



Evaluative Research Project:

Final Report to the Independent Gambling Authority



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Abbreviations

OLGC	Office of Liquor and Gambling Commissioner
LGC	Liquor and Gambling Commissioner
IGA	Independent Gambling Authority
BE	Break Even Services
SACOSS	South Australian Council of Social Services
RSG	Responsible Service of Gambling
RSA	Responsible Service of Alcohol
AHA	Australian Hotels Association

Executive Summary

This Report details the findings of an Evaluative Research Project examining the effects of initiatives in regulating gambling in South Australia. Its focus is on the impact of the Advertising and Responsible Gambling Codes, which took effect on April 30, 2004.

Data for the research came from interviews and surveys. Interviews were conducted with gambling providers and industry bodies, staff in gambling venues, gamblers, the Office of the Liquor and Gaming Commissioner, and members of the 'concern sector'. Telephone surveys of samples of recreational and problem gamblers were also conducted. In most cases, interviews and surveys were longitudinal, collecting information from the same groups of people at 4 time points: immediately prior to the formal implementation of the Codes, and 3 months, 9 months and 15 months after implementation.

The surveys of recreational and problem gamblers provided a profile of each group, and showed how they differ. Problem gamblers tend to have significantly lower education and income than recreational gamblers. The groups do not differ substantially on other demographic characteristics. However, their gambling behaviour is substantially different: problem gamblers are most likely to focus on EGM gambling, while recreational gamblers are most likely to focus their gambling on lotteries. Problem gamblers spend far more on their gambling than recreational gamblers, they gamble much more frequently and they spend much longer in gambling sessions.

The longitudinal survey of recreational gamblers found no evidence that the gambling behaviour of the group changed significantly after the introduction of the Codes, though recreational gamblers did slightly increase their gambling outlays over the course of the research.

In contrast, problem gamblers' behaviour almost certainly changed. Their overall spending on gambling declined, as did the frequency with which they gambled on Electronic Gaming Machines (EGMs) and, probably, the length of their EGM sessions. Though these changes were significant, the gambling behaviour of problem gamblers remained very different from that of recreational gamblers. It is likely that most of the change in their behaviour occurred shortly after the introduction of the Codes.

An econometric model of gamblers overall outlays was estimated, incorporating both recreational and problem gamblers. This modelling showed that outlays were largely unaffected by major demographic variables such as education and income. The most important determinants of outlays were simply how often gamblers gambled and for how long they did so. Moreover, after taking account of a range of demographic and behavioural factors, variations in individuals' underlying propensities to gamble explained a very large part of their gambling outlays.

Research with a cohort of 30 licensees revealed that all said that they had made significant changes in progressing towards compliance with the Codes. Implementation of the Codes was gradual. Licensees generally said that they quickly complied with aspects of the Codes that they saw as clear and precise. However, other aspects of the Codes proved more difficult to implement, with some requiring quite substantial culture change in venues. As venues' uncertainty about their responsibilities in regard to the Codes were clarified and further understood, aspects of the Codes that initially proved problematic were adopted and implemented by licensees, albeit quite a time after the implementation of the codes and with some continuing concerns.

Research with industry bodies (peak bodies and large gambling provider organisations) confirmed that the process of implementation of the Codes was a gradual one. These bodies

tended to be concerned about perceived ambiguities and difficulties in the Codes in the early phases of the research. Over the course of the research, the general pattern was for industry groups to become more focused on actually assisting gambling providers to comply with the Codes. Their focus on the difficulties of compliance shifted from emphasising that it was going to be virtually impossible to comply, to an emphasis on solving the practical problems associated with compliance. This shift represented a gradual acceptance that the Codes were unavoidable and, in some cases, an emerging perception that they were capable of producing some positive change in the gambling environment. However, the responses of the various industry groups also became more differentiated over time. Some viewed the Codes as largely inapplicable to them, since they saw themselves as not primarily gambling organisations. Others recognised that gambling was a major aspect of their activities, and gradually accepted the fuller implications of the Codes.

Casino staff appear to have been able to adapt to the Codes and implement them with relative ease, particularly through the early implementation of formal policies and procedures that made clear the division of responsibilities. Initially these procedures appeared to have been built onto established staff roles. However, at later stages, core responsibility for implementation and compliance with the Codes was given to dedicated staff members. Casino staff did appear to have accepted the responsibility to intervene with possible problem gamblers, whether they did so directly or by alerting other staff to issues. They also appeared to view problem gamblers as a problem for the casino, since they disrupted other gamblers.

Hotel staff's experience of the implementation and operation of the Codes was variable. Some hotels established procedures that meant that many staff did not have major responsibilities for ensuring compliance with Code provisions such as alcohol service rules and two EGM play. Others operated on a more *ad hoc* basis, with no well defined division of responsibility. Staff also responded to the Codes in variable ways. Some focused on a perceived conflict of interest between the main purpose of their jobs and their responsibilities under the Codes. Others took the Codes as an opportunity to assist patrons facing gambling problems.

The Office of the Liquor and Gambling Commissioner (OLGC), the body with major enforcement responsibility for the Codes, perceived a number of ambiguities in the Codes that made them difficult to enforce. In response to these ambiguities, the OLGC adopted a largely educative approach towards enforcement of the Codes through much of the first year after their implementation. This approach probably assisted gambling providers to come to terms with the intent of the Codes, and lead to the OLGC's view that compliance with many provisions of the Codes was high by the conclusion of the research. However, even at the end of the research, the OLGC continued to believe that it was virtually impossible to assess compliance with some provisions of the Codes, and remained uncertain of the level of compliance with these provisions.

Representatives of the 'concern sector' remained fairly sceptical of the Codes' impact at the end of the research. They did accept that most gambling providers had made substantial progress towards complying with the Codes. They thought that the Codes had useful effects in raising awareness of problem gambling, and in forging new connections between gambling providers and problem gambler support services. However, they did not believe that any effects on problem gamblers' behaviour were substantial, and noticed no real positive change in the referrals they received to their problem gambler counselling services. Their view was generally that the Codes represented a first step in the right direction, but only a first step.

1. Introduction

This Report details the findings of an Evaluative Research Project examining the effects of initiatives in regulating gambling in South Australia. The research originally aimed to evaluate three initiatives: implementation of Advertising and Responsible Gambling Codes; changes resulting from the inquiry into the management of gaming machine numbers; and introduction of the Problem Gambling Family Protection Orders Scheme. However, the changes resulting from the inquiry into the management of gaming machine numbers, most notably the reduction in gaming machine numbers, was implemented much later than had been anticipated when the research was begun. As a result, it is not possible to provide a complete evaluation of the impact of that change, though comments about it are made where possible. The Problem Gambling Family Protection Orders Scheme was implemented as anticipated, but had more limited uptake than expected, and it was not possible to evaluate its effect. Therefore, this Report focuses primarily on the impact of the Advertising and Responsible Gambling Codes. The research was commissioned by the Independent Gambling Authority and involved the collection of longitudinal data from a range of different sources at four time points during 2004-05.

1.1 *The Legislative Changes*

The Advertising and Responsible Gambling Codes of Practice were required to be adopted by hotels, clubs, Sky City Adelaide Casino, SA TAB, licensed racing clubs and SA Lotteries from the 30th of April, 2004.

The Responsible Gambling Code of Practice incorporates a number of provisions to ensure that general gambling practices are conducted in a responsible manner so as to minimise the harm caused by gambling. For example, it specifies that gambling providers display responsible gambling posters and pamphlets, and that gambling help line materials be both displayed and made available to people who have problems controlling their spending on gambling. It requires gambling providers to take all reasonable steps to provide people who appear to have problems with gambling with the contact details of a gambling help service. Gambling providers are also required to take all reasonable steps to prevent intoxicated people entering and remaining in the gambling area of a venue and gambling, and to ensure that alcohol is not offered to reward or encourage gambling. Restrictions are also placed on the service of alcohol to people sitting or standing at a gaming machine, and patrons are required to play only one electronic gaming machine (EGM) at a time. The Code also requires that staff undertake responsible gambling training and refresh this training every 2 years. Venues are also required to facilitate the exclusion of people who request to be prohibited from gambling, and ensure to the extent reasonably possible that self-excluded people do not enter or remain in the gambling areas from which they have been prohibited.

The Advertising Code of Practice similarly incorporates a number of provisions to ensure that gambling providers' advertising activities are conducted in a responsible manner so as to minimise the harm caused by gambling. This Code makes quite detailed provision for the time and manner in which advertising should take place. For example, it specifies that gambling providers should refrain, on weekdays, from advertising gambling products on radio between 6am and 8:30 am and on television between 4:00pm and 7:30 pm. Audio sounds of gaming machines are also prohibited in TV and radio advertisements. Furthermore, advertisements of gambling products are not permitted to be directed at minors or disadvantaged groups, must not promote gambling as a form of relieving

financial difficulties or as a means to enhance social standing. They cannot make claims about winning prizes that are not based on fact. Advertisements are also required to display the odds of winning. Restrictions are also placed on the association of gambling with excessive alcohol consumption in advertisements.

The State wide reduction in the number of electronic gaming machines began on the 1st of July 2005. Its aims were twofold: to reduce the total number of electronic gaming machines in South Australia by 3000 from approximately 15,000 to 12,000 and to reduce the total number of venues that have electronic gaming machines. With the exception of not for profit association licensed venues, this reduction meant that for every licensed premises with more than 28 machines, the number was reduced by 8. For venues with 21-27 machines the number of electronic gaming machines was reduced to 20. The reduction in venue numbers was to result from allowing venues to buy back gaming machine entitlements up to the previous maximum level of 40 via a controlled trading system, anticipating that some venues may decide to relinquish all machines.

1.2 Research Aims

The research sought to achieve an independent analysis of the social and economic impact of these legislative changes on gamblers, gambling activity and gambling providers. This was to be achieved by interviewing a number of different groups within the gambling industry. Issues that were to be covered in these interviews included the operation and implementation of the codes, the perceived effectiveness of the provisions, experiences of implementing the codes, the impact of the codes on work practices as well as gamblers and gambling activity.

1.3 The Approach

Due to the evaluative nature of this research, the study adopted a longitudinal research design and collected both qualitative and quantitative data from a range of different sources.

Interviews were conducted with a number of different stakeholders as well as proprietors of licensed premises. Interviews were also undertaken with key informants from the OLGC and Break Even service providers. A small sample of both casino and licensed premises staff were also interviewed. Finally telephone interviews were conducted with randomly selected samples of recreational and problem gamblers.

Interviews took place at 4 time points throughout 2004-05. Wave 1 data collection was collected in the period March to April 2004, immediately before the implementation of the Advertising Code and Responsible Gambling Code of Practice. Wave 2 data was collected in August and October 2004, beginning three months after the implementation of the codes. Data was again collected in February and March 2005, 9 months after the implementation of the Codes and again in August and October 2005, 15 months after the implementation of the Codes.

We turn now to consider the research participants in more detail.

1.3.1 Problem and Recreational Gamblers

1.3.1.a The Surveys and Samples

Longitudinal surveys were undertaken with a sample of recreational gamblers and a sample of problem gamblers (see Attachment 2 for Survey Instrument). Survey participants answered a short questionnaire via telephone interview at each Wave of the research. The surveys were contracted to McGregor Tan Market Research. The samples were random samples of all South Australian adults aged 18 or over, based on white pages telephone listings. The aim was to achieve completed samples of 500 recreational gamblers and 50 problem gamblers at Wave 1 of the research. The intention was to interview the same group of gamblers at each Wave of the research to study how their gambling patterns might have changed after the introduction of the Codes. Higher than expected attrition of the sample occurred between Waves 1 and 2 of the survey, and new participants were recruited to the samples at each Wave of the study to maintain the sample sizes.

1.3.1.b Survey Participant Screening

Survey participants were asked several questions at the commencement of their first interview to assess whether they were recreational or problem gamblers, and were then assigned to the appropriate sample. At Wave 1, an initial screening question asked whether participants had participated in any gambling activities (with the major types of activities being listed to potential participants) in the previous 12 months. Those who had not participated in gambling activities during the previous 12 months were thanked for their time, and were not included in the survey. Those who had participated in gambling activities were then subjected to an abbreviated version (3 questions) of the Victorian Gambling Screen (see Appendix 2)¹, and assigned to either the recreational or problem gamblers sample on the basis of their answers. Every effort was made to ensure that new entrants to the sample were drawn from the populations of recreational or problem gamblers at the time of the Wave 1 survey. This meant that the time frame of the initial screening questions was adjusted at each Wave. For example, at Wave 2, approximately 3 months after Wave 1, the initial screening question to new entrants to the samples asked whether potential participants had participated in any gambling activities during the previous 15 months. The result of these techniques is that all samples can be treated as independent random samples of the populations of recreational and problem gamblers (as defined above) at Wave 1. In addition, the samples contain important longitudinal elements that we exploit where appropriate in our analysis.

1.3.1.c Sample Sizes, Entry Waves, and Response Rates

Tables 1 and 2 show the sample sizes at each Wave of the surveys, and the Wave entry points of survey participants.

¹ This procedure was used on the advice of the developers of the Victorian Gambling Screen, Prof. David Ben-Tovim and Dr Adrian Esterman. It represented a practical compromise, since administering the full screen at the beginning of the interview would have resulted in a sharp increase in refusals to participate. The 3 items used were 'Has gambling been more important than anything else you might do? ', 'Has the thought of gambling been constantly on your mind? ', and 'Has your need to gamble been too strong to control? '. The remainder of the Screen was administered towards the end of the interview and it was found that about 66% of participants who had been classified as problem gamblers on the basis of the 3 items were also found to be problem gamblers on the full screen. The remaining 34% were 'borderline problem gamblers', and all showed some problem gambling tendencies. For the purposes of this research, this group thus comprised the problem gamblers sample, and represented a group with clear problem gambler tendencies.

Table 1.1: Wave entry point of recreational gambler sample

Entry Point	Wave 1		Wave 2		Wave 3		Wave 4	
	April 2004	No.	July 2004	No.	February 2005	No.	September 2005	%
Wave 1	504	100.0	220	43.1	153	31.5	112	26.3
Wave 2			290	56.9	223	45.9	148	34.7
Wave 3					110	22.6	63	14.8
Wave 4							103	24.2
Total	504	100.0	510	100.0	486	100.0	426	100.0

Table 1.2: Wave entry point of borderline and problem gambler sample

Entry Point	Wave 1		Wave 2		Wave 3		Wave 4	
	April 2004	No.	July 2004	No.	February 2005	No.	September 2005	%
Wave 1	50	100	18	38	16	32	6	14
Wave 2			29	62	15	30	12	28
Wave 3					19	38	15	35
Wave 4							10	23
Total	50	100	47	100	50	100	43	100.0

Considerable effort was made to enhance participant continuation rates, particularly after the poorer than expected continuation rates between the first and second Waves of data collection, and particularly amongst the problem gambler sample. The effect of these efforts is reflected in the much higher continuation rates between Waves 2 and 3 and between Waves 3 and 4, compared to that between Wave 1 and 2. For example, the continuation rate for the problem gambler sample was 36% between Waves 1 and 2, 66% between Waves 2 and 3, and 66% between Waves 3 and 4.

1.3.1.d Survey Questions

The surveys of recreational and problem gamblers primarily sought information on gambling behaviour, but also contained some questions about subjective responses to gambling, and some demographic questions. The surveys asked participants about the types of gambling in which they participated during given time frames, the frequency with which they gambled, and aspects of the amounts of money they reported gambling and believed they had won or lost. They also asked about the circumstances under which people gambled (for example, was gambling part of a social outing or were trips to gambling venues made solely for the purpose of gambling), and the pleasure they gained from gambling. Demographic questions included participants' age, sex, marital status, housing tenure type, country of birth, household income, labour force status, education, and the main source of household income.

1.3.2 Industry Groups and Peak Bodies

Interviews were conducted with senior representatives from the Australian Hotels Association (AHA), Clubs SA, SA TAB, Harness Racing SA, Greyhound Racing SA, Thoroughbred Racing SA, SA Lotteries, and Sky City Adelaide Casino at each Wave of the research. Interviews were unstructured but focused around key issues such as the experiences of the implementation and operation of the Codes and the impact the Codes had had on their business (see Appendix 3 for Interview schedule).

1.3.3 Licensee

Prior to data collection, a sample of 35 venues was randomly selected by computer from a list of licensed premises provided by the OLG. Seven additional venues were included, to ensure that venues from several large regional centres which had not been randomly selected were incorporated, and to increase the representation of clubs. A total of 42 venues were selected, 32 of which were interviewed, giving a response rate for venues contacted at Wave 1 of 76%.

Retention of venues throughout the research was extremely high. The initial 32 respondents were again contacted at each Wave of the research and invited to contribute once more. At Wave 2 and 3, 30 of the initial respondents contributed to the research. At Wave 4, 29 participated. Table 3 documents the compositions of the licensee sample across the Wave of the research.

Table 1.3: Licensed premises sample composition

	Wave 1	Wave 2	Wave 3	Wave 4
Venue type				
Hotel	25	23	23	22
Club	7	7	7	7
Location				
Metropolitan	21	20	19	18
Country	11	10	11	11
Total Sample	32	30	30	29¹

¹ Note: while 29 venues were interviewed at Wave 4 of the research, 1 venue only answered questions new to the survey due to both time constraints and their perception that nothing had changed since Wave 3.

An interview schedule was used with a mix of closed and open-ended questions (see Appendix 4). These questions were designed to assess licensees' experience of the operation and implementation of the Codes, the effectiveness of the provisions and the impact of the Codes on the staff, the venue and the patrons.² Additional questions about the impact of the possible changes in the numbers of gaming machines on the venues and patrons were also incorporated in the Wave 1, 3 and 4 schedules. Essentially the same schedule of questions was implemented at each Wave of the research to allow assessment of changes in responses over time. Face to face interviews were conducted with metropolitan venues while country venues were interviewed by phone.

1.3.4 Licensed Premise Staff

Interviews were conducted with staff from eight licensed premises three months after the introduction of the Codes. A structured interview schedule was used, with questions developed to assess the impact the Codes had had on the behaviour of patrons and on their work (see Appendix 5).

The participants were employed in a variety of settings. Six worked in hotels and two in clubs. The number of gaming machines in their venues ranged from 4 to 40. Four worked in venues with 40 machines, one venue had 21 machines, and the rest worked in

² It is possible that the process of interviewing venues affected their response to the Codes, perhaps by sensitising them to the Codes' requirements. While it is not possible to entirely eliminate this possibility, it is extremely unlikely to be of consequence for the outcomes reported in this Report. Interviews were short, requiring about 20 minutes of managers' time, and occurred at quite long intervals (3 or 6 months). Such brief, infrequent discussions would be unlikely to have lasting effects of what managers did. Indeed, interviewees showed no indication of having even remembered the questions or even the main topics of the interview when they were reinterviewed.

establishments with 10 or fewer machines. The length of time staff had been employed in gaming rooms ranged from 7 months to 11 years.

1.3.5 *Casino Staff*

Three months after the Codes came into operation (Wave 2), interviews were conducted with nine staff employed by the casino. An interview schedule was used with questions aimed to assess any changes in the behaviour of patrons and in the work of staff since the introduction of the Codes (see Appendix 6). Interviews were not conducted with casino staff at Wave 1 because the focus of interviews was on their experience of implementing Codes.

Fifteen months after the implementation of the Codes, casino staff were interviewed for a second time. Interviews were sought with the same respondents who participated at Wave 2 of the research. However, some of the initial participants had either left the company or were no longer working in the same capacity within the company. In these circumstances staff that held the same or similar positions to those who had participated previously were invited to contribute to the research. Of the nine staff interviewed at Wave 2, six were reinterviewed at Wave 4, along with one new staff member. The remaining staff members interviewed at Wave 2 were reported to have left the casino and the invitations to staff who had been appointed to their positions were declined.

The initial interview schedule developed at Wave 2 was again implemented to allow us to assess changes in responses over time.

Staff interviewed at both Waves of the research worked in managerial positions in the following areas: table games, gaming machines, security, food and beverages, and host responsibility coordinators. The length of time respondents had worked at the casino varied significantly, with some having been employed for less than a year, and others having worked at the casino for over 18 years.

1.3.6 *Compliance Sector*

Interviews were conducted at each Wave with the Liquor and Gambling Commissioner and staff from the Casino and Licensed Premises Inspectorates. At Wave 1, interviews were conducted with both the Commissioner and the Deputy Commissioner for Gambling. The Manager for Gambling Administration was also interviewed. It was not possible to interview OLGC Inspectors at this stage of the research project, as the new policies and procedures were at the development stage, and inspectors would not be informed of the new requirements until close to the 30 April deadline.

At Wave 2, three people from the Licensed Premises and Gaming Machine Installation Inspectorate were interviewed together at the OLGC. The group comprised two inspectors and the manager of the inspectorate. One individual interview was also conducted with an inspector from the Casino Inspectorate at the casino.

The Liquor and Gambling Commissioner along with the Manager Gambling Administration as well as a staff member from the Casino Inspectorate at the casino were interviewed again at Wave 3. Licensed Premises and Gaming Machine Installation Inspectors were also interviewed, this time without the manager present. With the exception of the Manager Gambling Administration, all were interviewed again at Wave 4 of the research.

A structured interview schedule was followed for the interviews with the Inspectors. This schedule included questions designed to assess any changes that had occurred in their work as a result of the Codes, their perceptions of, and opinions on the impact of the Codes, and progress made by venues in compliance with the Codes (see Appendix 7 and 8).

1.3.7 *Concern Sector*

Interviews were conducted with representatives from a number of Break Even services, as well as the Hon. Nick Xenophon at each Wave of the research. At Wave 1, interviews were conducted with representatives from the Heads of Churches Gambling Task Force, SACOSS, and key representatives from Anglicare, Uniting Care Wesley, Relationships Australia, Nunkuwarrin Yunti, Centre for Anxiety and Related Disorders, and Lifeline Break Even services.

With the exception of SACOSS, whose representative took a position at the AHA, all participants agreed to contribute to the research at Wave 2. To counter the loss of one participant, a representative from the Salvation Army Break Even Service was included in the Wave 2 sample.

Apart from the representative of one agency, these respondents continued their participation in both Wave 3 and 4. The agency representative who declined to participate at Waves 3 and 4 suggested that they could not contribute further to the research as nothing had changed.

Interviews were based around an unstructured interview schedule that aimed to cover topics about perception of the Codes, the impact of the Codes on gamblers and gambling activity, relationships with gambling providers, any changes in the number of enquirers or clients, the types of gambling that are presenting as a problem for people, and changes to agencies' capacity to provide support for people who have problems with gambling (see Appendix 9).

1.4 *Conclusion*

The remainder of this Report explains the main findings in relation to each of the above groups. The concluding chapter outlines some of the main findings and their implications, with a focus on bringing together findings from the various chapters.

2. Recreational Gamblers and Problem Gamblers, Continuity and Change

2.1 *Introduction*

In this chapter of the Report, we examine the results of our longitudinal surveys of recreational and problem gamblers. We begin by presenting profiles of each group. These profiles are important contextual information for assessing change in gambling behaviour, and also sharply define the differences between recreational and problem gamblers. We then focus on the key question of the research: did the gambling behaviour of recreational or problem gamblers change following implementation of the Advertising Code and the Responsible Gambling Code of Practice? Overall, we find little evidence of consistent change in the behaviour of recreational gamblers, but some consistent evidence that problem gamblers reduced the frequency of their self-reported EGM gambling, and the amounts they gambled overall and took to EGM gambling sessions. In the final section of this chapter, we present the results of a sophisticated statistical analysis of the results of our surveys. These results throw important light on the factors affecting how much money gamblers outlay, suggesting that most demographic factors have no impact on gambling behaviour, that frequency and length of EGM sessions are crucial in gamblers' outlays, and that individual differences not caused by demographic characteristics explain a large part of gamblers' expenditure.

2.2 *A Profile of Recreational and Problem Gamblers*

The characteristics of gamblers and their patterns of gambling behaviour provide an important context for assessing the impact of policy change and development. In this section we outline the main demographic characteristics of each group at Wave 1 of our surveys, and the main features of their gambling behaviour at Wave 1.

2.2.1 *Demographic Characteristics*

Table 2.1 shows that recreational gamblers were more likely to be women than men – nearly 60% were women and about 40% were men. The pattern is reversed with respect to problem gamblers. Nevertheless, problem gambling was by no means a male preserve, with 44% of our problem gambler group being women. Problem gamblers also appeared to be less likely to be married or living with a partner than recreational gamblers and more likely to have never been married, though the majority of both groups were partnered. The two groups were not strikingly different in the kinds of households they lived in, with the largest number of both groups, just over a third, being in couple families with children. Similarly, the problem gambler group was not strikingly different from the recreational gambler group in its patterns of housing tenure, country of birth or main source of income. However, there were sharp differences in household income and education. Problem gamblers were much more likely than recreational gamblers to come from low income households – 48% of the former came from households with annual incomes of \$30,000 or less, compared to 30% of the latter. Problem gamblers also tended to have lower levels of formal education than recreational gamblers, with 65% of recreational gamblers having completed high school compared to only 39% of problem gamblers. There were no significant differences in the age distribution of the two groups.

Table 2.1: Demographic characteristics of recreational and problem gamblers, Wave 1

Demographic Characteristics	Recreational Gamblers %	Problem Gamblers %
Sex		
Males	40.3	56.0
Females	59.7	44.0
<i>Number of Responses</i>	501	50
Age in years		
18-29	20.0	18.0
30-49	42.1	48.0
50+	37.9	34.0
<i>Number of Responses</i>	501	50
Marital Status		
Married or living with partner	63.3	50.0
Sep/div/widowed	17.0	16.0
Single (Never married)	19.2	34.0
Refused	0.6	-
<i>Number of Responses</i>	501	50
Household type		
Single	17.0	20.0
Couple, no children	26.3	18.0
Couple with children	39.3	36.0
Single parent with children	8.4	18.0
Other	8.6	8.0
Refused	0.4	-
<i>Number of Responses</i>	501	50
Housing Tenure		
Own	44.7	30.0
Paying off	31.3	30.0
Rent	19.2	38.0
Other	4.8	2.0
<i>Number of Responses</i>	501	50
Country of Birth		
Australia	78.5	62.0
UK	13.6	20.0
NZ	0.6	2.0
Europe	5.1	14.0
Asia	1.0	2.0
Other	1.2	-
<i>Number of Responses</i>	494	50
Main Source of Income		
Wage/salary	61.6	66.0
Own business/private income	14.4	4.0
Pension or benefit	24.0	30.0
<i>Number of responses</i>	492	50
Household Income		
0-\$30k	30.1	47.6
\$30,001-\$60,000	34.5	28.6
More than \$60,000	34.7	23.8
<i>Number of Responses</i>	390	42
Education level		
Did not complete high school	35.1	61.2
Yr 12	24.8	20.4
Trade certificate or diploma	19.0	10.2
Bachelor/PhD	21.1	8.2
<i>Number of Responses</i>	479	49

2.2.2 *Gambling Behaviour*

The gambling behaviour of the problem gambler group we surveyed was strikingly different from that of the recreational gambler group. This is not a surprising result – by definition problem gamblers behave differently from recreational gamblers. However, understanding the ways in which the gambling behaviour of the two groups differs is important in comprehending how they may respond to changes in the gambling environment.

Table 2.2 shows gamblers' patterns of participation across different types of gambling activity during the 12 months before their Wave 1 interview. In general, problem gamblers were much more likely than recreational gamblers to participate in every type of gambling except lotteries, where about three quarters of both groups participated. Nearly all problem gamblers (86%) had used Electronic Gaming Machines (EGMs), the most common form of gambling for the group. In contrast, 48% of recreational gamblers had used EGMs, substantially less than the 75% who had participated in lotteries.

Problem gamblers were also much more likely than recreational gamblers to have participated in multiple forms of gambling. Only 10% of problem gamblers had participated in only one form of gambling, compared to 42% of recreational gamblers. And 46% of problem gamblers had participated in 4 or more types of gambling compared to 12% of recreational gamblers.

Asking which activities gamblers played most, and which they spent most money on, made it very clear that EGMs were the dominant activity for problem gamblers. Two thirds said that they spent most money on EGMs, and 58% said that EGMs were the activity they played most. In sharp contrast, about one third of recreational gamblers said that they spent most money on EGMs, and a quarter said that they played them more than other activities. For recreational gamblers, lotteries were dominant, with half saying that this was the form of gambling in which they participated most, and 45% saying it was the one on which they spent most money. In contrast, only about 15% of problem gamblers focused their gambling on lotteries, a proportion similar to that focusing on racing.

Table 2.2: Types of gambling engaged in by recreational and problem gamblers, and most important types, Wave 1 (per cent)

Type of Gambling	Recreational Gamblers %	Problem Gamblers %
<i>Gambling activities in last 12 months (multiple response)</i>		
EGM's	47.9	86.0
Racing	21.2	42.0
Lottery products [†]	74.9	76.0
Instant scratch tickets	35.5	50.0
Keno	11.0	40.0
Casino table games	6.4	22.0
Bingo	3.8	8.0
Sports betting	3.8	14.0
Casino games on the internet	0.4	2.0
Cards Privately for money	3.0	8.0
Other	0.2	-
<i>Number of responses</i>	501	50
<i>No. of Types of Gambling</i>		
1	42.1	10.0
2 or 3	45.3	44.0
4 or more	12.2	46.0
<i>Number of responses</i>	501	50
<i>Gambling activity played most</i>		
EGM's	25.4	57.8
Racing	5.2	22.2
Lottery products	50.5	17.8
Instant scratch tickets	12.4	-
Keno	2.4	2.2
Casino table games	0.3	-
Bingo	0.7	-
<i>Number of responses</i>	291	45
<i>Gambling Activity Spent Most Money</i>		
EGM's	32.0	66.7
Racing	9.0	15.6
Lottery products	45.0	15.6
Instant scratch tickets	8.0	-
Keno	2.0	2.2
Casino table games	1.0	-
Bingo	1.0	-
<i>Number of responses</i>	336	45

[†]Respondents were asked about "Lotto or any other lottery game (e.g. SA Lotto, Oz Lotto, Powerball, Super 66, the Pools)".

Table 2.3 demonstrates the sharply different frequency of EGM gambling and time spent on EGM gambling sessions of problem gamblers compared to recreational gamblers. Whereas about 9% of recreational gamblers who used EGMs did so at least once a week, about 77% of problem gamblers who used EGMs did so this often. Most recreational gamblers who used EGMs were very infrequent users, with 65% using them less than once a month, whereas only 14% of problem gamblers who played EGMs used them this often. As well as using EGMs much more often than recreational gamblers, problem gamblers also tended to spend much longer using them. Whereas 63% of recreational users of EGMs usually spent less than 30 minutes per session on the machines, only 5% of problem gamblers did so. Indeed, just over half of problem gamblers usually spent 1½ hours or longer per session, compared to 5% of recreational gamblers.

Lottery gambling is the other area of gambling where we can readily compare the behaviour of problem gamblers and recreational gamblers. Here, the behaviour of the two groups is far more similar than in relation to EGMs, although problem gamblers were clearly somewhat more frequent participants than recreational gamblers. About 43% of recreational gamblers who participated in lotteries did so at least once a week, compared to 53% of problem gamblers.

Table 2.3: Frequency and duration of EGM gambling and frequency of lottery gambling, recreational and problem gamblers, Wave 1

Frequency of gambling and length of type gambling	Recreational Gamblers %	Problem Gamblers %
Frequency of use of gaming machines		
Daily	-	9.3
2-3 times a week	1.3	37.2
Once a week	7.9	30.2
Once a fortnight	12.1	7.0
Once a month	13.3	2.3
Once every 2-3 months	31.7	11.6
Less than once every 3 months	33.7	2.3
<i>Number of responses</i>	240	43
Usual length of time on gaming machines		
Less than 30 minutes	63.3	4.7
30-59 minutes	21.3	23.3
1 to 1.5 hours	8.3	18.6
1.5 to 2 hours	3.3	23.3
2 to 3 hours	1.7	11.6
Over 3 hours	-	16.3
Varies	2.1	2.3
<i>Number of responses</i>	240	43
Frequency of buying lottery products		
More than once a week	5.8	13.2
Once a week	37.5	39.5
Once a fortnight	7.4	2.6
Once a month	12.0	26.3
Once every 2-3 months	22.9	7.9
Less than once every 3 months	14.4	10.5
<i>Number of responses</i>	376	38

^{*}Note: percentages are of those who engage in each type of gambling.

Table 2.4 shows the frequency and, in some cases time spent, on other less common forms of gambling by recreational³ gamblers: racing betting (horses or greyhounds), instant scratch tickets ("scratchies") and Keno. In general, the Table indicates that a sizeable majority of those recreational gamblers who participated in these forms of gambling did so less often than once a month. Moreover, when they did participate in racing betting or Keno, most spent less than 30 minutes in betting activities.

³ As Table 2.2 shows, relatively few gamblers engage in these activities. Because of the small size of the problem gamblers sample, the numbers who engaged in these activities was too small to provide reliable estimates for this group.

Table 2.4: Gambling patterns of recreational gamblers with respect to racing betting, instant scratch tickets and Keno, Wave 1

Frequency of gambling and length of type gambling	Recreational Gamblers %
Frequency of buying instant scratch tickets	
Once a fortnight or more often	19.7
Once a month	20.2
Less than once a month	59.0
Don't know	1.1
<i>Number of responses</i>	<i>178</i>
Frequency of betting on horses/dogs	
Once a fortnight or more often	17.9
Once a month	3.8
Less than once a month	78.3
<i>Number of responses</i>	<i>106</i>
Time spent on gambling activity at horses/dogs	
Less than 30 minutes	63.2
30-59 minutes	11.3
1 hour or more	23.5
Don't know	1.9
<i>Number of responses</i>	<i>106</i>
Frequency of playing Keno	
Once a fortnight or more often	14.6
Once a month	12.7
Less than once a month	67.2
Don't know	5.5
<i>Number of responses</i>	<i>55</i>
Usual time spent on Keno	
Less than 30 minutes	78.2
30-59 minutes	7.3
1 hour or more	5.4
Varies	1.8
Don't know	7.3
<i>Number of responses</i>	<i>55</i>

Note: percentages are of those who engage in each type of gambling.

Problem gamblers had much higher overall outlays than recreational gamblers.⁴ Whereas about 78% of recreational gamblers said that they spent \$10 a week or less on average on gambling, only 7% of problem gamblers did so (Table 2.5). In contrast, over half of problem gamblers spent more than \$50 per week on all gambling, compared to about 4% of recreational gamblers. This sharp difference in overall gambling spending was reflected in EGM expenditure, where 66% of recreational gamblers usually took \$10 or less when they went to an EGM session, compared to only 11% of problem gamblers. Nearly three quarters of problem gamblers usually took \$26 or more (with many taking much more) for EGM sessions, compared to 9% of recreational gamblers. Problem gamblers were also much more

⁴ Survey questions about gambling outlays were asked using two different phrasings. Respondents were asked about the overall amount they 'spent' weekly on all gambling and on lotteries, and when they bought instant scratch tickets. They were asked how much money they usually 'took' to gamble when they gambled on EGMs, horse race betting, and Keno. This wording was used, following pilot testing of the survey instruments, because the amount gamblers took to gamble at venues where they spent some time gambling was felt to be the most useful indicator of the intensity of their commitment to that gambling. It was also a question they could readily answer. Patterns of spending on lotteries were not susceptible to this wording, since people tended simply to buy lottery products at a venue and then leave. Respondents found the question on overall gambling spending relatively easy to answer too. The result of these variations in question wording is that it is not possible to precisely compare spending on some forms of gambling with others (e.g., lotteries spending cannot be precisely compared with EGM spending). In this chapter, we compare outlays (using both phrasings) of recreational and problem gamblers, and outlays across Waves of the study, but we do not make precise comparisons between types of gambling where question wording makes this impossible.

likely than recreational gamblers to say that they used ATMs or coin machines at gambling venues when playing EGMs. Nearly 80% of recreational gamblers never used ATMs and nearly 60% never used coin machines, compared to 23% of problem gamblers who never used ATMs and only 9% who never used coin machines. Again, differences in the behaviour of problem and recreational gamblers were much less pronounced in relation to lottery gambling. Here, 98% of recreational gamblers outlaid \$25 a week or less, as did 82% of problem gamblers. Moreover, no problem gamblers outlaid more than \$50 per week on lotteries.

Table 2.5: Total, EGM and lottery outlays, recreational and problem gamblers, Wave 1

Amounts Outlaid on Gambling	Recreational Gamblers %	Problem Gamblers %
Average amount spent each week on all gambling		
<i>Number of responses</i>		
\$0-\$10	77.7	6.7
\$11-\$25	12.9	13.3
\$26-\$50	5.2	24.4
\$51-\$100	1.9	22.2
\$101 or above	2.3	33.3
<i>Number of responses</i>	426	45
Usual amount taken to EGMs		
0-\$10	65.5	10.5
\$11-\$25	25.6	15.8
\$26-\$50	6.7	26.3
\$51-\$100	1.8	18.4
\$101 or more	0.4	28.9
<i>Number of responses</i>	240	38
Frequency of use of ATMs and coin machines for EGM play		
Never	77.9	23.3
Rarely	11.7	23.3
Sometimes	8.8	34.9
Often	1.3	16.3
Always	.4	2.3
<i>Number of responses</i>	240	43
Amount spent weekly on lottery products		
\$0-\$10	78.4	44.1
\$11-\$25	19.7	38.2
\$26-\$50	2.0	17.6
\$51-\$100	-	-
\$101 and above	-	-
<i>Number of responses</i>	356	34

**Note: percentages are of those who engage in each type of gambling.*

As Table 2.6 shows, recreational gamblers' outlays⁵ on other forms of gambling were also modest. Three quarters of those who bet on racing said they outlaid \$25 or less when they do so, 99% of those who buy instant scratch tickets outlaid \$10 or less when they bought them, and 94% of Keno players spent \$10 or less when they play Keno. In keeping with this pattern, almost all Keno gamblers (92%) did not use ATMs when they gambled on Keno (data note shown in Tables).

⁵ Again, due to the small proportion of gamblers of both types engaging in these activities, the number of problem gamblers engaging in them was too small to provide reliable estimates.

Table 2.6: Recreational gamblers' outlays on racing, instant scratch tickets and Keno, Wave 1

	Recreational Gamblers %
Amount taken to bet on horses	
\$0-\$10	45.6
\$11-\$25	33.0
\$26-\$50	14.6
\$51-\$100	5.8
\$101 and above	1.0
<i>Number of responses</i>	<i>103</i>
Amount spent when purchased instant scratch tickets	
\$0-\$10	99.4
\$11-\$25	0.6
\$26-\$50	-
\$51-\$100	-
\$101 and above	-
<i>Number of responses</i>	<i>172</i>
Amount taken to play Keno	
\$0-\$10	93.6
\$11-\$25	4.3
\$26-\$50	2.1
\$51-\$100	-
\$101 and above	-
<i>Number of responses</i>	<i>47</i>

*Note: percentages are of those who engage in each type of gambling.

2.2.3 Gambling Circumstances

In addition to direct gambling behaviour, the circumstances under which people gamble are of great interest. Survey participants were asked about the types of venues where they usually undertook gambling, other activities they undertook with gambling, how far they travelled to gamble, and whether they were able to gamble easily at the venues they visited.

Table 2.7 shows that most recreational and problem gamblers engaged in EGM gambling at pubs or hotels, with only small minorities doing so at the casino or at clubs. It also indicates that the vast majority of recreational gamblers (about 84%) used EGM machines when visiting venues for social reasons. In other words, EGM gambling is not the main purpose of their visit. In contrast, over half of problem gamblers indicated that gambling was the sole reason for their visit to EGM venues, and another 21% said that both gambling and social reasons motivated their visits to EGM venues. This was consistent with accounts of other activities in which gamblers participated while at venues. Almost all recreational gamblers (84%) indicated that they dined at EGM venues on the occasions when they used EGMs, and half said that they drank. No recreational gamblers indicated that gambling was the only activity they undertook when they attended EGM venues. In contrast, only just over a third of problem gamblers (37%) dined at EGM venues, and about a quarter said that did nothing but gamble, though half also said that they drank at venues. Thus, it appears that problem gamblers' visits to EGM venues are much more focused on gambling than those of recreational gamblers. Indeed, EGM gambling is usually a peripheral activity at EGM venues for recreational gamblers.

Most gamblers do not travel far to reach EGM gambling venues, though, on average, problem gamblers travel shorter distances than recreational gamblers. Again, this may be

because recreational gamblers are engaged primarily in social activities at EGM venues, and these may not necessarily occur at the nearest EGM venues.

Few gamblers reported any difficulty in finding EGMs available when they wanted to use them.

Table 2.7: Gambling circumstances of recreational and problem gamblers

Gambling Circumstances	Recreational Gamblers %	Problem Gamblers %
Type of Venue where EGMs usually played		
Casino	14.2	4.7
Club	10.0	20.9
Pub or Hotel	86.7	93.0
Other	1.3	-
<i>Number of respondents</i>	240	43
Reasons for visit to EGM venue		
Social	83.8	27.9
Gambling	7.5	51.2
Both	8.3	20.9
Varies	0.4	-
<i>Number of responses</i>	240	43
Other activities at EGM venue		
Dining out	84.1	37.2
Drinking	50.6	51.2
Live entertainment	21.9	9.3
Using the ATMs	15.5	27.9
Something else	3.0	2.3
Nothing else	-	23.3
<i>Number of respondents</i>	233	43
Distance travelled to play EGMs		
Less than 5 kms	55.8	72.1
5 to less than 10 kms	25.8	20.9
10 to less than 15 kms	5.4	2.3
15 to less than 20 kms	5.0	4.7
20 or more kms	5.4	-
Don't know	2.5	-
<i>Number of responses</i>	240	43
Was EGM available when wanted?		
Yes	92.5	93.0
No	7.5	7.0
Don't know	-	-
<i>Number of responses</i>	240	43

**Note: percentages are of those who engage in each type of gambling.*

Table 2.8 shows that, amongst recreational gamblers who bet on racing, only a minority gambled at a racetrack. Most used TAB facilities, either at an off-course TAB outlet, or at a Pub TAB. It also appears that, like their visits to EGM venues, recreational gamblers' visits to the casino when they play table games are primarily social in motivation. Only 12% of recreational gamblers said that they visited the casino to gamble, with the vast majority (82%) saying that they went for social reasons.

Table 2.8: Circumstances of racing and casino gambling, recreational gamblers

	Recreational Gamblers %
Where did you place horse bets?	
At a racetrack	32.1
Off-course TAB outlet	46.2
Pub TAB	29.2
By phone	9.4
Via the internet	0.9
<i>Number of responses</i>	106
Reason for visit to Casino	
Social	82.4
Gambling	11.8
Both	5.9
Varies	-
<i>Number of responses</i>	34

^{*}Note: percentages are of those who engage in each type of gambling.

2.2.4 Summary

Problem gamblers do differ from recreational gamblers in some demographic characteristics: problem gamblers are more likely to come from low income households, they are less likely to be born in Australia, and they are much less likely to have completed high school. While these differences are clear cut, it remains the case that problem gamblers are to be found in all demographic groups.

Problem gamblers are sharply distinguished in their gambling behaviour, most strikingly with EGM gambling. They are more likely to use EGMs than recreational gamblers, and EGM gambling is the form on which they spend most time and money. In contrast recreational gamblers spend most time and money on lotteries. Problem gamblers use EGMs much more frequently and for much longer periods than recreational gamblers, and they outlay much more money on them. They do also spend more money on lotteries and gamble on them somewhat more frequently than recreational gamblers. However the contrast between the behaviour of the two groups is much sharper with respect to EGM gambling than lotteries gambling.

Data about the circumstances in which people gamble indicate that gambling tends to be a peripheral activity for recreational gamblers who attend gambling venues for other purposes, usually social ones. On the other hand, problem gamblers usually adduce gambling as a prime motivator for their visits to gambling venues.

2.3 Did Gambling Behaviour Change Following Code Changes?

The prime purpose of collection of data on the gambling behaviour of recreational and problem gamblers was to assess whether their behaviour changed following the introduction of the Codes in April 2004. Both groups were surveyed shortly before the introduction of changes and at three intervals after their introduction: 3 months, 9 months and 15 months after the changes. These time points were chosen because it was not known at the start of the research how long it might take for the regulative changes to affect gamblers' behaviour. By collecting data at the above three time points, it was hoped that any significant change in behaviour would be observed, and some assessment could be made of how long it may take for regulative changes to have effect on gamblers' behaviour. Thus, the primary aim of these longitudinal surveys was to assess whether gambling behaviour

changed between the initial survey and each following time point, although we were also interested in whether it changed between surveys after the initial introduction of changes.

Assessment of whether gambling behaviour changed during the research period would have been straightforward had the retention of participants been at the level expected by the researchers and the contracted survey company. However, as noted in Chapter 1, there were significant problems of retention in the surveys, particularly in the problem gamblers sample following the first survey. While replacement of participants lost between survey Waves did assist in ensuring that useful findings could be made from the surveys, they also necessitated adaptation of the analyses used to assess change. No single technique is able to provide unequivocal assessment of whether behaviour change occurred. However, combining the results of different forms of analysis generates a clearer picture of whether change did occur. In the analyses that follow, we describe the results of several forms of analysis before reaching conclusions about the evidence of change in gamblers' behaviour.

2.3.1 **Recreational Gamblers**

2.3.1a **Type of gambling**

One important dimension of gambling behaviour is simply the types of gambling in which people engage. Table 2.9 shows clearly that there was no shift in the proportion of recreational gamblers who engaged in each of the major types of gambling over the course of the research. Even the small declines in the proportions who participated in most gambling activities other than lotteries and bingo between the first and second Waves of the survey are reversed in the final Wave. This confirms that they are almost certainly due to the shift in the time frame of the question (12 months in Waves 1 and 4, and 3 months in Waves 2 and 3).⁶ The only indication of change is that the proportion who bought lottery tickets did steadily increase. Although the rise is small, it does suggest that there was a small increase in lottery gambling by recreational gamblers over the period of the research.

