

Appendix A

Victorian Casino and Gaming Authority – Research Reports by Year of Publication

Appendix A: Victorian Casino and Gaming Authority – Research Reports by Year of Publication

1992

- First Survey of Community Gambling Patterns
- Bibliography of Gaming Publications

1994

- Review of Electronic Gaming Machines in Victoria (the Schilling Report)
- First Survey of Gaming Venues
- A Research Plan for the VCGA

1995

- Second Survey of Community Gambling Patterns

1996

- Third Survey of Community Gambling Patterns
- Second Survey of Gaming Venues
- The Effect of Electronic Gaming Machines upon Charity and Non-Profit Organisations in Victoria
- First Survey of Positive and Negative Perceptions of Gambling

1997

- Fourth Survey of Community Gambling Patterns
- The Impact of the Expansion in Gaming on the Victorian Retail Sector
- The Effect of Gambling on Employment in Victoria
- The Definition and Incidence of Problem Gambling Including the Socio-Economic Distribution of Gamblers
- Older People and Gambling
- Community Facilities Resulting from the Providers of Gaming in Victoria (including Third Survey of Gaming Venues)
- Social and Economic Effect of Electronic Gaming Machines on Non-Metropolitan Communities
- Impact of Electronic Gaming Machines on Small Rural Communities
- Impact of Gaming Venues on Inner City Municipalities
- Fifth Survey of Community Gambling Patterns combined with Second Positive and Negative Perceptions of Gambling Survey
- Patron Profile of a Major Casino Operating in a Metropolitan Environment
- Summary of Research Findings – 1996-97 Research Program

1998 – no research report publications

1999

- Sixth Survey of Community Gambling Patterns and Perceptions
- Australian Gambling Comparative History and Analysis
- Hotel and Club Industry Gaming Impact Study

2000

- The Impact of Gaming on Specific Cultural Groups
- The Impact of the Expansion of Gaming on the Tourism, Entertainment, and Leisure Industries
- The Economic Impact of Gambling
- Seventh Survey of Community Gambling Patterns and Perceptions
- Longitudinal Examination of Perceptions and Their Relationship with Actual Findings
- The Impact of Gaming and Crime Statistics
- Longitudinal Community Impact Study

Appendix B

Detailed Descriptions of Projects in the Victorian Casino and Gaming Authority 1998-99 Research Program

Appendix B: Detailed Descriptions of Projects in the Victorian Casino and Gaming Authority 1998-99 Research Program

Background information and specific research objectives proposed for each project in the Authority's *1998-99 Research Program* are given below¹. These descriptions are drawn directly from the Authority's *1998-99 Research Program* Tender Briefs.

1. Gaming – Comparative History and Analysis, Framework for Evaluation and Summary of 1998-99 Findings

A study of the comparative history of gaming impacts in Australasia, followed by the development of a rigorous framework to measure the social impacts of gaming and the subsequent use of this framework in critically analysing and summarising the whole of the *1998-99 Research Program*. This project will be undertaken in three stages².

Stage One. The first stage of the project is to establish a comparative history of gaming and analyse gaming behaviour and attitudes in the Australian State jurisdictions and New Zealand. This comparative history and analysis is to examine:

- The recent history and current features of:
 - The structure of the gambling industry in each jurisdiction; and
 - The conduct of gambling in its various forms;
- Research which has been conducted on social impacts, including international research developments relevant to stage two of the project;
- Similar and different patterns in gambling behaviours and attitudes, and issues across different States;
- Areas where the different stages of maturity of the gaming industry provide opportunities for comparison with the Victorian situation; and
- Areas where collaborative initiatives would be advantageous to the on-going Victorian research efforts.

This stage will establish where Victoria is placed with regard to research undertaken and highlight any initiatives which would enhance the Authority's research efforts.

Stage Two. The second stage of the project addresses the need to develop a "rigorous social model of the impacts of gaming". This issue emerged from the results of the project *Summary of Findings – 1996-97 Research Program* (Arthur Andersen, 1997). The construction of a suitable analytical social framework and associated indicators is a challenging task and one for which there appears (from preliminary literature searches) to be very little directly applicable material on which to draw.

¹ Given extensions to their timeframes, final reports for Projects 3 and 4 were not available at the time this report was prepared. Therefore, Projects 3 and 4 are not discussed in Sections 5-8 of this report.

² Stages 2 and 3 of this project form the basis for this report.

It is critical that this analytical social framework establish linkages between:

- the various levels at which data is collected (State, regional, community, household and individual);
- the multiple dimensions at which gaming impacts occur (families and individuals, communities and neighbourhoods, society and culture, and the economy); and
- the positive and negative impacts at the level of data collection and the dimension of each impact.

In order to address this issue, the following matters require consideration:

- improvements that can be made to the reporting of both the economic and social impacts of gambling (including an evaluation of frameworks used, both nationally and internationally, to report on the impacts of similar activities);
- the ability to address the positive impacts on the lifestyle and wellbeing of individuals and communities as well as the more easily measurable negative effects;
- the availability of data required for the development of a framework for evaluation (for example: availability of data related to the causes of welfare assistance);
- the ability to compare gambling with other so-called “social ills” (eg. alcohol, smoking, illegal drug use); and
- the indicators/outputs that would be derived to report the impacts.

Stage Three. The third stage of the project should build on research previously conducted by the Authority and critically analyse and evaluate the research projects undertaken as part of the Authority’s *1998-99 Research Program* and to draw conclusions about the social and economic impacts of gaming.

The report is to be based on the analytical social framework recommended under stage two of the project. This project will be expected to highlight instances of convergence and divergence of findings and report on the following:

- the various levels at which data is collected (State, regional, community, household and individual);
- the multiple dimensions at which gaming impacts occur (families and individuals, communities and neighbourhoods, society and culture, and the economy); and
- the positive and negative impacts at the level of data collection and the dimension of each impact.

In addition, this project should identify and analyse other relevant third party information (statistical and qualitative) which support or contradicts the findings of the Authority’s research.

2. Continuing Surveys of Community Gambling Patterns and Perceptions

The Authority has previously undertaken a series of surveys of community gambling patterns and perceptions. Surveys conducted as part of this series are as follows:

- Survey One – Community Gambling Patterns: conducted in May 1992 prior to the introduction of gaming machines in Victoria on 16 July 1992;

- Survey Two – Community Gambling Patterns: conducted in May 1994, after the introduction of gaming machines but prior to the opening of the temporary Casino on 30 June 1994;
- Survey Three – Community Gambling Patterns: conducted in May/June 1995 one year after the opening of the temporary Casino on 30 June 1994;
- Survey One – Positive and Negative Perceptions: conducted in April 1996;
- Survey Four – Community Gambling Patterns: conducted in August/September 1996 prior to the opening of the permanent Melbourne Casino (this was initially scheduled to open on 16 August 1996, but was not opened until 8 May 1997); and
- Survey Five – Community Gambling Patterns combined with Survey Two Positive and Negative Perceptions: conducted in September 1997 following the opening of the permanent Melbourne Casino.

The survey series has undergone continual improvement and refinement since its inception. It is intended to continue this improvement by commissioning the sixth and seventh surveys in the one project and incorporating between the two surveys an investigation into methodological issues in survey research. In particular:

- The need to improve the quality and consistency of data collected, specifically:
 - To better relate what people say they do and spend with what they actually do and spend,
 - To avoid confusion and misinterpretation of terminology (eg. expenditure, turnover and amount lost);
- An evaluation of the data collection techniques used in order to determine the accuracy of responses and to measure the likely magnitude of the non-response bias; and
- An examination of the possibility of using randomised response techniques to ask sensitive questions about problem gambling behaviours.

3. Evaluation and Further Use of Existing Data Sets

The Authority has established a Baseline Database, which contains information regarding gaming venue locations and associated details and relevant social and socio-demographic data from the Australian Bureau of Statistics.

In the report *Victoria's Gaming Industry – An insight into the role of the regulator*, the Auditor General's special report no. 54 to the Parliament of Victoria, states at paragraph 7.29 that:

“If the baseline database is to satisfy its basic purpose of assisting the Authority to answer fundamental gambling-related questions, it will be important that the database is progressively updated both from the research material already gathered by the Authority and relevant material as it becomes available to the Authority from future research projects.”

Accordingly, this project aims to:

- Provide a review, including geo-demographic profiling, of existing data sets collected as part of the Authority's 1996-97 Research Program and the

Community Gambling Patterns and Perceptions Survey series. This review will extend to data collected as part of the 1998 survey; and

- Evaluate the integration of this data into the Baseline Database.

