

The Impact of Banning Interactive Gambling Services

“A survey of Australian Residents”

Final Report

Prepared for

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Family and Community Services**

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IRIS Research

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EXECUTIVE SUMMARY

Chapter 1: Study Overview

An amount of recent literature on the incidence of gambling, suggests there is a significant connection between increased accessibility and prevalence of problem gambling. Given the increasing levels of access to the Internet by Australian households, there is a great deal of concern that this access will lead to increased gambling and therefore problem gamblers on the Internet.

In particular, given the emergence of various forms of gambling on the Internet, the Government is very interested to determine:

“Whether a ban which makes access to any interactive gambling site very difficult, and prohibits all Australian-based regulated gambling sites, would discourage interactive gambling: or would people still seek to access off-shore unregulated sites?”

This survey intended to address these issues, with a particular emphasis on determining peoples interest in Internet gambling and whether they would actively seek alternative means of access if it were banned in Australia. As such the survey focused on peoples current attitudes to gambling in general as well as specifically to gambling on the Internet. These reactions are then discussed in the light of various demographic (age, sex, state) and behavioural (gambling, Internet access) differences amongst the respondents.

In particular, there were clear findings on the primary questions of;

- the relationship between gambling access and gambling behaviour in Australia
- the extent and forecast increase of internet access (and by implication, internet gambling access, given the number of current and likely future sites available for such);
- the current state of attitudes relating to issues of Internet gambling, including the possibility of a ban.

Chapters 2 & 3: Methodology and response

This report analyses the response of 1,183 people aged 18 years or older across all states of Australia, gathered by means of a telephone interview during September 2000. Five key State areas were determined, and a proportional response drawn in accordance with current population levels in each area. In addition, an age by sex quota limit was set for each area to ensure a balanced response across all of Australia. A set of randomly generated 'potentially unlisted' numbers was also included to ensure the broadest cross-section of response was obtained.

STATE	Response	%
NSW & ACT	422	35.7
Victoria & Tasmania	317	26.8
Queensland	207	17.5
Sth Australia & Nth Territory	108	9.1
Western Australia	129	10.9
Total Australia	1,183	100.0

Chapter 4: Participation in gambling

This chapter provides an overview of respondents gambling behaviour, including frequency of participation and spending on a variety of forms of gambling. The key intention of the questions here was to differentiate between people involved in gaming (Casino tables etc), wagering (racing or sports betting) and chance games (lotto, lotteries, pools etc) to determine if they have similar or differing attitudes and intentions toward Internet gambling.

Gambling Pursuit	% partic
Gambling at a Casino	19
Gambling at a club or hotel	36
Bet on horse or dog racing	21
Bets on sporting events	3
Lottery, scratchie, lotto etc.	71
Other gambling like bingo etc	4
Did not gamble	20

Eighty percent of people surveyed indicated they had at least "gambled" once in the past 12 months. This finding was consistent with the Productivity Commission's National Gambling Survey (1999) which suggested 82% of Australian adults participated in at least one gambling activity in the last 12 months. The level of gambling across the 5 reported State areas was fairly uniform, ranging from 78% in NSW to 83% in Western Australia.

By far the highest incidence of gambling was found to be in lottery tickets, scratchies, lotto or pools etc. In fact, 28% of people surveyed indicated this was the only form of gambling they had participated in the past 12 months, indicating that close to 50% of respondents were involved in none or only these 'soft' areas of gambling pursuits.

While availability of gambling sites is related to usage, there is some interplay between the types of venues on offer and the level of usage. For example in Western Australia, where the only venue for poker machines is in the State Casino, 27% of respondents reported using a Casino in the past 12 months, compared to 8% for gambling in a club or hotel. In Victoria, which has introduced poker machines in more recent times, the comparative figures were 23% for Casinos and a substantial 35% for Clubs/Hotels. For NSW, which has a wide and long standing network of Clubs and Hotels providing poker machines, usage of a Casino was lowest at 13%, compared to 43% who have gambled in a club or hotel. Usage of Casino based gambling seems to decline as the network of clubs and hotels providing similar opportunities increases. That is, there may be a finite limit to the number of people wishing to be involved in gambling, with interchangeability between Casino and Clubs etc depending on availability.

While the pursuit of gambling activities varied across age group, females were just as likely as males to participate in gambling activities, apart from betting on horse racing.

Relating to age differences, the survey found:

- people gambling at a Casino were more likely to be aged 18-34 years;

- over half of the respondents aged 18-24 years had played gaming machines at a club or hotel in the past 12 months;
- lotteries, scratchies, lotto and pools etc. were most popular amongst respondents aged 25 to 54 years.
- There is a basic component of all age groups who are interested in each type of gambling activity.

Gambling Pursuit (% partic)	18-24	25-34	35-44	45-54	55-64	65+	Male	Female
Gambling at a Casino	34	25	14	18	10	11	18	19
Gambling at a club or hotel	51	39	34	34	32	28	36	36
Bet on horse or dog racing	18	27	21	23	23	11	25	17
Bets on sporting events	7	5	3	3	-	1	5	2
Lottery, scratchie, lotto etc.	55	74	78	75	66	68	69	72
Other gambling like bingo etc	7	5	4	2	3	5	2	6
Did not gamble	22	15	16	21	27	27	21	20

Chapter 5: Usage of the Internet

The incidence of Internet usage was found to be just over 50% Australia-wide, although slightly lower in rural areas, among women, and particularly amongst people aged 55 years or older.

People who did not gamble reported a slightly lower use of the Internet in the past 12 months (46%), compared to 54% usage amongst people involved in all forms of gambling. The differences reported proved significant at the 90% confidence level, however are only indicative of an association between the types of people who gamble and those who use the Internet. Despite this association, generally due to age of respondent, the more frequently a person gambled, the less likely they were to have accessed the Internet. That is, the association is due to the large number of people with low level gambling activity.

The home Internet connection rate was put at 42% of dwellings. Given these figures, there has been a substantial increase in the proportion of dwellings connected to the Internet in recent years. However this survey suggests that only a further 11% of

respondents plan to hook up in the next 3 years, which would result in coverage of 53% of dwellings across Australia, growing to a high of 58% in Western Australia down to a low of 49% in South Australia-Northern Territory.

Only 0.4% of people had accessed the Internet in the last 12 months to place a bet or wager with a betting agency or played a gaming site for money, while 3% had played a gaming site for fun, but not for money.

Chapter 6: Attitudes of the Target Group

The target group was defined as people 18 years old or over, who have either used the Internet or gambled (in any form except raffles) in the past 12 months. Overall, 89% of the people contacted fell into one or both of these groups. Proportions quoted in this chapter relate only to the 1,051 respondents so defined. All other analysis however relates to the full 1,183 respondents.

