2 Rarely
 3 Sometimes
 4 Often
 5 Always
 99 Don't know/cant remember **DO NOT READ OUT**
 Refused **DO NOT READ OUT**
 Q.F12 Do you tend to spend your winnings in that same gambling session, would you say never, rarely, sometimes, often or always?
 1 Never
 2 Rarely
 3 Sometimes
 4 Often
 5 Always
 99 Don't know/can't remember **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
 Q.F13 When you gamble, do you (INSERT OPTION).
 Would you say that you never, rarely, sometimes or often (insert option)
 (REPEAT FOR EACH OPTION)

ROTATE	Never	Rarely	Sometimes	Often	Always	Don't Know Not Sure	Refused
Withdraw money before you gamble	1	2	3	4	5	99	97
Withdraw money from the ATM at the venue	1	2	3	4	5	99	97
Withdraw money at the cashier	1	2	3	4	5	99	97
Withdraw money Using your credit card	1	2	3	4	5	99	97
Obtain money by cashing cheques	1	2	3	4	5	99	97

- IF QS7B CODE=1 CONTINUE,
 IF QS7B CODE=2 AND QS4 CODE=1 GO TO QF17,
 IF QS7B CODE=2 AND QS4 CODE=2A OR 2B SKIP TO QF22
 ALL ELSE SKIP TO QX1**
 Q.F14 Do you usually take breaks when you are gambling?
 1 Yes
 2 No
 99 Don't know/can't remember **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
**IF QF14=CODE 1 CONTINUE
 ELSE SKIP TO QF16**
 Q.F15 Why do you usually take a break? **MULTIPLE RESPONSE**
 1 Eat
 2 Drink
 3 Smoke
 4 Toilet
 5 Talk with friends
 6 To get change, money from ATM
 98 Other (please specify)
 99 Don't know/cant remember **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
 Q.F16 How do you usually keep track of the time when you gamble? **MULTIPLE RESPONSE**
 1 Clock in room
 2 Watch
 3 Ask someone
 98 Other (please specify)

- 4 I don't keep track
99 Don't know/can't remember **DO NOT READ OUT**
97 Refused **DO NOT READ OUT**
IF QS4=CODE 1 CONTINUE
ELSE SKIP TO QF22
- Q.F17 What kind of poker machine or gaming machine do you usually play? **DO NOT READ OUT IF RESPONDENT GIVES RESPONSE THAT DOES NOT RELATE TO SIZE OF BET OR DENOMINATION PROMPT WITHWHAT WE ARE LOOKING FOR IS THE VALUE OR DENOMINATION OF THE POKER OR GAMING MACHINE'**
- 1 1 cent machine
2 2 cent machine
3 5 cent machine
4 10 cent machine
5 20 cent machine
6 50 cent machine
7 \$1 machine
\$2 machine
9 Higher than \$2 machine
10 Combination of the above
99 Don't know/can't remember **DO NOT READ OUT**
97 Refused **DO NOT READ OUT**
- Q.F18 Do you bet more than 1 line at each press of the button?
- 1 Yes
2 No
99 Don't know/cant remember **DO NOT READ OUT**
97 Refused **DO NOT READ OUT**
- Q.F19 Do you bet more than 1 credit per line? **SINGLE RESPONSE**
- 1 Yes
2 No
99 Don't know/cant remember **DO NOT READ OUT**
97 Refused **DO NOT READ OUT**
- Q.F20 Do you insert notes in the poker machines or gaming machines? Would you say never, rarely, sometimes, often or always? **SINGLE RESPONSE**
- 1 Never
2 Rarely
3 Sometimes
4 Often
5 Always
99 Don't know/cant remember **DO NOT READ OUT**
97 Refused **DO NOT READ OUT**
- Q.F21 Do you use a loyalty card which you can use to earn bonus points when you play poker machines or gaming machines? **SINGLE RESPONSE**
- 1 Yes
2 No
99 Don't know/cant remember **DO NOT READ OUT**
97 Refused **DO NOT READ OUT**
IF QS4=CODE 2A OR 2B CONTINUE
ELSE SKIP TO QX1
- Q.F22 The following question is about your betting on horse or greyhound races
Do you bet on horses or greyhounds – **READ OUT CODES 1-4-**
MULTIPLE RESPONSE
- 1 At a race track
2 At an off course venue such as a TAB agency, Pub TAB or Club TAB
3 By phone
4 Via the Internet
99 Don't know/cant remember **DO NOT READ OUT**
97 Refused **DO NOT READ OUT**
IF SOGS SUB-SAMPLE SKIP TO QX2
ELSE CONTINUE
- Q.X1 The next few questions are about some ways people have obtained money.
In the last 12 months, have you borrowed to gamble or pay debts from (INSERT OPTION)...
Would you say that you never, rarely, sometimes, often or always borrowed to gamble or pay debts from (INSERT OPTION)...
(REPEAT FOR EACH OPTION)