Table 2.9: Participation in gambling activities, recreational gamblers (per cent*)

Form of Gambling	Wave 1	Wave 2	Wave 3	Wave 4
Poker or gaming machines	47.9	44.4	44.0	51.0
Horse or greyhound races	21.2	11.7	11.4	17.3
Lotteries	74.9	79.0	81.3	82.4
Instant scratch tickets	35.5	27.4	27.3	34.4
Keno	11.0	10.6	11.2	14.1
Casino table games	6.4	3.3	3.9	6.7
Bingo	3.8	5.1	4.6	6.7
Sports betting	3.8	3.3	.7	5.9
Casino games on the internet	.4	.2	.2	.5
Cards privately for money	3.0	2.0	1.9	3.7
Other	.2	.4	-	.2
<i>Number of respondents</i>	<i>501</i>	<i>453</i>	<i>411</i>	<i>404</i>

*Per cent of respondents who gambled

W1, W4 = Previous 12 months

W2, W3 = Previous 3 months

⁶ The pattern for participation in betting on horse or greyhound racing follows this pattern, with a clear indication that as many as half of those who bet on horses or greyhounds do so only about once a year.

Tables 2.10 and 2.11 show which gambling activities recreational gamblers played most, and which they spent most money on. Again, there is little evidence of significant change in gambling patterns amongst this group. If anything, lotteries, always the dominant form of gambling amongst recreational gamblers, became slightly more dominant during the period of the study. This shift was largely at the expense of instant scratch tickets.

Table 2.10: Gambling activity played most, recreational gamblers (per cent*)

Gambling Activity	Wave 1	Wave 2	Wave 3	Wave 4
Poker or gaming machines	25.4	21.4	24.5	24.7
Horse or greyhound races	5.2	6.9	9.2	5.5
Lotteries	50.5	52.4	49.3	54.2
Instant scratch tickets	12.4	7.3	9.2	5.2
Keno	2.4	2.8	2.6	2.2
Casino table games	.3	.8	.4	1.5
Bingo	.7	3.6	3.1	3.7
<i>Number of respondents</i>	<i>291</i>	<i>248</i>	<i>229</i>	<i>271</i>

*Per cent of respondents who gambled

W1, W4 = Previous 12 months

W2, W3 = Previous 3 months

Table 2.11: Gambling activity on which the most money was spent, recreational gamblers (per cent*)

Gambling Activity	Wave 1	Wave 2	Wave 3	Wave 4
Poker or gaming machines	32.0	32.0	31.0	25.8
Horse or greyhound races	9.0	9.0	10.9	7.0
Lotteries	45.0	44.0	46.3	54.6
Instant scratch tickets	8.0	4.0	4.8	1.8
Keno	2.0	1.0	1.3	1.8
Casino table games	1.0	4.0	1.7	1.8
Bingo	1.0	4.0	2.2	4.4
<i>Number of respondents</i>	<i>336</i>	<i>280</i>	<i>229</i>	<i>271</i>

*Per cent of respondents

W1, W4 = Previous 12 months

W2, W3 = Previous 3 months

2.3.1b Frequency and time spent gambling

Turning to the frequency with which recreational gamblers participated in various forms of gambling, and the amount of time they spent in gambling sessions, Tables 2.12 and 2.13 show little consistent evidence of change with respect to EGM gambling. At every Wave of the survey after the first, nearly three quarters of recreational gamblers said that they used EGMs every 2-3 months or less often (including not using them at all). This proportion was a little higher at Wave 1 (84%), indicating the possibility that recreational gamblers slightly increased their use of EGMs after Wave 1. Table 2.13 does show some variation in the proportions of recreational gamblers usually gambling for short (less than 30 minutes) and long periods. The changes are small, but they do suggest that recreational gamblers may have increased the time they spend on EGM gambling immediately after Wave 1.

Table 2.12: Frequency of using gaming machines, all recreational gamblers (per cent)

Frequency	Wave 1	Wave 2	Wave 3	Wave 4
More than once a week	0.6	2.0	1.0	2.1
Once a week	3.8	5.9	6.2	4.3
Once every 2-4 weeks	12.2	17.7	19.4	18.4
Once every 2-3 months	15.2	11.8	10.1	20.6
Less than once every 3 months	68.3	62.6	63.2	54.6
<i>Number of respondents</i>	501	508	484	423

*W1, W4 = Previous 12 months**W2, W3 = Previous 3 months***Table 2.13: Usual length of time spent using gaming machines, recreational EGM gamblers (per cent)**

Time	Wave 1	Wave 2	Wave 3	Wave 4
Less than 30 minutes	63.3	51.0	40.8	52.2
30-59 minutes	21.3	26.0	27.4	22.0
1-3 hours	13.3	19.5	21.8	22.9
More than 3 hours	-	1.5	2.2	-
Varies	2.1	2.0	7.8	2.9
<i>Number of respondents</i>	240	200	179	205

*W1, W4 = Previous 12 months**W2, W3 = Previous 3 months*

As well as snapshots of the behaviour of recreational gamblers at different time points, the survey data can be used to follow changes in the behaviour of individual gamblers. For example, we can calculate the number of gamblers who increased or decreased the frequency with which they used EGMs from one Wave to the next. In the analysis that follows, we combine all such transitions, not distinguishing transitions between different Waves. Given the significant losses from the gamblers surveys, this method provides an efficient use of the longitudinal aspect of the data. It means that information about changes in the behaviour of any gambler who was interviewed in at least two adjacent Waves of the survey can be used.

Table 2.14 shows the proportions of recreational EGM gamblers who changed the frequency with which they used EGMs or changed the usual amount of time they spent using them. The Table shows that there is quite considerable variation over time in the frequency with which recreational gamblers use EGMs, and the time they spend on them. Where recreational gamblers gambled on EGMs in two adjacent Waves of the survey, only just over half did not change the frequency with which they used machines or the usual time they spent using them. However, there is no indication that there was any consistent trend in the changing behaviour of those who altered the frequency of usual time spent on EGMs between Waves. Almost exactly the same proportions increased their frequency of EGM use as decreased it, and almost exactly the same proportion increased the usual length of time they used EGMs as decreased it.

Table 2.14: Changes in frequency of use of EGMs and time spent using EGMs, recreational gamblers who used EGMs in 2 adjacent Waves

	Proportion (per cent)
Frequency of use of EGMs	
Increased	25.5
Decreased	22.8
Unchanged	51.7
<i>Number of transitions</i>	259
Usual time spent using EGMs	
Increased	23.3
Decreased	24.5
Unchanged	52.2
<i>Number of transitions</i>	253

In a similar vein, there is limited indication of change in the frequency with which recreational gamblers bought lottery products or scratch tickets, especially after Wave 1 of the research (Tables 2.15 and 2.16). There may have been a small increase in the proportion who bought each of these products once a week or more after Wave 1, but there is little consistent evidence of other change. The dominance of lottery products as a form of gambling is evident in that only around a third or less of recreational gamblers bought lottery products less often than once every 3 months.

Table 2.15: Frequency of buying lottery products, recreational gamblers (per cent)

Frequency	Wave 1	Wave 2	Wave 3	Wave 4
More than once a week	4.4	8.9	7.9	9.2
Once a week	28.1	33.7	30.3	31.6
Once every 2-4 weeks	14.5	18.5	21.0	19.3
Once every 2-3 months	17.1	9.1	9.8	16.7
Less than once every 3 months	35.9	29.9	31.1	23.1
<i>Number of respondents</i>	502	508	482	424

W1, W4 = Previous 12 months

W2, W3 = Previous 3 months

Table 2.16: Frequency of buying instant scratch tickets, recreational gamblers (per cent)

Frequency	Wave 1	Wave 2	Wave 3	Wave 4
More than once a week	0.6	1.0	0.6	0.5
Once a week	4.2	6.3	6.2	6.2
Once every 2-4 weeks	9.4	10.0	10.5	9.5
Once every 2-3 months	10.4	6.1	5.6	14.7
Less than once every 3 months	75.4	76.7	77.1	69.2
<i>Number of respondents</i>	499	510	484	422

W1, W4 = Previous 12 months

W2, W3 = Previous 3 months

Table 2.17 suggests that there was no clear trend in the frequency with which recreational gamblers bought lottery products. The proportion of gamblers buying lottery products more and less frequently in adjacent Waves of the study was almost exactly the same, when they bought lottery products in both Waves. Although there is a small difference in the proportion increasing and decreasing the frequency with which they bought scratch tickets, the numbers are too small to be confident that any real change had taken place. Overall, it appears that there was no significant change in the frequency with which recreational gamblers bought lottery products or scratch tickets.

Table 2.17: Changes in frequency of buying lottery products or scratch tickets, recreational gamblers who bought lottery products or scratch tickets in 2 adjacent Waves

	Proportion (per cent)
Frequency of buying lottery products	
Increased	19.7
Decreased	19.0
Unchanged	61.2
<i>Number of transitions</i>	552
Frequency of buying scratch tickets	
Increased	24.3
Decreased	32.1
Unchanged	43.6
<i>Number of transitions</i>	140

Table 2.18 similarly indicates that there is no real evidence of change in the frequency with which recreational gamblers bet on horses.⁷ It is possible that recreational gamblers did so somewhat more often in the 12 months before the final Wave of the survey than in the 12 months before the first Wave. However, again, the change is very small, with the vast majority of recreational gamblers not placing bets on races at all, and the majority of those who did so placing them less than once a month.

Table 2.18: Frequency of betting on horse, harness or dog races, recreational gamblers (per cent)

Frequency	Wave 1	Wave 4
More than once a week	1.0	0.7
Once a week	1.4	2.6
Once every 2-4 weeks	2.2	3.3
Once every 2-3 months	2.8	7.3
Less than once every 3 months*	92.6	86.1
<i>Number of respondents</i>	501	423

⁷Includes those who did not use EGMs at all during the relevant period.

W1, W4 = Previous 12 months

2.3.1c Amount spent gambling

Table 2.19 shows the average amount of money recreational gamblers said they spent on gambling each week. It indicates that there may have been some increase in the proportion who spent between \$11 and \$50 per week on gambling between the first and second Waves of the study, but no change after then. It is particularly notable that this change seems to have been maintained in Wave 4 of the research, when the reference period for the question (12 months) was the same as in Wave 1. This pattern is consistent with indications described above of small increases in the frequency of gambling amongst recreational gamblers between Waves 1 and 2 of the research.

⁷ Table 2.18 only provides data for Waves 1 and 4 of the survey because the number of recreational gamblers betting on races at Waves 2 and 3 (where they were asked whether they had participated in this type of gambling in the previous 3 months) is too small to provide reliable estimates of distribution of gambling frequencies for this type of gambling.

Table 2.19: Average amount of money spent each week on all gambling activities, recreational gamblers (per cent)

Amount of Money	Wave 1	Wave 2	Wave 3	Wave 4
Did not gamble	-	11.7	15.6	5.4
\$0-\$10	77.7	57.8	48.7	61.2
\$11-\$25	12.9	16.6	22.5	20.2
\$26-\$50	5.2	10.0	9.5	8.9
\$51-\$100	1.9	2.9	2.6	2.0
\$101 and above	2.3	1.0	1.1	2.3
<i>Number of respondents</i>	426	431	462	392

W1, W4 = Previous 12 months

W2, W3 = Previous 3 months

In a similar vein, Table 2.20 shows that those recreational gamblers who used EGMs appear to have slightly increased the amount they usually took to play EGMs between Waves 1 and 2 of the research, and to have maintained the slightly higher amounts in subsequent Waves. Thus, whereas 66% of recreational gamblers usually took \$10 or less to gamble in the first Wave, the proportion taking this amount had declined to 49% by the second Wave, and remained at about this level. At the same time, the proportion of EGM recreational gamblers taking \$11-\$25 or \$26-\$50 increased a little.

Table 2.20: Usual amount of money taken to play gaming machines, recreational gamblers (per cent)

Amount	Wave 1	Wave 2	Wave 3	Wave 4
0-\$10	65.5	48.9	50.6	51.1
\$11-\$25	25.6	32.8	33.5	33.2
\$26-\$50	6.7	14.0	12.7	11.4
\$51-\$100	1.8	3.8	1.9	3.3
\$101 or more	0.4	0.5	1.3	1.1
<i>Number of respondents</i>	240.	186	158	184

W1, W4 = Previous 12 months

W2, W3 = Previous 3 months

Recreational gamblers who gambled on lottery products also appear to have slightly increased the amount they spent on lottery products between Waves 1 and 2 of the survey, and maintained this slight increase in subsequent Waves (Table 2.21). However, even at the end of the study, only about 30% usually spent more than \$10 a week when they bought lottery products, and only 4% spent more than \$25.

Table 2.21: Usual amount of money gambled on lottery products, recreational gamblers (per cent)

Amount	Wave 1	Wave 2	Wave 3	Wave 4
0-\$10	78.4	71.7	69.0	70.6
\$11-\$25	19.7	24.6	25.5	25.0
\$26-\$50	2.0	3.4	5.2	4.1
\$51-\$100	0.0	0.3	0.0	0.3
\$101 or more	0.0	0.0	0.3	0.0
<i>Number of respondents</i>	356	350	326	320

W1, W4 = Previous 12 months

W2, W3 = Previous 3 months

Table 2.22 shows the proportion of recreational gamblers who engaged in various types of gambling who increased, decreased or kept unchanged the amount that they typically spent for each type of gambling. Overall, those gamblers who continued to gamble from one Wave to the next were very slightly more likely to increase the amount they spent than to decrease

it. In relation to specific gambling forms, this pattern is also evident in relation to lottery products and EGM spending. However, in every case, the vast majority of recreational gamblers were likely to maintain their levels of spending across Waves roughly unchanged. Given the small differences between the proportions increasing and decreasing their spending, Table 2.22 is consistent with the above results suggesting that there was probably a small increase in recreational gamblers spending overall, and on lottery products and EGMs.

Table 2.22: Changes in gambling spending between survey Waves, recreational gamblers

Type of gambling spending	Proportion (per cent)
Amount spent each week on all gambling activities	
Increased	16.4
Decreased	12.2
Unchanged	71.4
<i>Number of transitions</i>	657
Amount usually spent on lottery products	
Increased	8.8
Decreased	6.1
Unchanged	85.1
<i>Number of transitions</i>	524
Usual amount taken to play EGMs	
Increased	17.6
Decreased	10.9
Unchanged	71.5
<i>Number of transitions</i>	221

2.1.3d Summary

In broad measure, there was little change in recreational gamblers' gambling behaviour following the introduction of the Codes. There was no significant change in the kinds of gambling they engaged in, with lotteries remaining the dominant activity. On some measures, the frequency of some types of gambling appear to have increased slightly, though on others there are no indications of change. Any change that did occur was so small as to be of little consequence. However, the surveys show consistent evidence that the proportion of recreational gamblers who increased their spending on gambling over the course of the research slightly outweighed the proportion who decreased it. This lead to a pattern of net increase in spending that was observable in overall spending, and spending on EGMs and lotteries. Nevertheless, the vast majority of recreational gamblers did not change their spending, so that the shift in spending patterns was very small.

2.3.2 Problem Gamblers

2.3.2a Type of gambling

The profile of problem gamblers above (Section 2.2) showed that EGMs were clearly the dominant form of gambling amongst problem gamblers. Moreover, compared to recreational gamblers, problem gamblers were far more likely to use EGMs and to spend more money and more time on EGMs than other forms of gambling. Tables 2.23, 2.24 and 2.25 show that these patterns did not change during the course of the research. Overall, there is little evidence of change in the types of gambling in which problem gamblers engaged, or the relative importance of each type (in terms of time and money spent on them) during the course of the research.

Table 2.23: Participation in gambling activities, problem gamblers (per cent)

Gambling activities	Wave 1	Wave 2	Wave 3	Wave 4
Poker or gaming machines	86	78	81	86
Horse or greyhound races	42	26	25	30
Lottery products	76	65	63	72
Instant scratch tickets	50	26	40	44
Keno	40	33	31	40
Casino table games	22	17	8	12
Bingo	8	2	2	16
Sports betting	14	11	2	7
Casino games on the internet	2	2	-	-
Cards privately for money	8	4	4	14
Any other	-	-	2	-
<i>Number of respondents</i>	<i>50</i>	<i>46</i>	<i>48</i>	<i>43</i>

* per cent of respondents

W1, W4 = Previous 12 months

W2, W3 = Previous 3 months

Table 2.24: Gambling activity played most, problem gamblers (per cent)

Gambling Activities	Wave 1	Wave 2	Wave 3	Wave 4
Poker or gaming machines	58	55	63	61
Horse or greyhound races	22	12	14	18
Lottery products	18	18	17	18
Instant scratch tickets	-	3	6	-
Keno	2	3	-	3
Bingo	-	3	-	-
Sports betting	-	3	-	-
Cards privately for money	-	3	-	-
<i>Number of respondents</i>	<i>45</i>	<i>33</i>	<i>35</i>	<i>33</i>

W1, W4 = Previous 12 months

W2, W3 = Previous 3 months

Table 2.25: Gambling activity on which most money was spent, problem gamblers (per cent)

Gambling Activities	Wave 1	Wave 2	Wave 3	Wave 4
Poker or gaming machines	67	64	77	70
Horse or greyhound races	16	12	11	18
Lottery products	16	6	9	6
Keno	2	3	3	3
Casino table games	-	9	-	3
Bingo	-	3	-	-
Cards privately for money	-	3	-	-
<i>Number of respondents</i>	<i>45</i>	<i>33</i>	<i>35</i>	<i>33</i>

W1, W4 = Previous 12 months

W2, W3 = Previous 3 months

2.3.2b Frequency and time spent gambling

Table 2.26 shows the frequency with which problem gamblers used EGMs at each Wave of the research. It suggests a significant decline in the proportion using machines more than once a week, and a corresponding rise in the proportion using them every 2-4 weeks over the course of the research. For example, before the introduction of the Codes, 66% of problem gamblers used EGMs once a week or more often, but 15 months later, by the final Wave of data collection, 47% did so. During the same period, the proportion who used the machines every 2-4 weeks rose from 8% to 28%. There was no change in the proportion

using gaming machines very infrequently (every 2-3 months or less) or not at all. Most of the change appears to have occurred immediately after the introduction of Codes (i.e., between Waves 1 and 2 of the data collection). However, there was a further small decline in frequency of EGM use between subsequent Waves. Most importantly, the change between the initial and final Waves of data collection is statistically significant at conventional levels (Chi-square = 9.96, wi. 3 df, p < .05), indicating that it is unlikely to be due to chance variation in the sample/s.

Table 2.26: Frequency of using gaming machines, problem gamblers (per cent)

Frequency	Wave 1	Wave 2	Wave 3	Wave 4
More than once a week	40	21	22	16
Once a week	26	30	22	30
Every 2-4 weeks	8	19	29	28
Every 2-3 months or less*	26	30	27	26
<i>Number of respondents</i>	50	47	49	43

*Includes those who did not use EGMs at all during the relevant period.

W1, W4 = Previous 12 months

W2, W3 = Previous 3 months

However, Table 2.27 indicates that there was no change in the usual time problem gamblers spent using EGMs. For example, 28% usually spent less than an hour on the machines before the introduction of the Codes, and 28% did so by the final Wave.

Table 2.27: Usual length of time spent using gaming machines, problem gamblers (per cent)

Time	Wave 1	Wave 2	Wave 3	Wave 4
Less than 30 minutes	5	11	10	14
30-59 minutes	23	19	21	14
1-1.5 hours	19	25	13	11
1.5-more than 3 hours	51	36	44	46
Varies	2	8	13	16
<i>Number of respondents</i>	43	36	39	37

W1, W4 = Previous 12 months

W2, W3 = Previous 3 months

Table 2.28 shows changes in the frequency of problem gamblers' use of EGMs and changes in the usual time they spent using EGMs, where data was available for the same gambler in adjacent Waves of the survey. First, it suggests that there is considerable variation in the frequency with which problem gamblers used EGMs, and, especially, the amount of time they usually spent using them. It is worth noting that there was little evidence of a tendency for problem gamblers to stop using EGMs over the course of the research – though the numbers are small, the number who stopped using them from one Wave to the next was about the same as the number who began using them. Table 2.28 also indicates that, between Waves of the survey, problem gamblers more often reduced than increased both the frequency with which they used EGMs and the time they usually spent using them. The differences in proportions increasing and decreasing EGM use on both measures are large enough to have considerable confidence that they are not due to sampling variability, and represent a real tendency for problem gamblers to reduce their EGM use over the course of the research.

Table 2.28: Changes in frequency of use of EGMs and time spent using EGMs, problem gamblers (per cent)

	Proportion %
Frequency of use of EGMs	
Increased	18
Decreased	33
Unchanged	49
<i>Number of transitions</i>	67
Usual time spent using EGMs	
Increased	32
Decreased	46
Unchanged	23
<i>Number of transitions</i>	57

Note: changes in frequency of use of EGMs include gamblers who stopped using EGMs between Waves (including those who ceased gambling altogether) and those who began using them between Waves. Changes in usual time spent using EGMs is based only on gamblers who used EGMs in adjacent Waves.

Table 2.29 shows some variation from Wave to Wave of the data collection in the frequency with which problem gamblers bought lottery products. However, this variation shows no consistent trend, and is well within that to be expected due to sampling variability (Chi square for Wave 1 compared to Wave 4 = 5.25, wi. 4 df, p>.05). Table 2.30 also indicates that there was no trend amongst problem gamblers to either increase or decrease the frequency with which they purchased lottery products.

Table 2.29: Frequency of Buying Lottery Products, problem gamblers (per cent)

Frequency	Wave 1	Wave 2	Wave 3	Wave 4
More than once a week	10	9	20	14
Once a week	30	34	27	23
Once every 2-4 weeks	22	9	12	12
Once every 2-3 months	6	11	2	19
Once every 6-12 months	32	38	39	33
<i>Number of respondents</i>	50	47	49	43

W1, W4 = Previous 12 months

W2, W3 = Previous 3 months

Table 2.30: Changes in frequency of buying lottery products, problem gamblers (per cent)

	Proportion %
Frequency of buying lottery products	
Increased	35
Decreased	33
Unchanged	42
<i>Number of transitions</i>	63

Note: changes in frequency of buying lottery products include gamblers who stopped using EGMs between Waves (including those who ceased gambling altogether) and those who began using them between Waves.

2.3.2c: Amount Spent Gambling

Table 2.31 shows clear evidence that the average amount problem gamblers said they spent on gambling each week declined during the study. Before the introduction of the Codes, 55% said that they spent more than \$50 per week on gambling. This figure declined to around 40% in Waves 2 and 3, and had fallen to 34% by Wave 4. This change between Waves 1 and 4 reaches statistical significance at conventional levels (Chi-square = 4.55, wi. 1 df, p<.05), indicating that it is unlikely to be due to sampling error.

Table 2.31: Average amount of money spent each week on all gambling activities, problem gamblers (per cent)

Amount of money	Wave 1	Wave 2	Wave 3	Wave 4
\$0-\$10	7	12	13	15
\$11-\$25	13	19	17	24
\$26-\$50	24	29	26	27
\$51-\$100	22	19	21	22
\$101 and above	33	21	23	12
<i>Number of respondents</i>	45	42	47	41

W1 = previous 12 months

W2, 3 ad 4 = previous 3 months

Note: Excludes 1 problem gambler in Wave 2 and 1 gambler in Wave 3 who did not gamble in previous 3 months.

If there was real change in spending by problem gamblers, Table 2.32 shows that it did not arise because they reduced spending on lottery products. Problem gamblers generally spent relatively small amounts on this form of gambling, and there was no clear trend in their spending over the course of the research.

Table 2.32: Usual Amount spent on lottery products, problem gamblers (per cent)

Amount	Wave 1	Wave 2	Wave 3	Wave 4
0-\$10	44	54	36	45
\$11-\$25	38	36	56	45
\$26-\$50	18	11	4	10
\$51-\$100	0	0	4	0
\$101 or more	0	0	0	0
<i>Number of respondents</i>	34	28	25	29

W1 = Previous 12 months

W2, 3 and 4 =Previous 3 months

Table 2.33 suggests that the decline in overall spending was at least partially due to a decline in the amount that problem gamblers took to play gaming machines. Whereas 47% said they usually took more than \$50 before the introduction of Codes, the proportion progressively fell to the point where 16% said that they took this amount 15 months after the introduction of the Codes. Again, this change is statistically significant at conventional levels (Chi-square = 7.50 wi. 1 df, p<.01).

Table 2.33: Usual amount of money taken to play gaming machines, problem gamblers (per cent)

Amount	Wave 1	Wave 2	Wave 3	Wave 4
0-\$10	11	12	7	10
\$11-\$25	16	29	38	26
\$26-\$50	26	32	35	48
\$51-\$100	18	18	10	13
\$101 or more	29	9	10	3
<i>Number of respondents</i>	38	34	29	31

W1 = Previous 12 months

W2, 3 and 4 =Previous 3 months

Table 2.34 partially confirms these results. It shows that many more problem gamblers decreased than increased the total amount they spent on gambling from one Wave of the study to the next (41% decreased compared to 14% increased). This is a large change, and strongly confirms the results from Table 2.29. However, there is no clear trend in relation to usual spending on lotteries or usual amount taken to gamble on EGMs.

Table 2.34: Changes in gambling spending between survey Waves, problem gamblers (per cent)

Type of gambling spending	Proportion (per cent)
Amount spent each week on all gambling activities	
Increased	14
Decreased	41
Unchanged	46
<i>Number of transitions</i>	<i>74</i>
Amount usually spent on lottery products	
Increased	30
Decreased	32
Unchanged	59
<i>Number of transitions</i>	<i>57</i>
Usual amount taken to play EGMs	
Increased	18
Decreased	22
Unchanged	59
<i>Number of transitions</i>	<i>49</i>

Note: changes in amount spent on gambling include gamblers who ceased gambling altogether between Waves. Changes in amount spent on lottery products and EGMs include gamblers who began or ceased spending on each forms of gambling.

2.3.2d Summary

The surveys showed strong indications that some aspects of problem gamblers' gambling behaviour changed during the course of the research, though others remained unchanged. The types of gambling in which problem gamblers tended to engage changed little, with EGM gambling remaining clearly dominant. However, EGM gambling patterns did change. The frequency with which they were used by problem gamblers declined, and the amount of time problem gamblers usually spent using them fell too. In contrast, problem gamblers did not change the frequency with which they bought lottery products. With regard to gambling spending, there is strong evidence that problem gamblers' overall weekly outlays declined. It is clear that this was not a result of change in spending on lottery products. While it seems most likely that it resulted from declines in spending on EGMs, this could have arisen in two ways. Either the average amount problem gamblers spent per gambling session could have declined, or they could have maintained the amount they spent per session but reduced the number of sessions. Our data provides some suggestion that amounts normally taken to EGM sessions declined, but this result is equivocal. Given that frequency of EGM gambling did decline, the simple decline in frequency of EGM sessions is certainly an important part of the explanation for the decline in overall outlays.

While these changes are significant, it is important to keep them in perspective. For example, while the proportion of problem gamblers spending more than \$50 per week on gambling did decline from 55% to 34% over the course of the research, only 4% of recreational gamblers spent this amount on gambling.

It is also important to recognise that we cannot be certain that the implementation of the Codes caused the changes we observe in problem gamblers' behaviour. There are other possible causes. An important one is 'maturation'. The normal pattern may be for problem gamblers to reduce their gambling over time, perhaps because they simply cannot afford to maintain it. This would mean that we would normally observe declines in gambling if we follow a cohort of problem gamblers over time. We cannot eliminate this possibility as an explanation for our results. However, there are reasons to think it is unlikely to explain all of

the change we observed. First, it appears that the biggest change in problem gamblers' behaviour occurred immediately after the introduction of the Codes. Any maturation effects of the kind described above would normally be spread evenly over time. Secondly, the changes in behaviour appear to be exclusively with respect to EGM gambling. Again, it seems unlikely that maturation effects would have this character. Nevertheless, some caution is appropriate in interpreting these results.

2.4 An Econometric Model of Gambling Expenditure

An econometric model of gamblers overall outlays was estimated, incorporating both recreational and problem gamblers. The details of this modelling are described in Appendix 1 of this report. The econometric modelling provides a useful complement to the analysis in earlier sections of this chapter. Its first important implication is that, of the range of demographic and gambling behaviour variables included in the models, by far the most significant factors affecting gambling outlays are simply the frequency with which people gamble and the amount of time they spend doing so. This indicates that where gamblers reduce the frequency with which they gamble or the amount of time they spend gambling, their expenditure will decrease. Moreover, other demographic and behavioural factors will have either no effects on expenditure or only very small ones. The findings in the previous section of this chapter are entirely consistent with this model. Problem gamblers do appear to have reduced both the frequency with which they use EGMs and the amount of time they usually spend on them. Given that EGMs are the dominant form of gambling amongst problem gamblers, the model predicts that their total outlays should decrease as a consequence of decreasing time spent gambling. And this is exactly what our earlier analysis showed. That analysis also showed no indication that recreational gamblers reduced either the frequency with which they gambled or the usual amount of time they spent in gambling sessions. Just as the model predicts, recreational gamblers also show no clear pattern of change in their normal gambling outlays.

A second important implication of the econometric modelling is that individual heterogeneity is a major influence on gamblers' outlays. In other words, allowing for the influence of the factors that some individuals have in common (sex, age, frequency and time spent gambling, etc.), there remains a very important individual propensity to gamble that is crucial in determining how much they outlay. If confirmed by further research, this finding suggests that it may be very difficult to prevent those with the propensity to gamble from doing so, except by removing the opportunity to gamble.

2.5 Conclusion

The longitudinal surveys of recreational and problem gamblers have produced useful insights, particularly about the extent and nature of any change in gamblers' behaviour following the introduction of the Advertising and Responsible Gambling Codes. They have also produced other insights into gamblers' behaviour.

The chapter has shown how recreational and problem gamblers differ, and are similar. Their major demographic differences appear to be socio-economic – problem gamblers tend to have significantly lower education and income than recreational gamblers. On many other dimensions – sex, marital status, household type, even age – differences are much more muted. However, the gambling behaviour of the two groups differs markedly. The types of gambling on which they focus tend to be different: problem gamblers are most likely to focus on EGM gambling, while recreational gamblers are most likely to focus their gambling

on lotteries. Problem gamblers spend far more on their gambling than recreational gamblers, they gamble much more frequently and they spend much longer in gambling sessions. While these results are hardly surprising, the size of the differences found in the surveys dramatises the difference between the groups.

The longitudinal survey of recreational gamblers found no evidence that the gambling behaviour of the group changed significantly after the introduction of the Codes. The types of gambling in which they engaged did not change, nor did the frequency with which they gambled or the amount of time they usually spent doing so. However, there is evidence that recreational gamblers slightly increased their gambling outlays over the course of the research. This is evident in overall spending, as well as spending on lotteries and EGMs. The change was very small, showed few signs of representing a long-term trend, as unlikely to be of practical significance.

Problem gamblers appear to have made larger changes in behaviour. While their choices of how to gamble did not change (EGMs remained heavily dominant throughout the research), the amount of time and money they spent in some areas of gambling declined. Changes in gambling behaviour with respect to EGMs were more important than in relation to other forms of gambling, with falls in the frequency and, possibly, length of gambling sessions. These appear to have lead to a decline in overall gambling spending amongst problem gamblers. While it is not possible to be certain that these changes result from the introduction of the Codes, it is not easy to explain them in other ways.

Finally, this chapter outlined the results of econometric modelling of gamblers' total gambling outlays. This modelling showed that outlays were largely unaffected by major demographic variables such as education and income, but that two behavioural factors had substantial effects on outlays. Both the frequency with which gamblers gambled and the length of time they spent in gambling sessions affected outlays. This model applies to both recreational and problem gamblers, with some differentiation between the groups in that recreational gamblers increase their spending less than problem gamblers for a given increase in the length of a gambling session. Thus, altering either the frequency or length of gambling sessions offers a substantial lever on gambling outlays. At the same time, the modelling showed that individual differences (not caused by gambling behaviour or demographic characteristics) explain a very large part of gambling outlays. These differences represent individual variation in the propensity to gamble. Their origin could range from intrinsic variation in individuals' susceptibility to the attractions of gambling, to the effects of habituation to gambling.

3. Gambling Industry Peak Bodies and Organisations

3.1 *Introduction*

This chapter focuses on the impact of the Advertising and Responsible Gambling Codes on the gambling industry, and the perceptions of gambling industry bodies about the wider impacts of the Codes. It is based on interviews at each Wave of the project with representatives of the Australian Hotels Association (AHA), Clubs SA, SATAB, SA Lotteries, SkyCity Adelaide Casino, Greyhound Racing SA, Harness Racing SA, and Thoroughbred Racing SA. The chapter provides baseline information about industry groups' perceptions of the Codes immediately before they were implemented, difficulties in interpreting the Codes experienced by industry, their experience of implementing and ensuring compliance to the Codes, and their perceptions of the impact of the Codes.

3.2 *Initial Perceptions of the Codes*

Generally, gambling industry representatives had very similar initial perceptions of the value, impact, and likely course of introducing the Advertising and Responsible Gambling Codes. However, in other respects their expectations differed.

Most groups expressed initial support for the Codes in the sense that they said they or their members would take the Codes seriously and implement them effectively. Most peak bodies had made some effort to communicate the Codes to members before they were implemented, and had received few inquiries about them. However, most bodies also expressed some level of scepticism about the likely effect of the Codes. This ranged from doubt that they would have any effect on problem gamblers to the expression of more general concerns about increasing regulation of the gambling industry.

Industry groups expressed some initial concern about some aspects of implementing the Codes. Most commonly, they were uncertain about how they were going to be able to identify problem gamblers, as they believed the Responsible Gambling Code of Practice required them to do. SA Lotteries and the SATAB indicated concern about how their agents would decide when to intervene with gamblers who could possibly be problem gamblers. The SATAB and racing industry representatives also raised concerns about how they or their members would be certain in identifying gamblers who may be intoxicated.

With the exception of Club SA and the casino, all groups also raised difficulties in identifying self-barred gamblers. Club SA did not perceive this to be a problem as the low staff turnover and regular patronage meant that self-excluded people would be easily identified. The casino suggested that the sophisticated surveillance and multiple security personnel allows for easy detection of self-excluded persons.

Racing industry peak bodies acknowledged that problem gambling existed, but generally doubted that problem gamblers were present in significant numbers in racing gambling. They emphasised that their activities were primarily sporting or entertainment ones, and that gambling was a relatively peripheral aspect of their activities. In general, they indicated that they did not regard the Codes as being of great relevance to their activities, but that they would nevertheless take implementing them seriously.

Some industry stakeholders, notably SkyCity Adelaide Casino and Clubs SA, indicated that they expected the Codes would have limited impact on their activities since many of the practices mandated by the Codes were already in place. For example, SkyCity Adelaide Casino expected that the main change in their practice that would arise from the Responsible Gambling Code of Practice would be to cease service of alcohol at EGMs. They claimed that its other major provisions were already largely in place.

The AHA did signal at the outset that it already had concerns about interpretation of some aspects of the Codes, particularly those related to service of alcohol at EGMs and what constituted playing two EGMs simultaneously. These concerns with interpretation of the Codes continued in subsequent interviews.

3.3 *Difficulties in Interpreting the Codes*

Like any regulatory requirements, the Advertising Code and the Responsible Gambling Code of Practice were capable of becoming objects of interpretation. Clearly, uncertainty in exactly what the Codes required of gambling providers could reduce their effectiveness in preventing undesirable behaviour or effects.

Some initial uncertainties about interpretation of the Codes undoubtedly arose from anxiety amongst gambling providers, particularly smaller and less knowledgeable ones, that they might be subjected to prosecution for activities that they did not understand to be prohibited by the Codes. In early Waves of the project, some peak bodies recounted inquiries from gambling providers that arose from such anxieties. However, these generally declined in later Waves, and appeared to be of little consequence by the end of the project, with the exception of hotels.

Aside from the AHA, industry bodies generally found few substantial problems arising from difficulties in interpreting the Codes. The Advertising Code did cause some initial difficulties. However, groups like SA Lotteries, SATAB and SkyCity Adelaide Casino quite quickly established new procedures to ensure that their advertising conformed with the Codes. For example, SA Lotteries submits all advertising to external experts for compliance assessment before it is used. At several points, industry stakeholders indicated that they were monitoring the activities of other gambling providers to assess whether their activities conformed with the Codes. For example, several groups questioned the compliance of another group's advertisements at Wave 3 of the interviews (February / March 2005).

At all four interview points, the AHA expressed concerns about interpretation of a small number of key points in the Codes. The AHA stated that there was still confusion about aspects of the service of alcohol even after the OLG had issued further 'Guidelines for Compliance' with respect to both Codes in January 2005. They claimed that, in some circumstances, it was difficult for hotels to know whether they were in breach of the Codes, that the OLG did not always provide unequivocal answers to questions about whether certain activities were permitted, and that there was disagreement between the OLG and the IGA about whether some activities were permitted.⁹

Whether or not the provisions of the Codes are ambiguous in the ways the AHA claims, it is clear that two aspects of the implementation of the Codes make it particularly likely that

⁹ The most frequently cited example here was whether the Responsible Gambling Code of Practice would be breached if a patron ordered alcohol while seated at an EGM, but then left the EGM to collect the drink. The OLG Guidelines clearly indicate that this would breach the Code, but the AHA claimed that the IGA's view was that it would not.

emphasising ambiguity will have the effect of making the assessment of compliance more difficult. First, the existence of two bodies with regulatory responsibilities (the IGA and the OLGC) immediately creates the potential for disagreement. That there is a widespread perception in the gambling industry that the IGA and the OLGC are not always in agreement about how Codes should be interpreted makes it more difficult to avoid perceptions that the Codes are open to significant ambiguities of interpretation. Second, the Codes themselves and some sections of the OLGC 'Guidelines for Compliance' use language that encourages a sense of ambiguity. Clearly, no form of words is likely to be entirely unambiguous. But in a context where industry stakeholders view the IGA and the OLGC as in a relationship of tension, the most successful regulatory strategy, that of creating a culture of compliance with the spirit of the Codes, is likely to be made more difficult.

3.4 *Implementing the Codes*

Several industry bodies did not see themselves as having direct responsibility for implementing the new Codes, or saw their responsibility as shared. For example, the AHA itself did not directly implement the Codes, this was done by its members. Similarly, individual clubs, rather than Clubs SA, were responsible for implementation in clubs. This issue was more complicated for the SATAB and SA Lotteries, where some aspects of the Codes were clearly their responsibility (notably advertising issues), but others were ultimately the responsibility of branches and agencies. The racing bodies appeared to accept only partial responsibility for implementing the Codes. In some cases, they viewed implementation as largely the responsibility of their member clubs, and in others as the responsibility of SATAB since it acted as a betting agency at their venues. Unsurprisingly, SkyCity Adelaide Casino did view implementation as its own responsibility.

Despite not generally having sole direct responsibility for implementing the Codes, these industry groups undertook various activities to assist implementation amongst their members and/or agencies. The AHA and Clubs SA developed a standard package of materials to satisfy the requirement in the Responsible Gambling Code of Practice that hotels have a responsible gambling document focused on how certain aspects of the Code are implemented in the hotel. SATAB developed a similar document. These packages were widely distributed and used, and were accepted by the OLGC. The AHA also developed a self-audit checklist to assist members in ensuring they complied with the Codes. As noted above, SATAB and SA Lotteries developed procedures to ensure that their advertising complied with the Codes. The main implementation activity of the racing bodies was to ensure that responsible gambling materials were available as required at their venues.

Several difficulties in implementation of the Codes were described in interviews. Some related to the capacity of industry bodies to ensure the compliance of members or agents. For example, SA Lotteries indicated that it was unable to ensure that its agents implemented the requirements that they approach problem gamblers to bring gambling referral services to their attention. SATAB noted similar difficulties.

Other difficulties related to problems that providers faced in actually doing what the Codes required. By far the most commonly mentioned of these was the issue of identifying 'problem gamblers'. Although the Responsible Gambling Code of Practice did not use the term 'problem gamblers' in its requirements, its stipulation that providers needed to take 'reasonable steps' to identify patrons who demonstrate 'difficulty' in controlling their

gambling expenditure was widely interpreted as a requirement that providers identify 'problem gamblers'. In early Waves of the project, industry groups frequently made the point that identifying such gamblers was often difficult, and that approaching them with responsible gambling materials was also an uncomfortable task. Our interviews suggested that the racing groups were not seriously involved in assisting their members to develop the skills to comply with this requirement, although they did make efforts to assess whether agents were complying.

The AHA was more active in assisting its members with this provision. It did indicate some surprise at how long it was taking to implement some aspects of the Codes, including this one. However, by the final Wave of data collection, it was presenting a fairly positive view of the capacity of staff training to be used to assist staff to identify problem gamblers and to bring assistance services to their attention. This was partly based on the AHA's establishment of a position of 'Responsible Gambling Officer' in May 2004. The occupant of this position had a background in providing assistance to gamblers, and was heavily involved in AHA organised staff training activities. The AHA's training activities for hotel staff also involved some direct use of staff from gambler counselling services. The AHA claimed that these were leading to increasingly cooperative relations with services like Break Even and other members of the concern sector. This view was partially confirmed by those groups. Clearly, one effect of the process of implementing the Codes has been some increased communication along these lines. It is also associated with a shift towards accepting that staff can be trained to ensure compliance with the Codes, even in difficult areas such as the identification of patrons who have difficulty controlling their gambling expenditure.

SA Lotteries and the SATAB also undertook training of its agents and/or staff around the time of the introduction of the Codes, and developed a program to train new agents and staff. This training included how to identify and approach problem gamblers. Like the AHA they used people associated with the concern sector and Break Even to deliver this training.

Implementing the Advertising Codes was generally regarded as fairly unproblematic. As noted above, some groups established new procedures to ensure their compliance. Several industry groups suggested that one aspect of implementing the Advertising Code was sometimes simply to reduce advertising, for fear that the Code might be contravened. This view was generally put by those who believed that advertising had little effect on the level of demand for the relevant form of gambling.

While some aspects of implementation of the Responsible Gambling Code of Practice did cause concerns and difficulties, as noted above, many appeared to cause few problems. In particular, compliance with the documentation requirements and staff training requirements raised little comment. In some cases, this appeared to be based on good knowledge of what members and agencies were doing. In others it appeared to owe at least as much to the belief that the Codes were more relevant in some parts of the gambling industry than others. In those where it was seen as less relevant (notably in the racing groups), implementation was not seen as a major issue simply because key aspects of the Codes were regarded as largely irrelevant in these areas. For example, the racing groups maintained that problem gambling in racing was minimal or absent, and that their activities were primarily sporting and entertainment ones. They therefore saw the need to identify problem gamblers in their activities as also virtually absent.

SkyCity Adelaide Casino did undertake a new initiative in the process of implementing the new Codes, and claimed to spend considerable resources on ensuring their compliance. They established a category of 'Host Responsibility Coordinators. The role of these 5 officers is to get to know gamblers and observe changes in their behaviour, and to approach gamblers when problems appear to arise, often suggesting voluntary barring or counselling. They are expected to follow up on the progress of barred and counselled gamblers. They also try to make gamblers feel welcome and comfortable at the casino, with a view to increasing the likelihood that they will return to the casino. SkyCity Adelaide Casino indicated that this program was now being treated as a pilot for its other casinos. It generally presented itself as having taken implementation of the Codes very seriously, and as having implemented them effectively.

3.5 Ensuring Compliance With the Codes

Industry groups were interviewed about their impressions of compliance with the Codes.¹⁰ In general, industry groups initially gave mixed impressions of the level of compliance amongst their members/agencies. However, by the end of the research, all were suggesting that compliance levels were very high.

3.5.1 Wave 2 – 3 Months after Code Implementation

Three months after the Codes were introduced, at the second Wave of data collection, SA Lotteries and the SATAB were conducting audits of some aspects of compliance amongst their agents. Both appeared to be focused on signage and advertising requirements, and appeared to have very limited knowledge of compliance in other areas. The racing bodies were generally confident of their compliance. They appeared to be focused on providing required responsible gambling materials (some complained about the administrative burden this created) and ensuring that advertising was compliant. There was little concern with staff training, with one body indicating that it did not believe it had staff who needed to be trained since all gambling activities were handled by the SATAB.

At this stage, the AHA indicated a range of concerns with compliance, and suggested that there was general confusion about the Codes in the hotel industry. It claimed that constant change in regulatory requirements was making it difficult for hotels to keep up with requirements. Some hotels did not understand the rationale for the Codes and therefore were not effectively complying. There was some concern that, although hotels may have appropriate staff training practices in place, they would not be considered to comply with the Code's staff training requirements because their practices were not appropriately documented. Inspectors were also said to be inconsistent in their decisions about whether hotels were complying. The AHA also emphasised the effect on compliance of the ambiguities it saw in interpretations of the Codes. Where there was ambiguity and hotels did not know what was required of them, compliance was not possible.

As at subsequent time points, SkyCity Adelaide Casino indicated that it was confident that it complied with the new Codes even at the first Wave of data collection. It indicated that it had passed an OLGC audit.

¹⁰ However, it is important to be aware that the research did not attempt to assess actual compliance; its focus was on industry perceptions of compliance.

3.5.2 *Wave 3 – 9 Months after Code Implementation*

Six months later (9 months after implementation of the Codes), all industry groups, except the AHA, claimed good compliance with the Codes. However, the basis for this assessment was variable. For example, SA Lotteries indicated that its agents were now more comfortable with the Code requirement that had caused them most concern – the need to identify problem gamblers. However, at the same time, SA Lotteries did not have any systematic knowledge of whether agents were actually complying with this requirement. Nevertheless, SA Lotteries had undertaken an audit to ensure that its procedures complied with the Codes. Despite their apparent confidence that compliance with the Codes was high, some groups did indicate that they continued to have difficulty with identifying problem gamblers. In at least one case, it appeared that it had taken some time for them to become aware of this issue.

At this point, the AHA claimed that most hotels were now taking the Codes seriously, understood what was required and were acting in accord with the intentions of the Codes. They suggested that documentation of procedures continued to be a problem, with some hotels not having appropriate documentation even if they had appropriate procedures. By this interview, the AHA had delivered 200 copies of its documentation for responsible gambling procedures to hotels. It believed that only some small hotels and some country hotels were still non-compliant in this respect. However, it again suggested that continuing ambiguities about some aspects of the Codes made full compliance difficult.

As before, SkyCity Adelaide Casino was confident that it was complying with the Codes.

3.5.3 *Wave 4 - 15 Months after Code Implementation*

In Wave 4 interviews, 15 months after the implementation of the Codes, industry groups appeared more focused on the practicalities of implementing the Codes than in previous Waves. This appeared to indicate an acceptance that the Codes needed to be taken seriously and solutions to implementation found.