Attitudes to Gambling

Respondents in the Target Group were asked to indicate the extent to which they agreed or disagreed with a number of statements relating to gambling in general. Statements were rated on a scale of 1 to 5, where 1 is strongly disagree and 5 is strongly agree. For comparison purposes the percent 'agreed' (score of 4 or 5) is reported in the tables. Statements in any of these attitude lists were presented in random order to avoid the possibility for any instrument effect due to order of presentation of the questions.

Of the statements tested, only the issue of gambling operator's responsibilities received a mixed opinion. Forty-four percent of the target group interviewed agreed (score of 4 or 5) with the statement gambling operators are not responsible for protecting gamblers from over spending. A further 17% provided a non-committal rating (score of 3), while 37% disagreed (score of 1 or 2) with the statement.

Overall, people are fairly level headed in their approach to gambling. Close to 80% believe you can't really win with gambling and that it is up to the individual to avoid

incurring any financial difficulties. A substantial majority believed there was already ‘too much opportunity for gambling in Australia’, while only small numbers agreed that it was a good form of recreation or leisure.

Statement	%agree
In the long run you can't really win with gambling	80
The establishment of Casinos has been good for Australia	18
Gambling is a good form of recreation or leisure	12
There is too much opportunity for gambling in Australia	72
Governments have a responsibility to minimise the harmful effect of gambling	64
It is up to the individual to make sure they don't get into financial difficulties from gambling	78
Gambling operators are not responsible for protecting gamblers from over spending	44

Given the large proportions involved in gambling, it would appear that people may differentiate between soft (say lotto, lotteries) and hard forms of gambling (poker machines, gaming etc), when making judgements about the impact of gambling on their lives.

There were very little differences in attitude between metropolitan, urban and rural areas, although the 18-24 years age group took a softer approach on most issues. Obviously the main determinant of attitude was the frequency of involvement in gambling. However, despite these differences, some 70% of people who gambled 3 or more times a week felt that ‘in the long run you can’t really win with gambling’, while in both cases, 58% agreed ‘there is too much opportunity for gambling’, and ‘governments have a responsibility to minimise the harmful effects of gambling’.

In summary then, the level of opinion was relatively stable across all states and most age groups, with close to two thirds of people aged 18 years or over agreeing that ‘Governments have a responsibility to minimise the harmful effects of gambling’.

Attitudes to the Internet

Respondents were also presented with a similar set of attitude questions relating to the Internet. Responses were relatively homogenous across all States and between metropolitan and rural areas.

Statement	% Agree
Overall you are comfortable using the Internet	50
It is safe to register your personal details with sites on the Internet	12
There is no risk in buying something over the Internet from Aust. based sites	14
It can be risky buying something over the Internet from Overseas based sites	68
Using your credit card over the Internet is risky	74

Under current circumstances only some 50% of people felt they were comfortable using the Internet, while large proportions of people were suspicious of buying something or using their credit card over the Internet and applied this suspicion equally to Australian and overseas based sites.

Older people were much less likely to feel comfortable using the Internet, while younger persons appeared more likely to trust Australian based sites. Even so only 21% of 18-24 year olds felt there was 'no risk in buying something over the internet from Australian based sites' and were equally concerned with the risk of buying something from overseas sites or using their credit card on the net.

Chapter 7: Attitudes to Internet gambling

As a means of testing general attitudes to gambling on the Internet, all respondents were asked whether they agreed or disagreed with a series of 4 statements. Again the response pattern was fairly consistent across all States. In addition there were no strong associations between attitude and age of respondent, although suprisingly

respondents who were involved in gaming and wagering showed more concern on the issues than people who did not gamble.

Statement (% Agree)	Non Gambler	Lotto, Lottery	Gaming Wager	Aust
Having gambling sites available on the Internet is a good idea	7	5	7	6
There could be some concern about the honesty of overseas based gambling sites	64	75	76	73
A gambling site that was based in Australia would be more trustworthy than overseas sites	18	26	34	28
Internet gambling should be licensed by the Government	69	77	77	76

The most interesting result was that only 6% of respondents felt having gambling sites available on the Internet was a good idea. This finding was consistent whether people were non-gamblers, involved in lotto or scratchies, or in other harder forms of gambling. This low level of interest in Internet gambling was amplified in a subsequent question, where people were asked ‘how much interest do you personally have either now or perhaps in the future in accessing any type of gambling site on the Internet?’ An astounding 96% of respondents said they had low interest (none, or very little), which was consistent across all states and only fell to 93% for 18-24 year old which was the lowest level for any age group. Further, a clear majority (68%) either supported or strongly supported a ban on Internet gambling in Australia.

Respondents were also asked “if Internet gambling was banned in Australia and you happened to find a gambling site on the Internet, what would you most likely do?” Overall, 1% of respondents indicated they would play the site, while a further 9% suggested they would have a look. Younger respondents and males in general were more likely to examine the gambling site. One in five respondents said they would report the site to the authorities, while 60% indicated they would just avoid the site in the future.

The incidence of those who had gambled on the Internet, either wagering or gaming was 10 out of 1183 (1%), all of these, save one, being male. None of these were in favor of a ban and only 1 of these individuals appeared to think they would have technical difficulty getting around a ban if they wished to do so. However, 9 out of 10

said they would comply with a ban (including offshore sites) were it imposed. Hence the survey suggests there is low interest in Internet Gambling, even amongst gamblers, while even for people who have used Internet gambling sites the ban would probably be enough to curb their access.

Final Conclusions

As a final summation, the points below highlight the key findings of the survey, as they relate to interest in gambling, access to the Internet and potential reaction to a ban on Internet gambling:

- ◆ Currently some 80% of people aged 18 years or older are involved in some form of gambling. By far the highest incidence of gambling was found to be in lottery tickets, scratchies, lotto or pools etc (71%). However given that 28% of people surveyed indicated that lotteries etc was the only form of gambling they had participated in, this meant that around 50% of respondents were involved in the 'harder' forms of gambling like Casino gaming, poker machines or racing etc.
- ◆ Gambling is not always the primary focus of people visiting a particular venue. For example it appears that playing of poker machines and other forms of gambling in a Club/Hotel is very much part of a broader social use of the venue. In all, close to 90% of respondents reported that they gamble while they are visiting a club or hotel, rather than gambling being the primary reason for their visit. This 'social' type aspect may detract from the Internet as a more personal form of gambling, devoid of social interaction.
- ◆ Some 51% of respondents had accessed the Internet at least once in the last 12 months. The bulk of this access was via a home connection, with some 42% of responding dwellings currently being connected. Of interest however, only an additional 11% of respondents suggested their dwelling would be connected in the next 3 years. In total then, given the current impetus to use the Internet, just over 50% of dwellings Australia-wide will be connected by 2003.