ROTATE (with exception of codes 2 and 3 which must be asked together and in order)	Never	Rarely	Sometimes	Often	Always	Don't Know Not Sure	Refused
Household money	1	2	3	4	5	99	97
Your spouse or partner	1	2	3	4	5	99	97
Other relatives or in-laws	1	2	3	4	5	99	97
Credit cards	1	2	3	4	5	99	97
Banks or finance companies	1	2	3	4	5	99	97
Credit Unions or pay day lenders	1	2	3	4	5	99	97
Loan sharks	1	2	3	4	5	99	97
Other (please specify)	1	2	3	4	5	99	97

Q.X2 Has your gambling ever (INSERT OPTION).
Would you say that your gambling has ever (INSERT OPTION) never, rarely, sometimes, often or always.
(REPEAT FOR EACH OPTION)

ROTATE	Never	Rarely	Sometimes	Often	Always	Don't Know Not Sure	Refused
Adversely affected how well you perform in your job	1	2	3	4	5	99	97
Resulted in you changing jobs	1	2	3	4	5	99	97
Resulted in your dismissal from work	1	2	3	4	5	99	97
Left you with not enough time to look after your family's interests	1	2	3	4	5	99	97
Resulted in you being declared bankrupt	1	2	3	4	5	99	97
Led to the breakup of an important relationship in your life, SUCH AS divorce or separation	1	2	3	4	5	99	97
Led you to obtain money illegally, even if you intended to pay it back	1	2	3	4	5	99	97
Led to trouble with the police	1	2	3	4	5	99	97

IF SOGS SUB-SAMPLE SKIP TO Q01

ELSE CONTINUE

Q.X3 Now on a scale of 1 to 10 – where 1 means you feel your gambling is not at all a problem and 10 means you feel your gambling is a serious problem — how would you rate your gambling right now?

1 Not at all a problem

-2-3-4-5-6-7-8-9

10 Is a serious problem

99 Don't know/not sure **DO NOT READ OUT**

97 Refused **DO NOT READ OUT**

READ OUT

The next few questions are about getting help for people who are experiencing difficulties related to gambling. Could you please answer from your own experience.

Q.H1 In the past 12 months, have you wanted help for problems related to your gambling? **SINGLE RESPONSE**

1 Yes

2 No

99 Don't know/can't remember **DO NOT READ OUT**

97 Refused **DO NOT READ OUT**

IF QH1=CODE 1 CONTINUE

ELSE SKIP TO QH17

Q.Hi Have you sought counselling or other forms of assistance from the following organisations related to your gambling?

Gamblers Anonymous

Gamblers Help agency

Your GP

Gamblers Helpline telephone service

Welfare group e.g. Emergency relief organisation

Church organisations e.g. Salvation Army, Centacare, Wesley

Family relationships organisation e.g. Relationships Australia

Specialised university or hospital research unit

Hospital or clinic

Community Health Centre

Indigenous or ethnic community agency

96 None

98 Other (please specify) _____

99 Don't know/can't remember **DO NOT READ OUT**

97 Refused **DO NOT READ OUT**

Q.H2 In the last 12 months, have you ever talked to a person at a gambling venue regarding gambling support services? **SINGLE RESPONSE**