SATAB and SA Lotteries did not appear to have made major changes to their implementation processes as outlined in previous interviews. However, both described issues of continued compliance that they were now facing. For example, SATAB indicated that there were sometimes difficulties in maintaining adequate supplies of responsible gambling literature and referral cards at agencies and in hotels. Like other groups, they suggested that some of this material was being used as notepaper. They also noted some problems to do with proper documentation of staff training and staff roles, though this was now resolved. SA Lotteries indicated some staff training issues, particularly with whether staff put training into practice. SA Lotteries was also preparing for the first major round of staff retraining as required under the Responsible Gambling Code. In general, both groups thought compliance was high, though they were not able to monitor some aspects of the Responsible Gambling Codes, particularly those to do with how staff and/or agents actually dealt with gamblers.

Racing industry bodies also focused somewhat more on the practicalities of compliance in this Wave of interviews. For example, one body noted the difficulties in keeping an adequate supply of referral cards because these were used as notepaper. Another noted that constant turnover of volunteer staff meant that the training burden was substantial. In general, however, all racing groups believed they were complying with the Codes.

The AHA continued to maintain that some ambiguities in interpretation of the Codes were causing problems. However, its focus appeared to be on the practicalities of continuing to comply with the Codes. For example, it described its role in assisting hotel staff to feel more confident about identifying and approaching problem gamblers, its attempts to encourage hotels to take responsibility for children on their premises and in carparks, and its consultations with hotels about the implementation of self-barring. It indicated that hotels and hotel staff that had initially been sceptical of some of these matters (particularly identifying and approaching problem gamblers and implementing self-barring) were now starting to accept that these could be achieved effectively. The AHA noted that the OLGC was moving from a primarily educative role in enforcing the Codes towards issuing formal reprimands and, possibly, initiating prosecutions. This appeared to raise some specific concerns about what constituted compliance. For example, the AHA claimed that some hotels that had developed their own documentation of procedures, rather than using the standard AHA documents, were being treated as non-compliant even though their documents were actually compliant.

As before, SkyCity Adelaide Casino maintained that it was spending considerable resources on compliance, and achieving high levels of compliance.

3.6 Impact of the Advertising Code

There is little doubt that the Advertising Code had forced all industry groups to review their advertising more carefully. Most described the introduction of some form of auditing of advertising, and indicated that this ensured that they had little difficulty complying with the Codes. Some indicated that advertising had been reduced to avoid contravening the Code. Most said that they monitored the advertising of other parts of the industry, and suggested that others were not being as closely scrutinised as they were! Aside from this issue of equity, there were few complaints about negative impacts of the Advertising Code. One body suggested that the Code may have caused a small reduction in revenue because it meant that gambling providers were unable to make offers (such as prizes, refreshments and alcohol) to patrons that were as attractive as those possible before the Code.

SA Lotteries suggested that an important effect of the Code (and of the Responsible Gambling Code of Practice) was to shift public and staff perceptions of the organisation. Previously, it had been regarded as separate from the gambling industry, but was now much more frequently seen as part of the industry. Practices such as providing responsible gambling materials to people purchasing lottery products played a particularly significant role in this shift. It also had consequences for the organisation's staffing since new staff were much more aware that they were entering the gambling industry than they had been previously.

Most industry groups were sceptical that compliance with the Advertising Code would have any effect on problem gambling. They seemed to regard it as primarily an annoying restriction on their activities that served little real purpose.

3.7 Impact of the Responsible Gambling Code of Practice

The Responsible Gambling Code of Practice clearly has had substantial impact on the activities of the gambling industry. At one level, much of this arises simply from the requirement to engage in certain activities to ensure that gambling providers comply with the Codes. However, there are wider impacts too. One is on the culture within the industry.

Here the issue is primarily whether the Code has lead to greater awareness of problems associated with gambling, and to more activities designed to mitigate these. Another set of impacts is on the costs associated with running gambling activities. Finally, the Code may actually impact on gamblers. This research assessed these issues largely through industry perceptions, though it is possible to compare these perceptions with other data elsewhere in the Report.

3.7.1 *Culture Change*

The question of whether the Codes have brought some culture change in the gambling industry, particularly through raising awareness of problem gambling, is an important one. Such change undoubtedly takes time, and the research aimed to assess whether there was evidence that it occurred progressively across all Waves of industry interviews. All industry groups suggested to some extent that such a change had occurred. However, there was some variation in perceptions of the amount and significance of this change.

Racing industry groups saw least change. Throughout the research, they continued to maintain that most of their activities had little to do with gambling, and that the Code was less applicable to them than to other industry groups. They particularly emphasised that the SATAB handled most of the gambling associated with racing. All racing groups said that they had not dealt with any request for self barring during the course of the research. They tended to view provision of responsible gambling literature as ineffective through much of the research. Their engagement with the Code's requirements to identify problem gamblers were limited in early phases of the research, although by the final Wave of interviews they were clearly confronting the issue of whether their staff might do this effectively. By this point, they were also suggesting that the Codes had had the effect of raising awareness of problem gambling amongst their staff (presumably through the required staff training processes). However, they remained sceptical that this would have any significant effect on the issue of problem gambling, largely because they did not see significant numbers of problem gamblers in their activities.

It was difficult to assess the extent of culture change in the SATAB and, to a lesser extent, in SA Lotteries. These are both large organizations with extensive agent networks, and the only source of information about change in the agencies was the impressions of those interviewed in the central offices. Nevertheless, both organisations did indicate that they believed staff were much more aware of gambling problems than they had been previously. As noted above, SA Lotteries described a significant change in that it is increasingly seen as part of the gambling industry, both by its customers and staff. One quite minimal indicator of the shift is that SATAB reported around 15-20 voluntary barrings by agency staff, indicating that agency staff were sympathetic enough to the issue of problem gambling to carry through on at least some voluntary barring requests to the head office, where all requests for self-exclusion are carried out. Both groups appear to be attempting to maintain views of themselves as at the 'softer' end of the gambling industry. Such a view, whether accurate or not, undoubtedly has some impact in softening the extent to which increased awareness of problem gambling amongst staff leads to actions that actually affect gamblers.

The AHA clearly did believe that there had been significant culture change in hotels, particularly with respect to awareness of problem gambling issues. It claimed that staff were now much more aware of the issue, and its increasing focus on implementing the more difficult aspects of the Code (notably identifying and approaching gamblers displaying inability to control their gambling expenditure) suggested that there was a real attempt to

grapple with this issue. Of course, this research did not assess the extent to which this apparent shift in culture actually translated into staff's ability and willingness to approach apparent problem gamblers. The AHA experience with self-barring suggested that there was still significant room for development of any new culture of awareness of problem gambling in hotels. It suggested that many hotels were still very sceptical of this provision, partly because they did not understand it or the logic for using it. In particular, many did not understand the need for immediate barring when it was requested, and how this related to IGA barring. However, the AHA had the impression that there was some progress in this respect too by the final Wave of interviews, with more hotels approaching them to discuss the practicalities of actually barring patrons. This appeared to indicate an increasing belief amongst hotels that the provisions could be effective. In short, the AHA's experience suggested that many hotels were more aware of problem gambling as a result of the implementation of the Codes, and that this culture was leading to some intervention with problem gamblers. However, there were also indications that the culture could be developed further.

Compared to other sectors of the industry, SkyCity Adelaide Casino appears to have had a culture that was more aware of problem gambling issues at the time the Code was implemented. The casino appears to have built on this culture after the implementation of the Code, with a particular focus on its 'Host Responsibility Coordinators'. It also claims to have developed an effective culture for detecting barred patrons. The casino most clearly articulated the view that there was no fundamental contradiction between detecting problem gamblers and its business interests, for two reasons. First, they were not 'sustainable' gamblers – they could not maintain their gambling over the long term and be regular patrons at the casino. Second, their distress could upset other gamblers and reduce their gambling. If effectively taken up by venue staff, a culture of encompassing these ideas may be especially effective in detecting problem gamblers. However, it raises the issue of whether detecting and intervening with problem gamblers represents a fundamental conflict of interest for staff and owners of venues.

For all gambling industry groups and venues, there is clearly considerable potential for the promotion of responsible gambling to be seen as in conflict with their business interests. Those industry groups in which the cultural change towards awareness of problem gambling were least developed also appeared to be those in which there was most likely to be a perceived conflict of interest. Amongst these industry groups, it was quite common for the view to be expressed that bringing problem gambling services to the attention of possible problem gamblers had the potential to alienate regular gamblers, including those not regarded as possible problem gamblers. In contrast, where the culture of awareness of problem gambling seemed to be most developed, *not* attempting to assist problem gamblers was apparently seen to be in conflict with business interests.¹¹

A final element of culture change lies in the establishment of relationships between gambling providers and agencies offering assistance to problem gamblers, the Break Even agencies. As noted above, the AHA claimed that such relationships had begun to develop between individual hotels and Break Even agencies. SA Lotteries indicated that some relationships of this kind had developed between individual lottery agencies and Break Even agencies. SkyCity Adelaide Casino appeared to indicate that they had quite well established relationships of this kind. Again, it appeared that a fairly well developed culture

¹¹ This observation refers to the expressed perceptions of industry bodies. The research did not assess the practical implementation of these expressed views.

of responsible gambling awareness was necessary for these relationships to develop. Once they did develop, they probably tended to reinforce this culture. However, developing these relationships at the level of individual gambling providers did not appear to be a conscious policy amongst any of the industry groups (except SkyCity Adelaide Casino).

3.7.2 Costs of Compliance

All industry groups indicated that compliance with the Code had costs for them. They required additional resources spent on staff training and on the provision of responsible gambling literature, and they required staff time when staff were making the literature available, and, occasionally, approaching gamblers about their gambling activities. In general, industry bodies had come to accept these costs by the end of the research, although those that saw their activities as least focused on gambling were least accepting of them.

3.7.3 Change in Gambler Behaviour

Views about whether the Code had affected gamblers' behaviour varied. The racing industry bodies thought it had had virtually no effect on their gamblers or on their revenue. None had experienced requests for voluntary barring, and they saw this as consistent with their belief that problem gambling was virtually absent from their activities. They also thought that the Code had no effect on their revenue or on betting patterns.

Club SA and the casino also regarded the Codes as having no noticeable effect on the behaviour of their patrons. This meant that they saw no change in revenue.

SATAB and SA Lotteries believed that there were some effects. SATAB's experience with self barring, in which 15-20 people had requested self barring, did suggest some effect. For SA Lotteries much of the effect was in the consequences of changing perceptions of lottery products amongst their customers. Overall, they did not believe there was much effect on the gambling patterns of customers who bought mainstream lottery products. However, they did note that implementing the Code had the capacity to surprise clients. For example, parents and grandparents who bought a scratch ticket and gave it to children were surprised when told they could not do this. SATAB indicated that they had experienced a small negative impact on revenue, and SA Lotteries thought the revenue impact had been minimal.

The AHA clearly believes that implementation of the Code has had some effect on gamblers. However, its focus up to the final Wave of data collection was largely on assisting hotels to implement the Code. It did note that hotels often suggested that one effect of the alcohol service aspects of the Code had been to reduce interaction between staff and gamblers. This meant that staff had less opportunity to observe gamblers' behaviour sufficiently to notice any signs of problem gambling. There were other changes having this effect as well: the advent of change machines was said to be another example. While the AHA suggested that the Codes had impacted on gamblers they did note that this was not affecting revenue.

Finally, it is likely that any culture changes in gambling providers' organisations also affected gamblers experiences and how they saw them, though assessing how this happened and its extent is well beyond the scope of this research. A particularly clear example lies in the case of SA Lotteries. SA Lotteries suggested that some provisions of the Code – such as the prohibition of providing gambling to minors, and the provision of responsible gambling literature at all gambling venues – had the effect on their customers of much more sharply

defining participating in lotteries as a form of gambling. To this extent it will have affected gamblers' own perceptions of their activities. Given the findings elsewhere in this report that participation in lotteries is the dominant form of gambling of recreational gamblers, this would be a significant change. It is quite possible that effects of this kind occurred elsewhere in the gambling industry too.

3.8 Conclusion

The implementation of the Advertising Code and the Responsible Gambling Code of Practice were clearly gradual processes. During the early phase of implementation, many gambling providers were focused on the difficulties they believed they faced in compliance (including perceived ambiguities in the Codes), the possibility that they may inadvertently contravene the Codes, their annoyance at being required to conform to a new set of regulations, and some were probably searching for ways to try to avoid the spirit of the Codes. However, even initially, a few saw limited difficulty in conforming to the Codes and accepted their intent. These early responses were both initiated and picked up from providers by industry bodies, and reflected in their initial responses to the Codes.

As time passed following the implementation of the Codes, the general pattern was for industry groups to become more focused on actually assisting gambling providers to comply with the Codes. Their focus on the difficulties of compliance shifted from emphasising that it was going to be virtually impossible to comply, to an emphasis on solving the practical problems associated with compliance. This shift represented a gradual acceptance that the Codes were unavoidable and, in some cases, an emerging perception that they were capable of producing some positive change in the gambling environment. However, the responses of the various industry groups also became more differentiated over time. Some believed that the Codes were not relevant to their core activities, which they saw as non-gambling. In these industries, it was not until 15 months after the implementation of the Codes that their activities appeared to be beginning to focus on the harder parts of implementing the Codes (such as facilitating self barring, and recognising and approaching possible problem gamblers). At the other extreme, the intent of the Codes could be accepted from the outset, with the focus immediately being on ensuring compliance and building it into the culture of the organisation. This appeared most likely to occur where the intent of the Codes was already accepted by the gambling provider, and some practical initiatives had already been taken to develop them. Between these extremes most industry bodies showed initial resistance to the Codes, which softened over the course of the research, but rarely disappeared entirely. However, the tone of their activities changed substantially. It appeared that the activities necessary to ensure compliance with the Codes also gradually brought some understanding and acceptance of the idea that gambling providers had some responsibilities to take practical steps to reduce the harm that gambling could cause. In other words, the experience of the practical activities associated with complying with the Codes had the effect of shifting the perceptions of some industry bodies and their members about the responsibilities they could practically accept to promote responsible gambling.

While this pattern of a gradual process of implementation was observable across all industries, the research did not attempt to assess how effectively it translated into compliance with the Codes, especially in the more difficult areas. On the one hand, it is possible that compliance did flow effectively from the gradual shift towards focusing on practical implementation. On the other hand, a focus on formal compliance could occur

without much change in actual behaviour in gambling rooms, especially if there was a perception that enforcement was unlikely. For example, compliance with providing responsible gambling materials or training requirements might have been achieved without any actual change in the behaviour of staff towards gamblers. On the basis of data described elsewhere in this report, particularly data arising from licensee and staff interviews, it seems unlikely that the latter reaction was the only one. However, the research did not assess the balance between the two.

In short, the process of implementation was a gradual one. Many interviewees expressed surprise at the time it took to face the real difficulties of implementing the Codes, with some being quite frustrated. Undoubtedly some of the slowness of the process was due to resistance on the part of gambling providers, and attempts to use apparent ambiguities in the Codes to hamper implementation. But it is also unrealistic to expect that a regulatory change of this kind would have instant effect. The research with industry bodies made it clear that the process of implementing the Codes is also a process of culture change within the industry. It takes time, and it was not completed by the end of the research (15 months after formal implementation of the Codes).

4. Licensees

4.1 *Introduction*

This chapter focuses on the impact the Advertising and Responsible Gambling Codes has had on licensees. It is based on interviews conducted with a random sample of licensees at each Wave of the project. Thirty two venues were interviewed at wave 1, 30 again agreed to be interviewed at Wave 2 and 3 of the research, and 29 Venue were reinterviewed in the final Wave of the research. The chapter provides detailed information about licensees perceptions of the Codes immediately prior to there implementation, the difficulties licensees reported to have in interpreting the Codes, their experience of implementing and ensuring compliance with the Codes, and their perceptions of the impact the Codes have had on the staff, the venue and the patrons. Information is also provided about licensees' perceptions and experience of the State wide reduction in the number of gaming machines.

4.2 *Advertising Code*

Prior to the implementation of the Advertising Code, 25¹² of 32 venues (78%) envisaged that no changes would need to be made to their advertising. This was primarily because venues stated that they either did not do much advertising for gaming machines or that they did only minimal advertising that would not need to be changed. Those that did foresee the need to make changes to their advertising as a result of the introduction of the new Advertising Code of Practice (only 8 venues) suggested that they would have to incorporate the responsible gambling message in their print media advertising and their signage.

Little change was evident in these responses three months after the introduction of the Codes with 26 of 30 venues (87%) still indicating that they had not made any changes to their advertising practices. Those that did make changes to their advertising at Wave 2, however, articulated different types of changes than those they thought they would need to make at Wave 1. Wave 2 changes (made by 6 venues) included the removal of \$ signs and the word 'win' and the inclusion of the odds of winning in their signage and print media advertising.

The small number of venues making changes to their advertising evident at Wave 1 and 2 of the research could be a result of the fact that venues did not actually do much advertising for their gaming machines (and thus did not require many changes to be made to comply with the Code). However, it is more probable that it reflects venues' uncertainty as to what changes they needed to make to their advertising as a result of the introduction of the Code.

The perceived ambiguity of the Advertising Code and the uncertainty of venues' responsibilities in relation to this Code were evidenced in the venues early comments about the Advertising Code. For example, one venue at Wave 2 of the research suggested that the Advertising Code was difficult to interpret and that different authorities and different people within statutory bodies gave different advice about what is and what is not permissible.

¹² Throughout this chapter, patterns of response are generally described using the number of licensees giving a particular response, rather than the percentage. This is because the number of licensees in the sample (around 30) means that percentages can be misleading in that they give a false sense of certainty about the proportion of all venues giving certain responses.

However, in the interim period between Wave 2 and 3 of the research the OLG released two Code of Practice Guidelines, which were created for the core purposes of assisting licensees to comply with the Codes and to clarify a number of issues related to the Codes that were of concern to licensees.

At Wave 3, these guidelines were mentioned by a number of respondents as helping to make clear what changes they needed to make to the venue's advertising to ensure they were meeting their responsibility in relation to the Advertising Code. As one respondent stated at Wave 3 'The guidelines issued by the OLG in January clarified most things'. Corresponding to this clarification, at Wave 3 and 4 of the research, the number of venues making **no** changes to their advertising declined dramatically and, conversely, the number of those making changes to aspects of their advertising rose sharply.

At Wave 3, only 11 (37%) venues said that they did not need to make any changes to their advertising with the majority of venues (19) stating that they had to make one or more changes to their advertising. Those venues that reported that they did not make any changes to their advertising said that this was mainly because they did not actually do much, if any, advertising for their gaming machines. Those venues with small numbers of gaming machines (9 – 19) were more likely to say that they did not make any changes to their advertising than those with more machines.

The most area of change at Wave 3 was in relation to promotional activities. Promotional activities were changed by 14 venues. Some venues stopped doing promotions altogether while others stopped incorporating certain types of products in their promotional activities such as whitegoods and alcohol. Venues also reported having to make changes to other aspect of their advertising at Wave 3 at higher rates than that which was evident in previous Waves. Seven venues also reported having to make changes to newspaper advertisements and 5 venues reported that they had had to change their signage to ensure that the word 'win' was removed and to incorporate the 'gamble responsibly' message. Six venues also reported that they had either stopped doing meal deals or changed their meal deals to ensure that alcohol was not offered with gaming machine discounts. A few licensees also reported making changes to their TV advertisements, Loyalty programs and newsletter.

Despite both the frequency of venues making changes to their promotional activities and the clarification of the codes issued by the OLG, venues still expressed concerns at Wave 3 about the ambiguity of the Advertising Code in relation to what was and was not permissible for promotional activities. As one venue stated 'We are very aware, more than most hotels, but promotions is still a grey area, in particular the giveaways and the odds of winning'. By Wave 4 of the research, however, this persistent ambiguity surrounding venues' responsibilities seemed to have dissipated, with only 1 venue reporting at Wave 4 that they had needed to make changes to their activities in this area.

At Wave 4 venues were still said to have made changes to other areas of their advertising at higher rates than they did at Wave 1 and 2. However, with the exception of changes made to signage, the number of changes venues reported that they had to make was lower than at Wave 3. Eleven venues stated that they had to make changes to their signage at Wave 4 of the research. Comments made in response to the types of changes they needed to make to their signage however, suggested that venues simply put up any new signage that was required under the Responsible Gambling Code rather than making changes to their existing advertising to comply with the Advertising Code of Practice. Nine venues also indicated at Wave 4 that formal procedures had been established for the scrutiny and approval of

advertising. For example one venue stated that 'we are very aware of our advertising now. We run all advertising past managers and gaming supervisors'.

Clearly, the Advertising Code has had a real effect on venues advertising activities. However, this effect was quite delayed with only a few venues making changes to their advertising at Wave 2 of the research. It appears that this was primarily a result of venues' uncertainty about their responsibilities in regard to the Advertising Code. The release of the OLGC guidelines for compliance clarified many of the ambiguities surrounding the Advertising Code for licensees, and this was evidenced in the sharp increase in venues making changes to their advertising practices at Wave 3 of the research. Venues still voiced concerns and or complaints about their responsibility with regard to their promotional activities at Wave 3, but this seemed to have declined by Wave 4 of the research.

Whilst articulating some concern about the clarity of the Advertising Code, venues also suggested at later stages of the research that the Advertising Code had its benefits. For example one venue stated that 'the only positive about the odds of winning and the Advertising Code is that we have to think more about what we are doing'. Venues generally felt that they needed to take great care in the wording of advertisements and the types of promotion and prizes they offered to ensure that they complied with the code. One venue stated that 'We have to think harder to avoid using wrong words before we do an advert'. Importantly, the changes to how some venues promote their activities as a result of the Advertising Code were not found to impede or interrupt business, but rather gave venues a guideline in how they go about one aspect of their business - advertising. As one venue pointedly put it 'it is not what we do, but rather how we do it'.

4.3 Responsible Gambling Code of Practice

4.3.1 Responsible Gambling Material

The Responsible Gambling Code of Practice requires that gambling providers prominently display responsible gambling materials (including cards and stickers of a widely available gambling referral service) in gambling areas and ensure that these materials are made available to patrons in 5 languages.

Venues were readily able to obtain the Responsible Gambling information for their partons with all but one venue having obtained this material for their patrons by Wave 2 of the research. At Wave 3 all venues had this material. Venues usually acquired this material from the Australian Hotels Association. Materials were also obtained from Clubs SA and the OLGC. Half of the venues interviewed needed to obtain more responsible gambling materials at both Waves 3 and 4 of the research. Licensees believe that the effectiveness of these materials varies among patrons. Some took them out of genuine interest; others did so for peripheral reasons (e.g., as paper to write on) and others took no notice of them at all.

A few licensees expressed frustration with the amount of signage required to be displayed as a result of the introduction of the Responsible Gambling Code suggesting that it increased their workload significantly, was aesthetically displeasing, and created an information overload whereby patrons switched off and did not bother about reading the information contained in the signs. Two venues' comments make this point:

We have a wall of signs. Each sign has too much information on it. You only need one sign and it should be simple. People switch off. They don't read the signs. They start not caring.

Every machine has got three very clear signs; there are also 3-6 signs at the cashier; many signs are hidden behind other signs. It's just a clutter. We just need one sign.

A few venues also took issue with the location in which the responsible gambling material for patrons was required to be placed, suggesting that patrons would not take the material in these publicly observable areas and that they would put additional responsible gambling and helpline materials in a pamphlet holder on the backs of toilet doors so that people could take them in private.

4.3.2 *Cheques*

The Responsible Gambling Code specifies that gambling providers will not cash cheques in the gambling area of the venue unless they obtained a written exemption from the IGA. At Wave 1 of the research, three months prior to the implementation of the codes, the overwhelming majority of licensees (93%) stated that they already had an established in-house policy not to accept cheques as payment or to cash cheques for patrons. Nevertheless, licensees were continually asked by patrons to cash cheques over the life of the research. The frequency with which patrons requested this, as reported by licensees, did not vary over the course of the research (once in six months or rarely) nor did the number of venues reporting that patrons had requested to cash a cheque (5-6 venues).

The Responsible Gambling Code also specifies that gambling providers will, if requested, provide a cheque in respect of a prize, winnings or redemption of credits, of \$1000 or more. It was found at Wave 4 that similar to the 'no cheque policy', many providers also had an established in-house policy or preference to pay any large wins out as a cheque. Only 9 venues actually reported having done this, however, with the majority of venues suggesting that no one had actually won that amount of money since the introduction of the Code.

4.3.3 *Service of Alcohol*

The introduction of the Responsible Gambling Code specified that gambling providers would no longer be able to serve alcohol to patrons who are sitting or standing at gaming machines.

Prior to the formal implementation of the Code, licensees were asked about the types of procedures they would put in place to ensure that this service would no longer be provided to patrons. Of the 32 venues, 13 stated at Wave 1 that they did not offer this service of alcohol in the gaming area and specified that patrons always had to come to the bar for service.

For those venues that had previously offered this service of alcohol to customers, procedures they expected to use included: training and educating staff, informing patrons verbally, refusing service, and displaying signs that informed patrons of the change to the service of alcohol. Nine of the 19 venues that had stated that they had offered patrons this service had actually implemented this aspect of the Responsible Gambling Code three months prior to its formal/legal implementation so as to educate patrons and allow staff to get use to the change. Six venues, while not stopping this service before the formal implementation of the Code, were informing patrons that requested to be served alcohol while sitting or standing

at the gaming machines that they would soon no longer be able to have this service. A few licensees expressed scepticism about the value of this particular provision, suggesting that the reduction of service would not have any impact on the amount of money that patrons spent on gambling but would rather reduce the profits licensees made from alcohol. All licensees that had previously offered the service of alcohol to customers at the gaming machines suggested that they continued to provide the service of coffee, tea and soft drinks to patrons playing the gaming machines.

Despite the procedures (which, as seen above, were quite educational in orientation) being put in place by venues to ensure that patrons are no longer served alcohol while sitting or standing at a gaming machine, venues still reported patrons requesting to be served alcohol while sitting or standing at the gaming machine throughout the data collection phases of the research project.

At Wave 2, the majority of venues (18) reported that they had received a request for such service from their patrons, but qualified this by emphasizing that the requests were mainly received in the first few weeks after the initial implementation of the codes and the requests became less frequent as patrons got used to the Code. As one venue stated, 'in the first few weeks there was a good number because they didn't remember the change in rules. The signage helped and now it is not an issue'.

At Wave 3, licensees reported that while the frequency with which patrons asked for this service was declining, it was nonetheless still a service that was requested by patrons. Twenty-two venues reported that patrons had requested this service in the previous six months. A few venues did clarify, however, that those that were more likely to ask for this service were those patrons that were visiting from interstate or overseas and were not aware of the changes that had occurred to the service of alcohol. As one stated:

The first few months were the hardest as they didn't know the laws. Over the last 5 months however there have only been a handful – mainly from interstate and overseas.

By Wave 4 it was made clear by speaking with licensees that most patrons had accepted and adapted to the restriction that had occurred to the service of alcohol with the majority (15) of the licensees interviewed stating that they had not received a request to be served alcohol by patrons who were seated or standing at a gaming machine. As one venue put it:

We are a very obedient society. If people know they are not allowed to be served alcohol while they are gambling they won't ask for it. Just like the one-meter rule by the bar when smoking. Once people know they don't do it.

While 13 venues still said that patrons requested this service at Wave 4 of the research they stated that it was often out of habit and that the frequency of these requests was much less than it had been previously. As highlighted by two licensees comments:

People ask and then state damn, I forgot, sorry! It is very rare.

Initially it was quite frequent, I'd say about 2-3 times a week. Now it is more like 2-3 times a month. Quite honestly, I myself have been caught out, when I am out and a staff member walks by and I ask 'Can I have a beer?' It's just that people forget and it is a habit.

Similar to the trend detectable in how frequently patrons requested to be served alcohol while gambling, patron's reactions to being refused this service appeased as time went on. Initially licensees reported that patrons were quite irritated and unhappy about the change but as time went on licensees reported that patrons generally accepted the rule and complied with the Code.

At first they were frustrated, since the Codes have been around they have started to understand.

There have been a few comments. What happens is that change happens; people whinge; and then we don't hear about it again.

In short, licensees generally considered that their patrons had gradually come to accept and understand the restriction that had been placed on the service of alcohol as a result of the introduction of the Responsible Gambling Code of Practice. However, licensees interpretation of what alcohol service they could actually offer those patrons who were gambling continually varied throughout the research project particularly in regard to people buying drinks on behalf of others who are playing the gaming machine.

Table 4.1: Does your venue serve alcohol to people who buy drinks on behalf of others who are playing the gaming machines?

	Wave 2	Wave 3	Wave 4
Yes	53.3 (16)	76.7 (23)	42.9 (13)
No	40.0 (12)	20.0 (6)	46.4 (13)
Don't know	6.7 (2)	3.3 (1)	10.7 (3)
N	30	30	29

Table 4.1 presents licensees' responses to whether or not they serve alcohol to people who buy a drink on behalf of others who are playing the gaming machines. Overall it is clear that licensees struggled with understanding what their responsibilities were in regards to being able to serve alcohol to people who were buying it for others who were gambling. However, this is with the exception of Wave 3 responses where the clear majority of venues stated that they do serve people who are buying alcohol on behalf of others gambling. There are two possible interpretations of this pattern.

One explanation is that licensees responses to this question, as presented in Table 4.1, actually reflect their desire to 'respond correctly' to the questions, to give the researcher the impression that they are complying with the Code. In this interpretation, their answers do not reflect their true practices. This explanation is supported by the fact that the number of licensees responding that they did serve alcohol to people who were buying it on behalf of others who were sitting or standing at a gaming machine spiked sharply at Wave 3 of the research – just after the release of the OLCG guidelines for compliance. These guidelines made it clear that licensees responsibilities in regards to ensuring that patrons are not served alcohol while sitting or standing at the gaming machines applies only to the service of alcohol by staff members and '...does not prevent a patron from ordering and/or delivering a drink on behalf of another patron who may be seated or standing at a gaming machine' (OLCG 2005:2).

It is arguable then that if a desire to appear to be complying with the codes was the licensees' motivations in answering the question, they would have a much clearer understanding of what does comply in respect to serving people who are buying alcohol on behalf of others gambling at Wave 3 than at Wave 2, where they did not have the benefit of

the OLG guidelines, or at Wave 4 where they may have forgotten or weren't as clear in what actually was specified in the guidelines the OLG released to assist licensees to comply with the codes.

Alternatively, licensees' responses in Table 4.1 may be interpreted as truly reflecting what the actual practices of venues were in regard to the serving of alcohol to people who were buying drinks on behalf of others gambling. It was still the case however that more venues provided this service shortly after the release of the OLG guidelines than at other times in the research.

Comments made in response to this question suggest that the majority of licensees really couldn't tell if a person is buying a drink on behalf of another person who is playing a gaming machine, as many gaming area bars had been closed down and other bars are not near the gaming area. Some venues said that on their busy nights it was impossible to tell, but on other evenings they did accept couples buying for each other but would not allow a person to buy more than two drinks. These detailed comments lend more support to the second explanation rather than the first.

4.3.4 *Intoxicated Persons*

At Wave 1, venues were asked what procedures they would put in place to prevent intoxicated people going into the gambling area and gambling. The majority of licensees responded by stating that they would apply the same Responsible Service of Alcohol (RSA) practices to gambling – monitoring drinks/ascertain intoxication, cutting off or refusing intoxicated person service and asking them to leave. Some venues suggest that those that play the gaming machines do not drink very much and so this would be easy to monitor.

At Wave 2 of the research venues tended to report that they constantly monitored the gambling area and asked any intoxicated person identified to leave the venue immediately. These procedures were actioned by the majority of the venues interviewed. At Wave 3, venues were found to rely more heavily on staff vigilance to ensure that intoxicated people did not enter the gambling area and gamble, with the majority of venues (19) stating that their staff had all been trained in the RSA at Wave 3, compared to 11 venues at Wave 2. At Wave 4, venues reported reverting back to monitoring their gaming area as the main practice used to prevent intoxicated persons from gambling.

Along with the shifts occurring to the procedures licensees used to identify intoxicated persons, there were also shifts in the frequency with which intoxicated persons were actually identified in the gaming area of the venue. At Wave 2 of the research half of the respondents (15 venues) had identified an intoxicated person in the gaming area in the previous 3 months. At both Waves 3 and 4 however, nearly three quarters of the licensees interviewed reported having identified an intoxicated person in the gambling area of their venue in the 6 months prior to being interviewed. Intoxicated persons were identified in the gambling area of 22 of the venues at Wave 3 and 20 of the venues at Wave 4 of the research. However, the frequency with which licensees reported identifying an intoxicated person in the gambling area of the venue did drop between Waves 3 and 4, with the majority of venues (16) stating this happened **less** than every month at Wave 4 of the research compared to **more** than every month as reported by the majority (15) of the venues at Wave 3 of the research.

The increase in respondents reporting that they trained their staff to ensure that intoxicated people were identified and removed from the gambling area at Wave 3 is not surprising considering that the majority of the venues would have completed providing their staff with the required responsible gambling training by this time. Given that more venues identified intoxicated persons in their gambling area and this identification was more frequent than at earlier Waves, it appears that training staff and relying on their vigilance is actually a very effective way to ensure patrons both gamble and consume alcohol responsibly.

4.3.5 *Gaming Machine Play*

The Responsible Gambling Code specifies that gambling providers will take all reasonable and practicable steps to ensure that patrons only play one gaming machine at a time. These steps would include gambling providers displaying a warning sign to this affect and verbally warning patrons who offend and if the warning is not observed, requesting the patron to leave the venue for 24 hours.

At each Wave of the research, licensees were asked to detail the procedures they used to ensure that patrons would play only one gaming machine at a time. At Wave 1 the overwhelming majority of licensees (26) stated that they would display the required warning signs. Nineteen of the venues also said that they would train their staff to be vigilant about policing patrons' playing of the machines and 15 stated that they would warn patrons who were playing two machines at once.

In subsequent Waves licensees indicated that they were complementing these legislatively recommended procedures with more proactive measures such as physically and electronically monitoring the gaming area, and verbally educating patrons about the restriction to ensure that patrons played only one machine at a time.

Despite the display of signs informing patrons of the restriction to playing one machine at a time and the verbal warnings given to patrons by licensees, nearly three quarters of the respondents still reported seeing patrons playing two machines at a time over the life of the research. While nearly all venues reported having to verbally warn partons about not doing this at each Wave of data collection, the number of venues requesting patrons to leave for 24 hours was very small with only 4 venues doing this at Wave 2, 8 at Wave 3 and 4 at Wave 4 of the research. The small number of licensees requesting patrons to leave at Wave 2 is understandable considering, as evidenced above, that many respondents said that they had tried to educate patrons about this change before reprimanding them for breaching the code. The small numbers at Wave 3 and 4 of the research, however, suggest that licensees are either not requesting that people who have previously been warned, and who continue to play multiple machines, leave for 24 hours (essentially continuing to take an educational approach to breaches of this aspect of the Responsible Gambling Code) or are not needing to reprimand them for breaches of the Code as patrons are obliging when initially warned about playing two machines a time.

A clearer understanding about why licensees do not request patrons to leave for 24 hours can be gleaned from their comments about this aspect of the Responsible Gambling Code. Many respondents suggested that people were generally obliging when warned about playing two machines thus not requiring them to be banned for 24 hours. As one respondent said 'They stop straight away when they are warned'. Others mentioned the frustration in asking a patron to leave for 24 hours as they would have the same patron come back in a couple of days and do it again.

Asking a patron to leave for 24 hours is a waste of time. They leave and then come back in a couple of days later and do it all over again. How do we enforce the rule if we don't have enough staff. We simply can't enforce it as we are not in the room. Do they expect us to employ more staff so that we can monitor people's behaviour?

Others also mentioned the problems in enforcing this aspect of the code because of the limited amount of time staff have to monitor the area.

We have signs, we tell them, we tell them they will have to leave and they still do it. It's just too hard to enforce without people in the room at all times.

However, it was also found that licensees simply were just not warning patrons and thus could not actually follow this warning through:

We just point it out to people. They know the law and are trying to get away with it.

We speak to them, we don't give them warnings.

We just mention it to them in a nice way and they say 'oops, I forgot'.

4.3.6 *Unattended Children*

The Responsible Gambling Code recommended that gambling providers develop protocols for children left unattended in the gambling provider's premises or in a motor vehicle parked in the venues car park. At Wave 1 of the research 20 venues said that they had never identified children left unattended in their venue or in their venue's car park so they had never had to develop any protocols for this. Of the 12 that reported that children had been left unattended in their venue or in their car park, 9 said that this occurred once a year, 2 reported it to occur once a week and one said it was a regular daily occurrence. Those that reported this to occur frequently (i.e. daily or weekly) clarified that this was actually because the children were left in an unsupervised children's playroom or playing video games the venue provided for children's entertainment. Seventeen venues said that if this did occur they would find the parents, speak to them about the policy and warn them. Four venues also said that they had procedures in place to ensure that the car park was patrolled. Eleven of the venues that stated that they had never identified a child who had been left unattended in their venue or car park also stated that for this reason they had not developed any protocols or policies regarding unattended children.

Little change in this trend was evident at Wave 2 of the research with the majority of venues still reporting that they had not identified children that had been left unattended in the venue (22) or in the venue's car park (29). Those that did specify that they had identified unattended children in their premises (8) stated that this occurred with similar frequency as that reported at Wave 1. At Wave 2, however, all venues were found to have formalised the procedures they would use to deal with children that are left unattended. These procedures differed little from those venues had described at Wave 1 of the research.

At Wave 3 the proportion of venues that actively monitored the presence of unattended children increased sharply. At Wave 3, just over half of the respondents (16) said that they now monitored car parks (compared to 4 venues at Wave 1 and 2), and over a third (11

venues) had erected signs that inform patrons of the policy (compare to 5 venues at Wave 2). The increase in these monitoring procedures adopted by venues, however, did not correlate to an increase in the detection of children being left unattended in their venues. Indeed, at Wave 3 the majority of venues (22) still reported that they had not identified children being left unattended in the venue in the last six months. A slight increase was evident in the number of venues reporting having detected children being left unattended in the car park of the venue, with 3 venues stating that this had happened in the previous 6 months (compared to 1 venue at Wave 2).

The slight increase in venues' detection of children being left unattended in cars can possibly be attributed to the corresponding increase in the number of venues that reported at Wave 3 that they actively monitored the car park (16). At Wave 4, however, the proportion of venues reporting actively monitoring the car park declined. Only a third (9) of respondents said that they monitored the car park at Wave 4 (compared to over a half at Wave 3). Venues were much more likely to report that they would find the parents of unattended children at Wave 4 (21) compared to any other Wave (15 at Wave 2, and 16 at Wave 3). However, many venues did suggest that patrons would inform them if a child was left in a car and they would go out and ask the child who their parents were and then find the parent. As one stated:

I was informed by a customer that there was a child in the car. I spoke to the child, asked what the parents looked like, went in, found the mother, asked her if it was her car, she said yes. I told her she was not allowed to leave kids in there, she said it was none of my business. I said it was and asked her to leave.

The results presented above suggest that the recommendation that gambling providers develop a protocol for children that are left unattended in the venue or in the venue's car park has clearly increased licensees' awareness of their responsibilities in this area. However, the relatively limited occurrence of this problem in car parks seems to have lead to venues favouring the development of policy and procedures that dealt specifically with children that were left unattended inside the gambling providers' premises.

4.3.7 *Staff Training*

TAFE was the principal provider of problem gambling training for venue staff over the life of the research. Venues also used the training provided by AHA and the Jackpot club at high rates. Clubs tended to utilise the training provided by Clubs SA and a few venues (usually the venues that were a part of a large hotel chain) also stated that they employed an independent training organisation to provide in-house training to all staff.

Overall venues showed a fairly positive attitude towards staff training. The overwhelming majority of venues reported at each Wave that they did not have any problems in providing problem gambling training to their staff. Those respondents that did have concerns about, and problems with, providing this training usually commented on the financial burden it had on the venue especially when staff turnover was an issue. Other negative factors included the time staff needed to have off to attend the training and the logistical problems this caused as a result of organising staff rosters around the provision of training. Many of the country venues also complained about the distance staff had to travel to attend the course, and the limited number of courses being offered in an area near to them.

These problems encountered by licensees in providing problem gambling training to their staff, while being mentioned less frequently over time, were echoed throughout the entirety of the research.

Despite any problems licensees reported in providing problem gambling training to venue staff, the majority of licensees did think that the training was useful for their staff. At all Waves of the research over half of the venues reported that the problem gambling training had been useful for their staff:

For someone who is not familiar with responsible gambling it is very good.
It is an eye opener for those new staff as to what to look for.

Very good. It got staff up to speed on what they should observe.

The training has increased community awareness, by training staff.

TAFE courses were very applicable. TAFE were conscious of the time and courses were 2-3 hours. They gave the facts and didn't waste your time. The government should be complimented on the training.

[Named trainers] came here and she was very good. Our hotel is part of a group. The training made everyone aware of situations and of patrons' behaviour. It heightened awareness and trained people to look.

It was very useful. It covered 90% of the stuff people need to know. It was a generic course. The other 10% are specific venue or company policies.

Those that did not find the training very useful usually complained that the training did not help staff identify and approach people who are having trouble controlling their spending on gambling.

The course was mediocre. It was commonsense really. Most people in the industry are aware of the regulations and it is reiterated to staff. How to deal with people is the hardest thing. The course didn't deal with how to approach people.

Comments made by a few respondents at Waves 2 and 3 of the research project indicated that staff recruitment strategies had changed as a result of the new staff training requirements, with venues seeking to employ staff who already had up to date responsible gambling training. For example, at Wave 3 one respondent stated that 'we are now employing staff that have already done their training in RSG¹³ and RSA¹⁴'. Following this up in Wave 4 of the research, we found that while the majority of respondents thought this was a favourable and desirable characteristic of potential employees, it was not a mandatory requirement as the responsible gambling training was an ongoing process and venues would eventually have to put staff through refresher courses. One third (8) of the respondents, however, did state that this was a definite attribute they were seeking in their new staff:

We definitely look for that as it means we don't have to pay for the cost of the training or the time they take off to complete the training. Finding it

¹³ Responsible Service of Gambling

¹⁴ Responsible Service of Alcohol

more and more to be an important issue, and more and more potential staff have the training.

From a labour supply point of view such comments indicate that potential employees are not being deterred by increased training requirements from seeking employment at gaming venues. Indeed, some may be seeking such training in order to secure this employment, while others obtain it while already employed.

4.3.8 *Problem Gambling*

The Responsible Gambling Code requires that gambling providers take all reasonable steps to ensure that people who have problems controlling their spending on gambling have their attention drawn to the name and telephone number of a widely available gambling referral service.

Throughout the research project, licensees reported that the majority of staff had difficulties in identifying people who have problems controlling their spending on gambling. Indeed, well over half (more than 15) of the respondents mentioned that staff found it either difficult or very difficult to identify people who have problems controlling their spending on gambling in the initial three Waves of the research. However, by Wave 4 nearly three quarters of respondents (20) stated that their staff had difficulty in doing this. Comments presented above in relation to staff training also suggested that the training offered to staff was of little use in helping staff implement this aspect of the code.

Some venues did specify that it was easier for more experienced staff to do this rather than new or casual staff:

It's easy for more experienced staff, for new staff it is quite difficult.

How easy identification is depends on staff members experience and how much they really want to get involved (e.g., commitment to their job).

For full time workers it is in the middle of the range. The casual workers find it a bit harder.

Most venues reported that staff relied on behaviour indicators such as signs of agitation, aggression or obsessive-compulsive/ritualistic behaviour, such as touching the screen and moving from one machine to another, to identify someone who has problems controlling their spending on gambling. Indicators of these types were mentioned with similar frequency in the initial Waves of the research but were found to be relied upon by more staff as an indicator of problem gambling at Wave 4 of the research.

Licensees also reported that staff observed the amount patrons gamble and the number and length of patrons' gaming sessions as other indicators of problem gambling. These indicators, while being reported by consistent numbers of licensees over the 4 Waves of the research, were not as commonly mentioned as staff's reported reliance on behavioural indicators.

In association with the length of gambling session and the amount gambled, licensees also reported that frequent visits to the ATM and/or coin machine were also indicators that staff used to identify a person who has trouble controlling their spending on gambling. These actions in isolation, however, were not often suggested to be reliable indicators, but

combined with the length of stay and/or the amount gambled, usually triggered warning bells in the awareness of staff. As one licensee highlights:

It's the amount of money that is spent. ATM visits back and forth. Trips to the coin machine. Sitting there all day. Then they have a problem.

Indeed all licensees emphasised by Wave 3 of the research that it was not one thing alone that indicated a person had problems controlling their spending on gambling but rather a combination of behaviours and actions that indicated the problem. As one venue stated:

In isolation we do not consider any of one of these to be conclusive indicators of problem gambling, but in conjunction, yes.

While licensees reported that the staff and themselves knew what indicators to look for when identifying a person that may have problems controlling their spending on gambling, approaching a person that they believed to be a problem gambler and offering them contact details and referral material for problem gambling counselling services proved to be an area of great concern and contention for licensees. As one venue put it:

Identification is easier than execution.

Licensees were asked to detail how they and their staff drew the attention of people who have problems controlling their spending on gambling to the name and telephone number of a gambling help service. As suggested above, licensees were found to express deep concerns and hesitation about how to confront people they believed had a gambling problem. Many were concerned about the practicalities of doing this and were uncertain about the etiquette required.

It's hard to go up to someone and tell them that they have a gambling problem. It goes against the privacy of the person and who am I to judge?.

Other venues suggested that they were concerned about getting it wrong and the consequences this may have for themselves and the venue.

Very hard for licensees to confront problem gamblers because we have to be 100% certain they have a problem, otherwise we risk offending someone and losing patrons, or worse litigation suits from patrons. As such, at the moment I don't encourage staff to say anything. Licensees are not covered enough.

Ramification about getting it wrong; liability, lawsuits, defamation, too risky.

Others simply rejected the idea that staff should be asked or required to carry out this task.

We have to be very careful about the roles that are given to hospitality staff. My staff are not social workers. Customers are adults and so only if a person's gambling problem is really obvious will staff be offering a referral.

I don't think we can or should be expected to do this. A social worker with six years of experience would have problems doing this let alone an 18 year old kid. I can't and won't ask my staff to do this.

We're not counsellors and should not be asked to act as counsellors.

The codes put the onus on the staff to act. It is unfair to ask staff to be social workers.

These concerns meant that for about half of the respondents at each Wave the only active step they reported taking in regard to this matter was displaying gambling helpline information such as signs, stickers and pamphlets. As licensees stated:

The pamphlets are there, it is up to them to take them.