- ◆ Respondents in the target group appeared quite realistic in their general attitude to gambling. Some 80% suggested that you ‘can’t really win with gambling’, while a majority felt that both governments (64%) and the individual (78%) are responsible to minimise the potential harmful effects of problem gambling.
- ◆ The bulk of target group respondents were quite suspicious of undertaking financial transactions over the Internet. Only 12% believed it was ‘safe to register your personal details on the Internet’, while 74% believed it was risky ‘using your credit card over the Internet’.
- ◆ Only 6% of respondents felt that ‘having gambling sites on the Internet’ was a good idea, demonstrating the very low level of interest in Internet gambling which currently exists amongst respondents. Added to this 76% agreed that if available, “Internet gambling should be licensed by the Government’.
- ◆ A huge 96% of respondents suggested they had little or no interest in Internet gambling, while only 3% of respondents indicated a medium, and 1% a high level of interest. Despite these very low levels of interest, a somewhat larger 19% of respondents suggested they would oppose the imposition of a ban on Internet Gambling. All the same if a ban were in-place, only 1% of respondents actually felt they would play an overseas gambling site if they stumbled upon it, although a slightly larger 9% might have a look at the site.

These points suggest that currently involvement in Internet gambling is only minimal and not likely to increase rapidly in the near future. The incidence of Internet gambling is still extremely low, despite easy availability for a number of years now. It appears the high degree of distrust of financial transactions on the Internet (74%), along with concern about the honesty of overseas based gambling sites (73%) act as a likely barrier to any large scale usage. It would seem logical that, if the level of trust in Internet transactions increased, then so too would the use of the Internet as a gambling opportunity.

The survey also shows that there is also an amount of displacement in terms of participation in various gambling types. For example the large involvement rate in Casino gambling (27%) in Western Australia, due to the lack of poker machines in Clubs or Hotels. As such while accessibility may increase gambling involvement, it will also displace an amount of usage from other previously available forms. Evidence the relatively low level of participation in Casino gambling in NSW (13%), compared to the hefty involvement in gambling at clubs or hotels (43%). Hence by induction, Internet gambling when available is not necessarily introducing a new form of gambling, but rather a new mechanism for accessing existing forms of gambling currently available in most states.

Finally, an overwhelming majority of people showed little or no interest in Internet gambling, while the majority would have no great opposition if a ban was introduced.

1.0 OBJECTIVES

It is widely agreed that problem gambling in Australia has strong negative social and economic consequences. Recent studies have identified an increase in problem gambling in Australia (paralleling trends in the U.S. and elsewhere), coinciding with an increase in access to gambling, including Internet gambling.

While there does not appear to be a clear consensus on so-called 'linking mechanisms', a number of other international studies appear to have established a positive relationship between problem gambling and access to gambling. The latter, coupled with the steadily increasing household access to the Internet, as well as an increasing number of local and off-shore gambling sites, has given rise to questions of the possibility of regulation of Internet access to gambling sites.

This survey will make a contribution to policy through shedding light on the following key matters:

1. Compliance/Enforcement issues relating to the degree to which individuals would engage in gambling activity (e.g. offshore) in the presence of a ban.
2. The perceived relationship between regulation/accessibility and people's use, both actual and prospective, of interactive gambling sites
3. General perceptions of and propensity for on-line gambling, as a whole and as related to demographics

Overall the essential elements of the survey is to examine opinions, attitudes and behaviours of Internet users and gamblers. From these measures, inferences about expected behaviour of these groups in relation to Internet gambling under the condition of a ban on local sites will be drawn.

2.0 METHODOLOGY

The project brief set out specific objectives to be addressed in the survey. These issues were discussed and expanded in an initial meeting with representatives from the Commonwealth Department of Family and Community Services (FaCS). The consultant then developed a draft survey to meet these objectives. The draft was refined in consultation with the project co-ordinator. An extensive pilot test was then carried out to refine the questionnaire and to ensure that the response categories covered the breadth of response likely to occur.

The final questionnaire was then implemented by telephone in IRIS Research's purpose built CATI facility which provides extensive data checking and respondent streaming within the interview situation, along with detailed records of individual call outcomes and overall response to the survey. A copy of the questionnaire is provided in Appendix I.

The survey was nationally based, with a set response of 1000 interviews with persons who had either gambled or used the Internet in the past 12 months. Only persons 18 years of age or older were to be interviewed. Given the level of response required, 5 State based strata were developed to ensure proportional representation from all areas. The smaller States or Territories were collapsed with the most suitable adjacent area as only 20 to 30 interviews would be required, which was not large enough for them to stand on their own.

TABLE 2.1: STATE BASED STRATA

Area	States	ERP* 18+yrs	Percentage
1	NSW & ACT	5,061,153	35.5
2	Victoria & Tasmania	3,920,361	27.5
3	Queensland	2,606,287	18.3
4	Sth Australia & Nth Territory	1,271,183	8.9
5	Western Australia	1,380,805	9.7

** 1999 ABS Estimated Resident Population – Preliminary Estimates.*

The most recent ABS State based population estimates (1999 preliminary), were used to produce the sampling targets for the survey. Each stratum had a pre-derived target for total number of interviews required. In addition, age by sex quotas were set for each of the five key survey areas to ensure a broad and representative cross section of respondents was achieved. The tight time frame originally set for the project meant that this was the most reliable procedure for generating a representative response, as all fieldwork had to be completed in eight days.

Initially, the brief required that only persons who had gambled or used the Internet in the past 12 months were required to be interviewed on their attitudes to Internet gambling. However, given that all respondents would be asked a full range of targeting questions on both their gambling and internet behaviour, the survey was expanded so that ‘all’ persons were asked the key questions on their attitudes to Internet Gambling (Q10q to Q14a). This was important as people may be connecting to the Internet in the future, or may have a different opinion to Internet gambling compared to other forms of gambling due to distance, access etc.

Given these considerations, a total response of 1,250 was initially set for the survey as previous data had shown that around 80% of people were involved in some form of gambling pursuit. This was later revised to 1,200, as there was quite a component of Internet users who did not gamble, resulting in a substantially larger proportion of respondents being in target for the full survey.

The final response targets for each State based on 1,200 respondents overall are detailed below.

TABLE 2.2: RESPONSE TARGETS BY STATE

Area	States	Target
1	NSW & ACT	427
2	Victoria & Tasmania	330
3	Queensland	220
4	Sth Australia & Nth Territory	107
5	Western Australia	116

The electronic white pages formed the basis of the sampling frame for the survey. An initial sample of numbers was taken for each State area. These numbers were then supplemented with a set of generated numbers using a derivative of the half open interval method to produce a set of 'unlisted' numbers to allow for private lines, or those yet to be added to the white pages listing. Previous experience with this method has shown that between 10% and 20% of the response, depending on the area will be obtained from these generated (unlisted) numbers.