4. Problem Gambler Measurement Instrument

This project is to follow on from the project undertaken as part of the Authority's 1996-97 Research Program titled *Definition and Incidence of Problem Gambling, Including the Socio-Economic Distribution of Gamblers*. Prepared by the Australian Institute for Gambling Research (AIGR), this report made a number of recommendations, in particular:

- that the following definition of problem gambling be adopted—
“Problem gambling refers to the situation when a person’s gambling activity gives rise to harm to the individual player, and/or to his or her family, and may extend into the community”;
- that the South Oaks Gambling Screen (SOGS) be included in the survey instrument for the project *Fifth Community Gambling Patterns Survey Combined With Second Positive and Negative Perceptions of Gambling Survey* (also part of the 1996-97 Research Program) to measure the prevalence of problem gambling; and
- that the inclusion of the SOGS be time limited to 2-3 years. Thereafter to be replaced by a newly developed method derived from a multi-disciplinary conceptualisation of the impacts of gambling on the individual and family.

It is the intent of this project to address the third of the above recommendations and in doing so to develop and validate a survey instrument to accurately measure the prevalence of problem gambling in the Victorian context. This project will:

- Examine developments in problem gambler measurements since the project *Definition and Incidence of Problem Gambling Including the Socio-Economic Distribution of Gamblers* was completed;
- Identify the criteria that the new measurement instrument must satisfy;
- Develop or establish the set of questions on which the new instrument and its interpretation will be based;
- Undertake pilot surveys to test the hypothesis used in framing the questions of the proposed measurement instrument; and
- Identify the criteria which the new measurement instrument must satisfy.

5. The Economic Impact of Gambling

Based on the success of both the retail and employment projects undertaken as part of the 1996-97 Research Program and the limited reliability of individual expenditure data collected as part of the Community Gambling Patterns Surveys – this project examines the overall impact of gaming from the macro (State) level through to the base micro (individual household/person) level. The project is to be undertaken in two stages.

Stage One. The first stage of this project involves the review of existing data for profiling purposes to ensure that the profiles developed are adaptable for the micro-simulation calculations necessary to determine individual expenditure patterns.

Stage Two. The second stage involves an assessment of the economic impacts of gaming based on the following levels:

- State
- regional or geographical area;
- community; and
- household/individual

This assessment will be approached in two ways. To determine the impact gambling has had on the overall State economy, econometric modelling will be undertaken. This will involve the selection of the appropriate model, the selection of the data required for use in the model, and the use of sensitivity analysis to test the model results. The micro-simulation approach is to analyse the impact of gambling across the State at the household/individual level. This will enable the consideration of the importance of such economic and social factors as income, employment type and status, and education.

6. Club and Hotel Industry Gaming Impact Study

As part of its research, the Authority has previously surveyed gaming venues on four occasions:

- The “First Survey of Gaming Venues” conducted in 1994;
- The “Second Survey of Gaming Venues” conducted in 1995;
- As part of the project “Community Facilities Resulting from the Providers of Gaming in Victoria” which was conducted in 1997; and
- As part of the project “The Effect of Gambling on Employment in Victoria” which was conducted in 1997 and also surveyed non-gaming venues.

The project *Community Facilities Resulting from the Providers of Gaming in Victoria* maintained comparability with the first two surveys but also concentrated specifically on the community benefits and facilities provided by gaming venues.

The current project is intended to broaden the survey to include non-gaming hotels and clubs to enable better comparison of the impacts of gaming on the venues themselves and on the communities of which they are apart. The survey will be an integral component of this larger project which aims to address the change in culture of hotels and clubs as a consequence of the introduction of gaming and will consider issues such as the impact on the entertainment and music industry and the provision of dining and other recreational, cultural and social facilities.

7. The Impact of the Expansion of Gaming on the Tourism, Entertainment and Leisure Industries

In the past there has been considerable debate regarding the impact of gambling on the tourism industry in Victoria, and the differing effects caused by the different gambling products, in particular the impact of the opening of the Casino and the introduction of electronic gaming machines in clubs and hotels.

This matter was considered in the *Review of Electronic Gaming Machines in Victoria*, known as the Schilling Review and released in April 1994, which made the following comments regarding the impact of gambling on tourism:

“Gaming machines should be seen as part of the hospitality or entertainment industry. The question of the desirable rate of growth of the tourism industry in Victoria is outside the scope of this report, but it seems likely that flourishing hotels and clubs would be able to play a part in growth of interstate and overseas tourists to Victoria...”

“The view was expressed in general (by persons/organisations who made submissions to the Review) that electronic gaming machines will not boost tourism in Victoria but that the casino would. The Review does not accept that view and believes that a flourishing hotel/club sector is a key requirement if Victoria is to exploit the tourism potential.”

As part of the 1998-99 Research Program, this study examines the place of gambling in tourism, entertainment and leisure industries and investigates the changes in the patterns of employment, expenditure and behaviour between these different sectors. The study allows for analysis at both the macro and micro levels and considers the social and economic impacts arising from the expansion of gaming.

In conducting this study the consultant is required to examine the following:

- The impact of gaming on tourism in Victoria, specifically:
 - The change in the number of international visitors and their expenditure and behaviour patterns,
 - The changes in the net interstate visitation numbers and subsequent changes in expenditure and behaviour, and
 - The effect on interstate travel as a consequence of the distribution of available gaming outlets and subsequent changes in expenditure and behaviour.
- The impact on the entertainment industry, including the changes in employment and performing opportunities for musicians and other entertainers.
- The extent and nature of the change in the leisure patterns of Victorians and consider those segments of the population whose range of leisure opportunities and quality of experience has been positively impacted by the expansion of gaming and those for whom the impact has been negative.

This project will be guided in its economic considerations by the results of the project *The Economic Impact of Gambling* (part of the 1998-99 Research Program).

8. Longitudinal Examination of Perceptions and Their Relationship to Actual Findings

This project aims to track, over time, the perceptions of individual Victorians about the operation of the gaming industry and the participation of people in casino gambling and the playing of electronic gaming machines at clubs and hotels.

The project will provide a greater understanding of individual perceptions, and how these perceptions relate to the actual findings of player participation and operation of the industry. An example of the differences in perceptions and actual participation from year to year was highlighted by Arthur Andersen in their report *Summary of Findings, 1996-97 Research Program* who concluded that:

“Community perceptions appear to be affected by differences in views about the social benefits, crime impacts and social harm of gambling. It is the community’s perception that the social impacts and costs of gaming in Victoria are growing and are too high. Furthermore, there appears to have been a shift in perceptions over time from acceptable/positive/indifferent views of gaming to unacceptable/negative/strong views...”

and

“...The research on community perceptions of gambling has noted that people surveyed tend to express satisfaction with their own gambling lives. However when asked about the harm associated with gambling the majority of respondents indicated that gambling resulted in more harm than good.”

Accordingly, the aim of this project is to attempt to reconcile the apparent inconsistency between individuals’ views of their own participation in gaming activities with their views of the participation of the community at large. It is also intended to establish how well people understand the operation and promotion of gaming.

This project along with the other longitudinal project contained in the 1998-99 Research Program, aims to address the issue raised by Arthur Andersen in their report *Summary of Findings, 1996-97 Research Program*, and repeated by the Auditor General in his report *Victoria’s Gaming Industry – an insight into the role of the regulator, Special Report No. 54* that:

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

9. The Impact of Gaming on Specific Cultural Groups

A number of the research projects undertaken as part of the 1996-97 Research Program involved interviews and meetings with specific cultural groups. A number of concerns were raised by various cultural groups about the impact that the increased

availability of gaming opportunities was having on their particular group. Difficulties were encountered in some cases in collecting relevant data, both primary and secondary, which could be used to confidently examine the nature and extent of these impacts of gaming which have particular relevance to such groups.

This project focuses on the impact of gaming on specific cultural groups and identifies the communication and cultural difficulties encountered in this information gathering process. The project is in two stages.

Stage One. The first stage identifies those specific cultural groups in Victoria for whom there are patterns of gambling behaviour, attitudes towards gambling and impacts of gambling which may be significantly different to those found among Victorians as a whole and for whom further investigation is warranted. In identifying the communities to be studied, consideration is to be given to a range of culturally related dimensions including ethnicity, nationality, religion and language.

In conducting this part of the project, the relevant previous research of the Authority, together with other relevant studies conducted by various cultural groups and other researchers, will be reviewed. Where available, existing databases will be integrated to attempt to identify distinctive patterns.

The problems involved in collecting accurate representative data, both qualitative and quantitative, will be identified and possible methods for addressing these problems will be developed. Interviews will be held with prominent opinion leaders of the various communities to establish avenues for data collection and to provide background information on beliefs and attitudes towards gambling.

Stage Two. The second stage of the project involves the detailed investigation of each of three groups selected in stage one. In particular:

- Patterns of gambling behaviour;
- Attitudes and beliefs towards gambling including cultural influences and values; and
- The extent and nature of the social and economic impacts, both positive and negative.

10. The Impact of Gaming and Crime Statistics

The media has given increasing attention to the perceived increase in problem gambling and its relation to crime. This matter has also been highlighted by a number of judges, including Judge Barnett and Judge Morrow, who have been reported in the media commenting on recent sentences passed relating to theft arising from gambling related problems. Accordingly, this project evaluates the availability of suitable crime statistics to enable a meaningful analysis of the association between gambling and crime rates.