We are poorest at this. We have the material here but we don't hand them out. We should but we are not confident that people are problem gamblers. We are wary - the staff refer them to me and I go out and ask them questions. If they close up I don't pursue it or go any further. It's hard to know how far to go or what to say. I ask them if they have enough money for their Christmas shopping. They can then turn to me and say 'I have got enough money to do my Christmas shopping and buy lots of presents'. They might be lying. It's hard to know if they are looking for help or not and I don't want to upset them.

At each Wave, however, half of the licensees interviewed also suggested that as well as displaying this material in their venues they would speak discretely to a patron about the gambling help services and provide the patron with information about these services. However, licensees frequently mentioned that they would only do this if a patron identified himself or herself as having a problem with gambling, rather than when a staff member considered that they had a problem.

The number of venues saying that they had actually given the name and telephone number of a gambling help service to patrons increased over the Waves of the research. At Wave 2, one third of the venues (10) reported that they had given information about gambling help services to patrons. This compares to half of the venues at Waves 3 and 4 (15 and 14 venues respectively). The reported increase in respondents giving information to people about problem gambling help services between Wave 2 and 3 could, however, be a result of the different time period we asked respondents to comment on at Wave 2 (3 months) compared to Wave 3 and 4 (6 months).

The number of gamblers given this information did increase across Waves, suggesting that some change has occurred as a result of the introduction of the Responsible Gambling Code. At Wave 2 gambling help service information was given to approximately 26 people. At Wave 3 licensees reported having given this information to approximately 51 patrons and at Wave 4 this number again grew with licensees giving this information to approximately 61 people¹⁵. The change could reflect licensees increased acceptance of giving people information about problem gambling help services. However, considering the fact that licensees most frequently mentioned that they would do this only when patrons themselves expressed a concern about their gambling, it is also possible that the change reflects an increase in people approaching staff. Moreover, increased staff awareness and acceptance of providing gamblers with this information may have created an environment in which people who have problems controlling their spending on gambling are more comfortable in asking for help services material. In any case, the requirement that licensees display and

¹⁵ These estimates need to be interpreted with caution as they are based on estimates made from licensees themselves.

provide problem gambling help service material does seem to have resulted in more gamblers receiving this material.

Licensees whose staff had approached a possible problem gambler did report that staff encountered some difficulties in doing this. This could have contributed to some licensees' reluctance to do this. At Wave 2 licensees commonly reported that staff felt embarrassed and uncomfortable in doing this. As one licensee stated:

It's nerve wracking for the staff, especially for the young ones.

Licensees also suggested that staff experienced physical and/or verbal aggression from patrons when doing this.

People get irate and violent. That's why we tell them to go to the manager.
People get insulted.

They will swear, get aggressive, deny the problem, tell you that you have made a mistake.

Staff were told to piss off and mind their own business.

While these issues continued to be experienced by staff at Wave 3 of the research, licensees more frequently said that patrons who were approached by staff denied that they had a problem and refused the information that was provided to them. Eight venues stated this. For example one venue commented,

Denial. Many people will deny the problem because they are embarrassed.

All of these issues were reported again as being faced by staff at Wave 4 of the research. However, they were mentioned much less than in other Waves. At Wave 4, many licensees emphasised that staff were no longer expected to do this and had been instructed to consult the manager if someone was observed as having a problem with gambling. This may explain why licensees reported that staff faced fewer issues at Wave 4 than in previous Waves. As many simply stated:

None, it is always the manager who does this.

It now goes to the manager first and they then deal with it. We don't want our general staff to be put in a confrontational situation.

In a few instances it was reported by licensees that patrons actually expressed gratitude to staff members for giving them this information.

Most took it really well and thanked us.

Patrons are positive if they feel that staff are concerned about them. They are negative towards us if they don't think they have a problem.

There are two main responses from patrons and nothing much in between.
Denial or 'thank god you found me.'

4.3.9 *Self Exclusion*

Three quarters of licensees had a self-exclusion program operating in their venue at Wave 1 of the research. Eight venues did not have a self-exclusion program operating; these venues said that this was because they had never been approached by anyone wishing to exclude themselves. Of those that did have a self-exclusion program, 19 venues' programs were based on barring a person under section 59 of the Gaming Machines Act 1992. However, some venues (3) preferred patrons to additionally bar under the Independent Gambling Authority Act 1995 and requested or arranged for patrons to make an appointment with the IGA once they completed the barring under the Gaming Machines Act 1992.¹⁶ Two venues explicitly stated that they would only bar a person under the Independent Gambling Authority Act 1995 because the requirements to have the bar lifted under this Act did not necessitate licensees' involvement. Both of these licensees narrated past accounts of lifting venue based barring orders only to find the same person gambling in their venue a week later.

The rate of licensees receiving requests from patrons to be self-excluded from their venues was relatively stable across the 4 Waves of the research project. At Wave 1 and 2, 13 venues reported having received a request for self-exclusion. This number increased a little at Wave 3 with half (15) of venues reporting that they had received a request, but reverted back to similar numbers at Wave 4 with 12 venues having received a request from patrons to be excluded from the venue.

The number of people licensees in the sample had received self-barring requests from did vary between Waves. At Wave 1 a total of 46 people were reported to have requested to be self-excluded. At Wave 2, the number declined by nearly half to 28 people. It then rose dramatically at Wave 3 with licensees reporting that they had received requests from a total of 68 people. However, at Wave 4 a decline was again reported, with only 22 people asking to be self-excluded. All requests for self-exclusion received by licensees were carried out.

The trend in these numbers is highly significant when we considered the time period the data was collected. Wave 1 data collection occurred in March and April of 2004 and licensees were asked to comment on how many requests they had received in the previous 6 months. These requests primarily reflect those requests made by patrons over the Christmas and New Year period. Wave 3 data was collected in February and March of 2005 and in this Wave licensees once more were asked to comment on how many requests they had received in the preceding six months, again seeming to primarily reflect requests received over the Christmas and New Year period. It thus seems that there is an increased tendency for people to ask to be self excluded from a venue over these financially demanding months compared to other times of the year. This finding may be useful to feed back to licensees to ensure that they pay particular attention to people who are having trouble controlling their spending on gambling at this time of the year, as it may well result in these people acknowledging the problem and taking active steps such as excluding themselves from that venue to remedy the problem.

The Responsible Gambling Code specifies that each request for self-exclusion made by a patron will include the provision of a translation service if requested and the referral to, or

¹⁶ Licensees did not consistently distinguish between venue based and IGA barring to the extent that trends in requests for each form of barring could be analysed separately. References to 'requests' for barring in the following paragraphs therefore refer to both types of barring, though we can say that the vast majority are venue based.

liaison with, a counselling service. Not one venue reported that people asking to be self-excluded requested the service of an interpreter.

The overwhelming majority of those that did receive self-exclusion requests had no problem in referring people to a gambling counselling service. However 4 venues did complain that some people, while requesting to be excluded, did not necessarily want counselling. As stated by one venue:

They weren't interested in going to see a counsellor. They admitted that they had a problem, were willing to be barred, but unwilling to have treatment or go to a counsellor.

Almost all venues at each Wave reported having people self excluded from gambling in their venue under either the Gaming Machines Act 1992 or the Independent Gambling Authority Act 1995. The procedures licensees used to identify self-excluded people who came into the gaming area of the venue varied little between venues and did not change over time. Over three quarters of licensees at every Wave reported that they kept a folder or book of photos of barred persons and encouraged staff to look through these regularly. As highlighted by one licensee's comments:

Every day, staff are told to check the photos in the book near the cashier. It's a start up procedure for all staff at the beginning of each shift. It is a focus for staff. It's in staff meeting agendas as a crisis reporting process – if a barred persons turns up at this venue the information is passed on to state level management. We consider it a serious gaming issue.

Others displayed photos on the wall as they thought this was more accessible for staff. As one venue states:

Have the photos displayed on the wall. We call it the 'wall of shame'. It depends on where you put your photos. If you have them in a book and ask staff to look through them once a week people don't look at them enough to memorise their faces. We have all the photos up on the wall, where staff can see them all the time when they go and have a smoke or a coffee.

However, licensees reported that despite having these photos, it was extremely difficult to identify self-excluded persons. At each Wave, over half of the licensees interviewed reported that they and their staff found it either difficult or very difficult to identify a self-excluded person that came into the gaming area of the venue. The number of licensees reporting that they found the identification of self excluded persons difficult increased over the research project. At Wave 1 and 2, 16 venues reported difficulty, whereas at Wave 3, 23 venues reported this and at Wave 4, 21 venues said that it was either difficult or very difficult to do this.

The difficulty licensees experienced in identifying self-excluded person usually related to having only a photo to use to do this.

One must hope for a photographic memory.

It is impossible to identify self-barred people from photos. We can't read the book of photos every night. It is inches thick. It is difficult unless people are unique.

It doesn't work. Even if I looked at the photos 3 times a day I would be lucky to identify anyone. It shouldn't be our responsibility to look out for them. They should look after their own self-exclusion. They should cop the fine if they breach the bar. Too much responsibility is placed on the floor staff.

Some licensees found the difficulty in identifying self-excluded person from a photo being compounded by the location photos were required to be kept. Licensees suggested that the ruling that photos can't be displayed in the public area is ridiculous as it limits the possibilities of identification and presents a contradiction to other aspects of legislation that mandates licensees approach people they perceive as having problems controlling their spending on gambling or who they believe to be self excluded from the venue.

The problem is that governments tell us on the one hand that we have to approach people who we think have a problem with gambling and also people who are problem gamblers (and this is not a breach of privacy), but we can't display photos for easy identification, as this is a breach of privacy. It's a joke.

One of the staff suggested that we should be able to have the photos up on the wall in the gaming area and there should be a sign which says "if you see me please ask me to leave", if you were serious about your gambling problem you wouldn't mind.

Recognition was also suggested to be difficult where venues had large numbers of people who were self-excluded, individuals had not previously patronised the venue, people changed their appearance, and/or when the photos were quite old.

Some licensees reported that they did not have much difficulty identifying self-excluded person as they either had excluded the person themselves, had small numbers of self-excluded people, and/or they were generally well known to staff. This was usually stated by venues in smaller communities and in country areas.

These difficulties, real or perceived, in licensees and their staff's ability to identify people who have excluded themselves from gambling in the venue may explain why half of the venues at Waves 2, 3 and 4 stated that they had not identified a self excluded person in their venue. The number of licensees reporting **not** having identified a self excluded person increased from Wave 1, with only a third of licensees (13) reporting **not** having done this prior to the implementation of the Code, and half of the licensees reporting **not** having done it after the implementation of the Code. Indeed the comments above suggest that there is a lot of variability between venues in how seriously they take their responsibilities in this area. The difficulties licensees articulated in relation to identifying people from photos suggests that this may be one area that could be reformed or improved to assist licensees in identifying self-excluded persons, and increase their commitment to their responsibilities in this area. As it stands the difficulties associated with doing this seem to be eroding licensees confidence and commitment to identify self excluded persons.

For those that had identified a self excluded person in the gaming area of their venue, it was usually the case that staff approached the person to ask for identification and after the identity of that person had been confirmed, requested the person to leave and explained to them the consequences for them and the venue if they remained in the gaming area. Surprisingly only one licensee at each Wave reported that they would give the person additional problem gambling information at this time, with the majority of comments suggesting instead that they were more concerned with making sure the person left the premises. This is highlighted by licensees' comments about the procedures they use to ensure that self-excluded people leave the gambling area:

I have explained to the staff that they must ask the person to leave or call the police if they refuse to go.

We've sent the police after one of them. If they want to hide it is unreasonable to fine us.

If once they been asked to leave and they don't, we warn them that we will have to use force or call the police.

If they refuse to leave, then security or the police are called.

These comments indicate something of a dilemma in the appropriate penalties for gamblers who contravene self-barring, and licensees who do not take immediate action to eject them. Faced with self-barred people in their venues, licensees were clearly concerned primarily that they avoid penalties for not ejecting those people. However, the focus on ejecting such patrons seems to cut across the intention of other provisions in the Code that venues provide people who appear to have gambling problems with gambling help services material. Indeed, the emphasis on ejection may make it more difficult for such gamblers to receive reinforcement¹⁷ of information about the assistance available to them. One interviewee illustrated the approach licensees might take if they were not so preoccupied with the penalty they may receive for allowing a self-excluded person to enter and remain in the gaming area of a venue:

Tread lightly. We would stop them from playing by asking politely. We would sit with them in another area and go through the referral material again and see if they are all right.

This issue prompted us to ask in the fourth Wave of data collection what contact licensees had had with a gambling counselling service since the introduction of the Codes. Out of the 29 venues that were interviewed at Wave 4 of the research, only six had had contact with a gambling help service and only three of these venues had instigated this contact themselves. This suggests that a lot can be done to improve communications and relationships between these two groups.

4.3.10 Responsible Gambling Document

The Responsible Gambling Code specifies that gambling providers will prepare and keep current a document that details the manner in which staff training and measures for

¹⁷ Gamblers who are barred will already have received information about gamblers' assistance services when they were barred. The point here is that for some, including those who attempt to gamble while barred, reinforcement of this information and provision of further support may be necessary for these gamblers' to take advantage of these services.

intervention with problem gambling are implemented and, the roles of staff in implementing the Responsible Gambling Code.

Licensees' documentation of these requirements varied in relation to the three different aspects that needed to be incorporated. The way in which staff were trained was found to be easily documented by licensees with three quarters of licensees having done this at Wave 3 and all venues having done this by Wave 4.

The numbers of licensees that had documented the roles of staff in putting the codes into operation was a little less than those having documented staff training, however three quarters of venues at Wave 3 and 4 reported having done this.

At Wave 3, three quarters of the venues had documented the measures in place for staff intervention with problems gamblers¹⁸.

4.4 Effects of the Codes and Overall Perceptions of the Codes

4.4.1 Difficulties Implementing the Advertising and Responsible Gambling Codes of Practice

Prior to the implementation of the Codes over half of the respondents (18) foresaw that they would have little or no difficulty in implementing the new codes. As time went on a slightly larger proportion of licensees reported having had no difficulties in implementing the Codes. Twenty two respondents said this at Wave 2, 18 at Wave 3 and 20 at Wave 4.

The problems that licensees did articulate usually related to separate aspects of the Codes as described above. For example, many complained about the difficulty in interpreting the Advertising Code and the increased amount of signage that was required under both the Advertising and Responsible Gambling Codes. Others took issue with the restrictions placed on the service of alcohol suggesting that it limited the quality of service they could provide and goes against the core business of their enterprise. A lot also articulated the same hesitations and concerns evidenced above in regards to approaching people they considered to have a gambling problem and the identification of self-excluded persons. Overwhelming, however, licensees referred to frustration with the increased workload the Codes had created in regarded to both implementing and enforcing the Codes to ensure they were compliant.

Time. A large amount of my time is spent on the ongoing maintenance of the Codes and the training of staff.

My gaming room manager, she is not the brightest, but she looks nice and she smiles and is good with the customers. She now has a lot to do. She has to keep the room clean, make sure the money balances, and now she has to make sure everything complies with the regulations. It is all too much, too hard and too much to do.

¹⁸ The question at Wave 4 seems to have been misinterpreted by a number of venues. This misinterpretation meant that many licensee told us whether they had intervene with problem gamblers rather than whether they had documented the measures they would use if they had to intervene with problem gambler. For this reason we are not able to say whether there was a change in proportion of venues which had documented the measures for staff intervention with problem gamblers between Wave 3 and 4 of the research.

The Codes increased workload. We are continually checking everything that is being done. We are very vigilant in making sure we comply but this creates additional work.

It is just a huge increase in managerial issues and an increased workload for everyone.

4.4.2 *Benefits of The Advertising and Responsible Gambling Code of Practice*

Despite the difficulties experienced in implementing the codes, one third of the respondents at Wave 3 (10 venues) and 4 (9 venues) did see some benefits from the Codes. Some of the regulations were thought to be useful, as staff felt more confident and had greater powers to enforce pre-existing in-house policies.

It gives managers guidelines to work within. The law is there to back you up. It reinforces in-house policy.

It's a lot easier to enforce in-house policies regarding alcohol consumption and gambling etc. We can now tell a patron that it is part of a Code and they cannot do that.

We have the right to control, the right to put controls into place. We can now say you are not doing the right thing and they will stop.

The code is useful to refer to. It's like having in-house rules. We can say it's the government, don't blame us, it's a statutory requirement.

The two-machine play rule was seen as the greatest asset, as patient patrons now have improved opportunities to play, while others are prevented from monopolising more than one machine. This helped reduce friction and tensions between players.

The notice that states you can only play one machine at a time means that there is less aggression with one playing two machines.

Staff training was also regarded as beneficial as it raised awareness of responsible gambling.

Enforced training is a good thing. All staff have to know these things.

It has increased staff awareness and has given them the confidence to do things.

This increased awareness was also said to have contributed to the reduction in the harm experienced by problem gamblers. Licensees were asked to comment at Wave 4 on their perception of whether or not the codes had reduced the harm experienced by problem gamblers. One third of the venues (9) said that, in their opinion, the Codes had reduced the harm experienced by problem gamblers. This was mainly due to overall increase in awareness of the problems gambling caused for some people, as the following comments highlight:

It has [helped], as we as licensees are more aware ourselves. It is an awareness issue.

It puts a focus on the industry. At least now the industry is aware of the problem gambling issue.

4.4.3 *Customer Awareness of Responsible Gambling*

Despite the increase in the industry's awareness of responsible gambling, there was no correlating increase in the level of customer awareness, as perceived by licensees, across the Waves of the research. Two thirds of the licensees interviewed at each Wave said that patrons had either high or medium awareness of responsible gambling issues. While over half of the venues at Wave 4 (14) said that the codes had been effective in raising this awareness amongst patrons, licensees tended to consider media coverage of responsible gambling issues as having a greater impact on raising awareness of responsible gambling. Comments on this issue did suggest that some licensees interpreted awareness of responsible gambling as meaning awareness of the Responsible Gambling Code. One venue commented:

Media scrutiny of the industry has heightened public awareness. It has highlighted what people can and can't do and this has made enforcement of the rules easier.

4.4.4 *Effects of Codes on Gambling Turnover*

The introduction of the Advertising and Responsible Gambling Code of practice was reported to have had no impact on the turnover licensees made from gambling. At Wave 1 just under three quarters (23) of the venues said that they expected their turnover to remain the same. In the following Waves over three quarters of the respondents reported that their turnover had stayed the same. At Wave 3 of the research, 2 venues suggested that the new smoking legislation had had a negative effect on their turnover, however at Wave 4 there was an increase in the number of venues stating that their revenue actually increased in the previous 6 months. Six venues reported this but stated that this was not a result of the Codes.

4.5 *Reduction in the Numbers of Gaming Machines*

4.5.1 *Reduction in the Number of Gaming Machines*

The proposed reduction in the number of gaming machines was a topical issue of concern for licensees. Indeed, at Waves 1, 2 and 3, licensees commented at length about the proposed reduction even though the reduction was still under debate in Parliament. Comments about the proposed reduction were highly emotive but the underlying sentiment amongst the majority was the belief that the reduction would have no impact on reducing the problem associated with gambling.

I don't think they know what they are doing. It won't affect problem gambling. How will reducing the numbers in my venue reduce problem gambling? They will go elsewhere if they can't get the machine they want. If they take the pokies away they will go elsewhere or go to another form of gambling.

I wish someone would get their head out of the sand. The reduction in the number of gaming machines won't make any difference. You drive along

and you see hotels with gaming machines open till 5am. If they changed that and made them all close at a similar time that may have an effect.

Problem gamblers will still gamble. They will use the EGMs that are there or they will turn to other forms of gambling.

It was also believed that while the reduction would not affect the bottom line, any loss of revenue as a result of the reduction would result in the loss of jobs and the cutting of costs elsewhere in the business.

Indirect unemployment as a result of the reduction. We have loans outstanding and we cannot make any new investments. Our gaming profitability underpinned our ability to refurbish and renovate. It is the first stage of more reduction that will follow.

Catering will have to be outsourced. Casual staff will have to go. Managers will have to do more tasks formerly done by other staff .

Don't think it will have an impact on gambling turnover but it will definitely on staff hours. It will have an impact on the non-measurable things.

It won't have a big impact on the bottom line, but if we lose 25% turnover I will cut staff and other costs.

Many also took the opportunity in speaking with us to voice their concerns about different aspects of the proposal such as the exemption of clubs and the casino from the reduction and the operation of the buyback scheme.

The buy-back scheme is a disgrace. I have a real concern about the buy back scheme. I don't want to see the big groups that currently dominate to profit while ripping off the smaller venues.

The casino is allowed to keep all their EGMs and they can open 24 hours a day. Problem gamblers will just go to the casino if they take the machines.

I am dark on clubs being able to keep 40 machines. If they need to cut 20% of machines they should cut them state wide.

Some venues also suggested that the reduction would cause aggression and competition among patrons as players had to compete for the use of machines.

If we have less than 40 machines people are going to have to wait to use them. They won't leave if all the machines are busy, they will wait. If someone is on a machine and another person is waiting they won't move they will stay on and keep playing as they think it is my machine. Then there will be conflict.

Between Waves 3 and 4 of the research, the reduction in the number of gaming machines did occur across South Australia. With the exception of clubs, this reduction meant that for venues with more than 28 machines a reduction of 8 machines would occur and for those venues with 21-27 machines the number of gaming machines would be brought down to 20.

As a large proportion of venues in our sample experienced this reduction and commented extensively on its proposal in previous Waves, we sought in the Wave 4 survey to assess the impact of this reduction on the licensee, the revenue and the venue more broadly so that these could be compared to licensees' previous comments about the reduction.

As clubs were exempt from this statewide reduction in the number of gaming machines, a total of 22 venues at Wave 4 were subject to the legislation. Of these 8 did not lose any machines. Two venues had the number of gaming machines brought down by 7, and 12 (over half of the venues) lost 8 machines.

In line with the expectations of some licensees at previous Waves which are noted above, most respondents (11) reported that their revenue had not changed as a result of the reduction. It was found however, that some licensees had adopted alternative strategies to curb this loss of revenue as a result of the reduction, like extending their opening hours.

We haven't lost revenue as we have just extended the time people can play the machine. We are even open on Sundays up until 3am.

Compared to the reported impact of the Advertising and Responsible Gambling Codes on turnover, more respondents at Wave 4 thought that the reduction had had a negative affect on turnover.

Some licensees reported that while not losing revenue they did have to cut costs in other areas as a result of the reduction.

It has affected us, wages had to be cut, expenses had to be controlled, we had to cut promotion and give-a-ways as well.

Due to the reduction we were down by 10% profit and had to reduce service levels and wages.

We have a 12 [midnight] to 6 am shift and I had to reduce the number of staff on that shift solely as a result of the reduction.

For a few licensees, the reduction was also reported to have lead to the envisaged increase in tension and aggression between patrons as players had to compete for the use of machines.

We don't have enough machines in peak periods, it makes patrons annoyed, to the point that people get abusive and walk out the door disgusted.

I have noticed more aggression in the use of machines. All 32 machines are being used most of the time.

This point is particularly interesting in light of previous findings reported above that suggested that one of the benefits of the restriction to playing one machine at a time experienced by licensees was the reduced aggression between players. This suggests that the two initiatives are having opposite effects. On the one hand the restriction to playing one machine at a time was reported by 6 different venues over the life of the research to have reduced tensions between players over machines but on the other, the reduction was reported by 8 venues at wave 4 of the research to have caused a re-ignition of these tensions, as there were now fewer machines to play.

The majority of the licensees that experienced the reduction expressed dissatisfaction with the large incidental costs incurred. These costs ranged from the minor reconfiguration of rooms to the major refurbishments of gaming areas.

Big expense. We have design issues, need cabling, carpeting, decorating, refurbishment, etc.

So far it has cost us a lot of time and money. Trying to find a tradesperson to fix room. Having designs of the room drafted. It has been quoted at \$15,000 to furnish room in a basic fashion, but the costs keep rising, electrical work, carpets, cabling furniture, etc.

The financial cost of refurbishing the room, it is a very rushed process.

Licensees however reported that the reduction had not caused patrons to switch to another gambling type as a result of fewer machines being available to play.

4.5.2 Reduction in the Number of Venues

The reduction in the number of gaming machine has the dual goal of not only decreasing the total number of EGMs in South Australia by 3000, but also to reduce the aggregate number of venues that have gaming machines. With the exception of not for profit association licensed venues, the reduction in the total number of gaming machines meant that for every licensed premises with more than 28 machines, the number was reduced by 8. For venues with 21-27 machines the number of electronic gaming machines was reduced to 20. The reduction in venue numbers was to result from allowing venues to buy back gaming machine entitlements up to the previous maximum level of 40 via a controlled trading system, anticipating that some venues may decide to relinquish all gaming machines entitlements.

At Wave 1, eleven venues reported that they would sell some of their gaming machine entitlements if the proposed reduction went ahead. At Wave 4, however, no licensee in the sample reported that they did or would do this. Indeed many expressed strong rejection of the system, as it was deemed to be financially inappropriate:

The buyback system is not tempting for small hotels to sell their entitlements. It doesn't make it viable. I would not sell for that amount of money.

Won't sell any entitlements. Don't want to sell. The large venues can only buy if someone wants to sell and I don't want to sell.

These comments may highlight why only a small proportion of the total amount of venues that have EGMs opted to go 'pokie free' by selling their gaming machine entitlements. Only 17 venues state wide did this after the introduction of the reforms (Advertiser 5/10/2005: 5').

The majority of venues were undecided as to whether or not they would buy back any gaming machine entitlements at Waves 1 and 3 of the research. At Wave 4, 4 licensees had had been successful in the first round of trading and bought a gaming machine entitlement back. Many of the respondents that had sought to buy back an entitlement suggested that the trading system was extremely complicated, unconsidered and poorly handled.

I think it was really poorly handled. It was unnecessarily complex.

Tried first round, but then we were unsuccessful, we are currently in the second round. A joke. I think it was very complicated, was not planned out well enough. Government used it as a revenue raiser. Have to pay money for every round entered into. People bought entitlements in first round but were then unable to pay for them, so they got put back into the second round.

4.6 Conclusion

As the results above suggest, the Advertising and Responsible Gambling Codes of Practice have clearly impacted on the way licensees conduct their businesses and have given rise to a heightened level of awareness of responsible gambling issues amongst them and their staff.

However, the experience of implementing the Codes was quite variable. Licensees had implemented aspects of the Codes that were clear and precise with little difficulty. Obtaining and displaying responsible gambling materials, restricting the use of gaming machines play to one at a time, providing problem gambling training to staff, and preventing intoxicated persons from entering the gambling area and gambling were reported by licensees to have been executed with relative ease. The majority of licensees said that they had complied with these aspects early in the research and in some cases prior to the introduction of the Codes. Other aspects of the Codes such as the restrictions placed on accepting cheques as payment or cashing cheques on behalf of patrons were also not of great concern, with many venues simply reinforcing existing in house policies.

However, some aspects of the Codes proved more difficult for licensees to put into practice. All of the Advertising Code, as well as some aspects of the Responsible Gambling Code were experienced by licensees as lacking the detailed prescription that would allow for their immediate and unproblematic implementation and execution.

Aspects of the Responsible Gambling Code that licensee indicated suffered from these problems included the requirement to identify and approach someone who has a gambling problem, and developing and keeping current a document that detailed the manner in which staff training and measures for intervention with problem gambling are implemented and, the roles of staff in implementing the Responsible Gambling Code.

As venues' uncertainty about their responsibilities in regard to the Codes were clarified and further understood, aspects of the Codes that initially proved problematic were adopted and implemented by licensees, albeit quite a time after the implementation of the codes and with some continuing concerns.

5. Gaming Room Staff – Licensed Premises

5.1 *The Sample*

Interviews were conducted with staff from eight licensed premises three months after the introduction of the Codes. A structured interview schedule was used, with questions developed to assess the impact the Codes had had on the behaviour of patrons and on their work.

Gaming room staff were employed in a variety of settings. Six worked in hotels and two in clubs. The number of gaming machines in their venues ranged from 4 to 40. Four worked in venues with 40 machines, one venue had 21 machines, and the remainder worked in establishments with 10 or fewer machines. The length of time staff had been employed in gaming rooms ranged from 7 months to 11 years.

5.2 *Role*

Half of the group said that their work had changed as a result of the Codes. The main changes identified were the restriction placed on the service of alcohol to patrons playing the gaming machines, increased information provision to customers about the changes due to the introduction of the Codes, and the monitoring and enforcing of the one machine at a time rule.

Several respondents emphasised the maintenance of good customer relationships as being an integral part of their role, however they had experienced abuse and rudeness from customers in the early stages following the introduction of the Codes, especially in regard to the service of alcohol and two-machine play. They stressed that as they were in the hospitality industry the way they related to their patrons was important. One said 'we don't head-kick our patrons', while another remarked that talking to customers was very important as 'the idea is to keep them in the gaming room as long as possible'.

5.3 *Service of Alcohol*

While several venues had never provided drink service to gaming room players, for those that did, it was evident that the venue managements interpreted this aspect of the codes in different ways. One respondent said that they still toured the gaming room to take orders from people playing the machines, but told customers to come to the bar to collect their drinks. This person liked the restrictions placed on the service of alcohol to people playing the machines as it reduced workload. This person said, 'I can be lazy'. The reduction in service was also reported to have reduced staff levels. At another venue with 40 machines the staff member did not take orders for drinks from people who were playing, and patrons had to go to the bar to obtain drinks.

The value of restrictions placed on the service of alcohol to gaming room patrons were questioned by respondents with many suggesting that most problem gamblers do not drink alcohol.

One respondent said at the venues in which they work, people could still press the service button beside the gaming machine for the service of tea and coffee. Two respondents considered that the Code should have included restriction on the service of tea, coffee and

soft drinks as well as alcohol, as people should be forced to leave the machines for all refreshments. One interviewee commented:

A drink is a drink. It does not matter if it is alcohol or not. The idea of the Codes was to get people up and away from the machines to get their drink but they can stay there and press a button for coffee.

Another respondent also considered that the provision of free tea, coffee, soft drinks, sandwiches, biscuits and chocolates to gaming room players should be banned, as it was thought that this encouraged gamblers to use their money primarily for the playing of machines, and rely on the free refreshments provided for sustenance. This respondent felt it was unethical to offer these items as it was thought that it induced people to gamble, encouraged longer gambling periods and constituted significant incentives to people on low incomes.

5.4 Playing Two Machines

Most respondents said that while people did play two machines in their venues, it had never been a common occurrence, and only a few engaged in this behaviour. One respondent commented that serious problem gamblers only played one machine at a time, as they did not want to split their money. Another commented that most people don't have enough money to play two machines at a time as their money is lost too quickly and they want to make it last. He felt that many people play because they are bored or depressed and they wanted to spend as much time playing the machines as possible. It was said that people who play two machines were the type of people who had too much money.

Patrons were generally reported to ignore signs about 2-machine play, but staff did state that most people stopped playing when informed of the rule. One respondent said, that if they did not stop, they would be asked to leave.

Staff members did report that a positive aspect of this new regulation was the reduction in conflict between patrons in the gaming room, which could arise as a result of people playing two machines at a time and preventing others from playing.

5.5 Identifying Problem Gamblers

Consistent with the view of licensees, hotel staff said they relied on multiple aspects of patron actions and behaviours as indicators of gambling problems. Playing the machines for long periods, continuing to play after a major win, becoming stressed, frustrated, angry, over-excited and elated, and sitting talking to staff or friends while feeding money into the machines without looking were reported by staff as things they look for as indications of whether or not someone might have a gambling problem.

Generally, it was considered impossible for staff to identify a problem gambler from the amount of money the gambler spent, as they did not have information about the person's income. A big spender could not be considered a problem gambler. However, changing large amounts of money, going to the ATM more than once, going to the coin change machines several times, and asking for credit were also considered important factors in identification. One respondent mentioned that problem gamblers had many different hotel gaming reward cards in their wallets and that was something they looked out for.

Appearance and dress were not considered reliable indicators, but changes in patrons' appearance over time, and/or noticeable transformations from being well dressed to dishevelled were indications that something might be amiss with the person.

5.6 Approaching Problem Gamblers

Few respondents had ever approached people they thought might have problems with gambling. Three venues had established policies that gaming room staff were not to approach people or say anything, until the customer approached the staff first.

They have to approach me first. I can do nothing unless they come up to me.

It is not our policy to say anything to anyone about their spending habits on the pokie machines. Our procedure, and what we have been taught in courses, is that we do not speak to the person unless the patron speaks to us about their gambling.

However, most respondents reported that people generally did not tell them they had gambling problems or ask for help.

In one venue, staff were required to tell the manager if it was thought a patron had a gambling problem, but no staff member had ever gone to the manager regarding problem gambling or problem gamblers. A respondent also said they did not have any problem gamblers.

One respondent said, 'it is near to impossible to approach a problem gambler until they indemnify staff against lawsuits'. Articulating concerns voiced elsewhere in this report, this person said the Code created a conflict of interest for the venue, as it was not in their interest to approach problem gamblers.

A few respondents, however, did report having made approaches to people they thought had gambling problems, and three said they would respond to problem gambling behaviour because it was part of their job. One who had approached a person on one occasion described how he said to the person, 'is everything OK? You've spent a lot of time here. Perhaps you should be home with your missus and spend time with her'. The customer left. The respondent emphasised the importance of how one approaches a person who may have a problem, as they could not be sure if the person could afford to gamble, and because of fears the person might become aggressive. Another respondent had approached three people. He did this by saying to them 'go easy' or 'don't play', and reported that they responded by saying 'yeah, yeah'. He added that while it was easy to speak to someone he knew, because he cared, it was not easy to speak to people he did not know. He pointed out that he was not a counsellor or an expert.

It is easy to speak to someone you know, because you care, but it is not easy to speak to people you don't know. Have you ever tried to tell a person they have a gambling problem? We are in hospitality industry, we are not experts at everything, and we are not counsellors.

Respondents said they were uncomfortable about responding to problem gambling behaviour. They did not like doing it, because it implied a judgment of the customer, and they expected a hostile reaction.

I don't like doing it; I don't do it because I expect people to be hostile if I say anything; this would put me off doing it; I would do it if I had to do it, but don't like it because it means I'm judging them.

Don't like doing it.

It's an uncomfortable situation

One said it was futile to make the first approach, as problem gamblers had to see that they had a problem themselves otherwise there was nothing anyone could do.

5.7 Self-exclusion

Respondents said that most, or all, of the people who were self-excluded from the venue were not locals and were from all over Adelaide making it difficult to recognise people who are self-excluded, especially if staff have poor memories, or work in busy venues with hundreds of customers each day, or in places with large numbers of self-barred persons. Respondents said it was difficult to keep all the faces in their heads.

It's very difficult. It's hard to keep 100 faces in your head. This is a busy gaming room and lots of people come through here every day.

How do you identify problem gamblers when you have 300 people coming in here every day.

We have their photos in a book. Personally, the book is a waste of time. I have referred to it a couple of times. It's a waste of time because of the addresses, they live in other places now.

The consequences for gaming room staff and the venue if they failed to recognise a self-barred person who entered were significant issues, as it was said that they could be sued for not noticing them. Two respondents complained that the onus was on the venue to recognise the person, not for the person to stay away from the venue. Instead of the current stress on the responsibilities of the staff and the venue, it was suggested that gamblers should take responsibility for themselves and their actions.

It's hard because if we don't 'pick them up' they could sue us for not noticing them. The onus is on us to recognise them, not for them to stay away from the hotel.

A lot of stress is put on the responsibility of the gaming venue. Gamblers need to take responsibility for themselves. They need education programs so that they take responsibility. The emphasis on the venue is fair enough, but people need to take responsibility for their own actions.

One respondent said he was very careful before approaching anyone thought to be self-excluded, as people can make remarkable changes to their appearance, and some deliberately disguised themselves, making it very difficult to be certain of the accuracy of the identification.

I tread very carefully; I go to the barring book and look at the photos; I am very careful. I had a woman once who changed her appearance, had long hair, changed her hair colour and had glasses; she was very hard to

recognise. You need to be sure it's them as they don't have to tell you their name.

They also had to take care about their method of approach. While one respondent said she had asked a lady 'is your name ...', another young man said when approaching people he would never ask someone 'are you ...' as that would be divulging the excluded person's name, and breach the Privacy Act. Respondents said they usually asked for the person's ID, but one respondent said he could only ask for ID to confirm age, not for identification for gambling purposes. Fear of aggression, especially from males, was also raised as an issue they possibly faced.

5.8 *Gambling Experience*

Respondents did not consider the Responsible Gambling Code of Practice had generally made a difference to the gambling experience of patrons. Patrons were still able to drink alcohol while at the gaming machine, but were just prevented from requesting service of alcohol while they were at the machines. However, not being able to play two machines was considered to have affected some people. Two respondents thought people had changed their gambling habits as a result of this restriction and were spending less money and patronising the venue less often.

One respondent thought the Code had made gambling problems worse, as it was considered that gamblers had become more secretive about their habit. He said:

It has made it worse. It has made the ones who want to gamble more secretive; they go to strange venues; other places away from where they live and venues where there is no supervision; or they go to the casino where they think they will be lost in the crowd, even though there is more supervision there. They will move around so people won't know what they are doing and how much they are gambling.

5.9 *General Comments and Perceptions of the Codes*

Opinion was divided on the value of the Codes. On the one hand it was said that the rules were good, as they provided clarity about the roles and responsibilities staff had in relation to problem gambling. The general feeling, however, was that the Codes did not go far enough and would be ineffectual in dealing with problem gambling.

The codes are 'just tinkering around the edges'; they give people 'a warm fuzzy feeling that they are doing something positive', but they do nothing.

A range of suggestions was made on ways to improve the Codes or for new measures that could be taken to deal with problem gambling.

It was suggested that ATM machines should be removed, and there should be a ban on gambling advertising, and poker machines should be changed so that people bet in dollars and cents rather than credits.

It was also suggested that people should be employed to come to the venues to deal with problem gamblers, instead of expecting the staff to do so, when they are not trained or expert in this area.

They need to use some of the money they make to employ someone who can come out and deal with problem gamblers instead of hotel staff. We need to be able to telephone someone,

tell them we have a problem gambler and get them to come and talk to them. We are not trained in how to do this.

It was considered that barring orders should be permanent and should never be removed:

People who have problems with gambling should have a barring order put on them and it should never be removed. For alcoholics it's total abstinence for the rest of their lives.

There was also criticism of the inducements hotels offer patrons to gamble, and in particular the 'pokie meal deals' which are heavily advertised. Loyalty programs that reward gambling, promotions, prizes, free food and drinks and lucky ticket machines were also all identified as being inducements offered to people to gamble that should be abolished. The OLG was criticised for being insufficient in tackling these gambling inducements.

Finally, it was considered that signs were an ineffective means of communication with gamblers as it was suggested that people do not notice signs even when they are placed on machines. Speaking to patrons and telling them the rules, was considered a far more effective means of communication.

We have all the signs up, but people don't come to look at the signs, they don't see them, they don't see the signs at the door, they don't read them. You have got to tell them things, not expect them to read signs. You need to constantly reinforce the rules and tell people not to do things. It's easier to tell them.

What they should be doing is educating young people, the police go into the schools to talk about drink driving and there should be something like this for gambling education.

5.10 Conclusion

Hotel staff's experience of the implementation and operation of the Codes was variable with half of the respondents saying that it had changed their work while the other suggesting that it had not made much difference to the duties which they carried out.

There was also clear differences in the way Codes were implemented in the venues in which staffed worked. This was particularly the case in regards to the restriction placed on the service of alcohol and the approach made to people who are believed to have problems controlling their spending on gambling. Some facilities had established formal procedures in relation to these two provisions while others seemed to have operated on an ad hoc or informal basis. To a significant extent, staff were bound by these management policies.

At the same time, the data reported here make it clear that staff responded to the Codes in highly variable ways. Some clearly felt ambivalence about promoting gambling, and were happy to have a basis for intervening with problem gamblers. They were well aware of the negative effects gambling could have, and were actively suggesting further regulation that they thought could be more effective than the existing Codes. However, others saw clear conflicts of interest between their responsibilities under the Code and other aspects of their jobs. Even these few interviews with hotel staff make it clear that effective implementation of the Codes, and of any future regulation of this kind, will depend on frontline staff accepting their responsible gambling responsibilities and regarding them as consistent with the other duties of their jobs.

6. Casino staff

6.1 The Sample

Three months after the Codes came into operation, interviews were conducted with nine staff employed by the casino, using an interview schedule with questions that aimed to assess any changes in the behaviour of patrons and in the work of staff since the introduction of the Codes.

Fifteen months after the implementation of the Codes, casino staff were interviewed for a second time. Interviews were sought with the same respondents who participated at Wave 2 of the research. Due to the high level of staff turnover in this sector generally, some of the initial participants had either left the company or were no longer working in the same capacity within the company. In these circumstances staff that held the same or similar positions to those who had participated previously were invited to contribute to the research. Of the 9 staff interviewed at Wave 2, six were reinterviewed at Wave 4, along with one new staff member. The remaining staff members interviewed at Wave 2, were reported to have left the casino and the invitation to staff that currently held the positions were declined. The initial interview schedule developed at Wave 2 was again implemented to allow us to assess changes in responses over time.

6.2 Role

Given the content of the questionnaire, which was submitted to the casino management in advance at their request, and also the vertical and horizontal division of responsibilities at the casino, management advised that front line staff lacked the capacity or experience to answer many of the questions, which were felt to deal with issues outside their work requirements. Thus the staff interviewed at both Waves of the research worked in managerial positions in the following areas: table games, gaming machines, security, food and beverages, and host responsibility.

The length of time respondents had worked at the casino varied significantly. Some had been employed for less than a year, with others having worked at the casino for over 18 years.

At Wave 2 of the research it was reported that prior to the implementation of the Codes information was given to all staff about the intent of the upcoming changes and what changes each division needed to make to ensure that they complied with the Codes. It was also suggested that the Host Responsibility Coordinators went through the Codes carefully to understand how they differed from existing legislation and internal codes of practice. It was pointed out that the main areas in which changes would occur would be to the casino's advertising, restricting patrons to playing one EGM at a time, not serving alcohol to patrons and ensuring staff training and re-training.

An important feature of organizational and staffing arrangements at the casino is that vertical and horizontal divisions of responsibilities mean that the impact of the Codes on the duties of staff were experienced differently by staff depending on the position they held. As one respondent said,

Staff roles are very compartmentalised and have very little overlap.

Initially the majority of respondents suggested that their work had not changed as a result of the introduction of the Codes. Some simply saw the Codes as reinforcing previous practices undertaken by the casino while others felt that the Codes had only impacted on the work of those who solely managed gambling activities (e.g., gaming machine shift managers and table games shift managers) or implemented barring procedures (security staff). For those who did experience a change in their work it was primarily a result of having additional tasks, as prescribed by the Codes, to undertake within their usual work hours. For example some suggested that the requirement to display responsible gambling and help services information meant that ensuring that this material was refilled and accurately displayed now became a routine part of their job.

We have cards and brochures out on problem gambling. We have to see that they are where they are supposed to be. It is part of our routine duty now. Every day in the morning – before there are many customers – we check the machines for stickers.

Others suggested that the two-machine play rule increased their workload as they spent a lot of time informing patrons of the restriction to playing one machine at a time.

Twelve months after this initial interview all but two respondents suggested that the Codes had changed the work that they undertook at the casino. It was generally felt however that rather than having making a wholesale change to the types of work being carried out, the Codes had had the effect of generating a shift in the focus of work effort and the allocation of resources. It was said that the introduction of the Codes had lead to the development of policies and procedures to ensure that staff had the ability to carry out the tasks prescribed in the Codes, such as identifying problem gamblers, with confidence and comfort. This meant that all workers had a central comprehensive focus on the Codes and the underlying intent of the Codes when carrying out their duties.

6.3 Two-machine Play

It was reported at Wave 2 of the research that prior to the implementation of the Codes, the casino had an informal policy of restricting use of the machines to one at a time when the casino was busy. The intent of doing this, however, was not to try to reduce problem gambling, but to deal with a limited supply of machines available for customer use and prevent inter-customer aggression.

With the implementation of the Codes, formal procedures were established whereby front-line gaming staff were not permitted to speak to patrons about playing two gaming machines at a time and were expected to refer all matters relating to playing two machines at a time to the gaming machine shift manager. As one shift manager stated:

We go and talk to people when we are called.

Despite the suggestion that this procedure was under review at Wave 2 of the research, at Wave 4 gaming room shift managers were still primarily responsible for the enforcement of the two machines at a time rule. It was said however that the newly appointed Host Responsibility Coordinators also had powers to enforce this rule if required.

It was suggested at Wave 2 of the research that this task specialisation resulted in many patrons that played two machines going undetected, as there were insufficient numbers of managers being on shift at any one time. Shift managers said that if they spoke to offenders

twice, they are 'supposed to get Security and kick them out' but 'it hasn't got to that', as 'no one has been spoken to twice'. It was explained that it was not always known which patrons had already been approached as different shift managers may have previously approached them.

Security staff said that while they might notice people playing two machines, it was not their responsibility to speak to the offenders, as this was the role of the gaming machine shift manager and it was this staff member too whom security staff reported this behaviour. Security was only called if a patron became upset if told they could not play two machines, or if the same shift manager observed a person playing two machines on two occasions.

By Wave 4 it was reported that 'a handful of people' were requested to leave for playing two machines at a time as they did not change their behaviour after being warned by staff members.

Initially shift managers reported that speaking to people about playing two machines occupied a great deal of their time, and on average they spoke to 1-2 people an hour, with more on the weekend. The offenders tended to be the people who frequented the casino on the weekends and who were not aware of the rules.

At Wave 4 the frequency of people being warned for playing two machines at a time had declined but it was still reported as being an issue. Staff believed that interstate and international visitors breached this rule the most and were quite confused when told that they were not allowed to do this. It was also reported that the 'top end players' or the 'more serious punters' had also been affected by this restriction as they would commonly play a machine while having reserved another machine or play another machine if their machine went into a feature. One respondent also suggested that these 'top end players' adapted to this ruling by moving from machine to machine.

At Wave 2 it was said that the two machine rule was 'a good thing' as it had reportedly slowed the loss rate, and prevented people with a limited amount of time from spending too much. At Wave 4, it was reported that the majority of patrons had accepted the change but a minority of patrons were still found to be annoyed at the restriction and became abusive when warned.