Experienced IRIS telephone interview staff were used to conduct the survey. Interviewing commenced on Friday, 1st September 2000 and was completed by Sunday, 10th September 2000. During the week, interviews were conducted between 4.30pm and 8.30pm to maximise the chance of contacting respondents. On weekends, interviews were conducted between 10.00am and 5.00pm. The presentation of telephone numbers was randomised. The respondent in each dwelling was either self selected or else specifically targeted to fill available age by sex quota groups.

Up to five extra retries were made to a particular dwelling before it was listed as a non-contact. Retries spanned at least two different evenings and four different time periods. Callbacks were also organised when a target individual was not available, or where the survey could not be completed at the time of initial contact.

Only persons aged 18 years or older, residing in a dwelling that was permanently occupied for a majority of the year was interviewed. Business establishments or visitors to a dwelling were not included.

3.0 RESPONSE CHARACTERISTICS

A total of 1,183 interviews were achieved by the end of the allocated survey period. These were virtually in line with the quotas laid down at the commencement of the survey. A good age by sex distribution was achieved in each of the five survey areas, although some variation did occur, particularly for the 18-24 years age group.

TABLE 3.1: STATE BASED RESPONSE

Area	States	Response	Percentage
1	NSW & ACT	422	35.7
2	Victoria & Tasmania	317	26.8
3	Queensland	207	17.5
4	Sth Australia & Nth Territory	108	9.1
5	Western Australia	129	10.9

The survey received a compliance rate (interviews as a percentage of interviews plus refusals) of just over 59%, which is considered quite reasonable for this type of survey. Compliance rates appear to fall in major metropolitan areas meaning that a national survey like this will not enjoy the level of response that might be achieved in a regional area. For example, a rate of 65-70 percent is more common in a place like Wollongong.

In addition some people appeared reluctant to respond to an issue like gambling. To overcome these objections, people were told that 'it is important that we speak to all people, whether they gamble or not'.

As a further measure to ensure a reasonable compliance rate, all initial refusals were recalled on a subsequent day to stress the importance of giving all people an opportunity to respond. This strategy proved quite successful with 14% of initial refusing dwellings becoming a respondent at a later date

Despite specific quotas being set for State areas as well as age by sex, some variation did occur between the desired and achieved distribution of response. As such the survey response was weighted to fully coincide with the 1999 ABS Estimated

Resident Population (preliminary estimates) data for Australia. The impact of this weighting procedure was quite minimal, usually resulting in a variation of no more than 1 percentage point from the response achieved in the raw data. Weighting was utilised simply to guarantee a completely accurate profile of respondents by age and sex across Australia. The difference between the 2 response bases is shown in Table 3.2, which also shows the actual sample size for each of the State areas.

**TABLE 3.2: ACTUAL AND WEIGHTED RESPONSE BY AGE AND SEX
(Number of respondents)**

New South Wales	Survey Response		Weighted Response	
	Male	Female	Male	Female
18-24 yrs	25	17	28	27
25-34 yrs	42	45	42	43
35-44 yrs	47	47	43	43
45-54 yrs	39	40	38	37
55-64 yrs	26	24	25	25
65+ yrs	29	41	31	39
Total	208	214	207	214

Victoria-Tasmania	Survey Response		Weighted Response	
	Male	Female	Male	Female
18-24 yrs	17	15	22	21
25-34 yrs	33	37	33	33
35-44 yrs	34	33	33	33
45-54 yrs	26	34	28	29
55-64 yrs	20	19	19	19
65+ yrs	17	32	24	31
Total	147	170	159	167

Queensland	Survey Response		Weighted Response	
	Male	Female	Male	Female
18-24 yrs	6	11	15	15
25-34 yrs	21	23	22	22
35-44 yrs	21	23	22	22
45-54 yrs	23	19	20	19
55-64 yrs	13	13	13	12
65+ yrs	16	18	15	18
Total	100	107	107	109

Sth Aust–Nth Terr	Survey Response		Weighted Response	
	Male	Female	Male	Female
18-24 yrs	5	7	7	7
25-34 yrs	10	10	11	10
35-44 yrs	11	14	11	11
45-54 yrs	9	9	9	9
55-64 yrs	7	7	6	6
65+ yrs	8	11	8	10
Total	50	58	52	53

Western Australia	Survey Response		Weighted Response	
	Male	Female	Male	Female
18-24 yrs	8	8	8	8
25-34 yrs	8	14	12	12
35-44 yrs	15	18	12	12
45-54 yrs	13	11	11	10
55-64 yrs	7	8	7	6
65+ yrs	8	11	7	9
Total	59	70	57	57

Total Australia	Survey Response		Weighted Response	
	Male	Female	Male	Female
18-24 yrs	61	58	80	77
25-34 yrs	114	129	120	120
35-44 yrs	128	135	121	122
45-54 yrs	110	113	106	104
55-64 yrs	73	71	70	69
65+ yrs	78	113	85	108
Total	564	619	583	600

Apart from age, sex and State area, one other key demographic variable is also used in the analysis, based on metropolitan, urban or rural location of the respondent. This variable has been termed ‘physical location’ for use in this report. This variable had 3 elements and was composed in the following manner:

- ◆ **Metro.** Persons who live in a State or Territory Capital City. That is, Sydney, Melbourne, Brisbane, Adelaide, Darwin, Perth, Hobart and Canberra.
- ◆ **Other Urban** Persons living in any other urban city, town, village or locality as identified by the respondent.
- ◆ **Rural** Respondents who identified themselves as living on a rural farm or property.

The distribution of response across this variable is shown in Table 3.3.