This project focuses on the collection of data relating to crimes committed by individuals as a consequence of their gambling. This involves the tracking of offenders through the various records held by those entities who deal with offenders, including: Victoria Police (records of number of offenders), the court system –

Supreme, County and Magistrates' Courts (conviction records), and Correctional Services (sentencing records).

An important element of this project is to ensure that the crime committed is in fact attributable to the gambling behaviour of individuals. Accordingly, it will be imperative that attempts are made to establish the reasons for their offences for those individuals who have been convicted of crimes and the significance of gambling in this.

The project in no way duplicates the Authority's gaming and liquor industries *Survey of Fraud and Other Criminal Conduct* which relates to crime committed on gaming premises in the conduct of their business.

11. Longitudinal Community Impact Study

Three projects examining the impact of gaming on eleven specific communities were conducted as part of the 1996-97 Research Program. This project narrows the focus of the three earlier studies in order to examine on a longitudinal basis the impact of gaming on specific communities, three from the eleven communities studied previously and three new areas.

The objectives of this study will be to investigate and report on:

1. The economic and social conditions experienced within each municipality over the period 1992 to the present. This will include not only general factors, but factors specific to a location or municipality. The description will cover such factors as:
 - changes in the demographic profile of the study area, both individual and household (eg. age, gender, income, country of birth);
 - employment, both industry and occupation;
 - the development of the gaming industry in each study area;
 - changes in community support services and their usage;
 - changes in the provision of entertainment, shopping, sporting and cultural facilities to communities; and
 - other matters for which statistically valid information is available.
2. The social and economic problems within these municipalities and their relationship to the introduction and development of gaming venues and the opening of the Casino. This would:
 - involve an understanding of the actual situation in each region before and after the establishment of gaming venues and the opening of the Casino;
 - identify the problems that are common to the municipalities studied and those specific to a municipality. Analysis of differences between municipalities will be undertaken.
3. The social and economic benefits of the establishment of gaming venues common to all municipalities studied and those specific to a municipality. Analysis of any differences between municipalities will be undertaken.

4. The differential effects of the introduction of gaming machines and the Casino on different sections of the population and their lifestyles, including:
 - changes in consumer preference over time;
 - entertainment, sporting, cultural and shopping pursuits;
 - expenditure patterns (individuals and households);
 - the socio-economic and demographic characteristics of the patrons of gaming venues;
 - the changes in the availability and demand on services and amenities to the communities;
 - the changes in the nature and functioning of community organisations, including sporting clubs.

The report will also compare:

- The use of gaming machines at club and hotel venues, and gaming activities at the Casino (both gaming machines and gaming tables) in order to establish the specific impact of gaming machines in different venues and movement by individuals to and from the municipality to participate in gaming; and
 - The findings of the project with those of the survey series “Community Gambling Patterns” and report any divergences from these findings.
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Appendix C

Attitudes to Gambling – Time Series Data 1996-1999

Appendix C: Attitudes to Gambling – Time Series Data 1996-1999

Table C.1 shows a time-series analysis of Victorians' attitudes to gambling that was originally presented in the report *Seventh Survey of Community Gambling Patterns and Perceptions* (Roy Morgan Research, 2000, pp. 78, 80-81). The time series compares results from the *Survey of Community Gambling Patterns* series (1996 to 1999) and the *Positive and Negative Perceptions of Gambling Survey* (1996).

TABLE C.1 ATTITUDES TO GAMBLING – TIME SERIES

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

Source: Roy Morgan Research (2000). *Seventh Survey of Community Gambling Patterns and Perceptions*. VCGA:Melbourne

TABLE C.1 ATTITUDES TO GAMBLING – TIME SERIES (continued)

Revenue from polder machines ("pokies") and the Casino has helped the State Government balance the books	Total %	Strongly disagree	Slightly Disagree	Neither	Slightly Agree	Strongly Agree	Can't Say
1996.....	100	16	6	9	32	31	5
1997.....	100	12	8	5	36	21	19
1998.....	100	11	12	9	40	12	17
1999.....	100	9	10	8	42	16	15
Gambling revenue has enabled better social and recreational facilities to be provided for Victorians							
1996.....	100	32	12	12	26	12	6
1997.....	100	22	19	4	33	12	11
1998.....	100	20	20	8	34	7	11
1999.....	100	19	22	8	33	6	12
The Crown Entertainment Complex is good for the community							
1996.....	100	N/A	N/A	N/A	N/A	N/A	N/A
1997.....	100	27	14	8	30	14	6
1998.....	100	26	21	13	28	7	6
1999.....	100	26	22	14	28	5	5
Gambling and gambling facilities should not be allowed to be advertised							
1996.....	100	17	21	11	17	34	1
1997.....	100	13	35	6	17	27	3
1998.....	100	11	34	10	24	19	3
1999.....	100	8	33	9	25	23	2
Victoria needs gambling activities to attract tourists							
1996.....	100	38	18	3	21	19	1
1997.....	100	32	21	2	29	15	2
1998.....	100	29	27	5	28	9	3
1999.....	100	28	29	5	29	6	3
Now that Victoria has a greater variety of gambling available, there are more opportunities for recreational enjoyment							
1996.....	100	34	17	8	26	11	2
1997.....	100	31	22	4	30	10	3
1998.....	100	21	23	7	37	7	5
1999.....	100	21	28	7	35	5	4
The current level of gambling activity in Victoria is sustainable							
1996.....	100	28	17	14	23	12	6
1997.....	100	30	22	3	26	7	12
1998.....	100	21	25	8	27	7	12
1999.....	100	25	29	8	24	3	11
Funding of support services for people with gambling addictions is about right							
1996.....	100	27	16	21	12	6	18
1997.....	100	27	16	4	19	12	23
1998.....	100	19	22	12	18	5	24
1999.....	100	21	22	10	17	5	25
Country Victorians should have access to local casinos							
1996.....	100	54	15	9	14	5	2
1997.....	100	46	20	4	22	5	4
1998.....	100	39	23	8	22	4	4
1999.....	100	34	30	6	23	2	5
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

Source: Roy Morgan Research (2000). Seventh Survey of Community Gambling Patterns and Perceptions. VCGA:Melbourne

TABLE C.1 ATTITUDES TO GAMBLING – TIME SERIES (continued)

Increased availability of gambling opportunities has not significantly increased the number of problem gamblers	Total %	Strongly disagree	Slightly Disagree	Neither	Slightly Agree	Strongly Agree	Can't Say
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
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
There are not enough hotels and clubs with poker machines("pokies")							
1996.....	100	75	11	7	2	3	2
1997.....	100	75	17	1	2	3	3
1998.....	100	64	25	3	3	1	4
1999.....	100	72	21	2	2	1	2
Victoria should have more casinos							
1996.....	100	89	6	1	2	1	0
1997.....	100	80	14	1	3	2	1
1998.....	100	68	26	2	3	1	1
1999.....	100	69	25	1	3	1	1

Source: Roy Morgan Research (2000). Seventh Survey of Community Gambling Patterns and Perceptions. VCGA:Melbourne

Appendix D

**Tax Rates for the Various Legal Forms of
Gambling in Victoria**

Appendix D: Tax Rates for the Various Legal Forms of Gambling in Victoria

Table D.1 originally presented in the report *Hotel and Club Industry Gaming Impact Study* (Market Solutions, 1999) provides details on how the various taxes for each legal gambling activity in Victoria are derived.

TABLE D.1 TAX RATES FOR THE VARIOUS LEGAL FORMS OF GAMBLING IN VICTORIA

CATEGORY		RETURN TO PLAYER	TAX RATE
Lotteries	Lottery consultations	60% in the form of prizes	For the 1998-99 financial year the tax rate applicable was 35.55% of subscriptions. This replaced the staggered taxation arrangements of : <ul style="list-style-type: none"> • 35% on first \$200 million of subscriptions • 35.5% on the next \$400million of subscriptions • 36% on all subscriptions above \$600 million As at 1 July 1999, the tax rate is 36% for each consultation (i.e. lottery)
	Soccer Pools	50% in the form of prizes	34% of subscriptions
Racing	Tabcorp	Not less than 80% of the amount invested from any one totalisator An average of not less than 84% of investments on all totalisators in any financial year	28.2% of the amount of commissions 28.2% of fractions
	Bookmarker	As per agreed bets at fixed odds	2.0% of turnover at metropolitan racecourses 1.5% at other racecourses within Victoria
EGMs		Minimum of 87% of turnover returned to players	Clubs – 33.33% of gross profit (net cash balance) Hotels – 41.67% of gross profit (net cash balance) includes contribution of 8.33% to the Community Support Fund Note: Gaming Operators are charged a supervision fee (defined as tax in legislation)
Casino		Minimum of 87% of EGM turnover returned to players Returns to players from casino table games determined by the rules of the games approved by the Authority	21.25% of gross gaming revenue (GGR – includes revenue from Casino EGMs and table games) Super Tax – 1% for each \$20m of GGR above \$556.3m (up to maximum total of 41.25% of GGR of \$936.3m) Commission Based Players (CBP) at 9% of GGR plus super tax on GGR above \$178m at the rate of 1% for each \$20m up to a maximum total of 21.25% of CBP GGR of \$600m A further 1% of GGR is paid as Community Benefit Levy 5 Annual payments to Tourism Victoria of \$1m each. Final payment due 1 July 1999
Other	Club Keno	82.5% of subscription returned to players	33.3% of weekly gaming revenue
	Sportsbook	As per agreed bets at fixed odds	20% of net investment (amount invested less amount paid out as winnings)

Source: Market Solutions Australia (1999), *Hotel and Club Industry Gaming Impact Study*, VCGA, Melbourne, p 129

Appendix E

Distribution of Electronic Gaming Machines (EGMs) in Victoria 1992-1999 by Local Government Area

Appendix E: Distribution of Electronic Gaming Machines (EGMs) in Victoria 1992-1999 by Local Government Area

Tables E.1 to E.8 provide data on the distribution of EGMs in Victoria 1992-1999 by Local Government Area.