6.4 Service of Alcohol

It was initially suggested that restrictions placed on the service of alcohol would not have a great overall impact on patrons as the majority (80%) of gaming patrons preferred to be served non-alcoholic drinks. However, at Wave 4 interviewees thought that the restrictions placed on the service of alcohol had impacted on most patrons, and was much more of an issue than the restrictions placed on machine usage. Interviewees believed that this impact was more about losing a level of service in the casino than about wanting alcohol service *per se*. Before the implementation of this provision, patrons regarded alcohol service as a unique part of the casino experience, and one that differentiated them from hotels.

This loss of service was also articulated as being a concern at Wave 2 of the research. To overcome this the casino introduced drink trolleys, which were reportedly moved around the gaming machine areas on the weekends to prevent build up in the fixed bar areas and the loss of money or credits of patrons who were away from the machines for too long purchasing drinks. At Wave 4 this trolleys service was reported to have stopped due to the

low take up. It was said that instead, temporary bars were set up on Friday and Saturday nights and limited drink service had been introduced at cashier points in the new area. It was reported at both Waves 2 and 4 that coffee, tea and soft drinks were still served to patrons at the EGMS.

One of the negative effects of the restriction placed on the service of alcohol, which was identified early in the research, was that staff no longer knew how much alcohol people consumed, or about any significant concerns that patrons had. This was because staff and patron interaction was limited. At Wave 4 this concern was again articulated and was argued to have been compounded by the fact that staff numbers had been reduced considerably because it was not financially viable to keep staff on the floor. Staff numbers had reportedly been reduced from 7-8 people to 1 staff member and may have to be cut altogether in the future.

It was reported that staff continued to receive a large number of requests for alcohol service at EGMS 15 months after the implementation of the Codes. It was not uncommon for 12 patrons a night to ask for this service, with many patrons being confrontational when denied. Indeed, interviewees said the negative response from patrons who were denied this service did not decrease over time. At both Waves patrons were said to resent the lack of service, and a few were very abusive to staff when being told of the rules.

Table game players are still served alcohol, but intoxicated people are not permitted to play, and staff closely monitor alcohol intake. Since the advent of the Codes, if table game players are thought to be intoxicated they are told to leave the casino, whereas previously they were asked to leave the area, and could go to another part of the casino.

6.5 *Problem Gambling*

Staff stressed that they recognised a large proportion of their customers, as they come to the casino on a regular basis 'day after day'. Table game staff had more opportunities to speak to patrons than gaming room staff, but the latter were still familiar with people, despite having fewer opportunities to interact as a result of the restriction placed on the service of alcohol.

At Wave 2, staff said that behavioural indicators of patrons, such as aggression and distress, were the most important signs of a person having problems controlling their spending on gambling. Staff also said that chasing wins, using credit cards to obtain coins, spending a long time at the machine and/or frequenting the casino on more than one occasion a day, were also signs that a person may have a problem with gambling. Other indicators were continuing to play, even when talking to others, and rituals such as touching and patting the screens. Staff again referred to these behavioural indicators at Wave 4.

The amount of money spent by individual gamblers was said to be a poor indicator of problem gambling, as staff do not know the financial circumstances of the patrons. Another factor of limited importance was the duration of time at the casino, as many people stay all day, but only spend small amounts of money.

At Wave 4, however, the duration of time spent at the casino was considered to be a very important indicator of problem gambling. This was said to be more important as an indicator since the casino had moved to being open 24 hours a day. It was suggested that staff now observed signs such as people wearing the same clothes as the day before as an

indicator that they may have a problem. These people were approached to try to determine whether they needed assistance.

At Wave 2 it was suggested that the identification of problem gamblers was less of a concern than approaching them. It was felt that general front line staff do not have the qualifications or confidence to approach people they believe may have problems with gambling, and procedures were developed for general staff to follow.

Front line staff have to deal with the issues – but they are lower paid, have lower qualifications. They need support mechanisms to be able to do what is required in regards to problem gambling. They need to identify a problem, raise it as an issue with their manager above them. Once the issue is raised a certain set of procedures follow automatically. It is crystal clear for them what they have to do and this is comforting to them. Staff report upwards and if they come across an issue it is taken to their immediate manager and so on upwards. The staff are happy with this process.

Initially it was put forth that only senior gaming and security managers were permitted to handle the issue and the initial approaches were indirect, to avoid causing offence. Those with the authority to approach do so by taking opportunities to have general conversations with people thought to have problems. They enquire what work people do, to gauge if they can afford their spending on gambling, or ask 'is everything OK'. Staff stressed that they had to be very careful in their method of approach, as customers may deny problems, or tell the staff member 'it is my money, I can afford it, leave me alone'. However, others were found to express gratitude for the support they received when approached.

It was pointed out that this procedure would soon be amended as they sought to create specific 'harm minimisation officers' or Host Responsibility Coordinators who would be the point of contact for problem gamblers in the casino.

At Wave 4, Host Responsibility Coordinators had been appointed. Staff generally suggested in response to questions about how they approached problem gamblers and how they felt about doing this, that 'there was a whole department of people whose job it was to do this' and that they were not expected to do anything but refer concerns they had to this department. The development of Host Responsibility Coordinators was supported and considered to be very valuable by other staff members. As one person stated:

It has made it easier for staff to deal with problem gamblers as they can now refer any concerns to someone who has the appropriate training to respond effectively. We are not all psychologists. I know that the gaming room staff have found the support of these people to be very positive.

Interviewees said that despite this increased staff specialisation, awareness of problem gambling issues had increased noticeably since the introduction of the Codes. It was also suggested that the number of people presenting with problem gambling as reported by staff to the Host Responsibility Coordinators had definitely increased throughout the facility. This was seen not to be a result of an increase in the number of people with gambling problems but rather resulted from the increase in casino staff awareness of problem gambling. As one respondents suggested:

There have been more people that present with gambling problems, but I don't think this is a result of more people having problems with gambling, but that staff have a heightened awareness of the issue and know what signs to look for.

Staff emphasized at both Waves that the casino did not want problem gamblers as they have a significant negative impact on both the perception of the casino and on other players if they become distressed or aggressive.

We have firm views on problem gambling. We don't want problem gamblers. We have enough patrons without them. We don't need them or their money.

Indeed a decline in the number of patrons reported at Wave 2 of the research was attributed to the problem gambling advertising campaign in 2003. This was believed to have generated negative community perception of the gaming industry, and the casino in particular. The development of Host Responsibility Coordinators and their promotion of problem gambling related programs such as 'Don't Lose Your Shirts' can arguably be interpreted as efforts by the casino to try to curb this negative perception. Indeed at Wave 4 it was said that numbers of patrons had again increased.

6.6 Self-exclusion

Respondents generally thought that it was rare for people to ask directly for help. Initially it was suggested that it was quite difficult to correctly interpret indirect negative comments made by patrons as being requests for help. It was said that a request for help could be articulated as 'it's getting to me', or 'my wife will be cross with me', but it may be a more direct comment such as 'I've thought about self-barring'. One respondent said that 'a casual comment is a cry for help' on which he acts. At Wave 4, more respondents were found to adhere to this latter comment and suggested that if anyone even hinted at identifying themselves as having a problem with gambling, the Host Responsibility Coordinators would be called to intervene and 'they would take care of it from there'.

At Wave 2 of the research respondents, said that there had been no increase in the number of people that had self-barred since the introduction of the Codes. At Wave 4 it was said that there had been a definite increase in the number of people self-barring due both to the increased diligence of the casino in identifying, approaching and talking to patrons about the options open to them in regards to their gambling problem, and the increased knowledge and awareness of this option out in the community. Indeed it was suggested that 'We have not had this level of self-barring in the past three years'.

While some interviewees initially suggested that it was not their responsibility to identify people who were self excluded, the majority of interviewees at Wave 4 said that they encouraged their staff to be conscious of the issue. It was suggested at both Waves of the research that the casino had the most rigorous security system of all the gambling providers in the State and this had translated into the effective monitoring of self-excluded persons. There are security personnel at each entrance, and checking for self-barred people at the door of the casino was a routine aspect of their work. Each notice of barring was logged into the central computing systems, which all senior staff were reported to have access to, and was used to help identify self-excluded persons. Surveillance staff were also reported to take the identification of both problem gamblers and self excluded person as seriously as they take theft and larceny. Front-line and other staff do not know if people are barred or not, but

there are a number of identity checks undertaken when people enrol for or use their loyalty card, or if they have a big win at the machines and tables. The names and photos of all barred people are also available in the table game pits, and managers can contact security if they think someone may be barred.

Despite these measures it was reported that self-excluded persons continued to be identified in the casino and were asked to leave by security staff once identification had been corroborated. Interviewees were critical of the barring process, suggesting that self-excluded people would just go to another venue to gamble or would turn to internet gambling and to unregulated forms of gambling in private/illegal clubs where money is lent to gamblers at exorbitant rates of interest, and where patrons are beaten up if gambling debts are not paid. This latter possibility was said to be particularly the case for table game players as there was nowhere else in the State to play. Respondents advocated a more central regulation of barring such as a computer system being established for venues in the CBD. It was suggested this would enable the sharing of information between venues about who was barred and if a person had entered a prohibited site after the bar.

6.7 General Comments

At Wave 2 the Codes were said to be 'an inconvenience to gambling providers, a pain to customers with no gambling problems and no help to problem gamblers'. It was suggested a more targeted approach was required for problem gamblers, among which were compulsory gambling cards with limits on spending, and personal approaches to people about their gambling problems.

At Wave 4 the overwhelming majority of respondents were positive about the Codes. It was suggested that the Codes had not had a major effect on the gambling experience of patrons but the restriction placed on the service of alcohol was said to have impacted on patrons' casino experience by reducing the level of service available to them. It was also reported that the Codes had not increased the workload of staff, but had rather meant that staff now had an additional focus in their work and an increased awareness of responsible gambling. It was suggested that the Codes had made the casino more diligent on issues such as problem gambling. Moreover, the protocols and procedures that it had established to implement the Codes had set precedents for the broader industry to follow. Many suggested that these initiatives had reduced the internal conflict some staff experienced from working in an industry that is harming some people. As one respondent suggested:

I understand that I am working in an industry that is harmful – I question this and a few years ago I went through a phase of questioning being employed in the industry. But I feel confident in the fact that in regards to smoking, responsible service of alcohol and responsible gambling we are doing more on a day to day basis than any other venue in the State. I have no problems going to sleep at night as we do everything in our power and more.

As suggested above, these procedures were also reported to make it easier for general staff with limited skills and qualification to implement some difficult or ambiguous aspects of the Codes. As suggested by one respondent:

I like working in the casino because the structure, hierarchy, rules, policies and procedures are all established and must be followed, unlike pubs

where the procedures and policies are not clear or not established and you are not sure what is permitted.

However, the vertical and horizontal division of responsibilities at the casino, and the increased task specialisation that results, may have the unintended consequence of limiting the development of a culture of awareness of problem gambling issues among **all** staff. Staff may see themselves as being responsible for only certain aspects of the Code, thus not implementing or practicing other aspects of the Codes regularly. This may be contrasted to the experience in licensed premises in which it was reported that while formal procedures had not been developed and staff still faced issues in implementing aspects of the Codes, the awareness of responsible gambling issues among all staff appeared to have developed as a result of the introduction of the Codes.

6.8 Conclusion

Casino staff appear to have been able to adapt to the Codes and implement them with relative ease, particularly through the early implementation of formal policies and procedures that made clear the division of responsibilities. Initially these procedures appeared to have been built onto established staff roles. However, at later stages, core responsibilities for implementation and compliance with the Codes were carried out by dedicated staff members. The Host Responsibility Coordinators became the primary point of contact for the majority of issues related to the Responsible Gambling Code of Practice, and other staff referred many of their concerns to these Officers.

While some difficulties were still faced by staff in relation to implementing the Codes, these were primarily concerned with informing patrons of the changes that resulted from the implementation of the Codes and dealing with patrons' responses when warned about breaching aspects of the Code or being denied service due to the restrictions specified in the Code. It was suggested that while the Codes had not had a major effect on the gambling experience of patrons, the restriction placed on the service of alcohol was said to have some impact on patrons' casino experience.

Casino staff did appear to have accepted the responsibility to intervene with possible problem gamblers, whether they did so directly or by alerting other staff to issues. They also appeared to view problem gamblers as a problem for the casino, since they disrupted other gamblers. In this sense, they appear not to have perceived a conflict of interest between their responsibilities under the Responsible Gambling Code of Practice and their other duties. Of course, we cannot be certain that they did not experience such a conflict of interest in practice.

7. Compliance Sector

Interviews were conducted at each Wave with the Liquor and Gambling Commissioner and staff from the Casino and Licensed Premises Inspectorates. A structured interview schedule was followed for the interviews with the Inspectors. This schedule included questions designed to assess any changes that had occurred in their work as a result of the Codes, their perceptions of, and opinions on the impact of the Codes and progress made by venues in compliance with the Codes.

7.1 *The Codes*

The Commissioner²² consistently expressed concerns with the clarity of some clauses of the Advertising and Responsible Gambling Codes of Practice and argued that requirements were insufficiently prescribed. At every Wave of the research the Commissioner suggested this lack of prescription and the imprecise wording of the Codes created uncertainty concerning what constituted a breach of the Codes, and meant that if breaches occurred it was impossible for the LGC to take action. At each Wave the Commissioner gave examples of the difficulty of prosecuting on the basis of some of the provisions outlined in the Responsible Gambling Code, arguing that the terminology incorporated in some aspects of the legislation is open to interpretation making it impossible for an authority to determine the validity of the breach after the fact.

For example the Commissioner illustrated problems with the Responsible Gambling Code's provision that 'The gambling provider should take all practicable steps to prevent a person who is intoxicated from being allowed to gamble'. It was thought that the LGC could not prosecute on the basis of these provisions, as the term 'all reasonable and practical steps' is open to interpretation.

It was also pointed out that the terminology used in relation to venues developing protocols for unattended children was unenforceable as it uses the word 'recommended'.

At Wave 2 the Commissioner again emphasised the difficulties his office was having in interpreting aspects the Codes. It was suggested that as a statement of intent the Codes were adequate but from an enforcement point of view the drafting of some aspects were problematic. At this Wave it was also reported that advice from Crown Law was being sought in regard to these matters.

The advice sought from Crown Law on the interpretation of the Codes resulted in the LGC releasing guidelines in January 2005 just prior to the third Wave of data collection. Despite this, it was still reported by the OLGC at Wave 3 that it had not been possible to gain complete certainty on the full legal responsibilities of licensees in relation to certain aspects of the Codes at this stage, nine months after the Codes were introduced. Indeed it was suggested that there was no one organization that was able to provide individual licensees with reliable, accurate advise on the interpretation the Codes in regards to specific issues such as the definition of a 'household staple' and the constitution of 'all reasonable and practical steps'. These factors were again said to have had implications for the enforcement of the Codes, and according to the LGC made it impossible to take disciplinary action.

The Commissioner expressed the same concerns about problems with the wording and interpretation of the Codes at Wave 4 of the research. He gave the example at Wave 3 of the

²² Herein, the Liquor and Gambling Commissioner will be referred to as LGC or Commissioner, while the OLGC means the Office of the Liquor and Gambling Commissioner.

difficulty of enforcing the Responsible Gambling Code of Practice, where venues are only required to use their best endeavours to prevent people playing two machines, and request the patron leave if they refuse to stop. However, it is not an offence if patrons play two machines and refuse to leave if requested. If venues have taken reasonable steps to prevent people playing two machines, by having signs and procedures in place and staff trained, the OLG can do nothing if a person plays two machines while staff are not looking. This issue was still a concern at Wave 4, with the Commissioner suggesting that it was almost impossible to gather evidence that would stand up in court in relation to these matters.

These perceived ambiguities of the legal responsibilities of licensees in relation to particular aspects of the Codes was suggested by the Commissioner at Wave 4 of the research to have resulted in peak bodies viewing the Codes as being statements of principles rather than statutory requirements. The Commissioner had to constantly inform them that while problems existed with the Codes, which resulted in the OLG experiencing difficulties in enforcing certain aspects of the Codes, the Codes were indeed a statutory requirement and as such they were required to adhere to them. At Wave 4 the Commissioner also reported that these ambiguities that existed in the Codes impacted on the level of compliance observed.

7.2 *Level of Compliance*

Inspectors reported a general increase in gambling providers' compliance with the Codes over the Waves of the research.

At Wave 2, it was said that compliance for licensed premises was generally poor with 21% of venues inspected not having the responsible gambling materials and pamphlets, and 61% not being able to detail their compliance with the requirements for responsible gambling documents. Adhering to their education policy, the OLG, in response to the low compliance, developed a checklist which was sent out to licensees so they could self-audit their compliance with the Codes. It was also suggested that peak bodies were developing templates of a document for their members to adopt to assist them in complying with the requirements for provision of responsible gambling documents, but that venues that were not members of industry associations would have to devise their own document or incur a cost in purchasing this template. This document was commonly referred to by both licensees and OLG as the Responsible Gambling Document.

At following Waves licensees were generally found to have obtained and were displaying the responsible gambling materials. Inspectors did state at Wave 4, however, that some venues needed to be reminded of the signage requirements but specified that these breaches did not attract disciplinary action.

While compliance with the requirement that venues develop and keep current responsible gambling documents was reported to have improved over the research period, this continued to be a source of non-compliance throughout the research. Inspectors suggested that as a result of having little detailed guidelines in the Codes regarding this document, there was little standardisation in those that were developed across the industry. It was reported that licensees continued to produce copies of the Responsible Gambling Code of Practice when asked for the above mentioned documents at Wave 3 of the research. By Wave 4, while being found to have the necessary documentation, many were found to have not incorporated it all into one document. Inspectors suggested that the Responsible Gambling Document should have been called a procedures manual, as this would have caused less confusion.

The majority of licensees were reported to have provided staff with the problem gambling training at Wave 2 of the research. It was noted however that the provision of training was problematic for venues located in remote country areas. At Wave 3 there was some variability in the statements of the OLGC staff on the compliance of venues in regards to staff training. According to the Commissioner, compliance on staff training had improved with very high proportion of staff having been trained. Inspectors said however that the compliance on staff training was still a problem but 'they are getting on top of it'. One of the reasons for non-compliance is the concern associated with the cost of the training. Country venues were reported to tend to wait until there is a course available in their local area, rather than send their staff to courses in distant locations, for which they will be liable for additional costs for staff-time, meals and accommodation. High staff turnover, especially in far-flung country towns is another factor giving rise to non-compliance. Employers have twelve months to get new staff trained, and according to Inspectors most of those who have not been trained are still within the six-month period. Inspectors suspected that hotels now tended to employ new staff that have already previously completed the required training, and poached trained staff from other venues. Another reason for non-compliance is that TAFE, which is the main provider of training, closes its courses during December and January. At Wave 4 it was generally considered that staff training requirements were adhered to, but Inspectors did note that full compliance was difficult to achieve due to the abovementioned issues. Interestingly, early in the research (Wave 2) Inspectors did comment that they were 'allowed' to initiate disciplinary action as a result of non-compliance in this area, despite their reported educational policy in relation to compliance with other aspects of the Codes. This disciplinary power may explain why such a high proportion of licensees in our sample said they had completed and documented staff training in problem gambling, as compared to their documentation of how staff intervene with problem gamblers and the staff roles in implementing the Codes.

Licensees were found to be highly compliant in restricting patrons' use of machines to one. Inspectors thought that licensed premises were compliant on 2-machine play, as it is in their interests to have gaming machines occupied by separate customers, rather than having queues form while individuals play more than one machine. The compliance observed in relation to the playing of two machines was reported to be consistently high over all Waves of the research.

The view was commonly expressed throughout the research that voluntary barring was ineffective. It was suggested that there were too many people barred for venue staff to remember faces from the photos and that self-excluded people go elsewhere to other venues from which they are not barred, or they change their appearance and enter venues from which they are excluded. It was also suggested that the policing of this aspect of the Code was futile as inspection only occurred once every twelve months for 2 hours in which it was not possible to ascertain whether or not self-excluded people had been identified.

While interpretation of some aspects of the Advertising Code remains an issue, Inspectors did note that many venues had responded to this ambiguity early on in the research by simply reducing their advertising or promotions, often finding that it was largely unnecessary anyway. Indeed at Wave 4 of the research it was suggested by Inspectors that licensees actually welcomed the advertising Code as it limited the amount of advertising other venues undertook and as such reduced the need for their venue to advertise. It was suggested that prior to the Codes licensees primarily advertised because they were under pressure from the surrounding venues to do so.

It is notable that the areas identified by the Commissioner and/or Inspectors as ones of high compliance were also areas where licensees found few difficulties. However, in other areas compliance was more problematic, often because the OLGC claimed to be uncertain of the meaning of the provisions, because they were found to be insufficiently prescriptive, or because the prescribed activities in the Codes are difficult to implement. These areas included the identification of problem gamblers, aspects of the Advertising Code, and the identification of self-excluded patrons. As we have shown elsewhere in this Report, these areas were also generally found to be problematic for both a significant number of the licensees we interviewed and licensees more generally as reported by the OLGC Inspectors.

The casinos compliance with the Codes was considered by the Commissioner to be good at early stages of the research and this perception did not change as the research progressed. It was pointed out, however, that the casino had also experienced difficulties in interpreting certain aspects of the Codes. The casino Inspector considered that in some areas the casino complies with the letter, but not the spirit of the code. These are: the provision of drink services to gaming machine players from mobile trolleys on Friday and Saturday nights, and the provision of a single sign at the casino entrance regarding the prohibition of playing two gaming machines.

It was reported that the casino was being very active in relation to the identification of problem gamblers (an area that is of much concern to licensees and problematic to monitor for the OLGC) with the establishment of Host Responsibility Coordinators and the appointment to these positions of staff that were considered to have unique skill in this area. However, it was reported that despite all the efforts of the casino it appeared that the Host Responsibility Coordinators focused mainly on the common gaming area, while the problem is denied among the VIP members. Also the increased specialisation of job responsibilities was suggested to have had the unintended consequence of other staff switching off to the problems associated with gambling, as they believed that only these officers are responsible for dealing with problem gambling. This issue will be explored later when we consider the effects of the Codes for casino and hotel staff.

Throughout the initial phases of the research the OLGC emphasized that they took an educative rather than punitive approach to inspections and compliance with the Codes. It was held that they would rather have people comply voluntarily than penalising people to enforce them to comply. At this time, breaches of Codes were generally dealt with at the time of the inspection so as to educate licensees in aspects of their non-compliance. It also had the effect of making their workloads manageable as it minimised the number of return visits required. At Wave 3, however, Inspectors indicated that the 'honeymoon period' on compliance was over and in future licensees would receive warning notices and face disciplinary action if they were not compliant in all areas. At Wave 4 the Commissioner reported that they had indeed reached a point where they had to 'draw a line in the sand' and move past the 'educational phase and shift into the enforcement phase'. The LGC had reported that disciplinary action had been taken against approximately 20 licensees for breaches of the Codes, particularly in relation to the provision of the Responsible Gambling Document. The Commissioner expected that this number would peak shortly as venues that had resisted full compliance were brought into line. He expected that disciplinary actions would then decline. Inspectors suggested at Wave 4 that the disciplinary action taken by the LGC had resulted in increases in licensed premises' compliance with the Codes.

Generally speaking compliance is certainly up. This is a direct result of the fact that some disciplinary action was taken by us. We have taken a few on.

This move to an enforcement model was not seen to be adopted by the casino Inspector who was still articulating at Wave 4 that they adopt an educational attitude to compliance.

7.3 Monitoring Implementation of Codes and the Compliance with the Codes

As suggested in the previous sections, the Commissioner and Inspectors described concerns and problems in relation to certain aspects of the Codes. Many of these concerns stemmed from the fact that OLGC found that the prescribed activities of some aspects of the Codes to be difficult, if not impossible, to monitor at inspections, and thus making it impossible to take disciplinary action for non-compliance. Inspectors were able to sight the Responsible Gambling Document if it existed, to observe signage, sight staff training certificates, etc. However, the inspection regime at Waves 2 and 3, which resulted in only one inspection per year for many venues, meant that they had limited ability to monitor compliance on self-exclusion, 2-machine play, service of alcohol and problem gamblers.

At Wave 2 Inspectors said they were trying to overcome these limitations by patrolling the gaming area and observing what they could before they identified themselves. At later stages, however, Inspectors reported that they posed hypothetical questions to staff about procedures in relation to these issues. For example, to test if venues are compliant on identification of self-barred people, Inspectors asked where the photos of barred persons were kept, what was done to prevent barred people from entering, and what procedures were followed if a barred person entered the venue. Inspectors also asked staff how they identified problem gamblers, and what steps they take after someone is identified who may have a gambling problem. It was emphasised that while these tactics worked in establishing if the licensee and staff knew what they were supposed to be doing, it remained uncertain what actually happens in venues.

The complication experienced in monitoring advertising, such as Inspectors' inability to monitor non venue advertising, lead to the OLGC outsourcing this aspect of monitoring to an independent organization at Wave 3 of the research.

Compounding the inability of licensees to enforce certain aspects of the Codes as a result of time limitations, the monitoring of other aspects of the Codes such as the display of the required signage, the provision of gambling help services material and the Responsible Gambling Document etc, were also reported to have increased the workload of Inspectors and increased the aggregate time taken to complete one inspection (from 1 -1 ½ to 2-2 ½ hours). It was highlighted that this increase in workload was not correspondingly accompanied by an increase in the OLGC resources. As a result, monitoring of some gambling providers was found simply to not occur.

Although the OLGC is responsible for monitoring compliance with the Codes at racecourses and SA TAB agencies, no staff had been employed to undertake this work in the three months following the introduction of the Codes. According to the Commissioner, funds were not allocated for this activity, as the OLGC received less than half of the funding sought for a new computer and extra staff to cope with the increased workload caused by the implementation of the Codes. The OLGC had only reviewed SA TAB head office activities, but had not monitored SA TAB agencies. Inspectors of licensed premises, however, did monitor PubTABs but only for signage compliance. At Wave 4 it was reported that the OLGC had started looking at enforcement of the Codes in SA TAB agencies and new staff had also been employed.

As noted above, at Wave 4 the OLGC reported shifting from an educational policy to an enforcement policy in relation to the compliance with the Codes. As a result, the protocol for inspections of licensed premises also changed to facilitate the 'need to inspect compliance with the Codes'. The Commissioner suggested that in the past, all liquor and gaming licensed venues were inspected every 12 months. By Wave 4, however, the OLGC had introduced a risk based audit and compliance program. Licensed liquor and gaming venues were now placed into one of three categories from low risk to high risk. All licensed gaming venues are in the highest risk category, and all venues in this risk category had to be inspected at least once per year although most were actually inspected three to four times a year.

7.4 Impact of the Codes

It was suggested throughout the research by both the Inspectors and the Commissioner that 'a genuine attempt was being made by the industry to comply', and that licensees' were taking their responsibilities seriously.

It was considered by the OLGC that the Advertising and Responsible Gambling Codes of Practice and the reduction in the number of gaming machines would have little impact on net gambling revenue and on problem gamblers. Indeed it was suggested that measures such as the removal of ATM from venues that had electronic gaming machines, as well as the introduction of smart card technology would have more of an impact on curbing problems associated with gambling.

It was emphasised however that the Codes would have the benefit of increasing the industry's awareness of responsible gambling issues. This was felt to be particularly so with regard to staff training about responsible gambling. Indeed at Wave 4, Inspectors noted that staff did appear to be much more aware of the intent of the Codes, and have the willingness to put its intent into practice, now that the Codes have been in place for some time and they have been trained. However, as noted above, the increased specialization of job tasks that occurred in the casino was seen to result in the reduction of awareness of responsible gambling issues for other casino staff members.

7.5 Compliance Data

In addition to the interview data, we also analysed data about the scrutiny of the operations of the Codes supplied by the OLGC to the Independent Gambling Authority.

The data collected by the OLGC relates to various aspects of the inspection of operations under the Gaming Machines Act 1992, The Casino Act 1997, and the Authorised Betting Operations Act 2000. The analysis reported here relates solely to information collected about the scrutiny of the various Acts as they relate to the Advertising and Responsible Gambling Codes of Practice for which information was available over time. We focus on information about aspects of the Codes with which licensees were found to be non-compliant, trends in the disciplinary action taken by the OLGC, and trends in the barring of problem gamblers from SkyCity Adelaide Casino²³.

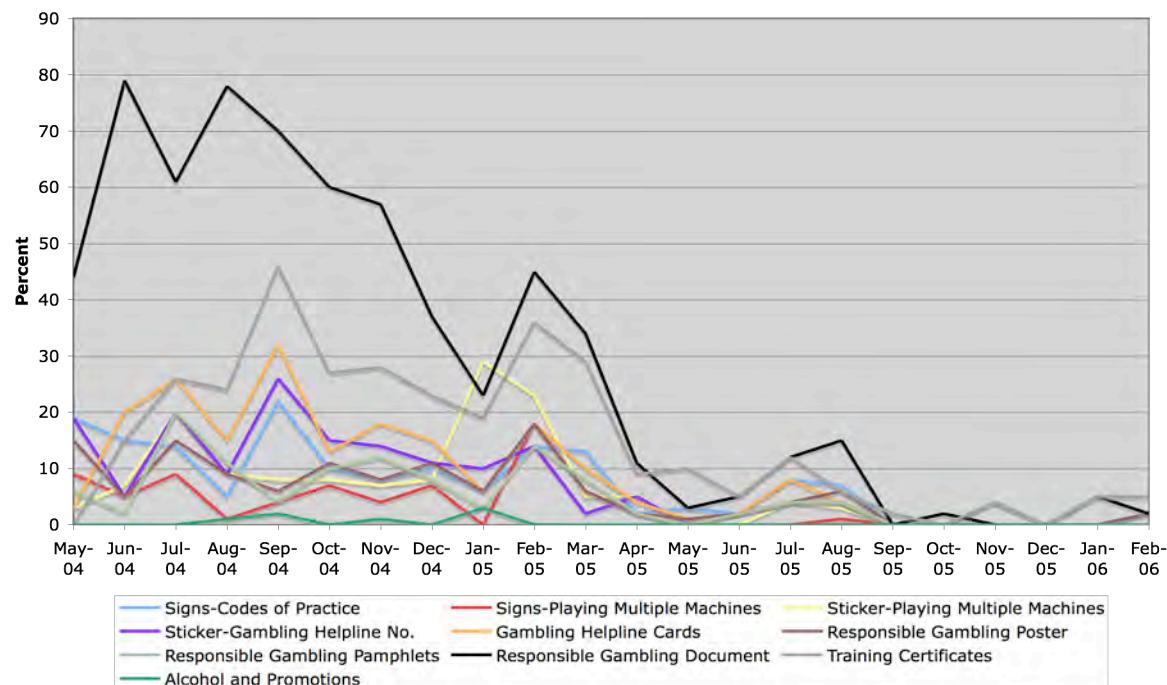
Overall the data collated by the OLGC confirms and quantifies the information provided by the Liquor and Gambling Commissioner and Inspectorate staff in interviews.

²³ Information regarding the scrutiny of the Advertising Code of Practice was only made available by the OLGC from Aug 2005. The limited time span of this information restricts the ability to detect any changes that occurred as a result of the introduction of the Codes and therefore has not been analysed. Moreover, since Aug 2005, only 1 breach of this code has been recorded by the OLGC.

7.5.1 Non-Compliance

Figure 1 shows the proportion of venues amongst those inspected that were found to be non-compliant on the aspects of the Responsible Gambling Code of Practice described.

Figure 1: Percentage of Inspected Venues in Breach by Type of Breach



Overall, the trend reported in interviews by Inspectors towards the increased compliance of licensees with the Codes over the time of the research is clearly evident, with the vast majority of licensees inspected being found to be compliant about a year after the introduction of the Codes.

A higher rate of breaches on *most* aspects of the Responsible Gambling Code is clearly seen about 3-5 months after the introduction of the Codes. This supports statements in OLGC interviews at Wave 2 of the research that compliance for licensed premises was generally poor.

It is clear that requirements to maintain a Responsible Gambling Document and Staff Training Certificates were much more likely to lead to breaches than other aspects of the Codes. Licensees were found to be non-compliant with these aspects of the Codes much more frequently and for a longer period than other aspects of the Responsible Gambling Code. With respect to the Responsible Gambling Document this is entirely in accord with the views expressed by Inspectors that, though compliance improved over time, it continued to be a problem throughout the research. Analysis of interview data uncovered some inconsistency, both between Inspectors and across time, in OLGC interviews on the compliance of venues in regard to staff training. The quantitative data relating to staff training certificates allows us to be certain about the compliance on this aspect of the code. It is clear that contrary to the perceptions of key informants within the OLGC, venues were quite commonly unable to produce training certificates for their staff over the life of the research. However, non-compliance did decline substantially, and is now very low.

Data relating to the casino's compliance with the Codes also supports the findings of the analysis of the interview data. The Casino recorded a very small numbers of breaches (6) from June 2004 to the conclusion of the 4th wave of data collection, and when non-compliance was reported, it related to the same areas of the Codes that the Casino Inspector identified as being of concern in the preceding section of this report.

7.5.2: *Notices of Proposed Disciplinary Actions Issued*

Not all breaches of the Codes resulted in formal disciplinary action being taken. As emphasised in the interviews with the OLGC in the initial phases of the research, the OLGC began by taking an educative rather than punitive approach to inspections and compliance with the Codes. However, at Wave 3 of the research the OLGC indicated that the educational stance previously adopted on compliance was now over, and, in future, licensees found to be in breach of the Codes would receive warning notices and face disciplinary action if they failed to comply with all aspects of the Codes.

The shift in the OLGC approach to inspections and compliance with the Codes is clearly evident in the trend data collated from the monthly reports of the scrutiny of the codes supplied to the IGA by the OLGC.

Figure 2:Total Disciplinary Action Taken

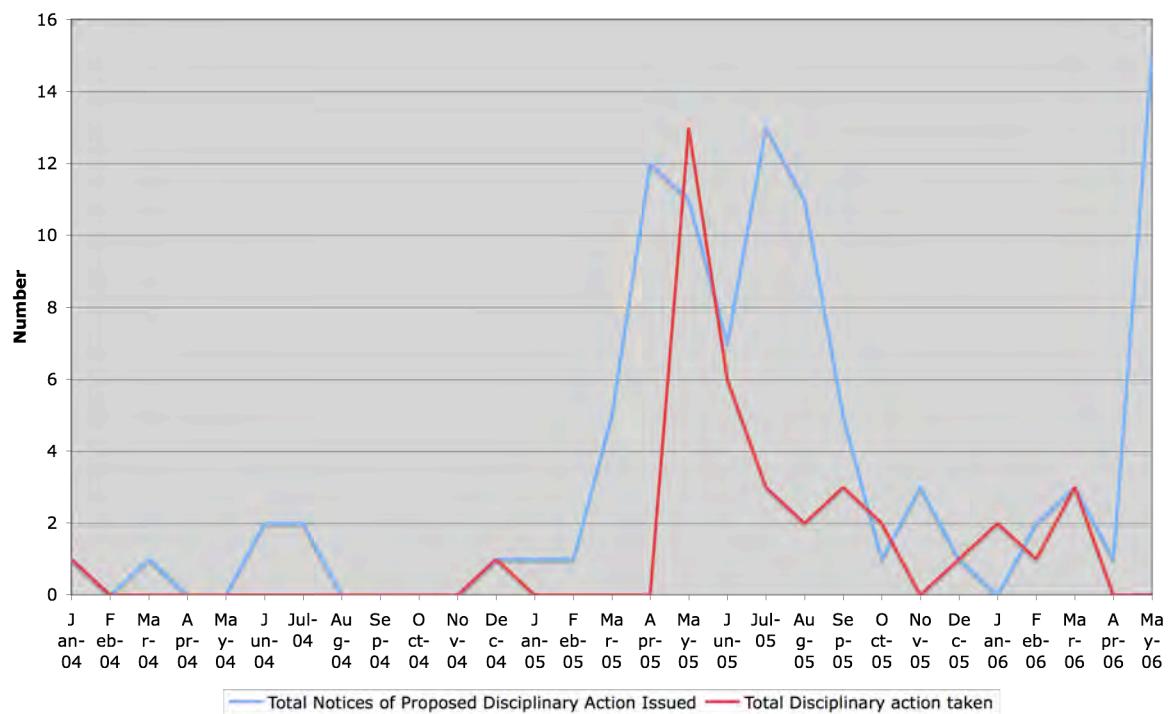


Figure 2 shows both the total number of venues that were issued notices of proposed disciplinary action and the total number of venues against which formal disciplinary action was taken. The OLGC inspectors audit venues against a range of compliance matters, not all of which relate to the Advertising and Responsible Gambling Code. The data provided captures all disciplinary action taken by the OLGC in regards to venues compliance. However, it is clear that a dramatic increase in the number of venues that had informal and/or formal disciplinary action taken against them by the OLGC occurs in near synchrony with Wave 3 data collection, at which time the OLGC indicated that the

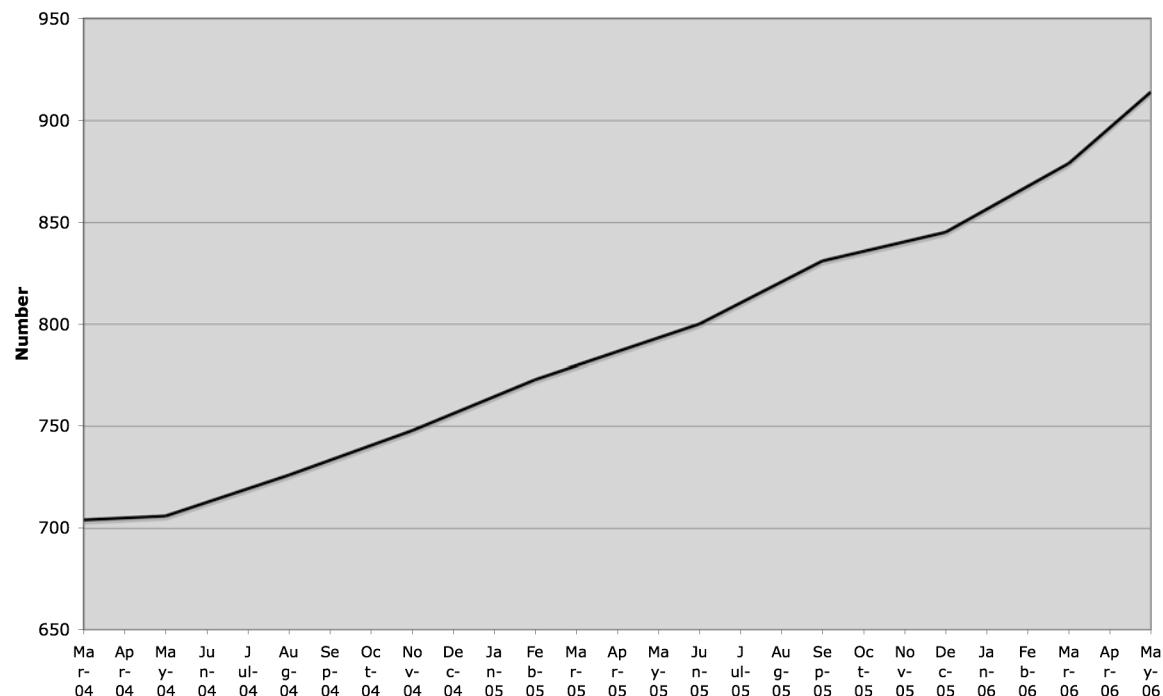
educational stance previously adopted on compliance had ended. The overwhelming majority of formal disciplinary action taken constituted 'reprimands'. Only 2 formal suspensions were carried out by the OLGC over the life of the research, and the data does not allow us to determine whether or not these suspensions were a result of breaches of the Codes of Practices or breaches of other Acts.

7.5.3 **Barring**

The OLGC compliance data included information about persons barred from the Casino. A review of how this data has changed over time is useful as it allows detection of any changes in the number of patrons barring and the Act under which they are being excluded.

Figure 3 shows the total number of persons barred over time from the Casino. As is clearly evident, the number of people barred has increased over time.

Figure 3:Total Numbers of Persons Barred from the Casino

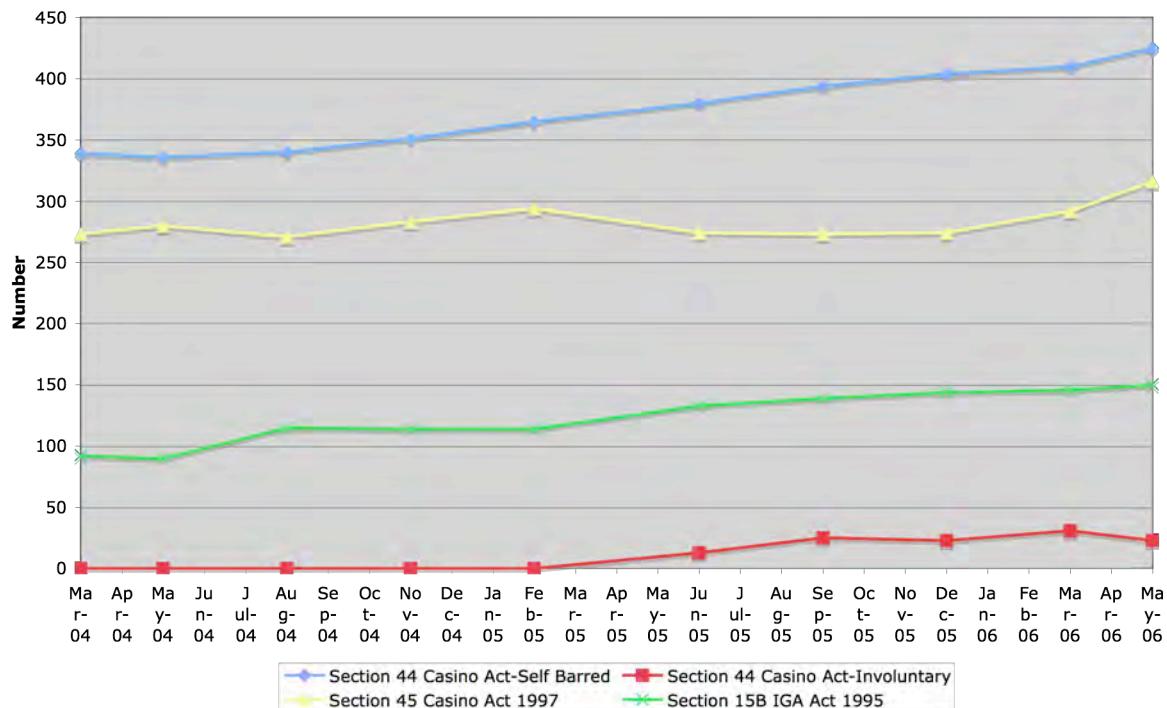


When we look at the total number of persons barred by the type of Act under which they were barred (Figure 4), we see that, with the exception of barring under Section 45 of the Casino Act 1997²⁴, the pattern of increased barring is occurring for all barring types. In particular, the total number of people who had barred themselves increased steadily.²⁵ While there was a small increase in the total number of people involuntarily barred, it is clear that most of the overall increase in barring arose from rising numbers of self-barred patrons.

Figure 4:Total Number of Persons Barred from the Casino by Type

²⁴ Section 45 of the Casino Act 1997 allows the LGC to involuntarily bar patrons on any reasonable grounds including problem gambling, theft or disorderly conduct.

²⁵ Under Section 44 of the Casino Act 1997, a person may initiate barring from the Casino. Section 44 also allows the Casino to initiate involuntary barring of patrons on any reasonable grounds, including problem gambling, theft or disorderly conduct. Section 15B of the Independent Gambling Act 1995 also allows people to bar themselves from the Casino by applying to the Independent Gambling Authority.

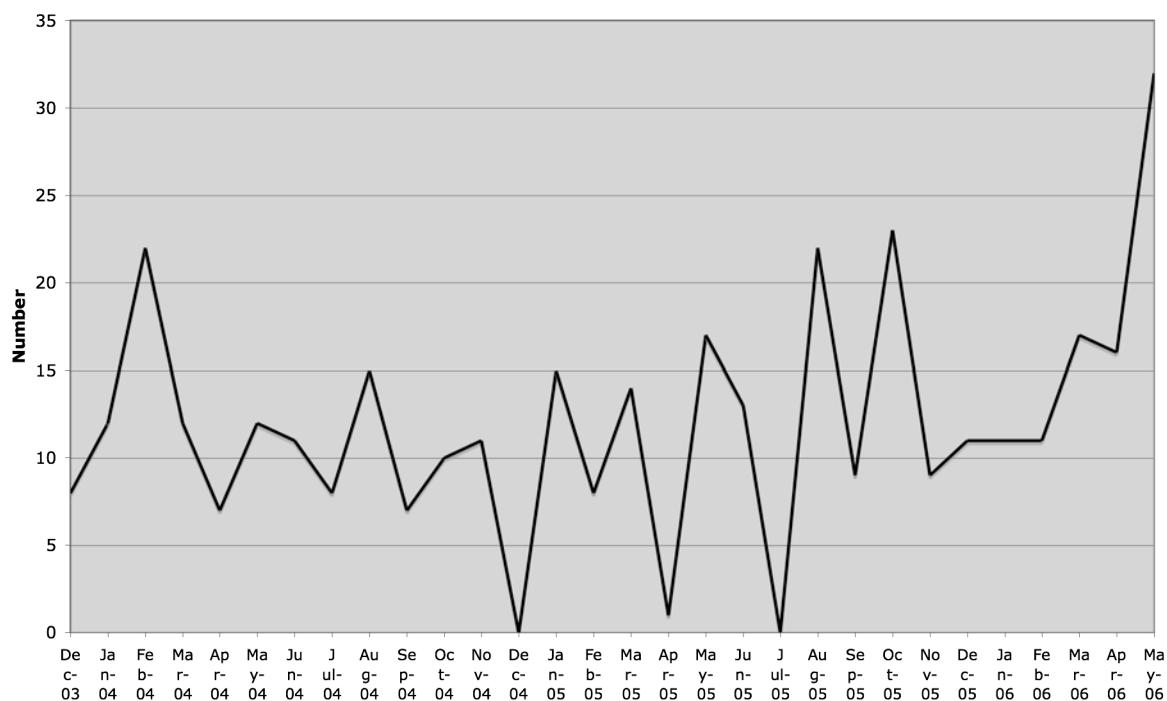


It is important to emphasise, however, that this does not automatically mean that the actual rate at which people are being barred is increasing. The conditions for removal of bars varies from one form of order to another. For example, involuntary barring under section 44 of the Casino Act 1997 can only be made for a period of up to 3 months. After this time that barred order ceases to be binding. However, the length of stay on a barring order issued under Section 45 of the Casino Act 1997 is at the discretion of the Liquor and Gambling Commissioner and the removal of any such order may require a person to prove they no longer pose a risk to their own welfare, or that of their dependents, through gambling. This means that many people who are on such a barring order must take action to have that order rescinded.