TABLE 3.3: LOCATION OF RESPONDENT

Location	Response	Percentage
Metropolitan	654	55.3
Other Urban	397	33.5
Rural	132	11.2

4.0 PARTICIPATION IN GAMBLING PURSUITS

4.1 LEVEL OF PARTICIPATION

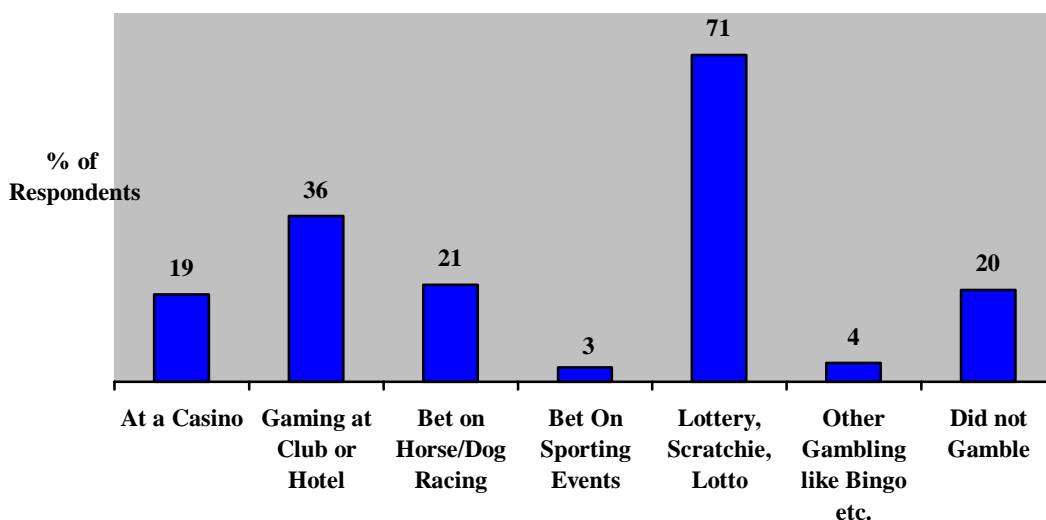
Figure 4.1 demonstrates the incidence of gambling in various activities across Australia. Eighty percent of people surveyed indicated they had at least "gambled" once in the past 12 months. This finding was consistent with the Productivity Commission's National Gambling Survey (1999) which suggested 82% of Australian adults participated in at least one gambling activity in the last 12 months.

By far the highest incident of gambling was found to be in lottery tickets, scratchies, lotto or pools etc. In fact, 28% of people surveyed indicated this was the only form of gambling they had participated in the past 12 months.

Playing poker machines, keno or other gaming machines at a club or hotel achieved the next highest participation level at 36%. One in five respondents indicated they had played gaming tables, poker machines or other gambling pursuits at a Casino or bet on horse or dog racing in the last 12 months.

The participation levels in individual gambling forms were consistent with the findings of the National Gambling Survey (1999).

FIGURE 4.1: PARTICIPATION IN GAMBLING IN LAST 12 MONTHS - AUSTRALIA



Western Australian respondents reported the highest incidence of gambling at a Casino in the past 12 months (refer to Table 4.1). The likely explanatory factor for this finding is that poker machines access in this State is much more limited than in other States, being only available in Casinos. Residents of NSW and the ACT reported the lowest incidence of participation of a gambling activity at a casino.

In contrast, 43% of NSW/ACT residents indicated they had participated in gaming activities at a club or hotel. The eight percent reported by Western Australian residents is in line with the limited access to poker machines.

Participation in lottery, scratchies, lotto and pools etc., was reported to be highest amongst residents of Queensland, South Australia/Northern Territory and Western Australia.

The proportion of "non gamblers" identified was similar throughout the States and Territories of Australia.

TABLE 4.1: PARTICIPATION IN GAMBLING BY STATE/TERRITORY
(% of respondents in State area)

Gambling Pursuit	NSW/ACT	VIC/TAS	QLD	SA/NT	WA	Aust
Gambling at a Casino	13	23	18	16	27	19
Gambling at a club or hotel	43	35	42	28	8	36
Bet on horse or dog racing	22	20	22	16	22	21
Bets on sporting events	4	2	4	2	5	3
Lottery, scratchie, lotto etc.	66	67	76	77	78	71
Other gambling like bingo etc	3	5	4	4	5	4
Did not gamble	22	22	17	20	17	20

Question: Which of the following activities have you participated in over the past 12 months?

4.2 CHARACTERISTICS OF PARTICIPATION

Access proved to be critical with the level of participation in gambling at a Casino, as respondents located in metropolitan areas reported higher levels. In comparison, no significant difference was found between respondents location and participation levels in Gambling at a club or hotel, betting on sporting events and buying lottery, scratchies or lotto tickets. However, respondents located in urban areas, outside of Metropolitan State capitals, reported a higher participation in betting on horse or dog racing.

Respondents living in rural areas reported the highest level of non-gambling in the last 12 months.

TABLE 4.2: PARTICIPATION BY PHYSICAL LOCATION, GENDER AND AGE
(% of respondents in group shown)

a. Participation by Location and Gender	Metro	Other Urban	Rural	Male	Female
Gambling at a Casino	22	14	16	18	19
Gambling at a club or hotel	34	41	31	36	36
Bet on horse or dog racing	19	26	16	25	17
Bets on sporting events	3	4	2	5	2
Lottery, scratchie, lotto etc.	70	74	64	69	72
Other gambling like bingo etc	4	5	3	2	6
Did not gamble	21	17	29	21	20

b. Participation by Age group	18-24	25-34	35-44	45-54	55-64	65+
Gambling at a Casino	34	25	14	18	10	11
Gambling at a club or hotel	51	39	34	34	32	28
Bet on horse or dog racing	18	27	21	23	23	11
Bets on sporting events	7	5	3	3	0	1
Lottery, scratchie, lotto etc.	55	74	78	75	66	68
Other gambling like bingo etc	7	5	4	2	3	5
Did not gamble	22	15	16	21	27	27

Question: Which of the following activities have you participated in over the past 12 months?

The level of participation in gambling activities was in some cases linked to age differences, whereas, apart from betting on horse or dog races, females are just as likely as males to participate in the various forms of gambling.

People aged above 55 years tended to participate in gambling activities at a noticeably lower level than the rest of the adult population. If we examine specific gambling pursuits, some trends emerge:

- people gambling at a Casino were more likely to be aged 18-34 years;
- over half of the respondents aged 18-24 years had played gaming machines at a club or hotel in the past 12 months;
- males were more likely than females to bet on horses or dog racing;
- lotteries, scratchies, lotto and pools etc. were most popular amongst respondents aged 25-54 years.
- At least 28% or more people in any age group are involved in gambling at a club or hotel.
- Apart from 18-24 year olds, around two thirds or more of people in each age group are involved in lottery, lotto, scratchies or other soft forms of gambling.

4.3 TYPES OF ACTIVITIES PARTICIPATED IN

Gambling at a Casino

Respondents who indicated they had gambled at a casino in the past 12 months were asked to indicate the type of activities they had played. Fifty percent of "casino" gamblers indicated they had played gaming tables and 69% had played the poker machines at a casino venue.

Interestingly, 22% and 41% respectively indicated they visited the casino to only play gaming tables or poker machines respectively.

Table 4.3 demonstrates that participation in gaming table activities is biased toward the younger age groups (less than 34 years) and significantly towards males. Respondents playing poker machines were more likely to be female. Higher participation levels in poker machine gambling were found for casino visitors aged 65 years or more.