TABLE E.1 GAMING MACHINES IN VICTORIA 1992

Local Government Area	Open Venues	No. Machines	Local Government Area	Open Venues	No. Machines
ALPINE SHIRE			RURAL CITY OF WANGARATTA	1	50
BASS COAST SHIRE			RURAL CITY OF WODONGA		
BOROUGH OF QUEENSCLIFFE			SHIRE OF BAW BAW	1	58
CITY OF BALLARAT	5	255	SHIRE OF BULOKE		
CITY OF BANYULE	2	190	SHIRE OF CAMPASPE	1	87
CITY OF BAYSIDE			SHIRE OF CARDINIA		
CITY OF BOROONDARA	1	61	SHIRE OF CENTRAL GOLDFIELDS		
CITY OF BRIMBANK	1	105	SHIRE OF COLAC-OTWAY		
CITY OF CASEY			SHIRE OF CORANGAMITE		
CITY OF DAREBIN	2	150	SHIRE OF DELATITE		
CITY OF FRANKSTON	2	151	SHIRE OF EAST GIPPSLAND		
CITY OF GLEN EIRA	1	70	SHIRE OF GANNAWARRA		
CITY OF GREATER BENDIGO			SHIRE OF GLENELG	1	71
CITY OF GREATER DANDENONG	2	140	SHIRE OF HEPBURN		
CITY OF GREATER GEELONG	1	105	SHIRE OF HINDMARSH		
CITY OF GREATER SHEPPARTON			SHIRE OF INDIGO		
CITY OF HOBSONS BAY	1	50	SHIRE OF LA TROBE		
CITY OF HUME	1	34	SHIRE OF LODDON		
CITY OF KINGSTON	2	195	SHIRE OF MACEDON RANGES		
CITY OF KNOX			SHIRE OF MELTON		
CITY OF MANNINGHAM	1	75	SHIRE OF MITCHELL		
CITY OF MARIBYRNONG	3	223	SHIRE OF MOIRA		
CITY OF MAROONDAH	1	105	SHIRE OF MORNINGTON PENINSULA	2	115
CITY OF MELBOURNE	4	303	SHIRE OF MOUNT ALEXANDER		
CITY OF MONASH	1	105	SHIRE OF MOYNE		
CITY OF MOONEE VALLEY	3	295	SHIRE OF MURRINDINDI		
CITY OF MOORABOOL			SHIRE OF NILLUMBIK		
CITY OF MORELAND			SHIRE OF NORTHERN GRAMPIANS		
CITY OF PORT PHILLIP			SHIRE OF PYRENEES		
CITY OF STONNINGTON			SHIRE OF SOUTH GIPPSLAND		
CITY OF WARRNAMBOOL			SHIRE OF SOUTHERN GRAMPIANS		
CITY OF WHITEHORSE			SHIRE OF STRATHBOGIE		
CITY OF WHITTLESEA			SHIRE OF TOWONG		
CITY OF WYNDHAM			SHIRE OF WELLINGTON		
CITY OF YARRA	1	105	SHIRE OF WEST WIMMERA		
GOLDEN PLAINS SHIRE			SHIRE OF YARRA RANGES		
RURAL CITY OF ARARAT			SHIRE OF YARRIAMBIAK		
RURAL CITY OF HORSHAM			SURF COAST SHORE		
RURAL CITY OF MILDURA	4	251			
RURAL CITY OF SWAN HILL			TOTAL	45	3349

Source: Australian Institute for Gambling Research (1997). Definition and Incidence of Problem Gambling including the Socio-Economic Distribution of Gamblers. VCGA:Melbourne

TABLE E.2 GAMING MACHINES IN VICTORIA 1993

Local Government Area	Open Venues	No. Machines	Local Government Area	Open Venues	No. Machines
ALPINE SHIRE	1	53	RURAL CITY OF WANGARATTA	3	88
BASS COAST SHIRE	2	10	RURAL CITY OF WODONGA	2	146
BOROUGH OF QUEENSCLIFFE			SHIRE OF BAW BAW	1	58
CITY OF BALLARAT	9	563	SHIRE OF BULOKE		
CITY OF BANYULE	6	389	SHIRE OF CAMPASPE	1	87
CITY OF BAYSIDE	5	342	SHIRE OF CARDINIA		
CITY OF BOROONDARA	1	61	SHIRE OF CENTRAL GOLDFIELDS		
CITY OF BRIMBANK	3	160	SHIRE OF COLAC-OTWAY	1	35
CITY OF CASEY	6	336	SHIRE OF CORANGAMITE		
CITY OF DAREBIN	4	239	SHIRE OF DELATITE		
CITY OF FRANKSTON	6	411	SHIRE OF EAST GIPPSLAND	3	72
CITY OF GLEN EIRA	4	277	SHIRE OF GANNAWARRA		
CITY OF GREATER BENDIGO	4	60	SHIRE OF GLENELG	1	71
CITY OF GREATER DANDENONG	9	577	SHIRE OF HEPBURN		
CITY OF GREATER GEELONG	7	392	SHIRE OF HINDMARSH		
CITY OF GREATER SHEPPARTON	2	80	SHIRE OF INDIGO		
CITY OF HOBSONS BAY	3	134	SHIRE OF LA TROBE	12	449
CITY OF HUME	3	129	SHIRE OF LODDON		
CITY OF KINGSTON	9	525	SHIRE OF MACEDON RANGES		
CITY OF KNOX	5	389	SHIRE OF MELTON	1	33
CITY OF MANNINGHAM	3	207	SHIRE OF MITCHELL	1	75
CITY OF MARIBYRNONG	5	308	SHIRE OF MOIRA		
CITY OF MAROONDAH	6	374	SHIRE OF MORNINGTON PENINSULA	6	328
CITY OF MELBOURNE	14	1176	SHIRE OF MOUNT ALEXANDER		
CITY OF MONASH	6	421	SHIRE OF MOYNE		
CITY OF MOONEE VALLEY	7	458	SHIRE OF MURRINDINDI		
CITY OF MOORABOOL			SHIRE OF NILLUMBIK		
CITY OF MORELAND	1	5	SHIRE OF NORTHERN GRAMPIANS		
CITY OF PORT PHILLIP	2	107	SHIRE OF PYRENEES		
CITY OF STONNINGTON	2	110	SHIRE OF SOUTH GIPPSLAND		
CITY OF WARRNAMBOOL	3	187	SHIRE OF SOUTHERN GRAMPIANS	1	45
CITY OF WHITEHORSE	5	288	SHIRE OF STRATHBOGIE	1	5
CITY OF WHITTLESEA	2	110	SHIRE OF TOWONG		
CITY OF WYNDHAM	3	182	SHIRE OF WELLINGTON	2	129
CITY OF YARRA	1	105	SHIRE OF WEST WIMMERA		
GOLDEN PLAINS SHIRE			SHIRE OF YARRA RANGES	3	124
RURAL CITY OF ARARAT	2	45	SHIRE OF YARRIAMIACK		
RURAL CITY OF HORSHAM	1	24	SURF COAST SHORE	1	43
RURAL CITY OF MILDURA	4	251			
RURAL CITY OF SWAN HILL			TOTAL	196	11273

Source: Australian Institute for Gambling Research (1997). Definition and Incidence of Problem Gambling including the Socio-Economic Distribution of Gamblers. VCGA:Melbourne