1 Yes

2 No

- 99 Don't know/can't remember **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
 Q.H3 In the last 12 months, have you ever tried to exclude yourself from a gambling venue?
SINGLE RESPONSE
 1 Yes
 2 No
 99 Don't know/can't remember **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
 Q.H4 In the last 12 months, have you tried to get any sort of help for problems related to your gambling, such as professional or personal help? **SINGLE RESPONSE**
 1 Yes
 2 No
 99 Don't know/can't remember **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
IF QH4=CODE 1 SKIP TO QH6
IF QH4=CODES 99 OR 97 SKIP TO H16
IF QH4=CODE 2 CONTINUE
 Q.H5 If you have not sought help for problems related to your gambling, why was this? **READ OUT**
MULTIPLE RESPONSE
 1 Didn't know where to go
 2 Too embarrassed to see a counsellor
 3 The kind of help I wanted wasn't available locally
 4 Thought I could beat the problem on my own
 5 I didn't consider I had a problem
 6 Other (please specify)
 98 Don't know/can't remember **DO NOT READ OUT**
 99 Refused **DO NOT READ OUT**
ALL SKIP TO H16
 Q.H6 What prompted you to seek help for your gambling problems? **READ OUT. MULTIPLE RESPONSE**
 1 Financial problems
 Relationship problems
 Legal problems
 Work employment problems
 Someone urged you to go
 Felt depressed/worried
 Court ordered YOU to go for counselling
 Referral from other counsellors
 98 Other (please specify)
 99 Don't know/can't remember **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
 Q.H7 Would you have sought help earlier if the following had been the case?
READ OUT-MULTIPLE RESPONSE.
 1 A service had been available in the gaming venue
 2 You were more confident about anonymity
 3 The service did not regard you as a problem gambler
 4 The service was provided under another guise so people would not know why you were going there
 5 The service was more easily accessible in respect to location
 6 The service was available around the clock
 7 You were more confident they would help
 8 Others could tell you if the service was helpful
 9 You had seen it advertised more widely
 98 Other (please specify)
 99 Don't know/can't say **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
 Q.H8 How did you find out about the services available to help people with gambling problems? Was it through ...
READ OUT. MULTIPLE RESPONSE.
 1 Signs at a gambling venue
 2 Pamphlets available at a gambling venue
 3 Cards, signs or pamphlets available elsewhere (e.g. GP's surgery)
 4 Telephone directory
 5 TV advertising
 6 Radio
 7 Newspaper and media articles on gambling
 8 Referral by a GP
 9 Referral by a financial adviser
 10 Referral by a community service agency
 11 Referral from other counsellors
 12 Employees assistance program
 12 Word of mouth
 14 Asked for help from someone
 98 Other (SPECIFY) _____
 16 Didn't/couldn't find out any ways of help

- 99 Can't say/Don't know **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
 Q.H9 Could you please tell me who did you first turn to for help for problems related to your gambling?
SINGLE RESPONSE
 1 Spouse or partner
 2 Family or friends
 3 Doctor (physician)
 4 Church or religious worker
 5 Gambling Help Line or other referral service or crisis line such as Gamblers' Help, Lifeline
 6 Social worker
 7 Indigenous or ethnic community worker
 8 Gamblers Anonymous
 9 Staff member at a gambling venue
 98 Other (please specify) _____
 99 Don't know/can't remember **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
 Q.H10 What type of assistance did you seek from this source? **MULTIPLE RESPONSE**
 Financial assistance/material aid
 Counselling
 98 Other (please specify) _____
 99 Don't know **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
 Q.H11 How satisfied were you with this assistance? Would you say...? **SINGLE RESPONSE**
 1 Very satisfied
 2 Satisfied
 3 Neither satisfied nor dissatisfied
 4 Dissatisfied
 5 Very dissatisfied
 99 Don't know **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
 Q.H13a Have you attended a problem gambling service but stopped going **SINGLE RESPONSE**
 Yes
 No
 99 Don't know/can't say **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
IF Q13A=CODE 1 CONTINUE
ELSE SKIP TOQH14
 Q.H13b Why did you stop?
 1 Felt you had overcome the problem
 2 Felt they were not helping
 3 No time
 4 Did not like the way they operated
 5 Could not be bothered
 6 Found some other way to handle the problem
 98 Other (please specify) _____
 99 Don't know/can't say **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
 Q.H17 Have you sought assistance from any source for other problems such as a
READ OUT MULTIPLE RESPONSE
 1 Relationship or family problem
 2 Financial problem
 Alcohol problem
 Drug problem
 Smoking
 96 None
 98 Other (please specify) _____
 99 Don't know **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
IF QH17=CODE 9 SKIP TO G1
ELSE CONTINUE
 Q.H18 Where did you seek help or assistance with INSERT 'THAT PROBLEM' IF SINGLE RESPONSE AT QH17/INSERT 'THOSE PROBLEMS' IF MULTIPLE RESPONSE AT QH17? **MULTIPLE RESPONSE**
 Your GP
 Welfare group e.g. Emergency relief organisation
 Church organisations e.g. Salvation Army, Centacare, Wesley
 Family relationships organisation e.g. Relationships Australia
 Specialised university or hospital research unit
 Hospital or clinic
 Community Health Centre
 Indigenous or ethnic community agency
 98 Other (please specify) _____
 99 Don't know/can't remember **DO NOT READ OUT**