Considering the trend in the rise of the number of excluded persons from this point of view, we cannot tell if the increase in the number of people barred actually reflects an increase of the rate at which people are being barred or an increase in the number of people who are not actively seeking to have the bar revoked.

Indeed Figure 5, which shows the total number of barring orders determined per month, suggests that there has been no consistent trend in the rate at which people are being barred.

Figure 5: Total Number of Barring Orders Determined



7.6 Conclusion

As we have seen, the concerns the OLG had about the clarity of some clauses of the Advertising and Responsible Gambling Codes of Practice lead them to adopt an educational approach to the monitoring of compliance. As ambiguities in the Codes were addressed, the OLG shifted away from such an emphasis and started to invoke disciplinary action for non-compliance.

Considering that similar concerns about the clarity of the Codes as reported in earlier chapters, as well as by OLG Inspectors, resulted in the initial low level of compliance among licensees, this educational approach was probably an appropriate policy to adopt. However, the apparent continued inability to enforce some aspects of the Codes may be of concern. Limitations in the monitoring of compliance with the identification and approaching of problem gamblers, as well as the identification and removal of self-excluded persons, were continually emphasised by both the LGC and Inspectors throughout the research. However, on the basis of findings presented in other chapters of the research, it is possible that venues are largely complying with these aspects of the Codes as their level of awareness of problem gambling increases among themselves, staff and the industry in general.

8. Concern Sector

Interviews were conducted with representatives from a number of Break Even services, as well as the Hon. Nick Xenophon at each Wave of the research. An unstructured interview schedule was utilised which aimed to cover core topics, while also allowing the exploration of other areas of inquiry as brought up in the interview process.

8.1 The Codes

Prior to the formal implementation of the Codes representatives from Break Even services and the Concern Sector articulated their general support for the Codes. Participants did express similar concerns to those reported elsewhere in this report in relation to the imprecise meaning of some aspects of the Codes and the insufficient prescriptions of gambling providers' responsibilities in relation to the Codes. There was also a general criticism of the lack of prescribed penalties for breaches of the Codes. Together, these concerns lead interviewees to believe that there were deterrents to gambling providers fully complying with the Codes. Similar concerns were raised in following interviews leading many to view the Codes at Wave 4 of the research as being only the first step in the right direction.

Similar comments were made in regard to the reduction in the number of gaming machines, with respondents at Wave 1 of the research voicing overall support for the recommended reduction but emphasising that it was not sufficient to curb or address problem gambling. These views continued to be expressed at Wave 4 of the research (after the reduction had been implemented) with many reporting that it has had little effect on net gaming revenue and problems associated with gambling.

Some aspects of the Codes were of more concern to participants than others. For example, the specification that gambling providers refer people who appear to have problem controlling their spending on gambling to a gambling help service was initially seen as creating a possible conflict of interest for staff who might feel their jobs were in jeopardy if they complied with the Code. This aspect of the Responsible Gambling Code was still a concern at Wave 4 of the research with respondents reporting that venue staff continue to have difficulties in identifying and approaching people who appear to have problems with gambling. This lead to general calls for the need to ensure ongoing staff training.

8.2 Compliance With the Codes

The concerns respondents expressed in relation to the wording and prescriptions of the Codes also translated into concerns about the ability to monitor compliance effectively, especially with the inspection regime adopted by the OLGC.

At Wave 1, it was suggested that the lack of enforcement of penalties for breaches in existing Codes was an indication that compliance with the new Advertising and Responsible Gambling Codes would be poor. It was suggested that the OLGC would need to adopt spot checks in their inspection regime to increase the effective monitoring of compliance with the Codes.

Interviewees had particular concerns about the effectiveness of the current OLGC monitoring mechanisms in regard to certain aspects of the Codes such as the playing of two machines, the services of alcohol to patrons playing machines, and the identification of

problem gamblers and self excluded persons. A few respondents at Wave 2 of the research proposed that flying squads, and or sample shoppers/gamblers could be used as alternative monitoring mechanisms. It was thought that this would improve on the current situation in which they saw complaints as being the only means by which breaches of the Codes are brought to the attention of authorities.

At Wave 4, while concerns were still being voiced in regard to the insufficiencies evident in the monitoring mechanisms in place and the perceived lack of enforcement and penalisation of breaches of the Codes, it was considered that sections of the industry had made a real attempt to comply. This was particularly thought to be true of the casino and the Lottery Commission, despite internal auditing of compliance by the lotteries being viewed as both problematic and unsatisfactory in earlier Waves of the research. Interviewees believed that licensees' compliance was variable with some embracing and applying the full philosophy of the Codes while others needed to be reminded about aspects of the Codes. The least effort was seen to have been made by SA TAB.

The most common areas of non-compliance, as reported by the Break Even services' respondents, were the cashing of cheques, the playing of two machines at a time, and breaches associated with advertising such as the use of machine sound effects.

8.3 *Impact on Clients of Break Even Services*

It appears that the introduction of the Advertising and Responsible Gambling Code of Practice has had little impact on the number, types and patterns of referrals to Break Even services.

Break Even services had noticed little or no change in the number of enquiries or the number of their clients over the life of the research. Break Even services similarly reported little change to have occurred in the sources of referrals, with most referrals at Wave 4 continuing to be by word of mouth from friends and relatives, the phone book, other community organizations, Gambling Helpline, newspaper promotions, and Break Even service brochures, rather than through the gambling industry.

There was also little change in the type of gambling that was presenting a problem for people seeking help, with the majority experiencing problems related to gaming machines. However, at Wave 4, there was a suggestion that counseling services may be receiving more clients who engaged in multiple types of gambling, although the numbers were seen to be too small to be confident that this was a general trend. Another reported an impression of growing dependence of problem gamblers on loan companies and pawnbrokers, and a growing connection of problem gambling to drug use. This was identified as an area of future focus for the Break Even services.

It was also generally considered that little change had been evident in the 'type' of person presenting with gambling problems. A couple of agencies at Wave 4 of the research did suggest that they were experiencing an increase in inquiries from younger gamblers, particularly those in their mid-20s. The emergence of a 'new generation' of gamblers and/or problem gamblers was also identified by the Commissioner at Wave 4 of the research. It was suggested by both the Break Even services and the Commissioner that this posed particular problems for the industry, as young people tended to view gambling as a form of entertainment and as such challenged traditional views of who a gambler and a problem gambler is. One agency respondent linked the emergence of young problem gamblers to the

increased number of late night poker shows broadcast on TV, and the opening of new poker game facilities at the casino.

8.4 Relationship with Gambling Providers

The Responsible Gambling Code of Practice has clearly had an impact in developing relationships between gambling providers and problem gambling support services.

Initially it was found that opinions differed among gambling support services about the locus of responsibility for establishing relationships between agencies and gambling providers. It was suggested that while the Code specified that individual venues provide every person who requested to be self-excluded with immediate referral to, or liaison with, a counselling service/gambling help services, it did not outline any mechanisms for the way in which this should be done.

Some agencies presumed that as the Code applied to the gambling providers it was therefore their responsibility to initiate contact with gambling help services. Other agencies said that in practice most responsibility for forging relationships lay with individual gambling help agencies, but no resources were allocated to them for this purpose.

The AHA's appointment of a 'Responsible Gambling Officer' was seen as a positive first step in the initiation of the establishment of these relationships and was seen to have improved communication between agencies and hotels early in the research.

Respondents noted an increase in the number of enquiries from hotels three months after the introduction of the Codes. At Wave 3, it was again reported that relationships between Break Even services and the gambling industry had improved, with all services noting that licensed premises had contacted them for information and/or general enquiries. Indeed the frequency of these contacts was also reported to have increased, especially in country areas. It was suggested that gambling providers generally initiated the contact, primarily to build relationships, but also to discuss options for handling particular situations. Several agencies again reported an increase in the frequency of the contact they had with gambling providers at Wave 4 of the research. In some cases, this was seen to be connected to the AHA's attempts to establish responsible gambling initiatives. However, views varied on the significance of these developments, with some agencies suggesting a considerable shift towards much greater cooperation between gambling providers and counseling services, while others remained skeptical of the impact of the AHA's initiatives and expressed concern with the level of expertise of the appointees.

While relationships between agencies and gambling providers were reported to have increased, contact was primarily to seek advice and assistance in regard to certain matters such as seeking clarification about certain aspects of the Codes. Services clearly indicated that this had not resulted in the referral of patrons to their services.

8.5 Self-Exclusion

Self-exclusion was consistently seen as being a problematic area of the Codes to both implement and enforce.

It was considered that while more gambling providers became aware of the barring process over time, and a general increase in the numbers of people who make requests for self-exclusion was witnessed, confusion continued to exist throughout the research about the

different forms of barring undertaken by the IGA, the LGC and licensees. This confusion was said to be experienced by licensed premises, gamblers, and the gambling help service sector alike. Break Even services tended to refer people who want multiple-venue-barring to the IGA, but provide help with the barring process to people who wished to bar from only a few local venues.

It was also noted that problems had arisen where patrons wished to have venue-based indefinite barring lifted, and the licensee requested a letter from a help service to demonstrate to the venue they no longer had a gambling problem to allow the barring to be lifted. Some services are unwilling to provide this written assurance, and have therefore adopted the approach of directing new clients to the IGA for barring, understanding that only the IGA holds the power to revoke the bar.

Agencies considered that relying on venue staff to recognise self-excluded gamblers from a photograph was problematic. This was due not only to the difficulties experienced by staff in actually recognising self-excluded people, but also because concern sector interviewees did not believe venues' were consistently requiring staff to implement this provision. Counsellors also said that another problem with venue-based barring was that patrons can change their appearance or simply go elsewhere to gamble.

8.6 Effects of Codes

Little change was evidenced in agencies perceptions of the effect that the Responsible Gambling and Advertising Codes have had. Overall, most agencies felt that, at the least, the Codes had raised gambling providers' awareness of problem gambling. It was suggested that the requirement that licensee provide people who request to be self excluded with the immediate referral to, and liaison with, a counseling agency was particularly successful in developing relationships between gambling agencies and gambling providers and in raising awareness of problem gamblers. However, the concern sector in general continues to view the Codes as only a first step in reducing the negative effects of gambling, and as one which is unlikely to have major impact.

Agencies indicated that it was too early to tell with certainty what effects the reduction in gaming machine numbers would have on gamblers. Most were skeptical that the reduction would significantly affect problem gambling, with several suggesting that it could even be having reverse effects because demand for machine use sometimes exceeds availability and aggression between players was seen to occur. Like many other stakeholders, they thought that the number of machines being removed was too small to have any effect other than to remove a relatively small number of low revenue machines. Most doubted that it would have any real effect on the overall sums gambled and indeed, at Wave 4 of the research, pointed to the increases in net gambling revenue as evidence of this.

8.7 Conclusion

Concern sector respondents reported that the impact of the Codes has been variable. On the one hand compliance was reported to have increased and relationships between agencies and gambling providers established. On the other however, little changes had been experienced in the number, types or patterns of referrals to Break Even services nor to the type of gambling presenting as a problem or the type of person that has a problem with gambling.

Concern Sector participants also expressed similar concerns to those reported elsewhere in this report in relation to the imprecise meaning of some aspects of the Codes and the insufficient prescriptions of gambling providers' responsibilities in relation to the Codes. The latter of these concerns also translated into concerns about the effective monitoring and enforcement of aspects of the Codes such as the playing of two machines, the services of alcohol to patrons playing machines, and the identification of problem gamblers and self excluded persons.

Despite these apprehensions participants did articulate their general support for the Codes, believing that some of the provisions, such as the requirement to develop relationships between agencies and gambling providers, as well as the provision of problem gambling training for staff, were successful in raising the awareness of problem gambling issues within the industry. It was maintained however, that the introduction of the Codes and the reduction in the number of gaming machines was only the first step in the right direction.

Conclusion

This Report has described the results of a research project aimed at evaluating the impacts of changes to the regulation of gambling in South Australia. The focus of the Report has been on the effects of the introduction of an Advertising Code and a Responsible Gambling Code of Practice in April 2004 that applied to all legal gambling providers in the State. Previous chapters of this Report have provided a detailed account of the findings and main conclusions of the research. This Chapter draws out the main threads that run through the previous chapters. It does not systematically summarise their conclusions.

The Report has presented strong evidence that venues did change their approach to gamblers during the course of the research. Generally, they implemented some aspects of the Codes more quickly than others. The initial focus was on provisions such as the requirement that they make responsible gambling literature readily available, and that they have documentation of responsible gambling procedures. Beyond these provisions, implementation of other important aspects of the Codes was a gradual process. The research found clear evidence of a change in culture amongst some gambling providers towards accepting that they had responsibilities for the welfare of gamblers, and that these sometimes required them to be proactive. However, it was also clear that this process was unfinished and continued at the time of the completion of the research, 15 months after the formal introduction of the Codes.

Thus, the implementation of the Codes was a long process that only began with the formal legal requirement that venues comply with the Codes from April 30, 2004. Almost all venues did not immediately comply fully or accept the need to do so, and many probably still did not fully accept the need to comply by the conclusion of the research. Industry peak bodies also took some time to focus on the practical steps needed for their members to comply with the Codes. Why was the acceptance by venues and industry groups of the need for full compliance so drawn out?

One important reason is that some aspects of the Codes themselves were not framed in ways that made them readily enforceable. Indeed, some provisions clearly required venues to make judgements about what would constitute compliance (e.g., the provision requiring that venues identify patrons who had difficulty controlling their gambling expenditure and 'take all reasonable steps' to ensure that they had contact details of a gambling referral service), and others were entirely advisory (e.g., the provision recommending that venues develop a protocol about the treatment of young children in venues). Complying with these provisions would always be difficult if venues approached them looking for unequivocal prescriptions about what would and would not constitute compliance. They required that venues adopt a concern for the welfare of some of their patrons that was clearly alien to many, and indeed, was thought to be opposed to their interests. These provisions produced much predictable complaint from venues when the Codes were first introduced. More importantly, compliance was only going to be possible once venues had accepted the idea that they had responsibilities for the welfare of some of their patrons, at least to some degree. And this required a significant culture change within many gambling provider organisations that was never going to occur overnight.

Of course, other aspects of the Codes were much more readily enforceable and easier to comply with (e.g., many provisions of the Advertising Code, the provision requiring documentation of procedures in the Responsible Gambling Code), and these appear to have

been the focus of many venues' initial compliance efforts. Interviews with licensees, industry groups and staff suggest that these more straightforward requirements laid an important foundation for the culture change necessary to practically implement other provisions requiring venues to make judgements and accept some responsibility for gamblers' welfare. Thus, it seems likely that the combination in the Codes of readily implemented provisions, alongside more far-reaching ones that required culture change, ultimately assisted in promoting the culture change necessary for all provisions to be implemented effectively.²⁶ But it also meant that implementation was a drawn out process in most venues.

The OLGC's approach to enforcing the Codes clearly focused on education in the first year or so after their introduction. Whether intentionally or not, the OLGC's strategy of focusing on education and persuasion first, and then moving towards rigorous sanction when venues continued to fail to comply, was broadly in line with what Ayres and Braithwaite (1992) have termed a 'regulatory pyramid'.²⁷ Their argument is that government regulation of any activity is most effective when it involves a base of education and persuasion aimed at producing voluntary compliance. However, this often needs to be backed up with a progressive ramping up of control when actors (gambling providers in this case) do not respond to education and persuasion, until severe sanctions are used against those who continue to refuse to comply with regulatory provisions. This approach necessarily means that widespread compliance with new regulations will not occur immediately. However, when compliance is achieved, it will be on the basis of general acceptance and understanding of the regulatory provisions. This is exactly what was required for the Codes to be fully implemented, and helps explain why implementation was quite a long process. We do not claim that the implementation process used by regulators in South Australia was optimal, or even that it fully conformed to the 'regulatory pyramid' model. Those are judgements that are beyond the scope of this research. However, it does seem likely that the broad approach of the OLGC did promote ultimate acceptance of the intent of the Codes in the ways the regulatory pyramid approach would have predicted.

Given that the approach of the regulators is very important in the successful implementation of any new regulations, the presence in South Australia of two different bodies (the IGA and the OLGC) which were both widely perceived as having regulatory responsibilities, probably detracted from effective implementation of the Codes. The two groups were widely seen in the gambling industry as offering different interpretations of key provisions of the Codes, and as being in some tension with one another. Whether true or not, this perception undoubtedly made it more difficult for the regulators to focus on promoting compliance in the certain knowledge that they would be seen as understanding what the Codes required. It also meant that some gambling providers focused on the apparent differences between the two regulatory bodies, and thereby took longer than they might otherwise have done to focus on the practical tasks necessary to comply with the Codes.

Interviews with licensees, some industry groups and venue staff all strongly suggested that effective implementation of all provisions of the Codes depends on frontline staff accepting both the feasibility and usefulness of the Code provisions. One important issue is whether they perceive a conflict between complying with the spirit of the Codes and other aspects of their jobs. Where such a conflict is perceived, it is unlikely that the Codes will be fully

²⁶ To be clear, this is not to say that all venues fully complied with all aspects of the Codes by the end of the research. The point is that the combination of types of provisions in the Codes assisted in moving towards this goal.

²⁷ This model has been explicitly adopted by the Gaming and Censorship Regulation Group in the New Zealand Department of Internal Affairs (see New Zealand, 2004).

implemented. The research did strongly suggest that perceptions of conflict of interest are not inevitable amongst staff. In cases where staff came to see problem gambling as contrary to the business interests of the venues where they worked, they did not appear to see a significant conflict of interest in their dual roles. While this does suggest one important route to effective implementation of the Codes, it relies on a very sharp distinction between recreational and problem gamblers. Moreover, it may be most effective where problem gamblers are seen as sharply deviant compared to recreational gamblers. Such perceptions may be useful in ensuring compliance with the requirements of the Codes. However, they could undermine harm minimisation, if they have the effect of marginalizing problem gamblers and those in the early stages of developing gambling problems.

Despite their gradual implementation, the Codes clearly had some effects on gamblers. The gamblers' surveys showed that the changes in recreational gamblers' behaviour after the introduction of the Codes were minimal. However, it appears that problem gamblers reduced some of their gambling activities, particularly with respect to EGMs, and the total amounts of money they gambled. There are two important features to this change. First, though significant, they did not generally turn problem gamblers into recreational gamblers. At the beginning of the research, it was evident that problem gamblers spent far more time and money on gambling than recreational gamblers. The changes in problem gamblers' behaviour were relatively small, given their prior behaviour, and served only to reduce the gap between them and recreational gamblers slightly.

Secondly, although the sample of problem gamblers was too small to be certain, it appears likely that much of their change in behaviour occurred immediately after the introduction of the Codes. This is a somewhat paradoxical finding, given that other aspects of the research suggest that venues took some time to become compliant with the Codes, especially in regard to the Code provisions that were designed to force venues to approach problem gamblers directly. Why would problem gamblers respond so quickly to the introduction of the Codes? We can only speculate about this. We are confident that many venues, probably the majority, quickly complied with the Responsible Gambling Code's requirement that they bring the Code to the attention of gamblers and provide them with literature about responsible gambling and contact details for gambling referral services. For gamblers, this was probably experienced as a sudden, quite dramatic shift in the gambling environment. In a short period, gambling venues changed from providing virtually no reminders of the possible negative effects of problem gambling to making these reminders hard to avoid. It is plausible that this effect of the Codes, which occurred very soon after their formal implementation, was sufficient to produce the relatively small, but significant reductions in gambling that we observed. Whether the fuller implementation of the more confronting aspects of the Codes would produce further reductions in problem gamblers' outlays and time spent gambling remains uncertain, since it is unlikely that these provisions had been very fully implemented by the conclusion of the research.

The implementation of the Codes undoubtedly had some costs for gambling providers and those who work in them. Quite substantial new responsibilities were given to staff. Initially, staff did expect that these would involve significant additional work for them, arising from requirements to ensure that there were sufficient supplies of gambling literature in venues, that they monitor gamblers more closely, etc. However, the limited evidence in the Report suggests that staff generally experienced only small changes to their workloads. Instead of increased workload, they were aware of new responsibilities, most directly through the

training the Codes required. Some appear to have readily accepted the new responsibilities the Codes placed on them, while others were more unwilling to take them seriously.

Gambling providers were aware of the additional costs arising from the Codes in areas such as the provision of responsible gambling literature, staff training, and the time involved in ensuring that required documentation of procedures was available. Some providers, especially larger organisations, also instituted new internal procedures to ensure that they complied with the Codes. These ranged from external auditing of advertising for compliance to procedures designed to ensure that any approaches to possible problem gamblers were made by managers rather than lower level staff. While some venues and peak bodies did complain about the costs of these changes, it appeared that they became part of the routine of running businesses quite quickly.

Although the conclusion of the research is that the Codes did produce change, both to how venues constructed the experience of gambling and to problem gamblers behaviour, not all stakeholders believed these changes were sufficient. Representatives of the 'concern sector' remained fairly sceptical of the Codes' impact at the end of the research. They did accept that most gambling providers had made substantial progress towards complying with the Codes. They usually felt that the Codes had useful effects in raising awareness of problem gambling, and in forging new connections between gambling providers and problem gambler support services. However, they did not believe that any effects on problem gamblers' behaviour were substantial, and noticed no real positive change in the referrals they received to their problem gambler counselling services. Their view was generally that the Codes represented a first step in the right direction, but only a first step.

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Appendix

Appendix 1: An Econometric Model of Gambling Expenditure

The panel (longitudinal) survey of gamblers provides a unique opportunity to examine the behaviour of both recreational and problem gamblers in South Australia in ways that are not available in cross-sectional data. In particular, a key question is the extent to which unchanging attributes shared by some gamblers (e.g., their gender, age, income, etc.), along with their gambling behaviour (e.g., how frequently and for how long they gamble), can explain their gambling expenditure. In cross-sectional data (i.e., single time surveys), the influence of these variables may be confounded with unobservable and unchanging factors that affect outlays. For example, some gamblers may simply have a greater natural propensity to gamble than others (though this may be correlated with factors like gender). Panel data allows these unobservable and unchanged factors to be assessed, and the effect of attributes and gambling behaviour on expenditure assessed independent of them.

The policy implications of this analysis are significant. First, it allows definitive analysis of whether particular measurable individual characteristics (such as gender, age, or income) and gambling behaviour actually affect gambling expenditure. This permits policy makers to assess whether any intervention aimed at changing gambling expenditure should focus particularly on any identifiable demographic groups. It also provides information about the likely impact of changing gambling behaviour on altering expenditure. Secondly, it allows assessment of the significance of individual heterogeneity – the differences between individuals that are not causally related to their measurable characteristics or their measured gambling behaviour – in explaining gambling expenditure. If the influence of this heterogeneity on gambling behaviour is significant, then understanding its character and source will be important if policy is to effectively alter undesirable gambling behaviour.

It is worth noting that little economic theory formally considers gambling behaviour, and expenditure on gaming has not been rigorously investigated.²⁸ Consequently, the following analysis is based on an econometric approach – the models are tested and if successful are accepted. If they are not successful adjustments are made to the models based on model test statistics and other model information.

A1.2 Specifying the Econometric Model

The gamblers' panel data provides observations on various attributes of gamblers; some time-invariant (for example, gender and country of birth), and some time-variant (for example, time spent gambling and income). The econometric models to be considered are based on the general log-linear specification:

$$\ln(\text{Outlay}_{it}) = \alpha + \beta_1 X_{1it} + \beta_2 X_{2it} + \dots + \beta_n X_{nit} + \varepsilon_{it}$$

The (natural) logarithm of expenditure on all forms of gambling by an individual gambler (person i , at time t , Outlay_{it})²⁹ depends on the n explanatory variables (X_{in});³⁰ α represents the

²⁸ Victorian Casino and Gaming Authority (2000).

²⁹ Gamblers outlays are converted from weekly to annual data. Gamblers who did not spend on gambling at a particular Wave have zero outlay. A number of gamblers report outlays that appear unlikely, i.e. on an annualised basis, exceeding income. Several options are available including deleting, scaling outlays to income, etc. Such treatment does not make any material difference to regression results and so that data are maintained as reported—except as noted when describing mean outlays. To maintain zero outlays, outlays of between zero and \$1 per annum are set equal to zero.

³⁰ Note that in the econometric modelling explanatory variables are generally dummy variables (one for each category of the explanatory variables—see attachment I). When econometric analysis takes place one dummy variable from each set is excluded, this being the 'base case'.

(common) intercept; β s represent the (common) slope coefficients to be estimated, and ε_{it} represents the regression residuals or errors.³¹

Explanatory variables (X_{in}) considered as potential influences on gamblers' expenditure can be classified as those pertaining to socio-demographic factors, and those relating to gambling behaviour. Socio-demographic factors used in the analysis below are the source of income (wages, business income, or pension), household income, age, education, employment status, marital and household status, the number of people in the household, and the number of children in the household. Variables related to gambling behaviour are: how often gamblers visit venues to gamble on EGMs, the time they spend doing so, whether they use an ATM machine at the venue, how far they travel to gamble, and whether they engage in other activities (such as dining) at the gaming venue (see Attachment I for details of these measures – including how they are treated in the empirical analysis to follow).

An attractive feature of the log-linear model is that the resulting variable coefficients (β s) represent the percentage change in the dependent variable (outlay on gambling) for a 1 unit change in an explanatory variable (or in the case of dummy variables, moving from one category to another).

The basis of panel data models is an adjustment to the regression error (residual). Specifically, the error is assumed to be composed of two elements, u_i represents the unobserved individual specific heterogeneity and ε_{it} the individual time-specific errors:

$$\varepsilon_{it} = u_i + v_{it}$$

Two forms of the panel model were considered, the 'Random Effects' (REM) and the 'Fixed Effects' (FEM) models.³² Econometric tests overwhelmingly indicate that the FEM is a better explanation for gamblers' outlays than the REM.³³ Consequently analysis using the FEM model is reported. In the FEM model the dummy variable representing individual heterogeneity (u_i) forms individual intercepts (representing the unobserved, but estimated, shift-impact latent individuality)—which can, if desired, be incorporated into the common intercept term (i.e. $\alpha + u_i$).³⁴

$$\text{FEM: } \ln(\text{Outlay}_{it}) = (\alpha + u_i) + \beta_1 X_{1it} + \beta_2 X_{2it} + \dots + \beta_n X_{nit} + v_{it}$$

³¹ This is a log-linear specification from the model $y = e^{X'\beta}$ which, after taking the natural log of both sides becomes $\ln Y = X'\beta = \alpha + \beta_1 X_1 + \dots + \beta_n X_n$. The specification is based on the assumption that there is not a linear relationship between outlays and gamblers' attributes, but that there is a linear relationship between the log of expenditure and attributes. Such log-linear relationships are common in econometric analysis. Empirical tests support this specification. For example, a pooled OLS regression of expenditure results in an Adjusted-R² of 0.1171 (i.e. accounts for about 12% of the variation in expenditure) compared to an Adjusted-R² of 0.4528 (i.e. about 45% of the variation is explained) for the model with the log of outlays.

³² Importantly, the distinction between the REM and the FEM does not relate to any intrinsic characteristic of the 'effect' itself, but is simply the assumption made regarding the relationship between the individual-specific unobserved heterogeneity (u_i) and the observed variables (or gamblers' attributes, X_{it}). If it is assumed that the individual-specific component is independent of the explanatory variables the model is termed the REM; if it is assumed that the individual-specific component and X_{it} are correlated the model is termed the FEM.

³³ The statistical test for FEM vs. REM model (the Hausman test) statistic is 107.03 (p -value = 0.0000) overwhelmingly supporting the FEM model.

³⁴ In the REM model, the individual heterogeneity forms part of the error term, and the error term is not decomposed into its two components: $\ln(\text{Outlay}_{it}) = \alpha + \beta_1 X_{1it} + \beta_2 X_{2it} + \dots + \beta_n X_{nit} + (u_i + v_{it})$.

One specific benefit of the FEM over the REM model is that individual effects (u_i) can be examined (e.g. whether the average of individual heterogeneity is different for problem compared to recreational gamblers).

A second benefit of the FEM model is that, if deemed appropriate, time effects can be included by the addition of a set of dummy variables for each of the time periods (i.e. 4 Waves of interview). Time effects are assumed different across time, but independent of individuals (represented by λ).³⁵

$$\ln(Outlay_{it}) = \alpha + u_i + \lambda_t + \beta_1 X_{1it} + \beta_2 X_{2it} + \dots + \beta_n X_{nit} + \nu_{it}$$

The ability to model gamblers' behaviour in panel models is not without some cost however. In the FEM model, variables which are unchanged (or time invariant) 'drop' out of the model if they are invariant for all individuals in the sample (for example country of birth). Nonetheless, and as noted above, time-invariant factors can be examined by assessment of the individual heterogeneity estimates, which capture much of the time constant information. In addition, interaction terms can be included in the model specification to account for some time-invariant factors (e.g. gender). For example, the measure of how often gamblers visit gambling venues can be treated as separate variables for males and females, thus overcoming the restriction associated with time-invariant variables in the FEM model.

Moreover, the assumption necessary for the REM to be appropriate is generally considered untenable (i.e. individual unobserved gambler's attributes are assumed to be unrelated to their observed attributes—which is generally believed to be unlikely, and which is unlikely for these data).

A1.3 Model Approaches and Results

Two general approaches to modelling gamblers' expenditure were considered. First, modelling recreational and problem gamblers separately was attempted. Second, a combined model was constructed, though this allowed a separation between problem and recreational gamblers by adapting explanatory variables (discussed in detail below). Because of the small sample, an econometric model restricted to problem gamblers was unsuccessful. A combined model was examined and found to be successful – and through the panel method used was able to usefully distinguish between problem and recreational gamblers (see below). This combined model is reported here.

As noted above, tests indicate that the 'fixed effects' model (FEM) is preferred to the 'random effects' model (REM). Nonetheless, REM models were estimated and they lend support to the general conclusions reached after estimating the FEM model. A 'pooled' model (in which there were no time effects) was also estimated.

Results relating to tests for model selection are given in Tables A1 and A2. As shown in Table A1, hypothesis tests conclusively indicate that model 5 (FEM with time effects) is superior to other models (the χ^2 square statistic and p -value indicate that models 1 to 4 are rejected in favour of model 5 at any reasonable level of significance). The test for the inclusion of time effects (model 5 vs. 4) is the 'least' significant (but accepted at up to the

³⁵ This model is generally referred to as the two-way effects model.

0.038% level)—confirming that time effects increase the explanatory power of the model by only a small amount—but indicating that exclusion would result in a misspecified model.³⁶

Table A1: Model selection – pooled vs. panel, random vs. fixed effects

Model (see Table 6)	Chi-squared	p-value
(2) vs (1)	3947.51	0.0000
(3) vs (1)	1015.28	0.0000
(4) vs (1)	4277.65	0.0000
(4) vs (2)	330.13	0.0000
(4) vs (3)	3262.36	0.0000
(5) vs (4)	20.95	0.0379
(5) vs (3)	3283.31	0.0000

Notes: (1) Models (1) to (5) are described in *Error! Reference source not found.* below. (2) A p-value < 0.05 indicates the model is preferred over its alternative (at the 5% level of significance); e.g. Model (5) is preferred over (4) at better than the 0.04% level of significance.

As demonstrated in Table A2, the FEM model with time effects (model 5) results in the highest R² statistic (and the lowest log-likelihood).³⁷ Note that the inclusion of individual effects improves the R² statistic by over 45 percentage points, but the inclusion of time effects, while assessed as appropriate by the test-statistic, has only a small impact on R² (and as noted in Table A2 below, the dummy variable for Wave 4 is not significant). As this Table demonstrates, the individual (unobserved) heterogeneity (or latent characteristics) are an important influence on explaining the variation in gamblers' outlays (i.e. they alone account for about 89% of the variation in (log) of annual outlays on gambling). When the individual effects are combined with the explanatory variables the explanatory power of the econometric model increases to over 90%. This provides very strong support for econometric analysis which incorporates individual effects.

Table A2: Model selection – pooled vs. panel, random vs. fixed effects

Test Statistics for Model Selection			
Model	Log-Likelihood	Log-likelihood	R-squared
(1) Constant term only	-3451.46	0.0000	
(2) Individual effects only	-1477.71	0.8894	
(3) X - variables only	-2944.41	0.4320	
(4) X and Individual effects	-1321.25	0.9071	
(5) X, Individual & time effects	-1309.14	0.9090	

Notes: (1) X variable are the set of explanatory variables outlined in Attachment I. Individual effects are the individual specific intercept terms, time effects are the sample time dummy variables. (2) The test is based on including the full set of X explanatory variables in the model specification (see Attachment II).

Based on the results of the tests for the appropriate model, and examination of the time effects above, the remaining analysis for all gamblers' outlays focuses on the FEM model with time effects.

Table A3 provides the results of the final panel fixed effects model (with time effects) for all gamblers with positive outlays in at least one Wave. The model is derived by estimating a

³⁶ A test was also conducted to compare the panel model with time effects to a panel model with first-order autocorrelation, time effects were preferred.

³⁷ R² is an increasing function of the number of explanatory variables in the regression model. The adjusted R² is 'deflated' to take the number of explanatory variables being included (R² can give an overoptimistic picture of the fit of the regression, particularly when there are a large number of explanatory variables).

model with all explanatory variables expected to influence gamblers' outlays included in the initial specification (see Attachment I for the description of the explanatory variables, and their treatment; and Attachment II for model output).³⁸

The general-to-specific method is used to obtain the final model. The most general model is estimated (containing all potentially relevant explanatory variables, including time and individual dummy variables). Then, by an iterative testing and reduction process the least significant variables (based on their *t*-statistic) are removed until a specific model is reached in which all remaining explanatory variables are significant, at least at the 5% level according to their *t*-statistic (*t* > 1.960 two-tailed).

The resulting model is successful; the adjusted R^2 indicates that the model explains 77% of the variation in gamblers' outlays (the unadjusted R^2 is 91%).

Table A3: Fixed effects panel model—specific model (gamblers' outlays)

	Coefficient	Stand. Err.	t-statistic	p-value
Renting or boarding (compared to owning or purchasing)	-0.3539	0.1560	-2.2676	0.0234
Pension or benefit is main source of income (compared to wages or business)	-0.2711	0.1364	-1.9874	0.0469
6-9 people in household (compared to fewer)	-0.9025	0.4685	-1.9266	0.0540
Attend venue specifically to gamble (compared to social reasons)	0.3320	0.1519	2.1859	0.0288
Hours usually spent in gambling session (problem gamblers)	0.1584	0.0483	3.2821	0.0010
Hours usually spent in gambling session (recreational gamblers)	0.1075	0.0268	4.0112	0.0001
No. of gambling sessions per year (women)	0.0071	0.0011	6.4701	0.0000
No. of gambling sessions per year (men)	0.0029	0.0008	3.5509	0.0004
Constant	5.5517	0.0822	67.5765	0.0000

Notes: (1) See Attachment I for details of explanatory variables. (2) TIMEPROB and TIMEFUN represents how long (measured in hours) problem (recreational) gamblers spend at a gaming venue; FREQFEM and FREQMALE represent how often female (male) gamblers attend a venue (measured as visits per year). (3) An interaction for type of gambler and how often they attend a venue was found to be the same for both types of gamblers and to avoid collinearity was excluded in favour of the gender specific terms. (4) Adjusted R^2 = 0.7744; F-statistic for the null hypothesis that all coefficients are zero is 6.93 (p-value=0.0000).

The striking feature of this Table is that the explanatory power of the model (excluding individual and time effects) is due to two measures:³⁹ How long individuals spent gambling (the sum of time spent on EGM, racing track, casino, and Keno)—constructed to differentiate between problem gamblers and recreational gamblers; and how often they gamble (the sum of how often individuals usually play or bet on EGM, racing track, casino, Keno, lottery, and instant scratch tickets)—differentiated by gender. The coefficient for time spent gambling

³⁸ An artefact of the data is that some gamblers answer differently when asked to nominate their country of birth at different Waves. Because of misreporting, this variable could be maintained in the FEM model (although it should 'drop out' as it is time-invariant). Maintaining it has no material influence on the model. The variable was not significant in the REM model. For these reasons, country of birth dummies are excluded from models reported.

³⁹ To examine the impact of the variables relating to gamblers' behaviour a reduced model was estimated. The adjusted R^2 for that model – excluding the effects of residential status (renting vs. owning), main source of income, and number of people in the home – was 0.7714 (compared to the model with 0.7744). Further, exclusion of the reason for visiting the venue only reduced the adjusted R^2 to 0.7701.

indicates that for each extra hour gambling per visit (playing poker machines, Keno, casino, or racing track) about 11% more will be outlaid by recreational gamblers, and about 16% more by problem gamblers. For frequency of gambling an additional visit to a venue to gamble per month (i.e. 12 extra visits per year) increases outlays by about 9% for females and about 4% for males. An extra visit per week will increase these proportions by over four times – women will increase their outlays by 37% and men by 15%.

There is some minor explanatory power in the variable measuring whether or not gamblers visited a venue specifically to gamble. Socio-demographic variables also add only minor explanatory power—these are: those who are renting have about 36% lower spending than those who own or are purchasing their home; households with 6 to 9 individuals are the only category of household size that differs from the base case of a single person household, their outlay is about 90% lower than single person households; and those gamblers on a pension, benefit, or with a non-specified source of income spend about 27% less than those on a wage.

It is interesting to take particular note of some of the variables that do not appear to influence outlays. They are, employment status (e.g. working, home duties, pensioner, etc), household status (e.g. couple with children, one parent family, etc), number of children, and importantly household income. In addition, how far the individual travels to gamble, where they play the poker machines (e.g. a pub or club), whether they use an ATM at the venue, and if they engaged in other activities (such as dining, drinking, etc) at the venue all failed to provide evidence of being relevant to gamblers' outlays.

A1.4 Summary

The econometric modelling provides a useful complement to the analysis in chapter 2. Its first important implication is that, of the range of demographic and gambling behaviour variables included in the models, by far the most significant factors affecting gambling outlays are simply the frequency with which people gamble and the amount of time they spend doing so. This indicates that where gamblers reduce the frequency with which they gamble or the amount of time they spend gambling, their expenditure will decrease. Moreover, other demographic and behavioural factors will have either no effects on expenditure or only very small ones. The findings in the previous section of this chapter are entirely consistent with this model. Problem gamblers do appear to have reduced both the frequency with which they use EGMs and the amount of time they usually spend on them. Given that EGMs are the dominant form of gambling amongst problem gamblers, the model predicts that their total outlays should decrease as a consequence of decreasing time spent gambling. And this is exactly what our earlier analysis showed. That analysis also showed no indication that recreational gamblers reduced either the frequency with which they gambled or the usual amount of time they spent in gambling sessions. Just as the model predicts, recreational gamblers also show no clear pattern of change in their normal gambling outlays.

A second important implication of the econometric modelling is that individual heterogeneity is a major influence on gamblers' outlays. In other words, allowing for the influence of the factors that some individuals have in common (sex, age, frequency and time spent gambling, etc.), there remains a very important individual propensity to gamble that is crucial in determining how much they outlay. If confirmed by further research, this finding suggests that it may be very difficult to prevent those with the propensity to gamble from doing so, except by removing the opportunity to gamble.

Attachment I

Table 2.38: Explanatory variables—treatment and frequency

Variable	Categories	Frequency	%
Q70 Marital status recoded 2 groups			
MARSTAT01	1 Married or living with partner	1093	57.9
MARSTAT02	2 Not married or with partner, or other	794	42.1
Q71 Household status			
HHSTAT01	1 Single person	378	20.0
HHSTAT02	2 Couple with no children	497	26.3
HHSTAT03	3 Couple with children	655	34.7
HHSTAT04	4 One parent family with children	157	8.3
HHSTAT05	5 Other & Missing	200	10.6
Q72 Number of children <18 in Household			
NUMCH01	ADDED CATEGORY ZERO KIDS	1299	68.8
NUMCH02	1 One	235	12.5
NUMCH03	2 Two	252	13.4
NUMCH04	3 3-7	101	5.4
Q73 Number of people in household			
NUMPEP01	1 one	356	18.9
NUMPEP02	2 two	623	33.0
NUMPEP03	3 3-5	753	39.9
NUMPEP04	4 6-9	37	2.0
NUMPEP05	Missing recode to OTHER	118	6.3
Q74 Residential status			
RESTAT01	1 Owned or purchasing	1311	69.5
RESTAT02	2 Renting or boarding	387	20.5
RESTAT03	Missing Recode to OTHER	189	10.0
Q75 Country of Birth			
COB	1 Australia	1322	70.1
	2 Asia	15	0.8
	3 Europe	158	8.4
	4 UK	250	13.2
	5 Other	62	3.3
	Missing Recode to OTHER	80	4.2
Q77 Work status			
WORKSTAT	1 Work full-time	706	37.4
	2 Work part-time	316	16.7
	3 Home duties	208	11.0
	4 Student	41	2.2
	5 Retired - self supporting	133	7.0
	6 Pensioner	340	18.0
	7 Unemployed	42	2.2
	8 Don't know	2	0.1
	9 Refused	5	0.3
	Missing (94), Don't know (2), refused (5)	101	5.8
	Recode to OTHER		

Table 2.38: Explanatory variables—treatment and frequency (cont'd)

Variable	Categories	Frequency	%
<i>Q78 Main source of HH income</i>			
INCSOR01	1 Wages/salary	1053	55.8
INCSOR02	2 Own business/private income	220	11.7
INCSOR03	3 Pension/benefits	508	26.9
INCSOR04	Missing Recode to OTHER	106	5.6
<i>Q80 Level of education</i>			
EDUCAT01	1 Primary/incomplete secondary	835	44.3
EDUCAT02	2 Year 12	349	18.5
EDUCAT03	3 Trade certificate/diploma	341	18.1
EDUCAT04	4 Bachelors/post-graduate degree	226	12.0
EDUCAT05	Missing Recode to OTHER	136	7.2
<i>Q10 Other activities when playing Poker machines</i>			
WHYVEN01	Did not play	1070	52.2
WHYVEN02	Specifically to gamble	147	7.2
WHYVEN03	For a social outing	732	35.7
WHYVEN04	Both gambling and social, and varies	102	5.0
<i>Q09 Where did you play the poker machines</i>			
WHPOK01	Did not play	1070	52.2
WHPOK02	Pub or hotel	843	41.1
WHPOK03	Other (casino, club, Other)	138	6.7
<i>Q11 Other activities did you usually engage in at the venue?</i>			
OTHERAC01	Did not play	1070	52.2
OTHERAC02	Other activities (e.g. dining, drinking)	928	45.2
OTHERAC03	Only engaged in using Poker machines	53	2.6
Q17	How far travelled to play Poker machine (HOWFAR)	Continuou s	--
Q02	Age	Category	--
Q03	Gender Male/female	Category	--
Q79	Income- 15 categories treated as continuous	Continuou s	--
Q08, Q23, Q30, Q34, Q37, Q44	How often played – sum of six (OFTPLAY, FREQFEM, FREQMALE)	Continuou s	--
Q12a, Q24a, Q38a, Q46a	How long played – sum of four (HOWLONG, TIMEPROB, TIMEFUN)	Continuou s	--
Q14, Q40, Q48	ATM Use (Between Never=0 and Always=6)	Continuou s	--
Outlays		Dollars	--
Q54b	Expenditure: (1) Outlays on all forms of gaming; (2) Outlays on poker machines only	Continuous	
Q21b, Q22b	Amount won/lost	Continuous	

Attachment II –Fixed Effects Panel Model

Table 2.37 provides details of the two-way fixed effects model prior to reduction to the specification reported.

Table 2.37: Fixed effects two-way model (full specification)

	Coeff.	Std.Err.	t-ratio	P-value
RESTAT02	-0.3689	0.1725	-2.1391	0.0324
RESTAT03	-0.1980	0.1936	-1.0228	0.3064
WORKST02	0.0799	0.1642	0.4867	0.6265
WORKST03	0.0187	0.2216	0.0846	0.9326
WORKST04	0.3919	0.4402	0.8904	0.3733
WORKST05	-0.2124	0.2418	-0.8785	0.3797
WORKST06	-0.2864	0.2413	-1.1868	0.2353
WORKST07	0.1468	0.2979	0.4927	0.6222
HHSTAT02	0.1309	0.2913	0.4495	0.6531
HHSTAT03	0.1665	0.2820	0.5904	0.5549
HHSTAT04	-0.0544	0.2853	-0.1907	0.8487
HHSTAT05	-0.1153	0.2317	-0.4977	0.6187
MARSTA02	-0.1299	0.2331	-0.5573	0.5773
INCSOR02	-0.0132	0.1696	-0.0778	0.9380
INCSOR03	-0.2209	0.1740	-1.2691	0.2044
INCSOR04	-0.0583	0.5386	-0.1082	0.9139
NUMCH02	-0.2019	0.1973	-1.0234	0.3061
NUMCH03	-0.0630	0.2291	-0.2749	0.7834
NUMCH04	0.1488	0.3854	0.3861	0.6994
NUMPEP02	0.0314	0.2509	0.1253	0.9003
NUMPEP03	-0.1237	0.2679	-0.4618	0.6442
NUMPEP04	-1.0448	0.5491	-1.9028	0.0571
NUMPEP05	-0.1030	0.2842	-0.3625	0.7170
OTHERA02	0.0582	0.3761	0.1546	0.8771
OTHERA03	0.2513	0.4175	0.6019	0.5473
WHYVEN02	0.1591	0.4312	0.3689	0.7122
WHYVEN03	-0.1577	0.4260	-0.3703	0.7112
WHYVEN04	-0.1340	0.4433	-0.3023	0.7624
WHPOK02	-0.0114	0.1505	-0.0759	0.9395
INCOMEHH	-0.0025	0.0284	-0.0871	0.9306
ATMUSE	0.0370	0.0483	0.7660	0.4437
HOWFAR	0.0557	0.0433	1.2871	0.1981
TIMEPROB	0.1419	0.0512	2.7700	0.0056
TIMEFUN	0.0882	0.0318	2.7705	0.0056
FREQFEM	0.0069	0.0011	6.1304	0.0000
FREQMALE	0.0031	0.0008	3.6748	0.0002
ONE	5.6362	0.3328	16.9365	0.0000

Appendix 2: Problem Gamblers Survey

Note:

- Recreational Gamblers Survey differed only in omitting the Problem Gamblers Screen (Q5-Q7 & Q55-59).
- At Subsequent Waves continuing respondents were not asked demographic questions.
- At Subsequent Waves the time period for which respondents were asked to detail their gambling activity was amended according to the time period specified in the contract.