TABLE E.3 GAMING MACHINES IN VICTORIA 1994

Local Government Area	Open Venues	No. Machines	Local Government Area	Open Venues	No. Machines
ALPINE SHIRE	2	93	RURAL CITY OF WANGARATTA	3	88
BASS COAST SHIRE	5	66	RURAL CITY OF WODONGA	2	146
BOROUGH OF QUEENSCLIFFE			SHIRE OF BAW BAW	1	58
CITY OF BALLARAT	11	598	SHIRE OF BULOKE		
CITY OF BANYULE	8	449	SHIRE OF CAMPASPE	2	60
CITY OF BAYSIDE	11	508	SHIRE OF CARDINIA	3	79
CITY OF BOROONDARA	6	202	SHIRE OF CENTRAL GOLDFIELDS	1	30
CITY OF BRIMBANK	10	601	SHIRE OF COLAC-OTWAY	2	40
CITY OF CASEY	8	440	SHIRE OF CORANGAMITE		
CITY OF DAREBIN	11	491	SHIRE OF DELATITE	2	52
CITY OF FRANKSTON	7	485	SHIRE OF EAST GIPPSLAND	3	72
CITY OF GLEN EIRA	6	380	SHIRE OF GANNAWARRA		
CITY OF GREATER BENDIGO	9	370	SHIRE OF GLENELG	3	102
CITY OF GREATER DANDENONG	13	742	SHIRE OF HEPBURN	2	50
CITY OF GREATER GEELONG	17	812	SHIRE OF HINDMARSH		
CITY OF GREATER SHEPPARTON	4	147	SHIRE OF INDIGO		
CITY OF HOBSONS BAY	6	213	SHIRE OF LA TROBE	14	526
CITY OF HUME	8	323	SHIRE OF LODDON		
CITY OF KINGSTON	9	525	SHIRE OF MACEDON RANGES		
CITY OF KNOX	9	609	SHIRE OF MELTON	2	83
CITY OF MANNINGHAM	6	430	SHIRE OF MITCHELL	1	75
CITY OF MARIBYRNONG	9	518	SHIRE OF MOIRA		
CITY OF MAROONDAH	7	399	SHIRE OF MORNINGTON PENINSULA	11	501
CITY OF MELBOURNE	22	1384	SHIRE OF MOUNT ALEXANDER		
CITY OF MONASH	9	546	SHIRE OF MOYNE		
CITY OF MOONEE VALLEY	10	576	SHIRE OF MURRINDINDI		
CITY OF MOORABOOL			SHIRE OF NILLUMBIK	1	24
CITY OF MORELAND	10	288	SHIRE OF NORTHERN GRAMPIANS		
CITY OF PORT PHILLIP	5	186	SHIRE OF PYRENEES		
CITY OF STONNINGTON	5	235	SHIRE OF SOUTH GIPPSLAND	2	55
CITY OF WARRNAMBOOL	4	222	SHIRE OF SOUTHERN GRAMPIANS	3	105
CITY OF WHITEHORSE	6	391	SHIRE OF STRATHBOGIE	1	30
CITY OF WHITTLESEA	4	275	SHIRE OF TOWONG		
CITY OF WYNDHAM	5	252	SHIRE OF WELLINGTON	4	179
CITY OF YARRA	3	145	SHIRE OF WEST WIMMERA		
GOLDEN PLAINS SHIRE			SHIRE OF YARRA RANGES	6	278
RURAL CITY OF ARARAT	2	45	SHIRE OF YARRIAMIACK		
RURAL CITY OF HORSHAM	3	106	SURF COAST SHORE	2	89
RURAL CITY OF MILDURA	5	275			
RURAL CITY OF SWAN HILL	1	105	TOTAL	347	17154

Source: Australian Institute for Gambling Research (1997). Definition and Incidence of Problem Gambling including the Socio-Economic Distribution of Gamblers. VCGA:Melbourne

TABLE E.4 GAMING MACHINES IN VICTORIA 1995

Local Government Area	Open Venues	No. Machines	Local Government Area	Open Venues	No. Machines
ALPINE SHIRE	2	93	RURAL CITY OF WANGARATTA	3	88
BASS COAST SHIRE	8	116	RURAL CITY OF WODONGA	3	167
BOROUGH OF QUEENSCLIFFE	1	20	SHIRE OF BAW BAW	1	58
CITY OF BALLARAT	12	630	SHIRE OF BULOKE		
CITY OF BANYULE	10	509	SHIRE OF CAMPASPE	3	80
CITY OF BAYSIDE	12	497	SHIRE OF CARDINIA	3	91
CITY OF BOROONDARA	9	272	SHIRE OF CENTRAL GOLDFIELDS	2	80
CITY OF BRIMBANK	12	681	SHIRE OF COLAC-OTWAY	4	85
CITY OF CASEY	9	528	SHIRE OF CORANGAMITE	2	49
CITY OF DAREBIN	13	543	SHIRE OF DELATITE	3	78
CITY OF FRANKSTON	8	511	SHIRE OF EAST GIPPSLAND	10	259
CITY OF GLEN EIRA	9	509	SHIRE OF GANNAWARRA		
CITY OF GREATER BENDIGO	11	534	SHIRE OF GLENELG	5	132
CITY OF GREATER DANDENONG	14	922	SHIRE OF HEPBURN	2	71
CITY OF GREATER GEELONG	21	888	SHIRE OF HINDMARSH		
CITY OF GREATER SHEPPARTON	6	247	SHIRE OF INDIGO		
CITY OF HOBSONS BAY	7	238	SHIRE OF LA TROBE	20	651
CITY OF HUME	10	456	SHIRE OF LODDON		
CITY OF KINGSTON	11	645	SHIRE OF MACEDON RANGES	2	35
CITY OF KNOX	9	669	SHIRE OF MELTON	2	110
CITY OF MANNINGHAM	6	425	SHIRE OF MITCHELL	3	125
CITY OF MARIBYRNONG	11	703	SHIRE OF MOIRA	1	20
CITY OF MAROONDAH	7	383	SHIRE OF MORNINGTON PENINSULA	17	637
CITY OF MELBOURNE	25	1473	SHIRE OF MOUNT ALEXANDER	1	5
CITY OF MONASH	11	762	SHIRE OF MOYNE		
CITY OF MOONEE VALLEY	13	627	SHIRE OF MURRINDINDI	1	20
CITY OF MOORABOOL	1	30	SHIRE OF NILLUMBIK	1	36
CITY OF MORELAND	11	349	SHIRE OF NORTHERN GRAMPIANS	1	30
CITY OF PORT PHILLIP	7	238	SHIRE OF PYRENEES		
CITY OF STONNINGTON	9	436	SHIRE OF SOUTH GIPPSLAND	4	97
CITY OF WARRNAMBOOL	5	247	SHIRE OF SOUTHERN GRAMPIANS	3	105
CITY OF WHITEHORSE	7	443	SHIRE OF STRATHBOGIE	1	30
CITY OF WHITTLESEA	4	275	SHIRE OF TOWONG	1	20
CITY OF WYNDHAM	8	396	SHIRE OF WELLINGTON	5	222
CITY OF YARRA	7	290	SHIRE OF WEST WIMMERA		
GOLDEN PLAINS SHIRE			SHIRE OF YARRA RANGES	7	274
RURAL CITY OF ARARAT	2	45	SHIRE OF YARRIAMIACK		
RURAL CITY OF HORSHAM	3	106	SURF COAST SHORE	3	111
RURAL CITY OF MILDURA	7	285			
RURAL CITY OF SWAN HILL	2	47			
			TOTAL	454	20834

Source: Australian Institute for Gambling Research (1997). Definition and Incidence of Problem Gambling including the Socio-Economic Distribution of Gamblers. VCGA:Melbourne

TABLE E.5 GAMING MACHINES IN VICTORIA 1996

Local Government Area	Open Venues	No. Machines	Local Government Area	Open Venues	No. Machines
ALPINE SHIRE	3	79	RURAL CITY OF WANGARATTA	3	79
BASS COAST SHIRE	9	203	RURAL CITY OF WODONGA	3	113
BOROUGH OF QUEENSCLIFFE	1	24	SHIRE OF BAW BAW	3	128
CITY OF BALLARAT	14	549	SHIRE OF BULOKE		
CITY OF BANYULE	11	589	SHIRE OF CAMPASPE	3	100
CITY OF BAYSIDE	12	409	SHIRE OF CARDINIA	5	146
CITY OF BOROONDARA	8	276	SHIRE OF CENTRAL GOLDFIELDS	2	109
CITY OF BRIMBANK	14	702	SHIRE OF COLAC-OTWAY	5	133
CITY OF CASEY	9	570	SHIRE OF CORANGAMITE	2	49
CITY OF DAREBIN	15	834	SHIRE OF DELATITE	3	96
CITY OF FRANKSTON	9	537	SHIRE OF EAST GIPPSLAND	12	336
CITY OF GLEN EIRA	12	659	SHIRE OF GANNAWARRA		
CITY OF GREATER BENDIGO	13	503	SHIRE OF GLENELG	5	113
CITY OF GREATER DANDENONG	14	998	SHIRE OF HEPBURN	3	87
CITY OF GREATER GEELONG	25	1139	SHIRE OF HINDMARSH		
CITY OF GREATER SHEPPARTON	7	300	SHIRE OF INDIGO		
CITY OF HOBSONS BAY	9	362	SHIRE OF LA TROBE	20	636
CITY OF HUME	10	528	SHIRE OF LODDON		
CITY OF KINGSTON	13	755	SHIRE OF MACEDON RANGES	3	75
CITY OF KNOX	10	668	SHIRE OF MELTON	3	183
CITY OF MANNINGHAM	7	515	SHIRE OF MITCHELL	3	92
CITY OF MARIBYRNONG	13	735	SHIRE OF MOIRA		
CITY OF MAROONDAH	7	387	SHIRE OF MORNINGTON PENINSULA	19	719
CITY OF MELBOURNE	25	1337	SHIRE OF MOUNT ALEXANDER	1	5
CITY OF MONASH	12	754	SHIRE OF MOYNE		
CITY OF MOONEE VALLEY	14	684	SHIRE OF MURRINDINDI	1	20
CITY OF MOORABOOL	2	55	SHIRE OF NILLUMBIK	1	36
CITY OF MORELAND	15	690	SHIRE OF NORTHERN GRAMPIANS	3	90
CITY OF PORT PHILLIP	7	309	SHIRE OF PYRENEES		
CITY OF STONNINGTON	8	342	SHIRE OF SOUTH GIPPSLAND	4	112
CITY OF WARRNAMBOOL	6	266	SHIRE OF SOUTHERN GRAMPIANS	4	110
CITY OF WHITEHORSE	8	543	SHIRE OF STRATHBOGIE	1	30
CITY OF WHITTLESEA	6	390	SHIRE OF TOWONG	1	20
CITY OF WYNDHAM	9	447	SHIRE OF WELLINGTON	7	242
CITY OF YARRA	9	273	SHIRE OF WEST WIMMERA		
GOLDEN PLAINS SHIRE			SHIRE OF YARRA RANGES	7	257
RURAL CITY OF ARARAT	1	38	SHIRE OF YARRIAMIACK		
RURAL CITY OF HORSHAM	3	100	SURF COAST SHORE	3	98
RURAL CITY OF MILDURA	7	218			
RURAL CITY OF SWAN HILL	4	92	TOTAL	511	23073