- 97 Refused **DO NOT READ OUT**
 THE FOLLOWING QUESTIONS ARE ABOUT YOUR GENERAL OPINIONS ABOUT GAMBLING, AS WELL AS ANY EXPERIENCES YOU MAY HAVE HAD WITH GAMBLING OR BETTING MONEY.
- Q.G6 Has anyone in your immediate family ever had a gambling problem? **SINGLE RESPONSE**
- 1 Yes
- 2 No
- 99 Don't know/cant remember **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
- Q.G9 In the last 12 months, have you gambled while under the influence of alcohol or legal or illegal drugs? **SINGLE RESPONSE**
- 1 Yes
- 2 No
- 99 Don't know/cant remember **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
- Q.G11 In the last 12 months, if something painful happened in your life, did you have the urge to gamble? **SINGLE RESPONSE**
- 1 Yes — this includes gambling as well as having the urge
- 2 No
- 99 Don't know/cant remember **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
- Q.G14 In the last 12 months, have you been under a doctor's care because of physical or emotional problems brought on by stress? **SINGLE RESPONSE**
- 1 Yes
- 2 No
- 99 Don't know/can't remember **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
- Q.G15 In the last 12 months, have you felt seriously depressed? **SINGLE RESPONSE**
- 1 Yes
- 2 No
- 99 Don't know/can't remember **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
- Q.CO4 Have you seriously thought about or attempted suicide as a result of your gambling? **SINGLE RESPONSE**
- 1 Yes
- 2 No
- 98 Don't know/can't remember **DO NOT READ OUT**
- 99 Refused **DO NOT READ OUT**
- IF QCO4 = CODE 2, 99, 97 SKIP TO QR1
 ELSE CONTINUE**
- Q.CO5 Have you thought like that in the last 12 months? **SINGLE RESPONSE**
- 1 Yes
- 2 No
- 99 Don't know/can't remember **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
- ASK ALL**
 Finally I need to ask some general questions about you and your household to make sure we have a reasonable coverage of the population.
- QUES Q R1 DEMOGRAPHICS — COUNTRY OF BIRTH
- Q.R1 In which country were you born?
- 1 Australia
- 2 Canada
- 3 China
- 4 Eastern Europe
- 5 Greece
- 6 Hong Kong
- 7 India
- 8 Italy
- 9 Lebanon
- 10 Malaysia
- 11 New Zealand
- 12 Philippines
- 13 South Africa
- 14 Spanish
- 15 United Kingdom
- 16 USA
- 17 Vietnam
- 98 OTHER (SPECIFY) _____
- 97 Refused **DO NOT READ OUT**
- QUES Q R2a DEMOGRAPHICS — MOTHER BORN IN AUSTRALIA
- Q.R2a Was your mother born in Australia?
- 1 Yes
- 2 No
- 97 Refused **DO NOT READ OUT**
- QUES Q R2b DEMOGRAPHICS — FATHER BORN IN AUSTRALIA