PROBLEM GAMBLERS SURVEY

Good morning/afternoon/evening. My name is I am from the *National Institute of Labour Studies at Flinders University. We are conducting an important survey for the Independent Gambling Authority about people's experiences of gambling and we would appreciate your help.

Could I speak to the person aged 18 years or over in your household who had the last birthday **(whose birthday is the closest to today's date) (IF PERSON NOT AVAILABLE ASK FOR SUITABLE TIME TO CALL BACK. RECORD NAME AND DETAILS FOR CALL BACK)

IF RESPONDENT CHANGES, REPEAT THE INTRODUCTION and add if necessary

This is not a sales call. We are telephoning to gather information for a research study.

You have been randomly selected from a list of White Pages telephone entries.

Anything you say will be held as strictly confidential. Your personal identity will not be disclosed to anyone.

For more information about the survey you can contact *Dr Christine Stevens on

IF RESPONDENT IS NOT THE PERSON WITH THE LAST BIRTHDAY, ASK FOR THE NEXT PERSON IN THE HOUSEHOLD WHO HAD THE LAST BIRTHDAY

ENTER THE REASON FOR SPEAKING TO CURRENT RESPONDENT

01	Person with last birthday
02	Away for duration of survey
03	Incapable/deaf/illness/disability/too old
04	Language problems
05	Other - specify

IF RESPONDENT RELUCTANT TO PARTICIPATE, say

I know this intrudes on your time, but gambling is an important social issue and it is therefore important to understand individual experiences. Your participation means the results will be more accurate. Can you spare a few minutes to participate in the initial part of the survey?

IF STILL REFUSES, THANK AND TERMINATE INTERVIEW

IF YES

I would like to ask a few quick questions to see if you qualify for the survey. They will only take a few minutes and your answers will be strictly confidential.

1. Have you participated in any gambling activities in the last 12 months? e.g. poker machines, betting on horse, harness or dog racing, scratchies, lotteries, casino games, keno and bingo (but not raffles or sweeps)
- 2.

1	Yes
2	No

IF NO

Thank the respondent and say that we are only interested in talking to people who have gambled in the past 12 months. THANK AND SKIP TO IQCA AT END OF SURVEY

3. For demographic purposes would you mind telling me your age please?

1	< 18
2	18 – 24
3	25 – 29
4	30 – 34
5	35 – 39
6	40 – 49
7	50 – 59
8	60 – 69
9	70 +

IF AGED < 18 SAY

Thank you for your time, but we only wish to speak with people aged 18 and over. SKIP TO IQCA AT END OF SURVEY

4. Record Gender

1	Male
2	Female

5. I am now going to read out a list of gambling activities. Could you please tell me which of these you have played, entered or bet on during the past 12 months?

Read out 01-10, multiple response (rotate 1-10?)

01	Poker machines or gaming machines
02	Horse/harness or greyhound races (excluding sweeps)
03	Lotto or any other lottery game (e.g. SA Lotto, Oz Lotto Powerball, Super 66, The Pools)
04	Instant Scratch tickets (Scratchies)
05	Keno
06	Table games at a Casino (e.g. roulette, black jack)
07	Bingo
08	Betting on a sporting event (e.g. tennis, football, cricket)
09	Casino games on the internet
10	Playing cards or mah-jong privately for money
11	Any other - specify
12	None

Please answer using the scale:

Read out : “never, rarely, sometimes, often, always”.

Your answers will be for the last 12 months.

So, in the last 12 months...

		Never	Rarely	Some times	Often	Always	Can't say	NA
6.	Has gambling been more important than anything else you might do?	1	2	3	4	5	6	7
7.	Has the thought of gambling been constantly on your mind?	1	2	3	4	5	6	7
8.	Has your need to gamble been too strong to control?	1	2	3	4	5	6	7

IF RESPONDENT SCORES LESS THAN 8 ON QUESTIONS 5, 6 AND 7, WHEN SCORES ARE COMBINED, SKIP TO IQCA AT END OF SURVEY

I still have more questions to ask you. Is this a convenient time for you to take part in the rest of the survey? It will take approximately 15-20 minutes of your time.

1	Yes, agrees to take part - GO TO SECTION 1A
2	No

IF NOT CONVENIENT TIME say

When is it convenient to call you back?

Who should I ask for? I only need a first name

IF DOES NOT AGREE TO PARTICIPATE say

I realise I am intruding on your time, but the results of this survey are for an important study, and by participating the results will be more accurate. Can you please spend some more time?

1	Yes, agrees to take part
2	No – SKIP TO IQCA AT END OF SURVEY

ANSWER THE FOLLOWING SET OF QUESTIONS IF POKER MACHINES OR GAMING MACHINES ANSWERED IN Q4 (Code 01)

SECTION 1A

9. Thinking over the last 12 months, how often do you usually play poker machines?

Read out 01-09, single response

01	Daily
02	2 – 3 days a week
03	Once a week
04	Once a fortnight
05	Once a month
06	Once every 2-3 months
07	Once every 6 months
08	Once every year
09	Less often than once a year
10	Don't know

10. At which type of venue do you usually play poker machines?

Read out 01-03, multiple response

01	Casino
02	Club
03	Pub or hotel
04	Other - specify

11. Do you visit poker machine venues just to play the machines or as part of a social outing?

Read out, single response

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

12. What other activities did you usually engage in at the venue?

Read out 01-04, multiple response (rotate 1-4)

01	Dining out
02	Drinking
03	Live entertainment
04	Using the ATM's
05	Something else - specify
06	Nothing else

13. For how long do you usually play the poker machines when you visit a venue?

12a	Specify number of minutes	
12b		
	01	<30 minutes
	02	30 – 59 minutes
	03	1-1.5 hours
	04	Over 1.5 – 2 hours
	05	Over 2 hours – 3 hours
	06	Over 3 hours
	07	Varies
	08	Don't know

14. When you visit a venue, how much money do you usually take with you to play the poker machines?

13a		
	01	Amount specified
	02	Varies
	03	Don't know
	04	Refused
13b	Specify \$ amount	

15. How often do you withdraw money from an Automatic Teller Machine (ATM) at a venue when you play the poker machines?

Read out 1-5, single response

1	Never
2	Rarely
3	Sometimes
4	Often
5	Always
6	Don't know

16. How often do you use the automated coin-dispensing machine when you play the poker machines?

Read out 1-5, single response

1	Never
2	Rarely
3	Sometimes
4	Often
5	Always
6	Don't know

17. **If always (code 5 in Q15):** How many times each session, do you usually use the automated coin-dispensing machine when you play the poker machines?

Unprompted, single response

1	Once
2	Twice
3	Three
4	More than three times
5	Don't know

18. **Ask all poker machine players (code 1 in Q4):**

Thinking about the last time you played poker machine, how far did you travel to get to the venue?

Read out 1-5, single response

1	Less than 5 kms
2	5 to less than 10 kms
3	10 to less than 15 kms
4	15 to less than 20 kms
5	20 or more kms
6	Don't know

19. Was there a gaming machine available when you wanted to play?

1	Yes
2	No
3	Don't know

20. **If no: (code 2 in Q18):**

What did you do when there was no gaming machine for you to play?

Did you... read out 01-05, multiple response

01	Wait in the gaming area for a machine to be vacant
02	Wait in another part of the gaming venue
03	Go to another gaming venue
04	Go to work
05	Go home
06	Do something else - specify
07	Don't know

21. **Ask all poker machine players (code 1 in Q4):**

Did you win or lose overall the last time you played poker machines?

1	Win	- Go to Q21
2	Lose	- Go to Q22
3	Broke even	- Go to next section respondent played/bet etc.
4	Don't know	- Go to next section respondent played/bet etc.
5	Refused	- Go to next section respondent played/bet etc.

22. **If won (code 1 in Q20):**

How much more money did you have when you finished playing than when you started?

21a		
	01	Amount specified
	02	Don't know
	03	Refused
21b		Specify \$ amount

23. **If lost (code 2 in Q20):**

How much less money did you have when you finished playing than when you started?

22a		
	01	Amount specified
	02	Don't know
	03	Refused
22b		Specify \$ amount

ANSWER THE FOLLOWING SET OF QUESTIONS IF BET ON HORSES, HARNESS OR GREYHOUND RACES ANSWERED IN Q4 (Code 02)

SECTION 1B

24. In the past 12 months, how often have you bet on the horses or greyhounds?

Read out 01-09, single response

01	Daily
02	2 – 3 days a week
03	Once a week
04	Once a fortnight
05	Once a month
06	Once every 2-3 months
07	Once every 6 months
08	Once every year
09	Less often than once a year
10	Don't know

25. On each day you bet on the horses, harness or greyhound races, how long did you usually spend studying the form, placing your bets, and listening to or watching the races?

24a	Specify number of minutes	
24b	01	<30 minutes
	02	30 – 59 minutes
	03	1-1.5 hours
	04	Over 1.5 – 2 hours
	05	Over 2 hours – 3 hours
	06	Over 3 hours
	07	Varies
	08	Don't know

26. With regard to your betting on the horses, harness or greyhound races, in which of the following ways do you usually place your bets?

Read out, multiple response (rotate)

01	At a racetrack or sporting venue
02	At an off-course TAB outlet
03	At a Pub TAB
04	By phone
05	Via the internet

27. Thinking about the last time you bet on the races, how much money did you (take with you to) bet on that day?

26a		
	01	Amount specified
	02	Don't know
	03	Refused
26b	Specify \$ amount	

28. Did you win or lose overall on that day of betting on the races?

1	Win	- Go to Q28
2	Lose	- Go to Q29
3	Broke even	- Go to next section respondent played/bet etc.
4	Don't know	- Go to next section respondent played/bet etc.
5	Refused	- Go to next section respondent played/bet etc.

29. **If won (code 1 in Q27):**

How much more money did you have when you finished betting on that day than when you started?

28a

	01	Amount specified
	02	Don't know
	03	Refused
28b	Specify \$ amount	

30. **If lost (code 2 in Q27):**

How much less money did you have when you finished betting on that day than when you started?

29a

	01	Amount specified
	02	Don't know
	03	Refused
29b	Specify \$ amount	

ANSWER THE FOLLOWING SET OF QUESTIONS IF PLAYED LOTTO OR ANY OTHER LOTTERY GAME ANSWERED IN Q4 (Code 03)

SECTION 1C

31. How often have you played lotto and lottery games (including Powerball, Super66 and The Pools, but excluding Keno) in the past 12 months?

Read out 01-09, single response

01	Daily
02	2 – 3 days a week
03	Once a week
04	Once a fortnight
05	Once a month
06	Once every 2-3 months
07	Once every 6 months
08	Once every year
09	Less often than once a year
10	Don't know

32. What lottery games have you played? I will read out a list of games. Please tell me if you have played each game in the last 12 months

Read out, multiple response (rotate)

01	Lotto
02	SA Lotto
03	Oz Lotto
04	Powerball
05	Super66
06	The Pools
07	Other - specify

33. Each week that you play lotto/lottery games, how much money do you usually outlay on this activity?

32a		
	01	Amount specified
	02	Varies
	03	Don't know
	04	Refused
32b	Specify \$ amount	

34. Approximately how much money would you say you have won from lotto/lotteries in the last 12 months?

33a		
	01	Amount specified
	02	Don't know
	03	Refused
33b	Specify \$ amount	

ANSWER THE FOLLOWING SET OF QUESTIONS IF PURCHASED INSTANT SCRATCH TICKETS ANSWERED IN Q4 (Code 04)

SECTION 1D

35. In the past 12 months, how often have you purchased instant scratch tickets?

Read out, single response

01	Daily
02	2 –3 days a week
03	Once a week
04	Once a fortnight
05	Once a month
06	Once every 2-3 months
07	Once every 6 months
08	Once every year
09	Less often than once a year
10	Don't know

36. How much money do you usually outlay each time you buy instant scratch tickets?

35a

	01	Amount specified
	02	Varies
	03	Don't know
	04	Refused
35b		Specify \$ amount

37. How much money would you say you have won from instant scratch tickets in the past 12 months?

36a

	01	Amount specified
	02	Don't know
	03	Refused
36b		Specify \$ amount

**ANSWER THE FOLLOWING SET OF QUESTIONS IF PLAYED KENO ANSWERED
IN Q4 (Code 05)**

SECTION 1E

38. In the past 12 months, how often have you played keno?

Read out, single response

01	Daily
02	2 – 3 days a week
03	Once a week
04	Once a fortnight
05	Once a month
06	Once every 2-3 months
07	Once every 6 months
08	Once every year
09	Less often than once a year
10	Don't know

39. For how long do you usually play keno on these occasions?

38a	Specify number of minutes	
38b		
	01	<30 minutes
	02	30 – 59 minutes
	03	1-1.5 hours
	04	Over 1.5 – 2 hours
	05	Over 2 hours – 3 hours
	06	Over 3 hours
	07	Varies
	08	Don't know

40. How much money do you usually take with you to play keno?

39a		
	01	Amount specified
	02	Varies
	03	Don't know
	04	Refused
39b	Specify \$ amount	

41. How often do you withdraw money from an ATM when you play keno?

Read out 1-5, single response

1	Never
2	Rarely
3	Sometimes
4	Often
5	Always
6	Don't know
7	Refused

42. Thinking about the last time you played Keno, did you win or lose overall at keno on that occasion?

1	Win	- Go to Q42
2	Lose	- Go to Q43
3	Broke even	- Go to next section respondent played/bet etc.
4	Don't know	- Go to next section respondent played/bet etc.
5	Refused	- Go to next section respondent played/bet etc.

43. **If won (code 1 in Q41):**

How much more money did you have when you finished playing than when you started?

42a

	01	Amount specified
	02	Don't know
	03	Refused
42b	Specify \$ amount	

44. **If lost (code 2 in Q41):**

How much less money did you have when you finished playing than when you started?

43a

	01	Amount specified
	02	Don't know
	03	Refused
43b	Specify \$ amount	

ANSWER THE FOLLOWING SET OF QUESTIONS IF PLAYED TABLE GAMES AT A CASINO ANSWERED IN Q4 (Code 06)

SECTION 1F

45. In the past 12 months, how often have played table games at a Casino?

Read out, single response

01	Daily
02	2 –3 days a week
03	Once a week
04	Once a fortnight
05	Once a month
06	Once every 2-3 months
07	Once every 6 months
08	Once every year
09	Less often than once a year
10	Don't know

46. Do you visit the casino just to play the table games or as part of a social outing?

Read out, single response

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

47. How long do you usually play the table games when you visit a casino?

46a	Specify number of minutes	
46b		
	01	<30 minutes
	02	30 – 59 minutes
	03	1-1.5 hours
	04	Over 1.5 – 2 hours
	05	Over 2 hours – 3 hours
	06	Over 3 hours
	07	Varies
	08	Don't know

48. How much money do you usually take with you to play the table games?

47a		
	01	Amount specified
	02	Varies
	03	Don't know
	04	Refused
47b	Specify \$ amount	

49. How often do you usually withdraw money from an ATM when you play the table games?

Read out 1-5, single response

1	Never
2	Rarely
3	Sometimes
4	Often
5	Always
6	Don't know
7	Refused

50. Thinking about the last time you played the table games, did you win or lose overall at the table games on that occasion?

1	Win	- Go to Q50
2	Lose	- Go to Q51
3	Broke even	- Go to next section
4	Don't know	- Go to next section
5	Refused	- Go to next section

51. **If won (code 1 in Q49):**

How much more money did you have when you finished playing than when you started?

50a		
	01	Amount specified
	02	Don't know
	03	Refused
50b	Specify \$ amount	

52. **If lost (code 2 in Q49):**

How much less money did you have when you finished playing than when you started?

51a		
	01	Amount specified
	02	Don't know
	03	Refused
51b	Specify \$ amount	

ASK THE FOLLOWING SET OF QUESTIONS OF GAMBLERS WHO UNDERTOOK MORE THAN ONE GAMBLING ACTIVITY ANSWERED IN Q4

SECTION 2

53. Of the gambling activities that you have undertaken, which one have you played the most in the last 12 months?

Read out, single response (show only those codes selected in Q4)

01	Poker machines or gaming machines
02	Horse/harness or greyhound races (excluding sweeps)
03	Lotto or any other lottery game (e.g. SA Lotto, Oz Lotto Powerball, Super 66, The Pools)
04	Instant Scratch tickets (Scratchies)
05	Keno
06	Table games at a Casino (e.g. roulette, black jack)
07	Bingo
08	Betting on a sporting event (e.g. tennis, football, cricket)
09	Casino games on the internet
10	Playing cards or mah-jong privately for money
11	Any other - specify
12	Don't know
13	Refused

54. On which gambling activity have you spent the most money in the last 12 months?

Read out, single response (show only those codes selected in Q4)

01	Poker machines or gaming machines
02	Horse/harness or greyhound races (excluding sweeps)
03	Lotto or any other lottery game (e.g. SA Lotto, Oz Lotto Powerball, Super 66, The Pools)
04	Instant Scratch tickets (Scratchies)
05	Keno
06	Table games at a Casino (e.g. roulette, black jack)
07	Bingo
08	Betting on a sporting event (e.g. tennis, football, cricket)
09	Casino games on the internet
10	Playing cards or mah-jong privately for money
11	Any other - specify
12	Don't know
13	Refused

ALL RESPONDENTS

SECTION 3

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

54a		
	01	Amount specified
	02	No limit
	03	Don't know
	04	Refused
54b		
Specify \$ amount		

Please answer using the scale:

Read out : “never, rarely, sometimes, often, always”.

Your answers will be for the last 12 months.

If respondent refuses (code as 6 can't say)

So, in the last 12 months...

		Never	Rarely	Some times	Often	Always	Can't say	NA
56.	Has gambling been a good hobby for you?	1	2	3	4	5	6	7
57.	Nowadays when you gamble, is it fun?	1	2	3	4	5	6	7
58.	Have you gambled with skill?	1	2	3	4	5	6	7
59.	Nowadays, when you gamble, do you feel as if you are on a slippery slope and can't get back up again?	1	2	3	4	5	6	7
60.	Have you felt that after losing you must return as soon as possible to win back any losses?	1	2	3	4	5	6	7
61.	Have you lied to yourself about your gambling?	1	2	3	4	5	6	7
62.	Have you gambled in order to escape from worry or trouble?	1	2	3	4	5	6	7
63.	Have you felt bad or guilty about your gambling?	1	2	3	4	5	6	7
64.	Have you thought you shouldn't gamble or should gamble less?	1	2	3	4	5	6	7
65.	How often has anyone close to you complained about your gambling?	1	2	3	4	5	6	7
66.	How often have you lied to others to conceal the extent of your involvement in gambling?	1	2	3	4	5	6	7
67.	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?	1	2	3	4	5	6	7
68.	How often have you spent more money on gambling than you can afford?	1	2	3	4	5	6	7
69.	How often has your gambling made it harder to make money last from one payday to the next?	1	2	3	4	5	6	7
70.	How often have you had to borrow money to gamble with?	1	2	3	4	5	6	7

ALL RESPONDENTS

SECTION 4

Finally, I would like to ask a few general questions about you and your household to make sure we have a good coverage of the community and to assist us in analysing the information you have provided.

71. What is your current marital status?

Read out, single response

1	Married or living with partner
2	Separated or divorced
3	Widowed
4	Single
5	Don't know
6	Refused

72. Which one of the following best describes your household?

Read out, single response

1	Single person
2	Couple with no children
3	Couple with children
4	One parent family with children
5	Group household
6	Other
7	Don't know
8	Refused

73. **If children mentioned (codes 3 or 4 in Q71):**

How many children under 18 years of age usually live in your household?

74. **ASK ALL:** How many people in total, including children, usually live in your household?

75. Do you own the dwelling in which you live – or are you paying it off – or are you renting?

Read out, single response

1	Own
2	Paying off
3	Renting – public
4	Renting – private
5	Other - specify
6	Can't say

76. In what country were you born?

Unprompted, single response

01	Australia
02	Africa
03	China
04	Greece
05	Italy
06	Malaysia
07	Middle East
08	New Zealand
09	North America
10	Philippines
11	United Kingdom
12	Vietnam
13	Other Asia
14	Other Europe
15	Other - specify
16	Don't know
17	Refused

77. **If not born in Australia (codes 02-17 in Q75):**

What year did you arrive in Australia?

76a		
	01	Year specified
	02	Don't know
	03	Refused
76b	Specify Year	

78. **ASK ALL:** Which of the following best describes your current work status

Read out, single response

1	Work full-time
2	Work part-time
3	Home duties
4	Student
5	Retired (self supporting)
6	Pensioner
7	Unemployed
8	Don't know
9	Refused

79. What is the main source of income in your household?

Read out, single response

1	Wages/salary
2	Own business
3	Other private income
4	Unemployment benefit
5	Pension or other benefit
6	Don't know
7	Refused

80. Could you please tell me your total annual household income from all sources before tax?

Read out, single response

01	0 - \$10,000
02	\$10,001 – 15,000
03	\$15,001 - 20,000
04	\$20,001 – 30,000
05	\$30,001 – 40,000
06	\$40,001 – 50,000
07	\$50,001 – 60,000
08	\$60,001 – 75,000
09	\$75,001 – 100,000
10	\$100,001 – 125,000
11	\$125,001 – 150,000
12	Over \$150,000
13	Don't know
14	Refused

81. What is the highest level of education you have reached?

Read out, single response

01	Primary school
02	Some secondary school
03	Completed Year 10 or 11
04	Completed Year 12
05	Trade certificate or diploma
06	Bachelors degree
07	Post-graduate degree
08	Other
09	Don't know
10	Refused

CLOSING STATEMENT

This completes your participation in this survey. Thank you very much for taking the time out of your day to assist with this research. Your cooperation and help is greatly appreciated.

82. We will be doing some further research in this area at some time in the future, could we contact you again.

1	Yes
2	No

83. Who should I ask for? I only need a first name ...

84. You would be contacted again in approximately three months. Will we still be able to contact you on this number at that time?

1	Yes
2	No

85. **If no (code 2 in Q83):**

Is there a number where you can be reached at that time? RECORD NEW NUMBER

86. **IF NO NEW NUMBER**

Is there someone we could contact who would know where to contact you in three months time?

1	Yes
2	No

87. What is the name of that person? ...
88. What is the telephone number of that person? ...

On behalf of the National Institute of Labour Studies, I would like to thank you again for your participation today, as your contribution to our research has been of great value.

WE LOOK FORWARD TO TALKING TO YOU AGAIN IN JULY.

Appendix 3: Gambling Industry and Peak Body Interview Schedule¹

Advertising Code

1. Have there been any problems with interpretation of the advertising code?
2. How are you going with the compliance of this code?
3. In your opinion what impact has the advertising code had on:
 - Patrons
 - Problem gamblers
 - Revenue
 - Venues - staff workload, physical environment change
 - Are you having any difficulties with the advertising code?

Responsible Gambling Codes

4. Have there been any problems with interpretation of the responsible gambling code?
5. How are you going with compliance with the responsible gambling code
6. In your opinion what impact has the responsible gambling code had on ...
 - Patrons
 - Problem gamblers
 - Revenue
 - Venues – staff workload, physical environment change.
 - Industry
7. Have there been any problems in identifying problem gamblers?

¹ Questions that refer to previous interviews were not asked in the first interview. Interviews were semi-structured, so that question wording and order sometimes varied somewhat from that documented, and issues were explored and elaborated as appropriate.

8. Have there been any people who have asked to be self-barred?

If so:

Did you have any problems providing them with contacts to help services?

9. Are you having any difficulties implementing the responsible gambling code?

10. How has the reduction in the numbers of gaming machines been experienced?

11. In your opinion, what impact have the codes and the reduction in the number of gaming machines had on problem gamblers?

12. In your opinion, what impact have the codes and the reduction in the number of gaming machines had on the industry as a whole?

13. Do you have any other comments you would like to make?

Appendix 4: Licensees Interview Schedule (Wave 1)

Good morning/afternoon. My name is..... I am from the National Institute of Labour Studies at Flinders University. We are conducting an important survey on the impact of the new Advertising Code of Practice on Gambling and the Responsible Gambling Code of Practice. The codes come into effect on 30 April 2004. We also have some questions about the effect the proposed reduction in gaming machine numbers will have on your business. The research has been commissioned by the Independent Gambling Authority.

We appreciate your help in this project, and for agreeing to talk today about the effects of the new provisions on your business.

The information you provide will be strictly confidential and will be summarised and reported in aggregate form only.

RECORD

NAME OF HOTEL/CLUB_____

LOCALITY_____

SECTION 1

READ OUT

I WOULD LIKE TO START BY ASKING A FEW QUESTIONS ABOUT YOUR HOTEL/CLUB.

IF HOTEL GO TO QUESTION 2

(Q1) Which of the following best describes your club?

Football club	1
Other sports club	2
Services club	3
Workers club	4
Community club	5
Ethnic club	6
Other (specify) _____	7

GO TO QUESTION 3

(Q2) Which of the following best describes your hotel? Is your hotel a

Part of a hotel group	1
Single venue	2
Other (specify) _____	3

(Q3) Are you the owner, venue manager or gaming manager (or another position)?

Owner	1
Venue manager	2
Gaming manager	3
Other (specify) _____	4

(Q4) How long have you been owner/manager of the hotel/club?

Number of years or months _____

SECTION 2

ADVERTISING CODE

READ OUT

Now, I would like to ask you a few questions about the effects of the new Advertising Code for gambling on the hotel/club. The code provides a framework to ensure that advertising is conducted in a responsible manner so as to minimise the harm caused by gambling.

(Q5) Will any changes need to be made to the hotel/club's advertising as a result of the new code?

Yes	1	
No	2	<u>GO TO SECTION 3</u>
Don't know	3	<u>GO TO SECTION 3</u>

(Q6) Will changes be needed in any of the following?

READ OUT

MULTIPLE RESPONSE

Signage	1
TV advertising content	2
TV advertising time slot	3
Radio advertising content	4
Radio advertising time slot	5
Print media advertising	6
Other (specify)_____	7

Comments

SECTION 3

GAMBLING CODE OF PRACTICE

READ OUT

Now I would like to move on to consider the new Gambling Code of Practice. It also provides a framework to ensure that gambling practices are conducted in a responsible manner so as to minimise the harm caused by gambling.

SECTION 3A

READ OUT

THE CODE REQUIRES RESPONSIBLE GAMBLING INFORMATION TO BE PROVIDED TO CUSTOMERS

(Q7) Where will you obtain responsible gambling materials?

Australian Hotels Association	1
ClubSA	2
Office of Liquor and Gambling Commissioner	3
Other (specify)_____	4
Don't know	9

Comments

SECTION 3B

READ OUT

SOME OF THE NEW REGULATIONS CONCERN PATRONS' ACCESS TO MONEY AND USE OF CHEQUES

READ OUT

In future cheques will not be cashed in the gambling area of the hotel/club, without written exemption from the Independent Gambling Authority.

(Q8) How often does the hotel/club receive requests to cash cheques from patrons in the gambling area?

READ OUT

Daily	1
Once or twice a week	2
Once or twice a month	3
Every couple of months	4
Less often than every couple of months	5
Never	6

GO TO Q10

(Q9) What percentage of the gambling patrons ask for this service? _____

(Q10) What cheques are cashed for gambling patrons in other parts of the hotel/club?

READ OUT

MULTIPLE RESPONSE

Third party cheques (not in the name of the person cashing the cheque)	1
Cheques not made payable to the hotel/club	2
Multiple cheques	3
All cheques	4
None	5
Don't know	9

SECTION 3C

READ OUT

THE NEW REGULATIONS ALSO RELATE TO ALCOHOL AND THE CUSTOMERS

(Q11) What procedures will the hotel/club use to ensure that alcohol is not served to people who are sitting or standing at the gaming machines?

READ OUT

In future all practical steps need to be taken to ensure that intoxicated people do not enter or remain in the gambling areas.

(Q12) How often is an intoxicated person identified in the gambling area of the hotel/club?

Don't know/unsure	99
-------------------	----

(Q13) What steps are in place or will be put in place to prevent intoxicated people entering and remaining in the gambling area?

READ OUT

In future all practicable steps need to be taken to ensure that people who appear to be intoxicated are prevented from gambling.

(Q14) What steps will the hotel/club take to ensure that people who appear to be intoxicated are prevented from gambling?

SECTION 3D

READ OUT

THE NEW REGULATIONS ALSO DEAL WITH THE WAY CUSTOMERS PLAY THE GAMING MACHINES

READ OUT

In future gambling providers will take all reasonable and practicable steps to ensure that patrons only play one gaming machine at a time.

(Q15) What steps will the hotel/club take to ensure that patrons only play one gaming machine at a time?

DON'T READ OUT

Display of warning sign	1
Verbal warning to patron	2
Request to patron to leave for 24 hours	3
Other (specify _____)	4
Don't know	9

(Q16) What percentage of patrons will be affected?

ESTIMATE PER CENT _____
Don't know 99

Comments

(Q17) How will you respond to patrons who repeatedly play more than one machine at a time despite the steps you take?

SECTION 3E

READ OUT

THE NEW REGULATIONS RECOMMEND THAT PROTOCOLS ARE DEVELOPED FOR UNATTENDED CHILDREN

(Q18) Does the hotel/club have child-care facilities?

Yes	1	
No	2	<u>GO TO Q20</u>
Don't know	9	<u>GO TO Q20</u>

(Q19) What form does the child-care take?

Supervised care under 2 hours	1
Supervised care of 2 hours or more	2
Unsupervised care under 2 hours	3
Unsupervised care of 2 hours or more	4
Other (specify) _____	5

(Q20) How often are children aged 10 and under left unattended on the premises of the hotel/club or in the car park?

More than once a week	1
Once a week	2
Once a month	3
Once a year	4
Never	5
Don't know/unsure	99

(Q21) What procedures do you have for dealing with unattended children?

SECTION 3F

READ OUT

UNDER THE NEW CODE STAFF WILL BE REQUIRED TO HAVE TRAINING ON PROBLEM GAMBLING

(Q22) Who will provide problem gambling training to your staff?

DON'T READ OUT

In house	1
TAFE	2
Clubs SA	3
Australian Hotels Association	4
Other (Specify)_____	5

(Q23) What issues do you think the hotel/club may have in providing training for staff on problem gambling?

(Q24) How valuable do you think the problem gambling training will be for your staff?

READ OUT

Very valuable	1
Reasonably valuable	2
Little value	3
No value	4
Don't know	9

Comments

SECTION 3G

READ OUT

THINKING ABOUT PROBLEM GAMBLING AND THE CUSTOMERS

(Q25) How do problem gamblers come to the attention of your staff? Is it by

READ OUT

MULTIPLE RESPONSE

Self-disclosure	1
Disclosure from family members	2
Observation	3
Don't know	4
Not applicable	5

Comments

(Q26) In your experience do staff find identification of problem gamblers by observation:

READ OUT

Very easy	1
Easy	2
Difficult	3
Very difficult	4
Don't know	9

(Q27) What behavioural signs do you and your staff use to identify someone who might be a problem gambler?

DON'T READ OUT OR PROMPT

MULTIPLE RESPONSE

Frequent visits to the ATM	1
Requests to borrow money from staff	2
Requests to borrow money from other patron	3
Requests to cash cheques	4
Requests for credit	5
Disorderly behaviour	6
Signs of agitation	7
Long gambling sessions	8
Staying after friends leave	9
Family members seeking out or enquiring about the patron	10
Number of gambling sessions each week	11
Alcohol intoxication	12
Children left unattended	13
Customer comments about losing	14
Customer comments about family problems	15
Other (specify)_____	16
Don't know	99

Comments

(Q28) What actions are taken at your venue if it is believed that a patron might have a gambling problem?

READ OUT

In future you will need to take all reasonable steps to ensure that patrons who have difficulty controlling their spending on gambling have their attention drawn to the name and telephone number of a gambling referral service.

(Q29)

What steps will your venue take to draw the attention of problem gamblers to a gambling referral service?

(Q30)

What issues do you think the staff may face in drawing the attention of problem gamblers to a gambling referral service?

SECTION 3H

READ OUT

PEOPLE ARE ABLE TO BAR THEMSELVES FROM GAMBLING VENUES.

UNDER THE NEW CODE EACH APPROACH FOR SELF-EXCLUSION MUST BE ATTENDED TO AT THE TIME THE REQUEST IS MADE.

THE SELF-EXCLUSION PROCESS MUST ALSO INCLUDE PROVISION OF AN INTERPRETER SERVICE AND REFERRAL TO A COUNSELLING AGENCY.

(Q31) Do you have a self-exclusion program at the hotel/club?

Yes	1
No	2 <u>GO TO Q41</u>

(Q32) How many requests for self-exclusion have been received over the past 12 months? _____

None	98
Don't know	99

(Q33) (a) How many people are currently self-excluded from the hotel/club? _____

(b) How many of these people would you consider are regular patrons and are known to staff at your venue? _____

(Q34) How does the self-exclusion program operate? Please describe the critical steps?

(Q35) How often is a self-excluded patron identified in the gambling area at the hotel/club?

READ OUT

More than once a week	1
Once a week	2
Once a month	3
Once a year	4
Never	5
Don't know/unsure	99

(Q37) What procedures are used to identify self-excluded people who come to the gambling area of the hotel/club?

(Q38) In your experience do staff find identification of self-excluded patrons:

READ OUT

Very easy	1
Easy	2
Difficult	3
Very difficult	4
Don't know	9

(Q39) What procedures are used to ensure that self-excluded customers leave the gambling area of the hotel/club?

(Q40) In your experience do staff find enforcement of self-exclusion:

READ OUT

Very easy	1
Easy	2
Difficult	3
Very difficult	4
Don't know	5

Comments

GO TO QUESTION 43

(Q41) After April 30th, what procedures will be used to identify self-excluded people who come to the gambling area of the hotel/club?

(Q42) After April 30th, what procedures will be used to ensure that self-excluded customers leave the gambling area of the hotel/club?

SECTION 3I

READ OUT

I WOULD NOW LIKE TO ASK YOU SOME GENERAL QUESTIONS ABOUT THE IMPACTS OF THE ADVERTISING AND GAMBLING CODES

(Q43) What services does your hotel/club provide?

READ OUT

MULTIPLE RESPONSE

Front bar	1
Accommodation	2
Restaurant/dining room	3
Live entertainment	4
Sells take-away liquor	5
Poker machines	6
Keno	7
TAB facilities	8
Lottery products	9
Other (specify) _____	10

(Q44) Approximately what percentage of the patrons use your

gaming machines	_____
Keno	_____
TAB	_____
lottery products	_____

(Q45) How would you rate the general level of awareness of responsible gambling issues amongst your customers? Is awareness

High	1
Medium	2
Low	3
Nil	4
Don't know	9

(Q46) What measures do you consider will be most effective in raising awareness of responsible gambling amongst your patrons?

(Q47) What effect will the codes have on your turnover from poker machines? Will turnover

READ OUT

Increase	1
Decrease	2
Stay the same	3
Don't know	9

REFER TO QUESTION 43

IF THE VENUE DOES NOT HAVE KENO GO TO QUESTION 49

(Q48) What effect will the codes have on your turnover from Keno? Will your turnover

READ OUT

Increase	1
Decrease	2
Stay the same	3
Don't know	9

REFER TO QUESTION 43

IF THE VENUE DOES NOT HAVE PUB TAB GO TO QUESTION 50

(Q49) What effect will the codes have on your turnover from the TAB? Will turnover

READ OUT

Increase	1
Decrease	2
Stay the same	3
Don't know	9

REFER TO QUESTION 43

IF THE VENUE DOES NOT HAVE LOTTERY PRODUCTS GO TO QU 51

(Q50) What effect will the codes have on your turnover from Lotteries? Will turnover

READ OUT

Increase	1
Decrease	2
Stay the same	3
Don't know	9

(Q51) What do you estimate the effect of the new codes will be on your total turnover from all gambling activities? Will turnover

READ OUT

Increase	1
Decrease	2
Stay the same	3
Don't know	9

Comments

(Q52) What difficulties (if any) do you think the hotel/club may have in implementing the new codes?

SECTION 4

GAMING MACHINE NUMBERS

READ OUT

FINALLY, I HAVE SOME QUESTIONS ABOUT THE EFFECT OF THE PROPOSED REDUCTION IN THE NUMBER OF GAMING MACHINES.

IT IS PROPOSED THAT THE NUMBER OF GAMING MACHINES BE REDUCED FROM 15 000 TO 12 000. THE PRESENT NUMBER OF MACHINES WILL BE REDUCED BY THE FOLLOWING METHOD:

FOR EVERY PREMISES WITH MORE THAN 28 GAMING MACHINES, THE NUMBER WILL BE REDUCED BY 8,

VENUES WITH 21 TO 27 MACHINES WILL BE REDUCED TO 20.

(Q53) How many gaming machines does the hotel/club have? _____

(Q54) How many gaming machines will the hotel/club lose as a result of the (proposed) reduction in gaming machine numbers? _____

(Q55) Will the hotel/club sell any of its gaming machine entitlements?

Yes	1	
No	2	<u>GO TO Q57</u>
Don't know	9	<u>GO TO Q57</u>

(Q56) How many? _____

(Q57) Will the hotel/club buy any more gaming machine entitlements?

Yes	1	
No	2	<u>GO TO Q59</u>
Don't know	9	<u>GO TO Q59</u>

(Q58) How many? _____

(Q59) What immediate effects do you anticipate the proposed reduction might have on the hotel/club?

(Q60) What long-term effects do you anticipate the reduction might have on the hotel/club?

(Q61) Do you have any other comments you would like to make?

CLOSING STATEMENT

That concludes the survey. Thank you very much for taking the time out of your day to help with this research. Your contribution has been of great value and is much appreciated.

We will be doing some further research on this issue at some time in the future, after the new codes have come into operation. Could we contact you again?

Yes	1
No	2

Who should I ask for?

On behalf of the National Institute of Labour Studies, I would like to thank you again for your participation today, as your contribution to understanding the effects of the new codes has been of great value.

WE LOOK FORWARD TO TALKING TO YOU AGAIN IN THE FUTURE.

Licensees Interview Schedule (WAVE 2)

Good morning/afternoon. My name is..... I am from the National Institute of Labour Studies at Flinders University.

Three months ago you took part in the first stage of a longitudinal survey, commissioned by the Independent Gambling Authority, on the impact of the new Advertising Code of Practice on Gambling and the Responsible Gambling Code of Practice.

As you know, the codes came into effect on 30 April this year, and now that they have been in operation for three months we are reviewing their impact for the first time.

Last time we saw you, we also asked questions about the proposed reduction in gaming machine numbers, but as Parliament has not yet debated this, we do not have any further questions on this at the moment, although you may comment on the proposal, and anything else you may wish at the end of our interview.

Thank you very much for agreeing to talk to us again today.

I would just like to remind you that the information you give will be strictly confidential and will be summarised and reported in aggregate form only.

RECORD

NAME OF HOTEL/CLUB_____

LOCALITY_____

SECTION 1 PRELIMINARY QUESTIONS ABOUT HOTEL OR CLUB

ASK NEW RESPONDENTS ONLY

1. Are you the owner, venue manager or gaming manager (or another position)?

1	Owner
2	Venue manager
3	Gaming manager
4	Other (specify)

2. How long have you been owner/manager of the hotel/club?

Number of years or months?_____

ASK ALL

3. Is your hotel/club a member of an industry association?

1	Yes
2	No GO TO QUESTION 5

4. Of which association(s) is your hotel/club a member?

READ OUT

1	AHA
2	ClubSA
3	Other (specify)

SECTION 2 ADVERTISING CODE

I would like to ask you about the impacts of the new Advertising Code for gambling on the hotel/club.

5. Do you have a loyalty program for gaming room patrons at your venue?

1	Yes
2	No GO TO QUESTION 7

6. Can you describe the program?

7. Do you do promotions activities for your gaming room?

1	Yes
2	No GO TO QUESTION 10

8. Can you please describe the promotions activities?

9. What advertising does your venue do for the promotions activities?

10. Have any changes been needed to the hotel/club's advertising?

1	Yes
2	No GO TO SECTION 3
3	Don't know GO TO SECTION 3

11. Have changes been made in

READ OUT

MULTIPLE RESPONSE

1	Signage
2	TV advertising content
3	TV advertising time slot
4	Radio advertising content
5	Radio advertising time slot
6	Print media advertising
7	Other (specify)

Comments

SECTION 3 RESPONSIBLE GAMBLING Code of Practice

Now I would like to move on to consider the Responsible Gambling Code of Practice.

Section 3A

12. Does your venue you have the responsible gambling materials for your patrons?

1	Yes
2	No GO TO QUESTION 14
3	Don't know GO TO QUESTION 14

13. Where did your venue get the responsible gambling materials for the patrons?

1	Australian Hotels Association
2	Clubs SA
3	Office of the Liquor and Gambling Commissioner
4	Somewhere else (specify)
5	Don't know

14. In the last three months has your venue been asked to cash a cheque in the gambling area?

1	Yes
2	No GO TO QUESTION 16
3	Don't know GO TO QUESTION 16

15. In the last three months, how many times has your venue been asked to cash cheques in the gambling area? _____

Section 3B ALCOHOL AND THE CUSTOMERS

I now want to ask you about the bar service available to gaming room patrons.

16. Are people allowed to drink alcohol in the gaming room?

1	Yes
2	No
3	Don't know

17. Does your venue serve alcohol to people who interrupt their play at the machines, and go to the bar for service in between games?

1	Yes
2	No
3	Don't know

18. Does your venue serve alcohol to people who buy drinks on behalf of others who are playing the gaming machines?

1	Yes
2	No
3	Don't know

19. In the last three months how many times have people asked to be served alcohol while they are sitting or standing at the gaming machines? _____

IF NONE GO TO QUESTION 21

20. How have people reacted to not being served alcohol while they are sitting or standing at the gaming machines?

DON'T READ OUT

MULTIPLE RESPONSE

1	No response
2	Verbal disputes / abuse
3	Physical abuse
4	Patrons have left
5	Other (specify)

Comments

21. What steps does your venue take to prevent intoxicated people going into and staying in the gambling area?

DON'T READ OUT

MULTIPLE RESPONSE

1	Signs
2	Train staff
3	Monitor gambling area
4	Ask intoxicated patrons to leave
5	Other (specify)
6	None

22. In the last three months, how often has an intoxicated person been identified in the gambling area?

1	Daily
2	Several times a week
3	Fortnightly
4	Monthly
5	Never
6	Don't know/unsure

23. In the last three months what has your venue done to ensure that people who appear to be intoxicated are prevented from gambling?

DON'T READ OUT

MULTIPLE RESPONSE

1	Signs
2	Train staff
3	Monitor gambling area
4	Ask intoxicated patrons to leave
5	Other (specify)
6	None

Section 3C THE WAY PATRONS PLAY THE GAMING MACHINES

24. In the last three months, what steps has the hotel/club taken to ensure that patrons only play one gaming machine at a time?

DON'T READ OUT

MULTIPLE RESPONSE

1	Train staff
2	Display warning sign
3	Monitor area
4	Inform patrons
5	Verbal warning to patron
6	Request patron to leave for 24 hours
7	Other (specify)
8	Don't know
9	None

25. In the last three months, how often have patrons used two machines while one machine is doing free spins?

Is this seen

1	Daily
2	Several times a week
3	Fortnightly
4	Monthly
5	Never
6	Don't know/unsure

26. In the last three months, how often have verbal warnings been given to patrons for playing more than one machine at a time?

Has this happened

1	Daily
2	Several times a week
3	Fortnightly
4	Monthly
5	Never
6	Don't know/unsure

27. In the last three months, how often have patrons, who have been playing more than one machine at a time, been asked to leave for 24 hours?

Has this happened

1	Daily
2	Several times a week
3	Fortnightly
4	Monthly
5	Never
6	Don't know/unsure

Section 3D UNATTENDED CHILDREN

28. In the last three months, how often have children aged 10 and under been left unattended in the hotel/club?

Has this happened

1	Daily
2	Several times a week
3	Fortnightly
4	Monthly
5	Never
6	Don't know/unsure

29. In the last three months, how often have children aged 10 and under been left unattended in the car park?

Has this happened

1	Several times a week
2	Fortnightly
3	Monthly
4	Never
5	Not applicable (no car park)
6	Don't know/unsure

30. What procedures do you have for children who are unattended on your premises?

DON'T READ OUT

MULTIPLE RESPONSE

1	Camera surveillance of car park
2	Patrol car park
3	Signs
4	Staff watch/supervise children
5	Find parents
6	Advise parents of policy
7	Warn parents
8	Ask family to leave
9	24 hour ban
10	Don't have this problem

Section 3E PROBLEM GAMBLING TRAINING FOR STAFF

31. Who provided problem gambling training to your staff?

DON'T READ OUT

1	In house
2	TAFE
3	Adelaide Hospitality and Tourism School
4	Clubs SA
5	Australian Hotels Association
6	Jackpot club
7	Other (specify)

32. What problems (if any) have you had in providing problem gambling training for your staff?

DON'T READ OUT

MULTIPLE RESPONSE

1	None
2	Time off needed for staff to attend courses
3	Financial cost to venue
4	Distance to course/ location of course
5	Staff turnover
6	Other (specify)

Comments

33. How useful do you think the problem gambling training has been for your staff?

Has the training been

1	Very useful
2	Reasonably useful
3	Little use
4	No use
5	Don't know

Comments

Section 3F PROBLEM GAMBLING

34. How do you and your staff identify someone who has trouble controlling their spending on gambling?

DON'T READ OUT

MULTIPLE RESPONSE

1	Frequent visits to the ATM
2	Frequent visits to coin machine
3	Requests to borrow money from staff
4	Requests to borrow money from other patron
5	Requests to cash cheques
6	Requests for credit
7	Amount gambled
8	Long gambling sessions
9	Number of gambling sessions each week
10	Staying after friends leave
11	Family members seeking out or enquiring about the person
12	Disorderly behaviour
13	Signs of agitation
14	Obsessive compulsive behaviour (rituals, going from one machine to another)
15	Inappropriate emotions (withdrawn, low affect, quiet)
16	Chasing wins/ upping bets
17	Alcohol intoxication
18	Children left unattended
19	Customer comments about losing
20	Customer comments about family problems
21	Other (specify)
22	Don't know

Comments

35. In your experience do staff find identifying people who have problems controlling their spending on gambling

READ OUT

1	Very easy
2	Easy
3	Difficult
4	Very difficult
5	Don't know

36. HOW do you and your staff draw the attention of people who have problems controlling their spending on gambling, to the name and phone number of a gambling help service?