Source: Australian Institute for Gambling Research (1997). Definition and Incidence of Problem Gambling including the Socio-Economic Distribution of Gamblers. VCGA:Melbourne

TABLE E.6 GAMING MACHINES IN VICTORIA 1997

Local Government Area	Open Venues	No. Machines	Local Government Area	Open Venues	No. Machines
ALPINE SHIRE	3	77	RURAL CITY OF WANGARATTA	3	99
BASS COAST SHIRE	9	234	RURAL CITY OF WODONGA	4	142
BOROUGH OF QUEENSCLIFFE	1	35	SHIRE OF BAW BAW	3	140
CITY OF BALLARAT	15	594	SHIRE OF BULOKE		
CITY OF BANYULE	11	594	SHIRE OF CAMPASPE	3	100
CITY OF BAYSIDE	11	366	SHIRE OF CARDINIA	5	166
CITY OF BOROONDARA	8	276	SHIRE OF CENTRAL GOLDFIELDS	2	109
CITY OF BRIMBANK	14	722	SHIRE OF COLAC-OTWAY	5	133
CITY OF CASEY	10	675	SHIRE OF CORANGAMITE	2	49
CITY OF DAREBIN	19	1037	SHIRE OF DELATITE	4	136
CITY OF FRANKSTON	9	541	SHIRE OF EAST GIPPSLAND	12	336
CITY OF GLEN EIRA	12	659	SHIRE OF GANNAWARRA		
CITY OF GREATER BENDIGO	12	479	SHIRE OF GLENELG	5	121
CITY OF GREATER DANDENONG	15	1129	SHIRE OF HEPBURN	3	80
CITY OF GREATER GEELONG	28	1310	SHIRE OF HINDMARSH		
CITY OF GREATER SHEPPARTON	7	300	SHIRE OF INDIGO		
CITY OF HOBSONS BAY	9	455	SHIRE OF LA TROBE	20	673
CITY OF HUME	12	653	SHIRE OF LODDON		
CITY OF KINGSTON	16	916	SHIRE OF MACEDON RANGES	3	75
CITY OF KNOX	12	837	SHIRE OF MELTON	3	195
CITY OF MANNINGHAM	7	538	SHIRE OF MITCHELL	3	92
CITY OF MARIBYRNONG	14	757	SHIRE OF MOIRA	1	25
CITY OF MAROONDAH	7	391	SHIRE OF MORNINGTON PENINSULA	19	784
CITY OF MELBOURNE	21	1191	SHIRE OF MOUNT ALEXANDER	1	30
CITY OF MONASH	14	924	SHIRE OF MOYNE		
CITY OF MOONEE VALLEY	17	850	SHIRE OF MURRINDINDI	1	20
CITY OF MOORABOOL	2	60	SHIRE OF NILLUMBIK	4	147
CITY OF MORELAND	17	808	SHIRE OF NORTHERN GRAMPIANS	3	88
CITY OF PORT PHILLIP	8	389	SHIRE OF PYRENEES		
CITY OF STONNINGTON	8	391	SHIRE OF SOUTH GIPPSLAND	5	142
CITY OF WARRNAMBOOL	7	280	SHIRE OF SOUTHERN GRAMPIANS	3	99
CITY OF WHITEHORSE	8	619	SHIRE OF STRATHBOGIE	1	30
CITY OF WHITTLESEA	9	575	SHIRE OF TOWONG	1	20
CITY OF WYNDHAM	9	505	SHIRE OF WELLINGTON	9	284
CITY OF YARRA	13	454	SHIRE OF WEST WIMMERA		
GOLDEN PLAINS SHIRE			SHIRE OF YARRA RANGES	7	302
RURAL CITY OF ARARAT	2	83	SHIRE OF YARRIAMIACK		
RURAL CITY OF HORSHAM	4	140	SURF COAST SHORE	4	115
RURAL CITY OF MILDURA	7	224			
RURAL CITY OF SWAN HILL	4	92	TOTAL	550	25892

Source: Australian Institute for Gambling Research (1997). Definition and Incidence of Problem Gambling including the Socio-Economic Distribution of Gamblers. VCGA:Melbourne

TABLE E.7 GAMING MACHINES IN VICTORIA 1998

Local Government Area	Venues	Lic EGMs	Local Government Area	Venues	Lic EGMs
ALPINE SHIRE	3	77	RURAL CITY OF WANGARATTA	4	124
BASS COAST SHIRE	9	245	RURAL CITY OF WODONGA	4	162
BOROUGH OF QUEENSCLIFFE	1	35	SHIRE OF BAW BAW	3	140
CITY OF BALLARAT	15	638	SHIRE OF BULOKE		
CITY OF BANYULE	11	628	SHIRE OF CAMPASPE	3	119
CITY OF BAYSIDE	10	294	SHIRE OF CARDINIA	5	172
CITY OF BOROONDARA	7	261	SHIRE OF CENTRAL GOLDFIELDS	2	114
CITY OF BRIMBANK	15	787	SHIRE OF COLAC-OTWAY	5	121
CITY OF CASEY	10	726	SHIRE OF CORANGAMITE	2	49
CITY OF DAREBIN	19	1054	SHIRE OF DELATITE	4	140
CITY OF FRANKSTON	9	545	SHIRE OF EAST GIPPSLAND	12	351
CITY OF GLEN EIRA	12	681	SHIRE OF GANNAWARRA		
CITY OF GREATER BENDIGO	12	485	SHIRE OF GLENELG	5	121
CITY OF GREATER DANDENONG	15	1156	SHIRE OF HEPBURN	3	75
CITY OF GREATER GEELONG	28	1372	SHIRE OF HINDMARSH		
CITY OF GREATER SHEPPARTON	7	323	SHIRE OF INDIGO		
CITY OF HOBSONS BAY	10	529	SHIRE OF LA TROBE	18	685
CITY OF HUME	13	699	SHIRE OF LODDON		
CITY OF KINGSTON	16	938	SHIRE OF MACEDON RANGES	3	75
CITY OF KNOX	12	911	SHIRE OF MELTON	3	197
CITY OF MANNINGHAM	6	511	SHIRE OF MITCHELL	4	142
CITY OF MARIBYRNONG	15	804	SHIRE OF MOIRA	1	35
CITY OF MAROONDAH	8	477	SHIRE OF MORNINGTON PENINSULA	19	838
CITY OF MELBOURNE	23	1129	SHIRE OF MOUNT ALEXANDER	1	30
CITY OF MONASH	14	1027	SHIRE OF MOYNE		
CITY OF MOONEE VALLEY	18	848	SHIRE OF MURRINDINDI	1	20
CITY OF MOORABOOL	2	60	SHIRE OF NILLUMBIK	4	147
CITY OF MORELAND	17	800	SHIRE OF NORTHERN GRAMPIANS	3	88
CITY OF PORT PHILLIP	10	482	SHIRE OF PYRENEES		
CITY OF STONNINGTON	8	391	SHIRE OF SOUTH GIPPSLAND	5	148
CITY OF WARRNAMBOOL	6	242	SHIRE OF SOUTHERN GRAMPIANS	3	94
CITY OF WHITEHORSE	8	624	SHIRE OF STRATHBOGIE	1	30
CITY OF WHITTLESEA	9	580	SHIRE OF TOWONG	1	20
CITY OF WYNDHAM	9	511	SHIRE OF WELLINGTON	10	333
CITY OF YARRA	13	442	SHIRE OF WEST WIMMERA		
GOLDEN PLAINS SHIRE			SHIRE OF YARRA RANGES	9	388
RURAL CITY OF ARARAT	2	86	SHIRE OF YARRIAMIACK		
RURAL CITY OF HORSHAM	4	137	SURF COAST SHORE	4	112
RURAL CITY OF MILDURA	7	253			
RURAL CITY OF SWAN HILL	4	107			
			TOTAL	559	26965