- Q.R2b Was your father born in Australia?
 1 Yes
 2 No
 97 Refused **DO NOT READ OUT**
- QUES Q R3 DEMOGRAPHICS — ABORIGINAL, TORRES STRAIT OR AUST SOUTH SEAS ISLANDER
 Q.R3 Do you identify yourself as an Aboriginal, Torres Strait Islander or Australian South Sea Islander?
 MULTIPLE RESPONSE
 1 Yes — Aboriginal
 2 Yes — Torres Strait Islander
 3 Yes — Australian South Sea Islander
 4 No
 97 Refused **DO NOT READ OUT**
- QUES Q R4a DEMOGRAPHICS — IS ENGLISH MAIN LANGUAGE IN HOUSEHOLD
 Q.R4a Is English the main language spoken in your household?
 1 Yes
 2 No
 97 Refused **DO NOT READ OUT**
IF QR4A=CODE 1 OR CODE 97 SKIP TO QR5
ELSE CONTINUE
- QUES Q R4b DEMOGRAPHICS — MAIN LANGUAGE IN HOUSEHOLD
 IF ENGLISH NOT MAIN LANGUAGE
 Q.R4b What is the main language spoken in your household? READ OUT
 1 Arabic
 2 Cantonese Chinese
 3 Chinese
 4 Croatian
 5 Dutch
 6 English
 7 Filipino
 8 French
 9 German
 10 Greek
 11 Indonesian
 12 Italian
 13 Korean
 14 Macedonian
 15 Malaysian
 16 Mandarin Chinese
 17 Polish
 18 Portuguese
 19 Russian
 20 Spanish
 21 Tagalog (Filipino)
 22 Turkish
 23 Vietnamese
 98 Other (SPECIFY)
 99 Don't know/can't say **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
- QUES Q R5 DEMOGRAPHICS — MARITAL STATUS
 Q.R5 What is your current marital status?
 1 Married or living with a partner
 2 Separated or divorced
 3 Widowed
 4 Single
 99 Don't know/can't say **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
- QUES Q R6 DEMOGRAPHICS — HOUSEHOLD STATUS
 Q.R6 Which of the following best describes your household? READ OUT
 1 Single person
 2 Group household (not related)
 3 Other related individuals
 4 Couple with no children
 5 One parent family with dependent children
 6 Two parent family with dependent children
 7 Two parent family with children not at home
 8 Other (specify)
 99 Don't know/can't say **DO NOT READ OUT**
 97 Refused **DO NOT READ OUT**
IF QR6=CODES 1, 4 AND 7 SKIP TO QR8
ELSE CONTINUE
- QUES Q R7 DEMOGRAPHICS — NUMBER OF CHILDREN UNDER 18 IN HOUSEHOLD
 Q.R7 How many children under 18 years of age usually live in your household?

- Number of children _____
- 99 Don't know/can't say **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
- QUES Q R8 DEMOGRAPHICS — CURRENT WORK STATUS
- Q.R8 Which of the following best describes your current work status? READ OUT
- 1 Working full-time
- 2 Working part-time
- 3 Home duties
- 4 Student
- 5 Retired (self-supporting, in receipt of superannuation)
- 6 Pensioner
- 7 Unemployed (or looking for work)
- 98 Other **DO NOT READ OUT**
- 99 Don't know/can't say **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
- QUES Q R9 DEMOGRAPHICS — HIGHEST LEVEL OF EDUCATION
- Q.R9 What is the highest level of education you have reached?
- 1 Primary School
- 2 Some secondary school
- 3 Year 10/ 4th form (or equivalent)
- 4 Year 11/ 5th form/ leaving certificate (or equivalent)
- 5 Year 12/ HSC/VCE (or equivalent)
- 6 Some technical or commercial
- 7 Finished technical school.
- 8 Commercial college or TAFE
- 9 Diploma from CAE
- 10 Diploma
- 11 Some university/CAE
- 12 Degree from university/CAE
- 13 Other **DO NOT READ OUT** (Specify) _____
- 99 Don't know/can't say **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
- QUES Q R10 DEMOGRAPHICS — MAIN SOURCE OF INCOME IN HOUSEHOLD
- Q.R10 What is the main source of income in your household?
- 1 Wage/salary
- 2 Own business
- 3 Other private income
- 4 Unemployment benefit
- 5 Retirement benefit/superannuation
- 6 Sickness benefit
- 7 Supporting parent benefit
- 8 Aged pension
- 9 Invalid/disability pension
- 10 Student allowance/scholarship
- 98 Other
- 99 Don't know/can't say **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
- QUES Q R11 DEMOGRAPHICS — RESPONDENT ANNUAL INCOME
- Q.R11 Could you please tell me your own annual income from all sources before tax?
- 1 Less than \$10,000
- 2 \$10,000 – \$14,999
- 3 \$15,000 – \$19,999
- 4 \$20,000 – \$24,999
- 5 \$25,000 – \$29,999
- 6 \$30,000 – \$34,999
- 7 \$35,000 – \$39,999
- 8 \$40,000 – \$49,999
- 9 \$50,000 – \$59,999
- 10 \$60,000 – \$69,999
- 11 \$70,000 – \$89,999
- 12 \$90,000 – \$119,000
- 13 \$120,000 or more.
- 99 Don't know/can't say **DO NOT READ OUT**
- 97 Refused **DO NOT READ OUT**
- IF Q.R6 = CODE 1 AND QS7B=CODE 3 (REGULAR GAMBLER), SKIP TO QR13.**
- IF QR6=CODE 1 AND QS7B= CODE 1 OR 2 (NON-REGULAR GAMBLER OR NON-GAMBLER) SKIP TO INTERVIEW**
- TERMINATION**
- ELSE CONTINUE**
- QUES Q R12 DEMOGRAPHICS – TOTAL ANNUAL HOUSEHOLD INCOME
- Q.R12 Could you please tell me your total annual household income from all sources before tax? Include income from all household members.
- 1 <Less than \$10,000