TABLE 4.3: ACTIVITIES PARTICIPATED IN AT CASINO BY AGE AND GENDER
(% of people gambling at a Casino)

	Total Participation (% of resps)	Gaming Tables	Poker Machines	Bet on Horse Racing	Keno/Other Electronic Games	Sports Betting
Age						
18-24 yrs	34	52	76	8	11	4
25-34 yrs	25	70	58	5	26	0
35-44 yrs	14	53	72	9	10	3
45-54 yrs	18	39	66	10	29	3
55-64 yrs	10	22	78	8	12	0
65+ yrs	11	26	80	11	28	0
Gender						
Male	18	74	56	12	21	3
Female	19	28	83	4	18	1
Total Persons	19	50	69	8	20	2

Question: Which activities do you play when you visit the Casino?

Gambling at a Club or Hotel

Persons indicating that they had gambled at a club or hotel were asked whether the key reason for the visit was to gamble, or whether gambling formed part of the activities they undertook while they were visiting. Clearly it appears that playing of poker machines or other forms of gambling are very much part of the broader social use of a club or hotel. In all, close to 90% of respondents gamble while they are visiting a club or hotel, gambling is not the primary reason for their visit.

This was a fairly consistent attitude across all states, although Victoria had a higher proportion (13%) who had visited primarily to gamble. This also applied to people from rural areas with 14% going there to gamble. Of interest, people aged 18-24 years were more likely to have visited for social or other reasons rather than just to gamble.

**TABLE 4.4: CLUB OR HOTEL VISITED TO PLAY GAMBLING FACILITIES?
(% of people gambling at a Club/Hotel)**

Characteristics	Yes to play	Sometimes to play	No, play while there
State			
NSW/ACT	5	6	88
VIC/TAS	13	2	86
QLD	3	1	96
SA/NT	6	4	90
WA	7	0	93
<i>Aust</i>	7	4	89
Location			
Metro	7	4	88
Other Urban	5	2	93
Rural	14	5	81
Age			
18-24 yrs	2	1	97
25-34 yrs	7	5	87
35-44 yrs	10	5	85
45-54 yrs	9	5	86
55-64 yrs	7	0	94
65+ yrs	7	4	89
Gender			
Male	5	4	91
Female	8	4	88

Question: Do you mainly visit the Club or Hotel to play the gaming machines or do you simply play them while you are there?

Betting on Horse or Dog racing

Respondents who indicated they had bet on horse or dog racing in the past 12 months were asked to indicate which facilities they used to place the bets. In person at the TAB proved to be the most popular facility, with almost 80% nominating this outlet. In fact, 56% of respondents gambling on horse or dog races indicated they only place bets in person at the TAB.

TABLE 4.5: FACILITIES USED TO PLACE BETS ON HORSE OR DOG RACES
(% of people gambling on Horse or Dog races)

Characteristics	Total Participation (% of resps)	Bookmakers /Tote at Track	In Person at TAB	By Telephone with TAB	Internet
State					
NSW/ACT	22	26	74	10	2
VIC/TAS	20	40	79	19	0
QLD	22	27	85	6	0
SA/NT	16	44	77	17	6
WA	22	26	88	3	0
<i>Aust</i>	<i>21</i>	<i>31</i>	<i>79</i>	<i>11</i>	<i>1</i>
Location					
Metro	19	29	78	14	2
Other Urban	26	32	77	9	1
Rural	16	39	95	10	0
Age					
18-24 yrs	18	30	77	7	0
25-34 yrs	27	32	81	13	0
35-44 yrs	21	33	80	8	4
45-54 yrs	23	34	76	13	2
55-64 yrs	23	31	75	16	0
65+ yrs	11	21	87	9	0
Gender					
Male	25	36	79	13	2
Female	17	24	80	10	0

Question: Which of the following facilities have you used to place bets on the horse racing in the past 12 months?

Respondents located in Queensland and Western Australia reported the highest personal use of the TAB to place bets. Also, people located in rural properties and farms indicated higher usage levels for the local TAB agency.

Eleven percent of respondents who gambled on horse or dog racing indicated they had placed a bet with the TAB by telephone in the last 12 months, while only 1% had used

the TAB Internet facility. This translates into around 2-3% of all people surveyed had lodged a horse or racing bet in the last 12 months from a remote access site (i.e. telephone/internet), although the Internet component was only around 0.2% of total respondents.

The frequency of use of remote access sites (telephone/internet) to lodge racing bets was highest amongst respondents in South Australia/Northern Territory.

4.4 FREQUENCY OF PARTICIPATION

The survey found that of those respondents who participated in at least one form of gambling activity, 34% gambled less than once a month, 33% gambled one to three times a month, 30% gambled one to three times a week and 3% gambled more than three times a week.

The frequency of gambling was highest amongst respondents who buy lottery, scratchie or lotto or pool tickets, with 60% pursuing this activity at least once a month.

Ninety-one percent of people gambling at a casino indicated they do so less than once a month, with two-thirds gambling only once or twice in the past 12 months.

The frequency of playing gaming machines at a club or hotel was reported to be relatively high, with 36% of respondents participating in this activity, doing so at least once a month.

TABLE 4.6: FREQUENCY OF GAMBLING ACTIVITY
(% of people involved in each form of gambling)

Form of Gambling	Total Participation (% of resps)	Less than Once a Month	1-3 Times a Month	1-3 Times a Week	More than 3 Times a Week
At Least One Activity	80	34	33	30	3
Gambling at a Casino	19	91	8	1	0
Gambling at a club or hotel	36	68	25	5	1
Bet on horse or dog racing	21	75	16	7	2
Bets on sporting events	3	79	21	0	0
Lottery, scratchie, lotto etc.	71	40	39	20	1
Other gambling like bingo etc	4	63	18	17	2

Question: How many times have you been gambling at (activity) in the past 12 months?

Appendix II contains a set of tables, which show the frequency of gambling for each activity type by State or Territory of respondent, Location, age group and gender. Generally the findings were relatively consistent across each characteristic, although the differences that were noticed have been detailed below. The interested reader should consult the Appendix for the actual figures.

People located in Western Australia tended to gamble more frequently than the rest of the country. Seventy-seven percent of Western Australian respondents participated at least monthly in a gambling activity. This proportion was 10 percentage points above the next highest State, Queensland with 67%.

The Western Australian finding is likely to be linked to the above average frequency of respondents buying lotteries, scratchies, lotto tickets and playing casino activities.

The main difference between people living in urban and rural locations was that people living on a rural property or farm who gambled at a casino tended to participate on a more frequent basis. As access would be a factor here, this finding is more likely to be linked to the casino being a key novel attraction linked with visits to the city by rural residents.