Do you

READ OUT

MULTIPLE RESPONSE

1	Display signs, stickers and pamphlets IF ONLY DISPLAYS MATERIALS GO TO Section 3G, QUESTION 40
2	Hand cards and pamphlets to patrons
3	Speak to patrons about gambling help services
4	Do something else (specify)

37. WHEN do you and your staff draw the attention of people who have problems controlling their spending on gambling, to the name and phone number of a gambling help service?

Is it when

READ OUT

MULTIPLE RESPONSE

1	Staff consider a person has a problem
2	A person tells a staff member they have a gambling problem
3	A person says they have concerns about their gambling (e.g. their gambling is out of control, or they have financial difficulties)
4	A person is visibly distressed
5	A person asks to be excluded
6	Some other occasion (specify)

38. In the last three months, how many people have been given the name and phone number of a gambling help service by your staff?

1	Number
2	None
3	Don't know

39. What issues did your staff face when drawing the attention of people who have problems controlling their spending on gambling, to a gambling help service?

DON'T READ OUT

MULTIPLE RESPONSE

1	Staff felt uncomfortable, embarrassed
2	Patron denied existence of problem
3	Verbal abuse
4	Physical abuse
5	Loss of customer
6	Patron gratitude
7	Other

Comments

Section 3G SELF-EXCLUSION (SELF-BARRING)

40. In the past three months, how many people have asked to be excluded from gambling in your venue?

1	Number.....
2	None GO TO QUESTION 46
3	Don't know GO TO QUESTION 46

41. When asking to be excluded, how many people asked for an interpreter?

1	Number.....
2	None GO TO QUESTION 44
3	Don't know GO TO QUESTION 44

42. Did you have any problems in providing an interpreter?

1	Yes
2	No GO TO QUESTION 44
3	Don't know GO TO QUESTION 44

IF YES

43. What problems did you have in providing an interpreter?

1	Interpreter not available when needed
2	No interpreter for the language
3	Cost
4	Other (specify)

Comments

44. Did you have any problems in referring people to a gambling counselling service?

1	Yes
2	No GO TO QUESTION 46
3	Don't know GO TO QUESTION 46

IF YES

45. What problems did you have in referring people to a gambling counselling service?

1	Counselling service not open
2	Waiting list at counselling service
3	No counselling service in vicinity
4	Don't know of a service
5	Other (specify)

Comments

46. a. How many people are currently self-excluded from gambling in your venue? _____

b. How many were excluded (barred) by your venue? _____

47. In the last three months, how often have self-excluded people been identified in the gambling area of your venue?

Has it been

1	Daily
2	Several times a week
3	Fortnightly
4	Monthly
5	Never
6	Don't know/unsure

48. What procedures does your venue use to identify self-excluded people who come to the gambling area?

DON'T READ OUT

MULTIPLE RESPONSE

1	List of names
2	Photos displayed on wall or in book
3	Staff refer to photos
4	Other (specify)

49. In your experience do staff find identification of self-excluded people:

READ OUT

1	Very easy
2	Easy
3	Difficult
4	Very difficult
5	Don't know

50. What procedures are used to ensure that self-excluded people leave the gambling area of the hotel/club?

DON'T READ OUT

MULTIPLE RESPONSE

1	Ask patron for ID
2	Offer gambling help service information
3	Warn patron
4	Ask patron to leave venue
5	Call police
6	Other (specify)

51. In your experience do staff find enforcement of self-exclusion:

READ OUT

1	Very easy
2	Easy
3	Difficult
4	Very difficult
5	Don't know

Section 3H SOME GENERAL QUESTIONS

52. Do you have an incident register at your venue?

1	Yes
2	No GO TO QUESTION 54

53. What type of gambling-related incidents are recorded?

54. In the last three months, what effect have the new codes had on your turnover from gambling?

Has turnover

READ OUT

1	Increased
2	Decreased
3	Stayed the same
4	Don't know

55. What difficulties (if any) has your venue had in implementing the new codes?

DON'T READ OUT

MULTIPLE RESPONSE

1	None
2	Cost of staff training
3	Staff workload increased
4	Staff ill-equipped to deal with new responsibilities (despite training)
5	Lack of staff awareness of new responsibilities
6	Confrontations with patrons
7	Recognition of self-barred persons
8	Policing of self-barring
9	Monitoring people playing more than one machine
10	Reduced drink service to customers
11	Other (specify)

Comments

56. How would you rate the general level of awareness of responsible gambling issues among your patrons?

Is awareness

1	High
2	Medium
3	Low
4	Nil
5	Don't know

57. What measures do you consider are the most effective in raising awareness of responsible gambling among your patrons?

DON'T READ OUT

MULTIPLE RESPONSE

1	Signage
2	Advertising and media campaigns
3	Staff awareness and communication with patrons
4	Display of Helpline stickers
5	Other (specify)
6	None

58. Do you have any other comments you would like to make?

CLOSING STATEMENT

That concludes the survey. Thank you very much for taking the time out of your day to help with this research. Your contribution has been of great value and is much appreciated.

We will be doing some further research on this issue in six months time. Could we contact you again?

1	Yes
2	No

Who should I ask for?

On behalf of the National Institute of Labour Studies, I would like to thank you again for your participation today, as your contribution to understanding the impacts of the new codes has been of great value.

WE LOOK FORWARD TO TALKING TO YOU AGAIN IN FEBRUARY NEXT YEAR.

Licensees Interview Schedule (WAVE 3)

Good morning/afternoon. My name is..... I am from the National Institute of Labour Studies at Flinders University.

Thank you very much for agreeing to talk to us again today.

Last year you/your venue took part in a longitudinal survey, commissioned by the Independent Gambling Authority, on the impact of the new Advertising Code of Practice on Gambling and the Responsible Gambling Code of Practice.

Now that the codes have been in operation for nine months we are reviewing their impact for the second time. We will mainly focus on the impact of the codes on you, your staff, your business and customers over the last six months, (i.e. since we talked with you last).

This time we are also reviewing the possible impact of the changes in the number of gaming machines.

I would just like to remind you that the information you give will be strictly confidential and will be summarised and reported in aggregate form only.

RECORD

NAME OF HOTEL/CLUB_____

LOCALITY_____

**Section 1 NEW RESPONDENTS: PRELIMINARY QUESTIONS ABOUT
HOTEL OR CLUB**

PREVIOUS RESPONDENTS GO TO SECTION 2

ASK NEW RESPONDENTS ONLY

1. Are you the owner, venue manager or gaming manager (or another position)?

1	Owner
2	Venue manager
3	Gaming manager
4	Other (specify)

2. How long have you been owner/manager of the hotel/club?
Number of years or months?_____

3. Is your hotel/club a member of an industry association?

1	Yes
2	No GO TO QUESTION 5

4. Of which association(s) is your hotel/club a member?

READ OUT

1	AHA
2	ClubSA
3	Other (specify)

SECTION 2 ADVERTISING CODE

I would like to start by asking about the impacts on your venue of the Advertising Code for gambling.

5. Since the Advertising Code came into operation, has your venue needed to make changes in

READ OUT

MULTIPLE RESPONSE

1	Signage
2	TV advertising
3	Radio advertising
4	Newspaper advertising
5	Website
6	Newsletters
7	Loyalty program
8	Promotions
9	Meal deals
10	Anything else (specify)
11	Nothing

Comments

Section 3 RESPONSIBLE GAMBLING Code of Practice

Now I have some questions about the Responsible Gambling Code of Practice.

Section 3A

6. Does your venue have the responsible gambling materials for the patrons?

1	Yes
2	No GO TO QUESTION 9
3	Don't know GO TO QUESTION 9

7. Where did your venue get the responsible gambling materials ?

DON'T READ OUT

MULTIPLE RESPONSE

1	Australian Hotels Association
2	Clubs SA
3	Office of the Liquor and Gambling Commissioner
4	Somewhere else (specify)
5	Don't know

8. Has your venue needed to get more responsible gambling materials?

1	Yes
2	No
3	Don't know

Comments

9. In the last six months / since we last saw you, has your venue been asked to cash a cheque in the gambling area?

1	Yes
2	No GO TO QUESTION 11
3	Don't know GO TO QUESTION 11

10. In the last six months / since we last saw you, how many times has your venue been asked to cash cheques in the gambling area?_____

Section 3B ALCOHOL AND THE CUSTOMERS

I now want to ask you about the bar service available to gaming room patrons.

11. Does your venue serve alcohol to people who interrupt their play at the machines, and go to the bar for service in between games?

1	Yes
2	No
3	Don't know

12. Does your venue serve alcohol to people who buy drinks on behalf of others who are playing the gaming machines?

1	Yes
2	No
3	Don't know

13. In the last six months / since we last saw you, how often have people asked to be served alcohol while they are sitting or standing at the gaming machines?

Has it been

1	Daily
2	once a week
3	2-3 times a month
4	Once a month
5	Every 2-3 months
6	Once in 6-12 months
7	Never GO TO QUESTION 15
8	Don't know / unsure

14. How have people reacted to not being served alcohol while they are sitting or standing at the gaming machines?

DON'T READ OUT

MULTIPLE RESPONSE

1	No response
2	Asked why
3	Grumbles / annoyance / complaints
4	Happy / understand rules
5	Other (specify)

Comments

15. What steps does your venue take to prevent intoxicated people going into the gambling area and gambling?

DON'T READ OUT

MULTIPLE RESPONSE

1	Signs
2	Train staff
3	Refuse entry
4	Monitor gambling area
5	Ask intoxicated patrons to leave
6	Refuse service of alcohol
7	None

Comments

16. In the last six months / since we last saw you, how often has an intoxicated person been identified in the gambling area?

1	Daily
2	once a week
3	2-3 times a month
4	Once a month
5	Every 2-3 months
6	Once in 6-12 months
7	Never
8	Don't know / unsure

Comments

Section 3C THE WAY PATRONS PLAY THE GAMING MACHINES

Now I want to ask you about the way patrons play the machines.

17. What steps does the hotel/club take to ensure that patrons only play one gaming machine at a time?

DON'T READ OUT

MULTIPLE RESPONSE

1	Train staff
2	Display warning sign
3	Monitor area
4	Inform patrons
5	Verbal warning to patron
6	Request patron to leave for 24 hours
7	Other (specify)
8	Don't know
9	None

Comments

18. In the last six months / since we last saw you, how often have patrons used two machines while one machine is doing free spins?

Is this seen

1	Daily
2	once a week
3	2-3 times a month
4	Once a month
5	Every 2-3 months
6	Once in 6-12 months
7	Never
8	Don't know / unsure

Comments

19. In the last six months / since we last saw you, how often have verbal warnings been given to patrons for playing more than one machine at a time?

Has this happened

Is this seen

1	Daily
2	once a week
3	2-3 times a month
4	Once a month
5	Every 2-3 months
6	Once in 6-12 months
7	Never
8	Don't know / unsure

Comments

20. In the last six months / since we last saw you, how often have patrons, who have been playing more than one machine at a time, been asked to leave for 24 hours?

Has this happened

Is this seen

1	Daily
2	once a week
3	2-3 times a month
4	Once a month
5	Every 2-3 months
6	Once in 6-12 months
7	Never
8	Don't know / unsure

Comments

Section 3D UNATTENDED CHILDREN

21. In the last six months / since we last saw you, how often have children aged 10 and under been left unattended in the hotel/club?

Has this happened

1	Daily
2	once a week
3	2-3 times a month
4	Once a month
5	Every 2-3 months
6	Once in 6-12 months
7	Never
8	Don't know / unsure

Comments

22. In the last six months / since we last saw you, how often have children aged 10 and under been left unattended in the car park?

Has this happened

1	Daily
2	Once a week
3	2-3 times a month
4	Once a month
5	Every 2-3 months
6	Once in 6-12 months
7	Never
8	Not applicable (no car park)
9	Don't know/unsure

Comments

23. What procedures do you have for children who are unattended on your premises?

DON'T READ OUT

MULTIPLE RESPONSE

1	Camera surveillance of car park
2	Patrol car park
3	Signs
4	Staff watch/supervise children
5	Find parents
6	Advise parents of policy
7	Warn parents
8	Ask family to leave
9	24 hour ban
10	Don't have this problem

Comments

Section 3E PROBLEM GAMBLING TRAINING FOR STAFF

Now I would like to turn to staff training

24. Who provided problem gambling training to your staff?

DON'T READ OUT

MULTIPLE RESPONSE

1	In house
2	TAFE
3	Adelaide Hospitality and Tourism School
4	Clubs SA
5	Australian Hotels Association
6	Jackpot club
7	Other (specify)

25. What problems (if any) have you had in providing problem gambling training for your staff?

DON'T READ OUT

MULTIPLE RESPONSE

1	None
2	Time off needed for staff to attend courses
3	Financial cost to venue
4	Distance to course/ location of course
5	Staff turnover
6	Other (specify)

Comments

26. How useful do you think the problem gambling training has been for your staff?

Has the training been

1	Very useful
2	Reasonably useful
3	Little use
4	No use
5	Don't know

Comments

Section 3F PROBLEM GAMBLING

Turning to problem gambling

27. How do you and your staff identify someone who has trouble controlling their spending on gambling?

DON'T READ OUT

MULTIPLE RESPONSE

1	Frequent visits to the ATM
2	Frequent visits to coin machine
3	Requests to borrow money from staff
4	Requests to borrow money from other patron
5	Requests to cash cheques
6	Requests for credit
7	Amount gambled
8	Long gambling sessions
9	Number of gambling sessions each week
10	Staying after friends leave
11	Family members seeking out or enquiring about the person
12	Disorderly behaviour
13	Signs of agitation
14	Obsessive compulsive behaviour (rituals, going from one machine to another)
15	Inappropriate emotions (withdrawn, low affect, quiet)
16	Chasing wins/ upping bets
17	Alcohol intoxication
18	Children left unattended
19	Customer comments about losing
20	Customer comments about family problems
21	Other (specify)
22	Don't know

Comments

28. In your experience do staff find identifying people who have problems controlling their spending on gambling

READ OUT

1	Very easy
2	Easy
3	Difficult
4	Very difficult
5	Don't know

Comments

29. Now, thinking about drawing the attention of people who have problems controlling their spending on gambling, to the name and phone number of a gambling help service

a. How do you and your staff do this?

DON'T READ OUT

MULTIPLE RESPONSE

1	Display signs, stickers and pamphlets IF ONLY DISPLAYS MATERIALS GO TO Section 3G, QUESTION 32
2	Hand cards and pamphlets to patrons
3	Speak to patrons about gambling help services
4	Do something else (specify)

Still thinking about drawing the attention of people who have problems controlling their spending on gambling, to the name and phone number of a gambling help service

b. When do you and your staff do this?

DON'T READ OUT

MULTIPLE RESPONSE

1	Staff consider a person has a problem
2	A person is visibly distressed
3	A person tells a staff member they have a gambling problem
4	A person says they have concerns about their gambling (e.g. their gambling is out of control, or they have financial difficulties)
5	A person asks to be excluded
6	Some other occasion (specify)

Comments

30. In the last six months / since we last saw you, how many people have been given the name and phone number of a gambling help service by your staff?

1	Number
2	None
3	Don't know

31. What issues did your staff face when drawing the attention of people who have problems controlling their spending on gambling, to a gambling help service?

DON'T READ OUT

MULTIPLE RESPONSE

1	Staff felt uncomfortable, embarrassed
2	Patron denied existence of problem
3	Verbal abuse
4	Physical abuse
5	Loss of customer
6	Patron gratitude
7	Other

Comments

Section 3G SELF-EXCLUSION (SELF-BARRING)

Now I have some questions on self-barring.

32. In the past six months / since we last saw you, how many people have asked to be excluded from gambling in your venue?

1	Number.....
2	None GO TO QUESTION 38
3	Don't know GO TO QUESTION 38

33. When asking to be excluded, how many people asked for an interpreter?

1	Number.....
2	None GO TO QUESTION 36
3	Don't know GO TO QUESTION 36

34. Did you have any problems in providing an interpreter?

1	Yes
2	No GO TO QUESTION 36
3	Don't know GO TO QUESTION 36

IF YES

35. What problems did you have in providing an interpreter?

1	Interpreter not available when needed
2	No interpreter for the language
3	Cost
4	Other (specify)

Comments

36. Did you have any problems in referring people to a gambling counselling service?

1	Yes
2	No GO TO QUESTION 38
3	Don't know GO TO QUESTION 38

IF YES

37. What problems did you have in referring people to a gambling counselling service?

1	Counselling service not open
2	Waiting list at counselling service
3	No counselling service in vicinity
4	Don't know of a service
5	Person did not want counselling
6	Other (specify)

Comments

38. a. How many people are currently self-excluded from gambling in your venue? _____

b. How many were excluded (barred) by your venue? _____

39. In the last six months / since we last saw you, how often have self-excluded people been identified in the gambling area of your venue?

Has it been

1	Daily
2	Once a week
3	2-3 times a month
4	Once a month
5	Every 2-3 months
6	Once in 6-12 months
7	Never
8	Don't know/unsure

40. What procedures does your venue use to identify self-excluded people who come to the gambling area?

DON'T READ OUT

MULTIPLE RESPONSE

1	List of names
2	Photos displayed on wall or in book
3	Staff refer to photos
4	Other (specify)

Comments

41. In your experience do staff find identification of self-excluded people:

READ OUT

1	Very easy
2	Easy
3	Difficult
4	Very difficult
5	Don't know

Comments

42. What procedures do you have, to ensure that self-excluded people leave the gambling area of the hotel/club?

DON'T READ OUT

MULTIPLE RESPONSE

1	Ask patron for ID
2	Offer gambling help service information
3	Warn patron
4	Ask patron to leave venue
5	Call police
6	Other (specify)

Comments

43. In your experience do staff find enforcement of self-exclusion:

READ OUT

1	Very easy
2	Easy
3	Difficult
4	Very difficult
5	Don't know
6	Not appropriate

Comments

Section 3H SOME GENERAL QUESTIONS ABOUT THE CODES

44. Do you document

- i. the way your staff are trained

1	Yes
2	No

- ii. staff roles in putting the codes into operation

1	Yes
2	No

- iii. the way your venue intervenes with problem gamblers

1	Yes
2	No

Comment

45. In the last six months / since we last saw you, what effect have the new codes had on your turnover from gambling?

Has turnover

READ OUT

1	Increased
2	Decreased
3	Stayed the same
4	Don't know

Comments

46. Has your venue had any benefits from the codes?

1	Yes
2	No

Comment

47. What difficulties (if any) has your venue had in implementing the new codes?

DON'T READ OUT

MULTIPLE RESPONSE

1	None
2	Cost of staff training
3	Staff workload increased
4	Staff ill-equipped to deal with new responsibilities (despite training)
5	Lack of staff awareness of new responsibilities
6	Confrontations with patrons
7	Recognition of self-barred persons
8	Policing of self-barring
9	Monitoring people playing more than one machine
10	Reduced drink service to customers
11	Other (specify)

Comments

48. How would you rate the general level of awareness of responsible gambling issues among your patrons?

Is awareness

1	High
2	Medium
3	Low
4	Nil
5	Don't know

Comments

Section 4 GAMING MACHINE NUMBERS

I now have some questions about the reduction in the number of gaming machines

FOR CLUBS GO TO QUESTION 52

ASK HOTELS ONLY

49. How many gaming machines will your venue lose?_____

50. Will your venue buy any more gaming machine entitlements?

1	Yes
2	No
3	Don't know

51. Will your venue sell any gaming machine entitlements?

1	Yes	GO TO QUESTION 53
2	No	GO TO QUESTION 53
3	Don't know	GO TO QUESTION 53

HOTELS GO TO QUESTION 53

ASK CLUBS ONLY

52. Will your club join Club One?

(Club One is a non-profit body which will own and operate gaming machines in clubs, and manage gaming machine entitlements on behalf of clubs.)

1	Yes
2	No
3	Don't know

53. Do you have any other comments you would like to make?

CLOSING STATEMENT

That concludes the survey. Thank you very much for taking the time out of your day to help with this research. Your contribution has been of great value and is much appreciated.

We will be doing the final follow-up on the impact of the codes and changes in the number of gaming machines for this research project in six months time. Could we contact you again?

1	Yes
2	No

Who should I ask for?

On behalf of the National Institute of Labour Studies, I would like to thank you again for your participation today, as your contribution to understanding the impacts of the new codes has been of great value.

WE LOOK FORWARD TO TALKING TO YOU AGAIN IN JULY.

Licensees Interview Schedule (WAVE 4)

Good morning/afternoon. My name is..... I am from the National Institute of Labour Studies at Flinders University.

Thank you very much for agreeing to talk to us again today.

Your venue has taken part in a longitudinal survey, commissioned by the Independent Gambling Authority, on the impact of the new Advertising Code of Practice on Gambling, the Responsible Gambling Code of Practice and the reduction in the number of gaming machines.

Now that the codes have been in operation for fifteen months we are reviewing their impact for the third and final time. We will mainly focus on the impact of the codes on you, your staff, your business and customers over the last six months, (i.e. since we talked with you last).

This time we are also reviewing the impact of the changes in the number of gaming machines.

I would just like to remind you that the information you give will be strictly confidential and will be summarised and reported in aggregate form only.

RECORD

NAME OF HOTEL/CLUB_____

LOCALITY_____

NAME_____

SECTION 1 NEW RESPONDENTS: PRELIMINARY QUESTIONS ABOUT HOTEL OR CLUB

PREVIOUS RESPONDENTS GO TO QUESTION 3

ASK NEW RESPONDENTS ONLY

1. Are you the owner, venue manager or gaming manager (or another position)?

1	Owner
2	Venue manager
3	Gaming manager
4	Other (specify)

2. How long have you been owner/manager of the hotel/club?
Number of years or months?_____

ASK ALL RESPONDENTS

3. Is your hotel/club a member of an industry association?

1	Yes
2	No GO TO QUESTION 5

4. Of which association(s) is your hotel/club a member?

READ OUT

1	AHA
2	ClubSA
3	Other (specify)

Section 2 ADVERTISING CODE

I would like to start by asking about the impacts on your venue of the Advertising Code for gambling.

5. Since the Advertising Code came into operation, has your venue needed to make changes in

READ OUT

MULTIPLE RESPONSE

1	Signage
2	TV advertising
3	Radio advertising
4	Newspaper advertising
5	Website
6	Newsletters
7	Loyalty program
8	Promotions
9	Meal deals
10	Anything else (specify)
11	Nothing

Comments

SECTION 3 RESPONSIBLE GAMBLING Code of Practice

Now I have some questions about the Responsible Gambling Code of Practice.

Section 3A

6. Has your venue needed to get more responsible gambling materials for patrons?

1	Yes
2	No
3	Don't know

Comments

7. In the last six months, has your venue been asked to cash a cheque in the gambling area?

1	Yes
2	No GO TO QUESTION 8b.
3	Don't know GO TO QUESTION 8b.

8.a. In the last six months, how **often** has your venue been asked to cash cheques in the gambling area?

Has it been

1	Daily
2	Once a week
3	2-3 times a month
4	Once a month
5	Every 2-3 months
6	Once in 6-12 months
7	Never
8	Don't know / unsure

8.b. In the last six months, how often have patrons asked to have their winnings/prizes worth \$1000 or more paid to them as a cheque?

Has it been

1	Daily
2	Once a week
3	2-3 times a month
4	Once a month
5	Every 2-3 months
6	Once in 6-12 months
7	Never
8	Don't know / unsure

Comments

Section 3B ALCOHOL AND THE CUSTOMERS

I now want to ask you about the bar service available to gaming room patrons.

9. Does your venue serve alcohol to people who interrupt their play at the machines, and go to the bar for service in between games?

1	Yes
2	No
3	Don't know

10. Does your venue serve alcohol to people who buy drinks on behalf of others who are playing the gaming machines?

1	Yes
2	No
3	Don't know

11. In the last six months, how often have people asked to be served alcohol while they are sitting or standing at the gaming machines?

Has it been

1	Daily
2	once a week
3	2-3 times a month
4	Once a month
5	Every 2-3 months
6	Once in 6-12 months
7	Never GO TO QUESTION 13
8	Don't know / unsure

12. How have people reacted to not being served alcohol while they are sitting or standing at the gaming machines?

DON'T READ OUT

MULTIPLE RESPONSE

1	No response
2	Asked why
3	Grumbles / annoyance / complaints
4	Happy / understand rules
5	Other (specify)

Comments

13. What steps does your venue take to prevent intoxicated people going into the gambling area and gambling?

DON'T READ OUT

MULTIPLE RESPONSE

1	Signs
2	Train staff
3	Refuse entry
4	Monitor gambling area
5	Ask intoxicated patrons to leave
6	Refuse service of alcohol
7	None

Comments

14. In the last six months, how often has an intoxicated person been identified in the gambling area?

1	Daily
2	Once a week
3	2-3 times a month
4	Once a month
5	Every 2-3 months
6	Once in 6-12 months
7	Never
8	Don't know / unsure

Comments

15. Do you feel that staff currently know patrons as well as they did prior to the restrictions placed on the service of alcohol for persons gambling?

1	Yes
2	No
3	Don't know

Comments

Section 3C THE WAY PATRONS PLAY THE GAMING MACHINES

Now I want to ask you about the way patrons play the machines.

16. What steps does the hotel/club take to ensure that patrons only play one gaming machine at a time?

DON'T READ OUT

MULTIPLE RESPONSE

1	Train staff
2	Display warning sign
3	Monitor area
4	Inform patrons
5	Verbal warning to patron
6	Request patron to leave for 24 hours
7	Other (specify)
8	Don't know
9	None

Comments

17. In the last six months, how often have patrons used two machines while one machine is doing free spins?

Is this seen

1	Daily
2	once a week
3	2-3 times a month
4	Once a month
5	Every 2-3 months
6	Once in 6-12 months
7	Never
8	Don't know / unsure

Comments

18. In the last six months, how often have verbal warnings been given to patrons for playing more than one machine at a time?

Has this happened

1	Daily
2	once a week
3	2-3 times a month
4	Once a month
5	Every 2-3 months
6	Once in 6-12 months
7	Never
8	Don't know / unsure

Comments

19. In the last six months, how often have patrons, who have been playing more than one machine at a time, been asked to leave for 24 hours?

Has this happened

1	Daily
2	once a week
3	2-3 times a month
4	Once a month
5	Every 2-3 months
6	Once in 6-12 months
7	Never
8	Don't know / unsure

Comments

Section 3D UNATTENDED CHILDREN

20. In the last six months, how often have children aged 10 and under been left unattended in the hotel/club?

Has this happened

1	Daily
2	Once a week
3	2-3 times a month
4	Once a month
5	Every 2-3 months
6	Once in 6-12 months
7	Never
8	Don't know / unsure

Comments

21. In the last six months, how often have children aged 10 and under been left unattended in the car park?

Has this happened

1	Daily
2	Once a week
3	2-3 times a month
4	Once a month
5	Every 2-3 months
6	Once in 6-12 months
7	Never
8	Not applicable (no car park)
9	Don't know/unsure

Comments

22. What procedures do you have for children who are left unattended on your premises?

DON'T READ OUT

MULTIPLE RESPONSE

1	Camera surveillance of car park
2	Patrol car park
3	Signs
4	Staff watch/supervise children
5	Find parents
6	Advise parents of policy
7	Warn parents
8	Ask family to leave
9	24 hour ban
10	Don't have this problem

Comments

Section 3E PROBLEM GAMBLING TRAINING FOR STAFF

Now I would like to turn to staff training

23. Who provided problem gambling training to your staff?

DON'T READ OUT

MULTIPLE RESPONSE

1	In house
2	TAFE
3	Adelaide Hospitality and Tourism School
4	Clubs SA
5	Australian Hotels Association
6	Jackpot club
7	Other (specify)

24. What problems (if any) have you had in providing problem gambling training for your staff?

DON'T READ OUT

MULTIPLE RESPONSE

1	None
2	Time off needed for staff to attend courses
3	Financial cost to venue
4	Distance to course/ location of course
5	Staff turnover
6	Other (specify)

Comments

25. How useful do you think the problem gambling training has been for your staff?

Has the training been

1	Very useful
2	Reasonably useful
3	Little use
4	No use
5	Don't know

Comments

26. Thinking back about the people you have hired over the past 12 months, have you or the venue tried to appoint people who have already completed the problem gambling training?

1	Yes
2	No
3	Don't know

Comments

Section 3F PROBLEM GAMBLING

Turning to problem gambling

27. How do you and your staff identify someone who has trouble controlling their spending on gambling?

DON'T READ OUT

MULTIPLE RESPONSE

1	Frequent visits to the ATM
2	Frequent visits to coin machine
3	Requests to borrow money from staff
4	Requests to borrow money from other patron
5	Requests to cash cheques
6	Requests for credit
7	Amount gambled
8	Long gambling sessions
9	Number of gambling sessions each week
10	Staying after friends leave
11	Family members seeking out or enquiring about the person
12	Disorderly behaviour
13	Signs of agitation
14	Obsessive compulsive behaviour (rituals, going from one machine to another)
15	Inappropriate emotions (withdrawn, low affect, quiet)
16	Chasing wins/ upping bets
17	Alcohol intoxication
18	Children left unattended
19	Customer comments about losing
20	Customer comments about family problems
21	Other (specify)
22	Don't know

Comments

28. In your experience do staff find identifying people who have problems controlling their spending on gambling

READ OUT

1	Very easy
2	Easy
3	Difficult
4	Very difficult
5	Don't know

Comments

29. Now, thinking about drawing the attention of people who have problems controlling their spending on gambling, to the name and phone number of a gambling help service

a. How do you and your staff do this?

DON'T READ OUT

MULTIPLE RESPONSE

1	Display signs, stickers and pamphlets IF ONLY DISPLAYS MATERIALS GO TO QUESTION 32
2	Hand cards and pamphlets to patrons
3	Speak to patrons about gambling help services
4	Do something else (specify)

Still thinking about drawing the attention of people who have problems controlling their spending on gambling, to the name and phone number of a gambling help service

b. When do you and your staff do this?

DON'T READ OUT

MULTIPLE RESPONSE

1	Staff consider a person has a problem
2	A person is visibly distressed
3	A person tells a staff member they have a gambling problem
4	A person says they have concerns about their gambling (e.g. their gambling is out of control, or they have financial difficulties)
5	A person asks to be excluded
6	Some other occasion (specify)

Comments

30. In the last six months, how many people have been given the name and phone number of a gambling help service by your staff?

1	Number
2	None
3	Don't know

31. What issues did your staff face when drawing the attention of people who have problems controlling their spending on gambling, to a gambling help service?

DON'T READ OUT

MULTIPLE RESPONSE

1	Staff felt uncomfortable, embarrassed
2	Patron denied existence of problem
3	Verbal abuse
4	Physical abuse
5	Loss of customer
6	Patron gratitude
7	Other

Comments

32. In the last six months, what contact has your venue had with AHA responsible gambling officers?

Section 3G SELF-EXCLUSION (SELF-BARRING)

Now I have some questions on self-barring.

33. In the past six months, how many people have asked to be self barred from gambling in your venue?

1	Number.....	
2	None	GO TO QUESTION 39
3	Don't know	GO TO QUESTION 39

34. When asking to be barred, how many people asked for an interpreter?

1	Number.....	
2	None	GO TO QUESTION 37
3	Don't know	GO TO QUESTION 37

35. Did you have any problems in providing an interpreter?

1	Yes	
2	No	GO TO QUESTION 37
3	Don't know	GO TO QUESTION 37

IF YES

36. What problems did you have in providing an interpreter?

DON'T READ OUT

MULTIPLE RESPONSE

1	Interpreter not available when needed	
2	No interpreter for the language	
3	Cost	
4	Other (specify)	

Comments

37. Did you have any problems in referring people to a gambling counselling service?

1	Yes	
2	No	GO TO QUESTION 39
3	Don't know	GO TO QUESTION 39

IF YES

38. What problems did you have in referring people to a gambling counselling service?

DON'T READ OUT**MULTIPLE RESPONSE**

1	Counselling service not open
2	Waiting list at counselling service
3	No counselling service in vicinity
4	Don't know of a service
5	Person did not want counselling
6	Other (specify)

Comments

39. a. How many people are currently self-barred from gambling in your venue?_____

b. How many were barred by your venue?_____

40. In the last six months, how often have self-barred people been identified in the gambling area of your venue?

Has it been

1	Daily
2	Once a week
3	2-3 times a month
4	Once a month
5	Every 2-3 months
6	Once in 6-12 months
7	Never
8	Don't know/unsure

41. What procedures does your venue use to identify self-barred people who come to the gambling area?

DON'T READ OUT**MULTIPLE RESPONSE**

1	List of names
2	Photos displayed on wall or in book
3	Staff refer to photos
4	Other (specify)

Comments

42. In your experience do staff find identification of self-barred people:

READ OUT

1	Very easy
2	Easy
3	Difficult
4	Very difficult
5	Don't know

Comments

43. What procedures do you have, to ensure that self-barred people leave the gambling area of the hotel/club?

DON'T READ OUT

MULTIPLE RESPONSE

1	Ask patron for ID
2	Offer gambling help service information
3	Warn patron
4	Ask patron to leave venue
5	Call police
6	Other (specify)

Comments

44. In your experience do staff find enforcement of self-barring:

READ OUT

1	Very easy
2	Easy
3	Difficult
4	Very difficult
5	Don't know
6	Not appropriate

Comments

45. In the last six months, what contact (if any) has your venue had with a gambling counselling service?

Comments

Section 3H SOME GENERAL QUESTIONS ABOUT THE CODES

46. Do you document

iv. the way your staff are trained

1	Yes
2	No

v. staff roles in putting the codes into operation

1	Yes
2	No

vi. the way your venue intervenes with problem gamblers

1	Yes
2	No

Comment

47. In the last six months, what effect have the codes had on your turnover from gambling?

Has turnover

READ OUT

1	Increased
2	Decreased
3	Stayed the same
4	Don't know

Comments

48. Has your venue had any benefits from the codes?

1	Yes
2	No

Comment

49. What difficulties did your venue have in implementing the codes?

DON'T READ OUT

MULTIPLE RESPONSE

1	None
2	Cost of staff training
3	Staff workload increased
4	Staff ill-equipped to deal with new responsibilities (despite training)
5	Lack of staff awareness of new responsibilities
6	Confrontations with patrons
7	Recognition of self-barred persons
8	Policing of self-barring
9	Monitoring people playing more than one machine
10	Reduced drink service to customers
11	Other (specify)
12	Codes difficult to understand

Comments

50. How would you rate the general level of awareness of responsible gambling issues among your patrons?

Is awareness

1	High
2	Medium
3	Low
4	Nil
5	Don't know

Comments

51. How effective have the codes been in raising awareness of responsible gambling among your patrons?

Do you think they have been:

1	Very effective
2	Effective
3	Have had little effect
4	Have had no effect
5	Don't know

Comments

52. In your experience/opinion, have the codes reduced the harm experienced by problem gamblers

1	Yes
2	No
3	Don't know

Comments

Section 4 GAMING MACHINE NUMBERS

I now have some questions about the reduction in the number of gaming machines

FOR CLUBS GO TO QUESTION 62

ASK HOTELS ONLY

53. How many gaming machines did your venue lose? _____

54. Has your venue bought any more gaming machine entitlements?

1	Yes
2	No
3	Don't know

55. Has your venue sold any gaming machine entitlements?

1	Yes
2	No
3	Don't know

56. **ONLY ASK THOSE WHO ANSWERED YES IN QUESTION 54 OR 55.**

How have you experienced the trading system?

57. What effect has the reduction had on your turnover from gaming machines?
Did turnover

READ OUT

1	Increase
2	Decrease
3	Stay the same
4	Don't know

58. What effect has the reduction in the number of gaming machines had on your turnover from TAB?
Did turnover

READ OUT

1	Increase
2	Decrease
3	Stay the same
4	Don't know

59. What effect has the reduction in the number of gaming machines had on your turnover from Keno?

Did turnover

READ OUT

1	Increase
2	Decrease
3	Stay the same
4	Don't know

60. What effect has the reduction in the number of gaming machines had on your turnover from Lottery products?

Did turnover

READ OUT

1	Increase
2	Decrease
3	Stay the same
4	Don't know

61. Overall, what effect has the reduction in gaming machine numbers had on your venue?

Comments

62. Do you have any other comments you would like to make?

CLOSING STATEMENT

That concludes the survey. Thank you very much for taking the time out of your day to help with this research. Your contribution has been of great value and is much appreciated.

On behalf of the National Institute of Labour Studies, I would like to thank you again for your participation today and for your/your venues previous participation, as your contribution to understanding the impacts of the codes and the reduction in gaming machine numbers has been of great value.

Appendix 5: Licensed Premises Gaming Room Staff Interview Schedule

1. How long have you worked in the gaming room?
2. How many gaming machines does your venue have?
3. Has your work changed at all as a result of the new responsible gambling code of practice?

IF NO GO TO Q 8

4. In what way has it changed?
5. How do you feel about the changes to your work as a result of the new code?
6. What do you like most about the changes to your work?
7. What do you like least about the changes to your work?
8. Are many patrons affected by the limit to using only one gambling machine at a time?

IF NONE GO TO Q 11

9. What types of patrons are affected?
10. How have they reacted?
11. Now that patrons cannot be served while they are sitting or standing at the gaming machines, how are these people served alcohol?
12. Are many patrons affected by the change?

IF NONE GO TO Q 15

13. What types of patron are affected?
14. How have they reacted?
15. How do you recognise someone who might have a problem controlling their spending on gambling?
16. What aspects of their behaviour are different from that of other gamblers?
17. What makes them easy to recognise? Or what makes them hard to identify?
18. What do you do, when you notice a person, who you think might have a problem controlling their spending on gambling?
19. What do you do if people tell you they have a gambling problem?

20. Do people ask for help because of their gambling?

If NO GO TO Q 22

21. What types of people ask for help?

22. How do you feel about responding to problem gambling behaviour?

23. What do you do when you notice a person who you think might be self-excluded from your venue?

24. How hard or easy is it to identify these people?

25. What makes them hard to identify?

26. Is there an incident register at the your venue?

27. What types of incidents are recorded?

28. How are those incidents responded to?

29. Since the introduction of the responsible gambling code of practice, do you think the gambling experience has changed for the patrons?

30. Why do you think so?

31. Since the introduction of the new code, do you think there has been a change in the way any of the patrons gamble?

IF NO GO TO Q 34

32. How has their gambling changed?

33. What types of people gamble differently?

34. Do you have any other comments you would like to make about the Responsible Gambling Code of Practice and your work?

Appendix 6: SkyCity Adelaide Casino Gaming Room Staff Interview Schedule¹

Thank you for agreeing to talk to me (again) about the impact of the Responsible Gambling Code of Practice on your work and on the patrons of the Casino.

Ask New Participants only

1. Can you please tell me what is your job at the Casino?
2. How long have you worked at the Casino?

Ask All Respondents

3. Since we spoke to you last, have there been any other changes to your work as a result of the responsible gambling code of practice?

IF NO GO TO Q 7

4. In what way has it changed?
5. What do you like most about the changes to your work?
6. What do you like least about the changes to your work?

GAMING MACHINES

IF WORKS IN TABLE GAMES GO TO Q 15

PLAYING 2 MACHINES

7. Turning now to the impacts the code has had on casino patrons, I was just wanting to inquire about your perceptions about how the limit to playing one gaming machine at a time has affected casino patrons?
8. Are many patrons affected?

IF NONE GO TO Q 11

9. What types of patrons are affected?
10. How have they reacted?

¹ Questions that refer to previous interviews were not asked in the first interview. Interviews were semi-structured, so that question wording and order sometimes varied somewhat from that documented, and issues were explored and elaborated as appropriate.

SERVICE OF ALCOHOL

11. Are many patrons affected by the change?

IF NONE GO TO Q 14

What types of patron are affected?

12. How have they reacted?

13. Do you feel that you currently know patrons as well as you did prior to the restrictions placed on the service of alcohol for person gambling?

PROBLEM GAMBLING

14. How do you recognise someone who might have a problem controlling their spending on gambling?

15. What aspects of their behaviour are different from other gamblers?

16. What do you do, when you notice a person, who you think might have a problem controlling their spending on gambling?

17. What do you do if people tell you they have a gambling problem?

18. Do people ask for help because of their gambling?

If NO GO TO Q 22

19. What types of people ask for help?

20. How do you feel about responding to problem gambling behaviour?

SELF-EXCLUSION

21. What do you do when you notice a person who you think might be self-excluded from the Casino?

22. How hard or easy is it to identify these people?

23. What makes them hard to identify?

24. What makes them easy to identify?

GAMBLING EXPERIENCE

25. Since the introduction of the responsible gambling code of practice, do you think the gambling experience has changed for Casino patrons?

26. Why do you think so?

27. Since the introduction of the code, do you think there has been a change in the way any of the patrons gamble?

IF NO GO TO Q 31

28. How has their gambling changed?

29. What types of people gamble differently?

30. Do you have any other comments you would like to make about the Responsible Gambling Code of Practice and your work?

THAT IS ALL THE QUESTIONS I HAVE TO ASK YOU ABOUT THE RESPONSIBLE GAMBLING CODE OF PRACTICE AND YOUR WORK

THANK YOU

Appendix 7: OLGC Licensee Inspectorate Interview Schedule¹

1. Have additional inspectors been employed since we last spoke to you?
2. Has your work changed since the codes came into operation?

If yes in what way has your work changed?

3. What proportion of licensed premises have been inspected so far for compliance with the codes?

ADVERTISING CODE

4. What impact have you noticed the Advertising Code has had on advertising done by licensed premises?
5. Are venues still uncertain about how to interpret any parts of the Advertising Code?
6. Are there any parts of the Advertising code that venues have more difficulty implementing than others?

RESPONSIBLE GAMBLING CODE

7. Are venues still uncertain about how to interpret any parts of the Responsible Gambling Code of Practice?
8. Are venues still making different interpretations of any parts of the code?
9. Do the differences vary according to the type of venue?
10. What changes have venues made so they don't supply alcohol to reward, promote or encourage continued gambling?
11. What proportion of venues have made these changes?

COMPLIANCE

12. Are there venues that still need to make changes so as to comply with the codes?
13. How do you know whether venues are complying with some parts of the codes? In particular:
 - a. Paying out winnings of more than \$1000 as a cheque if requested
 - b. Patrons playing one gaming machine at a time
 - c. Not serving alcohol to a person sitting/standing at a machine

¹ Questions that refer to previous interviews were not asked in the first interview. Interviews were semi-structured, so that question wording and order sometimes varied somewhat from that documented, and issues were explored and elaborated as appropriate.

- d. Preventing intoxicated people from entering gambling areas and gambling
- e. Providing interpreters when people ask to be excluded
- f. Referring people to counselling services when they are excluded
- g. Preventing self-barred people from entering gambling areas and gambling
- h. Responding to problem gamblers

14. What proportion of venues have completed training their staff in responsible gambling?

15. Are there any differences between metropolitan and country venues in getting staff trained?

16. What proportion of venues now have a Responsible Gambling Code document?

17. What parts of the codes are venues complying with well at this stage?

18. What parts of the codes are most often breached by venues at this stage?

19. What complaints are received about how venues are complying with the codes?

20. How many warning notices have been given to venues about breaches of the codes?

21. What disciplinary action has been taken against venues who have breached the codes?

PERCEPTIONS OF CODES

22. What impact do you think the training has had on staff understanding of responsible gambling?

23. Have you noticed any change in staff attitudes to problem gambling since the introduction of the code?

24. How confident do you think staff are about responding to problem gamblers?

25. How have venues experienced the reduction in the number of gaming machines?

26. Do you have any other comments you would like to make?

Appendix 8: OLGC Casino Inspectorate Interview Schedule ¹

1. Since we spoke to you last has your work changed as a result of the codes?

If yes, in what way?

2. What effect do you think the Advertising Code has had on the Casino's advertising?
3. Are there still any grey areas in the way parts of the Advertising Code is interpreted?
4. Since we last spoke with you has the Casino made any other changes to its loyalty scheme and promotions so it does not supply alcohol to reward, promote or encourage continued gambling?

If yes, what have these changes been?

5. How do you know if the Casino is complying with the Responsible Gambling Code regarding
 - a. Paying winnings of more than \$1000 in the form of a cheque if asked
 - b. Playing one machine at a time
 - c. Serving alcohol to people standing or sitting at the machines
 - d. Drawing the attention of people to the gambling help services
 - e. Identifying people who are barred
6. What areas of the codes give rise to breaches?
7. What do you do when you notice there is a breach of the codes?
8. Has any disciplinary action been taken as a result of a breach of the codes?
9. What complaints are made about how the Casino complies with the codes?
10. What impact do you think the Responsible Gambling Code has had on staff understanding of responsible gambling?
11. Have you noticed any change in staff attitudes to problem gamblers since the introduction of the code?
12. How confident do you think staff are about responding to problem gamblers?

¹ Questions that refer to previous interviews were not asked in the first interview. Interviews were semi-structured, so that question wording and order sometimes varied somewhat from that documented, and issues were explored and elaborated as appropriate.

13. How effective is the role and work of the Host Responsibility Coordinators in relation to problem gamblers at this stage?

14. What impact do you think the codes have had on patron awareness of responsible gambling?

Do you have any other comments you would like to make about the codes and your work?

Appendix 9: Concern Sector Interview Schedule ¹

1. Have there been any changes in the number of clients?
2. Have there been any changes in the source of referrals?
3. Have there been any changes in the type of gambling presenting a problem for people seeking help?
4. Have there been any changes in the amount and type of contact you have had with gambling providers?
5. Who initiates the contact?
6. What are your thoughts, if any, on the AHA's initiative of establishing 'an Early Intervention Agency' which provides 6 responsible gambling officers, who are each linked to regions of hotels with gaming machines across the state.
7. In your opinion, how compliant is the industry with the codes?
 - Advertising?
 - Responsible gambling?
8. Are there still grey areas in the interpretation of the codes?
9. Have there been more people self-barring?
10. Have there been any changes in the uptake of the Problem Gambling family Order Protection Scheme?
11. In your experience/opinion, what has been the impact of the reduction in the number of gaming machines?
12. In your opinion, what impact have the codes and the reduction in the number of gaming machines had on gamblers?
13. In your opinion, what impact have the codes and the reduction in the number of gaming machines had on the industry?
14. Do you have any other comments you would like to make in regards to the impact of the codes and the reduction in the number of gaming machines?

¹ Questions that refer to previous interviews were not asked in the first interview. Interviews were semi-structured, so that question wording and order sometimes varied somewhat from that documented, and issues were explored and elaborated as appropriate.