- 2 \$10,000 – \$14,999
- 3 \$15,000 – \$19,999
- 4 \$20,000 – \$24,999
- 5 \$25,000 – \$29,999
- 6 \$30,000 – \$34,999
- 7 \$35,000 – \$39,999
- 8 \$40,000 – \$49,999
- 9 \$50,000 – \$59,999
- 10 \$60,000 – \$69,999
- 11 \$70,000 – \$79,999
- 12 \$80,000 – \$89,999
- 13 \$90,000 – \$99,999
- 14 \$100,000 – \$124,999
- 15 \$125,000 – \$149,999
- 16 \$150,000 – \$174,999
- 17 \$175,000 or more.

99 Don't know **DO NOT READ OUT**

97 Refused **DO NOT READ OUT**

IF REGULAR GAMBLER (QS7B = CODE 1) ASK

QUES Q R13 DEMOGRAPHICS – FUTURE CONTACT FOR RESEARCH

Q.R13 There is a possibility that we might want to contact participants again in the future to follow up in more detail some of the questions asked today. Could we contact you?

1 Yes

2 No

IF 'YES', RECORD CONTACT DETAILS.

THANK & TERMINATE

That is the end of the survey, thank you very much for your time and assistance. Your co-operation is greatly appreciated.

If you require Gambling information and support services, either for yourself, or for someone else you know, contact the Gamblers Helpline on 1800 156 789

Just in case you missed it my name is (...), I am calling from ACNielsen Research, and we are conducting this research project on behalf of the Victorian Government. As this is market research, it is carried out in compliance with the Privacy Act and the information you provided will be used only for research purposes.

RESPONDENT'S NAME:

In case my supervisor needs to check my work, may I please confirm your name?

Once this project is completed, your contact details will be removed from your responses (which we anticipate to happen within a month from now). Under the Privacy Act you have the right to request access to the information you have provided.

MRSA PRIVACY LINE

If you have any queries, you can call the Market Research Society's free Survey Line on 1300 364 830 or ACNielsen's Privacy Line on 1800 021 717.

TO BE COMPLETED BY THE INTERVIEWER

QUES Q S1 INTERVIEWER ASSESSMENT – RESPONDENTS CO-OPERATION

S1 PLEASE RATE THE LEVEL OF THE RESPONDENT'S CO-OPERATION WITH THE SURVEY. HOW WILLING WAS THE RESPONDENT TO BE INTERVIEWED?

1 HIGH

2 MEDIUM

3 LOW

QUES Q S2 INTERVIEWER ASSESSMENT – COMMUNICATION AND UNDERSTANDING

S2 PLEASE CODE THE QUALITY OF THE COMMUNICATION WITH THE RESPONDENT (HOW WELL DID THE RESPONDENT APPEAR TO UNDERSTAND THE QUESTIONS?)