Respondents aged 45 years or above tended to gamble more regularly. Playing gaming machines at a club or hotel and buying lottery, scratchies or lotto tickets were the pursuits more regularly participated in by these age groups. In addition, respondents aged 55 years or above tended to gamble more frequently on horse or dog racing than the other age groups.

Frequency of gambling by gender revealed some minor differences. While no gender bias towards overall gambling participation was established, males tended to gamble more regularly, mainly linked to the frequency of betting on horse or dog racing.

4.5 SPENDING ON GAMBLING

Figure 4.3 illustrates the distribution of spending on gambling activities across Australia. Overall, 61% of those who pursued at least one gambling activity in the last 12 months spent \$5 or less a week. This represents 49% of all persons surveyed.

The level of expenditure was linked with the type of gambling activity pursued. For respondents who only purchased lottery, scratchies, lotto or pools tickets, 83% spent \$5 or less a week. In comparison, for respondents pursuing other gambling activities (gaming and wagering), 51% spent \$5 or more a week.

FIGURE 4.2: ANNUAL SPENDING ON ALL GAMBLING ACTIVITIES

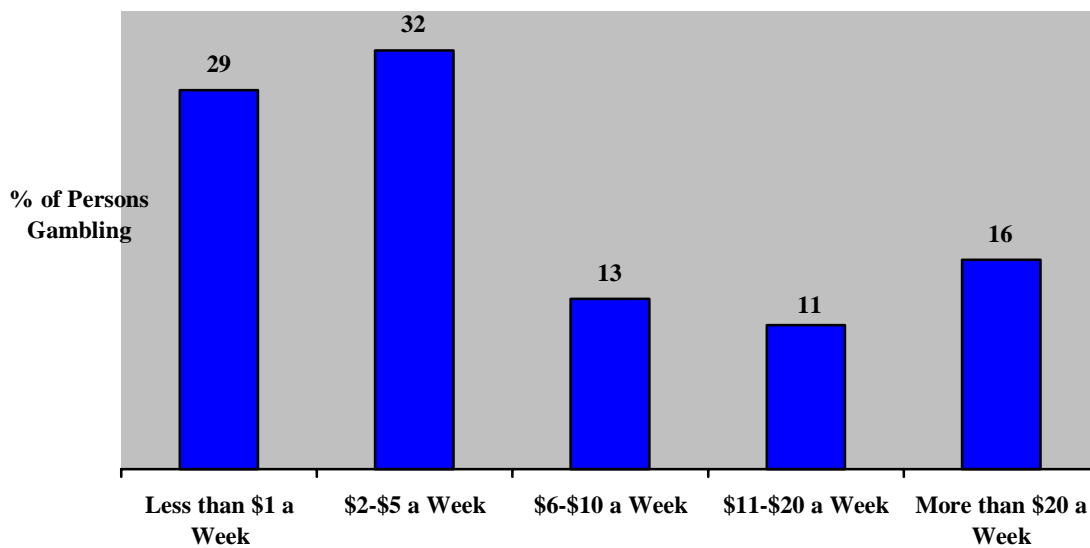


Table 4.7 examines annual spending on gambling by characteristics of respondents.

No significant differences were found by State, location, or age of respondent based on this classification of spending.

However, a gender bias was established with males tending to annually spend more on gambling than their female counterparts.

TABLE 4.7: ANNUAL SPENDING ON GAMBLING BY GAMBLER CHARACTERISTICS

	Total Participation (% of resps)	% of all gamblers in group shown				
		Less than \$1 a Week	\$2-\$5 a Week	\$6-\$10 a Week	\$11-\$20 a Week	More than \$20 a Week
State						
NSW/ACT	78	29	33	10	11	17
VIC/TAS	78	31	30	14	10	16
QLD	83	29	34	13	9	16
SA/NT	80	30	30	21	10	9
WA	83	21	32	15	15	17
<i>Aust</i>	80	29	32	13	11	16
Location						
Metro	89	27	33	15	10	16
Other Urban	83	29	31	12	12	15
Rural	71	36	31	7	10	17
Age						
18-24 yrs	78	35	38	10	7	10
25-34 yrs	85	32	29	14	11	15
35-44 yrs	84	30	27	18	7	18
45-54 yrs	79	25	35	12	11	17
55-64 yrs	73	24	31	9	17	20
65+ yrs	73	25	36	12	14	13
Gender						
Male	79	24	31	12	13	20
Female	80	33	33	14	8	11

The following figures demonstrate the median expenditure on gambling by characteristic of respondent. Figure 4.3 includes all persons interviewed in the survey (i.e., also non-gamblers) while Figure 4.4 refers to only respondents who gambled in at least one of the activities listed. Both figures utilise the median measure.

The median is the value that divides the set of data in half, 50% of values being below it and 50% above it. Since it splits the observations into two halves, it is sometimes called the middle value. The median is used in place of the average when the response contains extreme values that may unduly inflate the average. For example, one respondent spending \$10,000 per annum would inflate the average spend of 1,000 respondents by \$10. In this instance the median is considered a better measure of central tendency.

Overall, the median annual expenditure per person on all gambling activities was reported to be \$100. For gamblers only, this figure increased to \$180. Both diagrams

indicate residents of Western Australia gamble more per person than the rest of the country.

FIGURE 4.3: MEDIAN ANNUAL SPENDING PER PERSON ON ALL GAMBLING ACTIVITIES (INCLUDES NON GAMBLERS)