Source: Victorian Casino and Gaming Authority

TABLE E.8 GAMING MACHINES IN VICTORIA 1999

Local Government Area	Venues	Lic EGMs 99_2	Local Government Area	Venues	Lic EGMs 99_2
ALPINE SHIRE	4	77	RURAL CITY OF WANGARATTA	5	128
BASS COAST SHIRE	8	240	RURAL CITY OF WODONGA	4	130
BOROUGH OF QUEENSCLIFFE	1	35	SHIRE OF BAW BAW	3	140
CITY OF BALLARAT	16	681	SHIRE OF BULOKE		
CITY OF BANYULE	11	618	SHIRE OF CAMPASPE	3	119
CITY OF BAYSIDE	9	284	SHIRE OF CARDINIA	4	159
CITY OF BOROONDARA	6	246	SHIRE OF CENTRAL GOLDFIELDS	2	114
CITY OF BRIMBANK	15	860	SHIRE OF COLAC-OTWAY	5	121
CITY OF CASEY	10	721	SHIRE OF CORANGAMITE	2	57
CITY OF DAREBIN	18	1017	SHIRE OF DELATITE	4	135
CITY OF FRANKSTON	9	525	SHIRE OF EAST GIPPSLAND	12	365
CITY OF GLEN EIRA	13	792	SHIRE OF GANNAWARRA		
CITY OF GREATER BENDIGO	13	532	SHIRE OF GLENELG	5	113
CITY OF GREATER DANDENONG	15	1154	SHIRE OF HEPBURN	3	70
CITY OF GREATER GEELONG	28	1393	SHIRE OF HINDMARSH		
CITY OF GREATER SHEPPARTON	7	328	SHIRE OF INDIGO		
CITY OF HOBSONS BAY	12	649	SHIRE OF LA TROBE	19	678
CITY OF HUME	13	716	SHIRE OF LODDON		
CITY OF KINGSTON	16	922	SHIRE OF MACEDON RANGES	3	75
CITY OF KNOX	12	902	SHIRE OF MELTON	4	242
CITY OF MANNINGHAM	6	523	SHIRE OF MITCHELL	5	192
CITY OF MARIBYRNONG	15	771	SHIRE OF MOIRA	1	38
CITY OF MAROONDAH	10	660	SHIRE OF MORNINGTON PENINSULA	20	855
CITY OF MELBOURNE	19	1030	SHIRE OF MOUNT ALEXANDER	1	30
CITY OF MONASH	16	1222	SHIRE OF MOYNE		
CITY OF MOONEE VALLEY	18	822	SHIRE OF MURRINDINDI	1	20
CITY OF MOORABOOL	2	60	SHIRE OF NILLUMBIK	4	147
CITY OF MORELAND	16	721	SHIRE OF NORTHERN GRAMPIANS	3	88
CITY OF PORT PHILLIP	10	453	SHIRE OF PYRENEES		
CITY OF STONNINGTON	7	290	SHIRE OF SOUTH GIPPSLAND	5	145
CITY OF WARRNAMBOOL	6	247	SHIRE OF SOUTHERN GRAMPIANS	3	90
CITY OF WHITEHORSE	7	541	SHIRE OF STRATHBOGIE	1	27
CITY OF WHITTLESEA	9	611	SHIRE OF TOWONG	1	20
CITY OF WYNDHAM	9	521	SHIRE OF WELLINGTON	10	332
CITY OF YARRA	11	409	SHIRE OF WEST WIMMERA		
GOLDEN PLAINS SHIRE			SHIRE OF YARRA RANGES	9	393
RURAL CITY OF ARARAT	2	93	SHIRE OF YARRIAMIACK		
RURAL CITY OF HORSHAM	4	141	SURF COAST SHORE	4	97
RURAL CITY OF MILDURA	7	255			
RURAL CITY OF SWAN HILL	4	107			
			TOTAL	560	27289

Source: Victorian Casino and Gaming Authority

Appendix F

Discussion Paper Sent to Key Victorian Stakeholder Groups

***Framework for Evaluation of the Social Impacts of
Gambling and Summary of the Victorian Casino and
Gaming Authority
1998-99 Research Program Findings***

***Prepared by the Social and Economic Research Centre (SERC)
University of Queensland for Consultation with Stakeholders***

November 1999

Contact

John Johnston

Telephone 07 33656663

E-mail j.johnston@mailbox.uq.edu.au

Introduction

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The Victorian Casino and Gaming Authority has contracted SERC to undertake a research project as part of the Authority's *1998-99 Research Program*.

This Discussion Paper has been prepared for the purpose of consultation with stakeholders on a draft analytic framework for the evaluation of the social impacts of gambling. The paper proceeds by outlining the objectives of the project and then surveying the matters reviewed in developing the draft framework. It next discusses the elements of the framework and their potential in the evaluation of the VCGA 1998-99 Research Program. The final section of the paper raises a number of questions seeking stakeholder responses.

Objectives

The two requirements of the project are:

1. To develop a rigorous framework to evaluate the social impacts of gaming. This framework will also consider related economic impacts. The need for a suitable analytical framework and associated indicators emerged from the results of the project "Summary of Findings - 1996-97 Research Program" (published December 1997).
2. To critically analyse and evaluate projects undertaken as part of the 1998-99 Research Program, drawing together the findings of the Authority's research and other relevant material. This will continue the process of drawing together the results of the Research Program into one easily accessible report which takes account of the criteria established in development of the framework.

Completion of these two steps will allow conclusions to be drawn about overall social and economic impacts and also identify the areas where there is a need for further research.

The overarching aim of this research is to integrate the various types of impact into a framework that allows for their analysis at various levels in a rigorous manner.

Development of the Draft Framework

The first step in the development of the framework was a critical review of the existing models of gaming in the general literature. Specific sources drawn on were:

- Alcohol and Gaming Authority. 1998. Annual Gaming Report 1997-98. Nova Scotia: Alcohol and Gaming Authority.
- Productivity Commission. 1999. Australia's Gambling Industries- Draft Report. Melbourne: Productivity Commission.
- Victorian Casino and Gaming Authority. 1997 Summary of Findings 1996-97 Research Program. Melbourne: VCGA.
- Various Reports commissioned by the VCGA as part of its Research Program.

The review identified a number of deficiencies with the current models of the social impact of gaming including:

- Research findings are usually presented by impact category for example health, tourism, employment with only limited consideration given to linkages across levels of analysis for example community or region and the nature of the impact (positive or negative).
- Limited analysis of the adequacy and availability of indicators.
- Limited identification of the factors that influence the nature and scale of impacts for example gender and age.

In developing the draft framework emphasis was placed on trying to avoid these deficiencies.

The Draft Framework

Against this background a framework was constructed based on:

- Levels of analysis
- Dimensions of impact

Levels of Analysis

The levels of analysis that were chosen are:

- individuals and families
- communities
- regions
- State

These are concepts that have tended to be adopted in most studies.

Individuals and Families

By “individual” we mean the person who undertakes the gaming activity and experiences its benefits and costs. The expression “family” includes those in the individual’s household or close relations or friends who will be affected by the outcomes of the individual’s gaming activities.

Communities

The selection of the levels community, region and state raised definitional issues since there is often a blurring of these levels in the literature. To address this problem the following definitions were developed.

While communities are generally accepted as a level of analysis at which the impact of gaming can be assessed, there is no commonly accepted definition.

There is a deal of attraction in the broad approach taken by the consultants for the Nova Scotia study. They identified three levels:

1. The local community
2. Social groups
3. Social networks which are self defined and are part of the world of gambling.

These levels recognise the necessity of a spatial and a social dimension when defining communities. At all levels a prerequisite is a shared community of interest.

Drawing on this approach community has, for the purpose of the framework being developed in this research, been defined as:

- All residents in a relevant geographical area
- Social groups, which would include sporting clubs; service clubs; church and other voluntary groups including ethnic associations. While some of these might be parties in commercial transactions the predominant characteristic will be mutuality of interests.
- Social networks will concern self -defined groups which form because of the common experience of frequenting places where gaming occurs.

Regions

The concept of “community” has to be clearly distinguished from that of “region”. For the purpose of this framework a region is taken to be predominantly economic based and the level at which private and government services are provided. There is as well a social dimension for example where there is a delivery of human services.

Regions are most likely to be defined initially by a spatial dimension. VCGA research projects that have examined regional issues have encountered difficulties as regions are not self contained and homogeneous. Regions are often defined in geographic terms or as a local authority. These definitions might not have given any cognisance as to whether or not there was a local economy that had a degree of self sufficiency with a reasonable balance of transactions with other regions. Accordingly it may be difficult to match economic and demographic data.

Despite this problem the assumption is that a region for the purpose of this framework has an economic basis.