1 HIGH

2 MEDIUM

3 LOW

Appendix D: Stakeholders Consulted

Date	Stakeholder	Contact name	Contact details
20th August 2002	Tabcorp	Rohan Martin, Community Relations Manager	5 Bowen Cres Melbourne Ph. 9868 2891 Mob 0417 311 602
	Tattersalls	Troy Hey, Public Affairs Manager: Gaming	615 St Kilda Rd Melbourne Ph. 8517 7777
	AHA	Rowan Lee, Manager – Gaming (Public Relations)	1 st Floor 322 Glenferrie Rd Malvern 3144 Ph. 9822 0900 Mob 0419 133 139
21st August 2002	Department of Human Services	Sally Richmond, Community Care Division	Level 1 555 Collins St Melbourne 3000 Ph. 9616 7777
	Treasury & Finance Gambling Policy Unit	Ryan Geddes Director	Level 11, 1 Macarthur St, Melbourne Ph. 9651 2118
	Gamblers Help	Eddie Chapman, Executive Officer. Julie Nelson Chris Freethy	VCOSS – Level 6 130 Little Collins St Melbourne Ph. 9654 3017 Mob 0411 879 262
	Victorian Local Governance Association	Mike Hill	Ross House, Level 1 247 Flinders Lane Melbourne 3000 Ph. 9654 0333
22nd August 2002	Salvation Army	John Dalziel Inter-Church Task Force	5 Hamilton St Mont Albert Ph. 9896 6007
	Australian Gaming Council	Vicki Flannery	Level 10, 34 Queen St Melbourne 3000 Ph. 9629 8000 Mob 0402 293 529
	Victorian Casino and Gaming Authority	Mr Brian Forrest, Chairman	Level 5/35 Spring Street Melbourne 3000
Written comments			
29th August 2002	Crown Casino	Bill Horman General Manager – Community Affairs	Level 6, 8 WhitemanSt Southbank Melbourne Ph. 9292 7517 Fax. 9292 7520
30th August 2002	Tattersalls	John Harris Manager, Special Projects	615 St Kilda Rd Melbourne Ph. 8517 7777
30th August 2002	ClubsVic	Margaret Kearney	Level 1 17–21 Argyle Pl Carlton Sth Melbourne Ph. 9349 2909 Fax. 9349 4915

Appendix E: Problem gambling screens

South Oaks Gambling Screen (SOGS) Lifetime version (adapted to 'past 12 months' for this survey)

1. When you gamble, how often do you go back another day to win back money you lost? (never; some of the time [less than half the time] I lost; most of the time I lost; every time I lost)
2. Have you ever claimed to be winning money gambling but weren't really? In fact you lost? (never or never gamble; yes, less than half the time I lost; yes, most of the time)
3. Do you feel you have ever had a problem with gambling? (no; yes, in the past, but not now; yes)
4. Did you ever gamble more than you intended to? (yes, no)
5. Have people criticised your gambling? (yes, no)
6. Have you ever felt guilty about the way you gamble or what happens when you gamble? (yes, no)
7. Have you ever felt like you would like to stop gambling, but didn't think you could? (yes, no)
8. Have you ever hidden betting slips, lottery tickets, gambling money, or other signs of gambling from your spouse, children or other important people in your life? (yes, no)
9. a) Have you ever argued with people you live with over how you handle money? (yes, no)
b) If you answered yes to the previous question: Have money arguments ever centred on your gambling? (yes, no)
10. Have you ever borrowed from someone and not paid them back as a result of your gambling? (yes, no)
11. Have you ever lost time from work (or school) due to gambling? (yes, no)
If you borrowed money to gamble or pay gambling debts, who or where did you borrow from? (check 'yes' or 'no' for each).
12. From household money? (yes, no)
13. From your spouse? (yes, no)
14. From other relatives or in-laws? (yes, no)
15. From banks, loan companies, or credit unions? (yes, no)
16. From credit cards? (yes, no)
17. From loan sharks? (yes, no)
18. You cashed in stocks, bonds or other securities? (yes, no)
19. You sold personal or family property? (yes, no)
20. You borrowed on your checking account? (passed bad checks)? (yes, no)

Source: Lesieur and Blume op.cit., p.118.

Canadian Problem Gambling Index (CPGI)¹⁰⁸

Dimensions	Variables	Indicators	Items and question numbers
Gambling Involvement	Type/Frequency	Gambling activities	1. How often did you bet or spend money on (list activities: daily weekly monthly yearly)?
	Duration	Time at play/type/session	2. Would you please try to tell me the number of hours or minutes you normally spend each time on (___)?
	Expenditure	Money wagered monthly Largest amount wagered	How much money, not including winnings, do you normally spend on this activity in a month? What is the largest amount of money you ever gambled on this activity in any one day?
Problem Gambling Behavior	Loss of control	Bet more than could afford Bet or spent more than wanted to	5. Have you bet more than you could really afford to lose? 15. Have you bet or spent more money than you wanted to on gambling?
	Motivation	Increase wagers	6. Have you needed to gamble with larger amounts of money to get the same feeling of excitement?
	Chasing	Returning to win back losses	7. When you gambled, did you go back another day to try to win back the money you lost?
	Borrowing	Borrowing or selling for money to gamble	8. Have you borrowed money or sold anything to get money to gamble?
	Lying	Lied to family members or others	14. Have you lied to family members or others to hide your gambling?
	Problem recognition	Felt might have problem Wanted to stop, didn't think could	Have you felt that you might have a problem with gambling? 16. Have you wanted to stop betting money or gambling, but didn't think you could? (NOT SCORED)
Adverse Consequences	Personal Consequences	Negative effects on health Criticism	Has gambling caused you any health problems, including stress or anxiety? 11. Have people criticized your betting or told you that you had a gambling problem, regardless of whether or not you thought it was true?
	Social Consequences	Financial problems Feelings of guilt	12. Has your gambling caused any financial problems for you or your household? 13. Have you felt guilty about the way you gamble or what happens when you gamble?
Problem Gambling Correlates	Faulty cognition	Due for a win after losses Have a winning system	17. After losing many times in a row, you are more likely to win? 18. You could win more if you use a certain system or strategy?
	First experiences	Remember big win Remember big loss	19. Do you remember a big win when you first started gambling? 20. Do you remember a big loss when you first started gambling?
	Family problems	Family gambling problem Family alcohol/drug problem	21. Has anyone in your family ever had a gambling problem? 22. Has anyone in your family ever had an alcohol or drug problem?
	Co-morbidity	Alcohol/drugs/gambling use Gambling under the influence Admit alcohol/drug problem	23. In the last 12 months, have you used alcohol or drugs while gambling? 24. Again, in the last 12 months, have you gambled while drunk or high?
	Relieve pain	Self-medication (gambling, drinking or drug use)	In the last 12 months, have you felt you might have an alcohol or drug problem? If something painful happened in your life did you have the urge to gamble?
	Stress	Treated for stress	If something painful happened in your life did you have the urge to have a drink?
	Depression Suicide	Feelings of depression Suicide ideation/attempts	If something painful happened in your life did you have the urge to use drugs or medication? Have you been under a Dr's care because of physical or emotional problems brought on by stress? Have you felt seriously depressed? Have you seriously thought about or attempted suicide as a result of your gambling?

¹⁰⁸ Ferris & Wynne, 2001. *The Canadian Problem Gambling Index: User Manual*. Report to the Canadian Inter-Provincial Task Force on Problem Gambling; Queensland Treasury. 2001. *Queensland Household Survey*, p.6.

Victorian Gambling Screen (VGS)¹⁰⁹

Questions are asked for 'the last 12 months'. Items are answered using the scale: never/rarely/sometimes/often/always.

1. Has gambling been a good hobby for you?
2. Nowadays, when you gamble, is it fun?
3. Have you gambled with skill?
4. Nowadays, when you gamble, do you feel as if you are on a slippery slope and can't get back up again?
5. Has your need to gamble been too strong to control?
6. Has gambling been more important than anything else you might do?
7. Have you felt that after losing you must return as soon as possible to win back any losses?
8. Has the thought of gambling been constantly in your mind?
9. Have you lied to yourself about your gambling?
10. Have you gambled in order to escape from worry or trouble?
11. Have you felt bad or guilty about your gambling?
12. Have you thought you shouldn't gamble or should gamble less?
13. How often has anyone close to you complained about your gambling?
14. How often have you lied to others to conceal the extent of your involvement in gambling?
15. How often have you hidden betting slips, Lotto tickets, gambling money or other signs of gambling from your spouse, partner, children or other important people in your life?

For the following questions, record response as Yes or No. These questions are only applicable if respondent has a partner.

If no partner or significant other code N/A and continue with Q19.

16. Have you and your partner put off doing things together?
- 16a. If yes, was this made worse by your gambling?
17. Have you and your partner criticised one another?
- 17a. If yes, was this made worse by your gambling?
18. Has your partner had difficulties trusting you?
- 18a. If yes, was this made worse by your gambling?

For the following questions use the scale: Never – rarely – sometimes – often – always.

19. In the past 12 months.....
20. How often have you spent more money on gambling than you can afford?
21. How often is your gambling made it harder to make money last from one pay day to the next?
22. How often have you had to borrow money to gamble with?

¹⁰⁹ Ben Tovim, D., Esterman, A., Tolchard, M. 2001. *The Victorian Gambling Screen*. Gambling Research Panel: Melbourne.