An additional feature of a region will often be that it encompasses the activities of a local authority, and gambling might have an impact on its capacity to provide infrastructure and community services.

State

The level of analysis “state” is intended to represent the impacts at the level of the state government for example as regulator and provider of some support services. It will be the beneficiary of revenue from licenses etc.

Dimensions of Impact

The dimensions of impact are Health and Wellbeing, Culture, Recreation and Tourism, Employment and Education, Legal/Justice, Economic Development, and Financial. Most studies of gaming impact have developed measures in one or other of the above dimensions. These can be defined as:

- Health and Wellbeing- this will recognise the impact that the results of gambling can have on the physical, psychological and social health and wellbeing of the individual and household. Also included are factors such as the costs to the community and the state in providing health and welfare services.
- Culture- this dimension takes in issues such as the development of social attitudes to gambling for example the degree of its acceptance as an acceptable activity. An allied concern will be the perception of the balance between benefits and costs that gambling contributes to social norms.
- Recreation and Tourism- this recognises issues such as the entertainment benefits that will follow from the development of gaming venues. Negative impacts will occur when these gaming facilities draw patronage away from live entertainment venues. A positive aspect is the benefit that accrues with social interaction at venues. A key issue is the differences that occur where gaming venues are seen as part of the tourism industry as opposed to being a convenience activity for residents.
- Employment and Education- this dimension recognises the job creation potential in the construction and running of venues. The dimension will also capture those instances where gaming activity has a deleterious impact on the individual’s work and education.
- Legal/Justice – this dimension covers impacts that could occur should gaming activity lead to an individual or members of a household coming into contact with the criminal justice system.
- Economic Development- this is a macro level indicator and takes into account the returns to the state from taxation of

gaming, and returns from increased economic activity, for example increased payroll tax as a concomitant of job creation.

- Financial- this dimension reflects the financial state of the individual and household and particularly the potential for increased household debt and bankruptcy. Increased profits for hotels and clubs will also be included in this dimension.

The preliminary conceptualisation of the dimensions at which positive and negative gaming impacts occur is presented in Table 1. This presents the framework as a matrix of Level of Analysis by Dimension of Impact. It is not intended to be exhaustive and this matrix is seen as a vehicle to facilitate feedback from stakeholders and consultants on the broad structure of the model.

The completed framework will include a detailed assessment of the impact of gaming on each cell with particular emphasis on linkages both across the rows and down the columns. It is probable that the cells will differ in significance. A great deal of research may be available for some, while for others there may be very little research at all. Examples of positive and negative impacts have been included in some cells as examples.

Table 1. Draft Analytical Framework of the Social Impacts of Gaming

LEVEL OF ANALYSIS				
Dimension of Impact	Individuals and Families	Communities	Regions	State
Health and Wellbeing	<p><i>Positive impacts:</i></p> <ul style="list-style-type: none"> • Forum for social interaction • Stress reduction <p><i>Negative impacts:</i></p> <ul style="list-style-type: none"> • Additional dependencies/cross addiction • Stress, depression and anxiety • Suicide • Poor physical health • Social isolation • Poor parent-child relationships • Marital breakdown • Family structure (reduced stability and cohesion) 	<p><i>Negative impacts:</i></p> <ul style="list-style-type: none"> • Increased demand for community health and related support services 		
Culture				
Recreation and Tourism	<p><i>Positive impacts:</i></p> <ul style="list-style-type: none"> • Entertainment • Relief from routines 		<p><i>Positive impacts:</i></p> <ul style="list-style-type: none"> • Increased tourism 	
Employment and Education	<p><i>Negative impacts:</i></p> <ul style="list-style-type: none"> • Loss of time from work • Loss of work efficiency and productivity • Job loss • Loss of time from study 			<p><i>Positive impacts:</i></p> <ul style="list-style-type: none"> • Increased state employment

Table 1. Draft Analytical Framework on the Social Impact of Gaming (continued)

LEVEL OF ANALYSIS				
Dimension of Impact	Individuals and Families	Communities	Regions	State
Legal/Justice	<p><i>Negative impacts:</i></p> <ul style="list-style-type: none"> • Use of “Loan Sharks” • Bankruptcy • Theft • Imprisonment • Domestic or other violence 	<p><i>Negative impacts:</i></p> <ul style="list-style-type: none"> • Increased crime 	<p><i>Negative impacts:</i></p> <ul style="list-style-type: none"> • Increased crime 	
Economic Development			<p><i>Positive impacts:</i></p> <ul style="list-style-type: none"> • Increased economic activity • EGMs allow the development of new markets <p><i>Negative impacts:</i></p> <ul style="list-style-type: none"> • Adverse impact on local industries • Need for infrastructure provision 	<p><i>Positive impacts:</i></p> <ul style="list-style-type: none"> • Increase in State economic activity • Expansion in some sectors of the economy (eg., those involved in or who supply the gaming industry) <p><i>Negative impacts:</i></p> <ul style="list-style-type: none"> • Decline in some sectors of the economy
Financial	<p><i>Positive impacts:</i></p> <ul style="list-style-type: none"> • Financial gain <p><i>Negative impacts:</i></p> <ul style="list-style-type: none"> • Financial distress • Loss of assets • Bankruptcy • Redistribution of wealth from players to non-players 	<p><i>Positive impacts:</i></p> <ul style="list-style-type: none"> • Increased profits for hotels and clubs <p><i>Negative impacts:</i></p> <ul style="list-style-type: none"> • Reduction in donations to clubs and charities 		<p><i>Positive impacts:</i></p> <ul style="list-style-type: none"> • Increased government tax revenue • Increased government expenditure

Feedback

Input is sought as a check on the appropriateness of the model and particularly whether or not the levels of analysis and the dimensions of impact capture the complexity of gaming from all perspectives. We realise that the possible impacts cover a wide field and in seeking your views accept that these are likely to be restricted to your own experiences of gaming and the gaming industry.

Specifically your responses to the following matters would assist us in refining the framework:

1. Do you feel that the levels of analysis and the dimensions of impact taken together provide an appropriate framework to analyse the social and economic impacts of gaming? Do you feel that additional measures should be included?
2. Are there any particular linkages, from your perspective, that should be emphasised in the analysis?
3. Do you have any data or material that might not be generally available that you think might assist the analysis? If so would you be willing to make this available?
4. Are there any other comments that you can offer that would assist?

Appendix G

**Discussion Paper Sent to VCGA 1998-99
Research Program Consultants**

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Gambling and Summary of the Victorian Casino and
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November 1999

Contact

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Objectives

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Table 1. Draft Analytical Framework on the Social Impact of Gaming (continued)

LEVEL OF ANALYSIS				
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Financial	<i>Positive impacts:</i> <ul style="list-style-type: none"> • Financial gain <i>Negative impacts:</i> <ul style="list-style-type: none"> • Financial distress • Loss of assets • Bankruptcy • Redistribution of wealth from players to non-players 	<i>Positive impacts:</i> <ul style="list-style-type: none"> • Increased profits for hotels and clubs <i>Negative impacts:</i> <ul style="list-style-type: none"> • Reduction in donations to clubs and charities 		<i>Positive impacts:</i> <ul style="list-style-type: none"> • Increased government tax revenue • Increased government expenditure

Feedback

Input is sought as a check on the appropriateness of the model and particularly whether or not the levels of analysis and the dimensions of impact capture the complexity of gaming from all perspectives.

Specifically your responses to the following matters would assist us in refining the framework:

1. How adequately does the framework fit with your conceptual understanding of the social impacts of gambling?
2. Which of the cells in the model does your past and current research fit into? Which specific positive and negative impacts have you identified as pertaining to those cells?
3. How have you measured those impacts?
4. Are there any other comments that you can offer that would assist?

Appendix H

List of Interviewees Affiliations for Stakeholder Interviews

Appendix H: List of Interviewees Affiliations for Stakeholder Interviews

PARTICIPANTS IN MELBOURNE INTERVIEWS

Licensed Clubs Association of Victoria

Margaret Kearney
John Kelley

Crown Casino

Bill Horman

Interchurch Gambling Task Force

Rev. Ray Cleary
Rev. Tim Costello
John Dalziel

TABCORP

Alan Goodfellow
Peter Fitzgerald
Rohan Martin

Tattersall's

John Harris

Victorian Local Governance Association

Mike Hill
Charles Livingstone

PARTICIPANTS IN TELECONFERENCES

Australian Hotels Association

Alan Giles

Break Even

Chris Freethy

Department of Human Services Victoria

Irene Tomaszewski

The Returned and Services League

Brigadier John Deighton

Appendix I

List of Consultants who Provided Feedback on the Discussion Paper

Appendix I: List of Consultants who Provided Feedback on the Discussion Paper

The following consultants undertaking projects as part of the Authority's *1998-99 Research Program*, provided feedback on the draft analytical framework distributed in November 1999.

Australian Institute for Gambling Research (AIGR)

Centre for Police and Justice Studies

Flinders Technologies Pty Ltd

Geospend

Marketing Science Centre