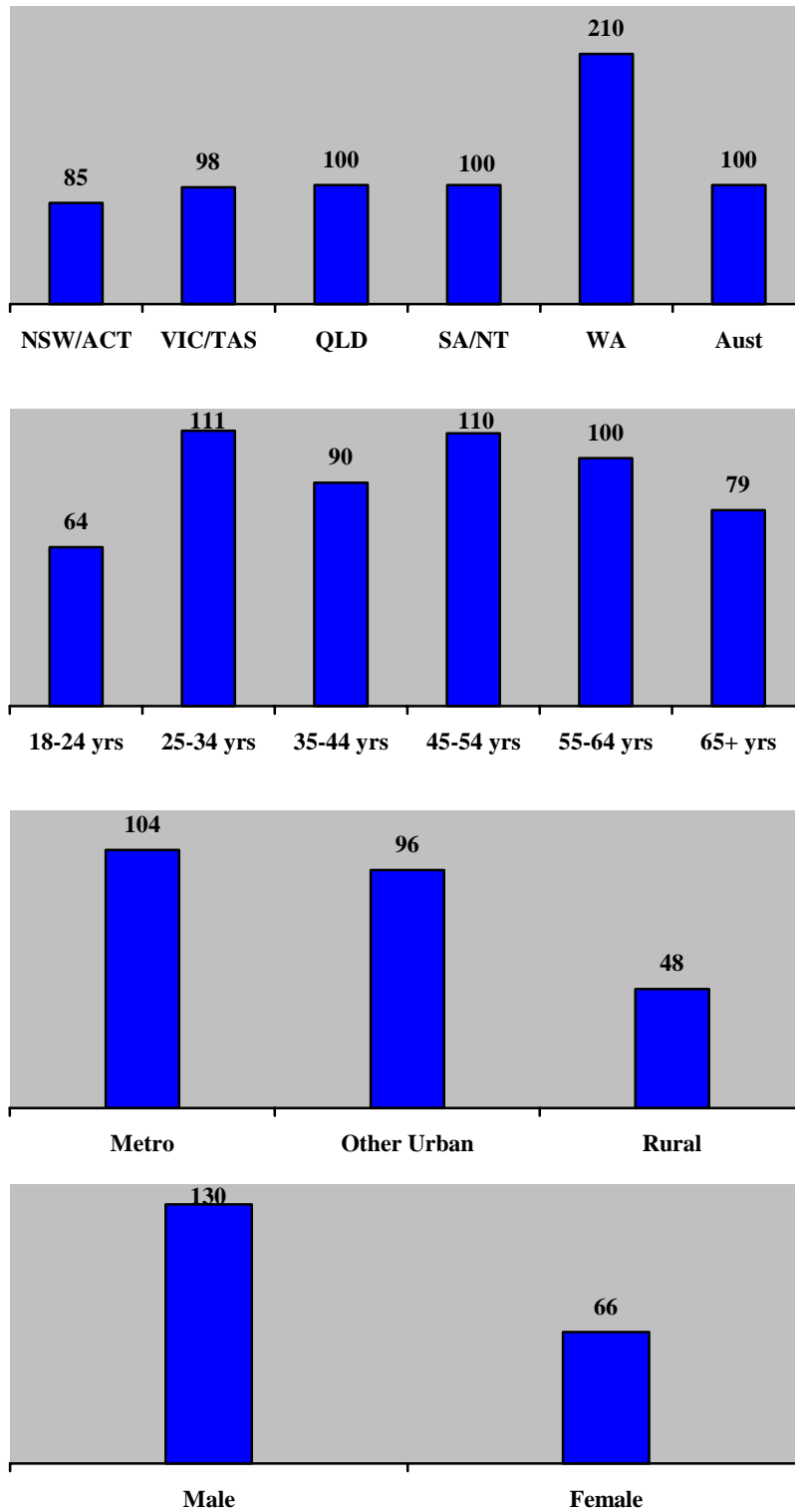
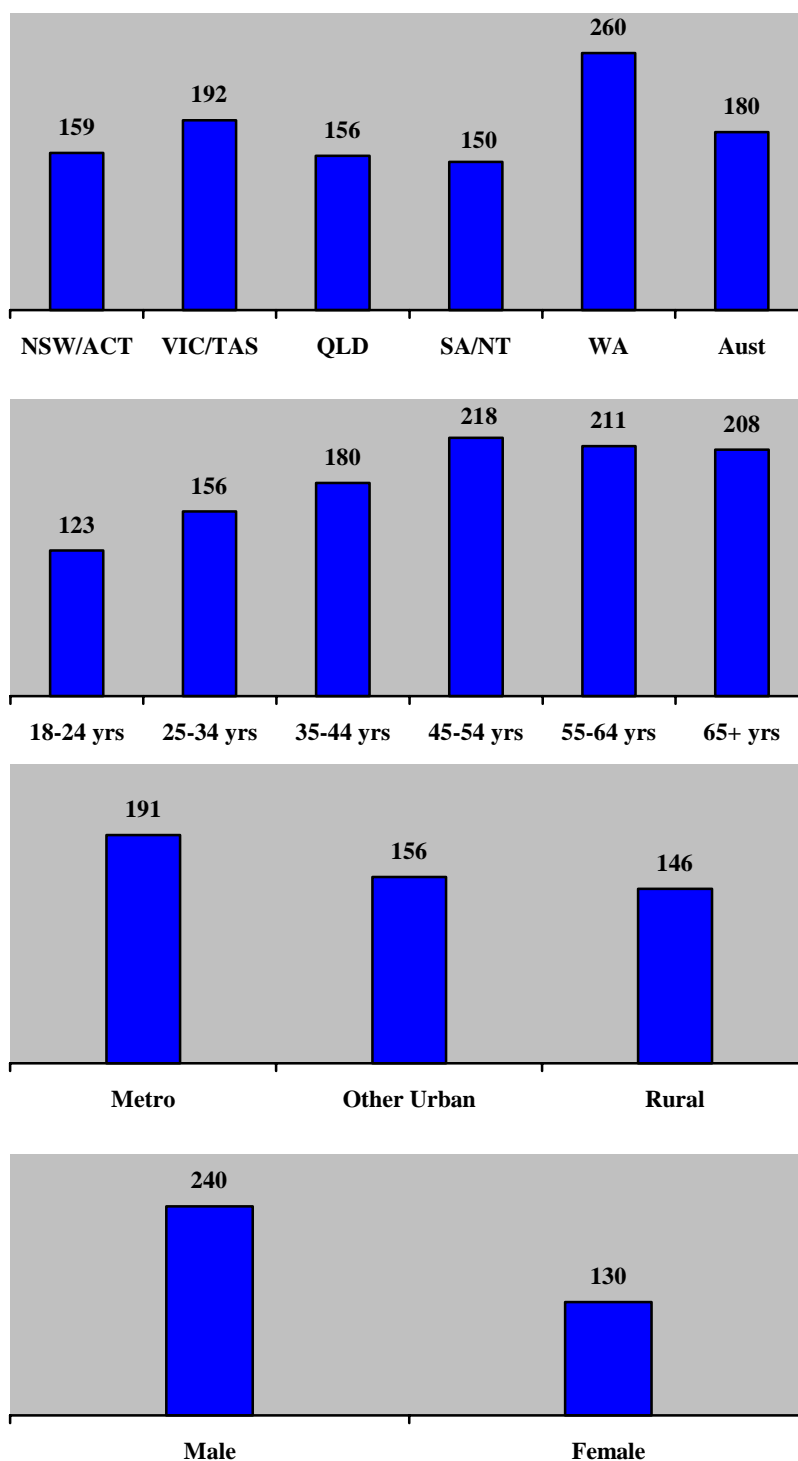


FIGURE 4.4: MEDIAN ANNUAL SPENDING PER GAMBLER ON ALL GAMBLING ACTIVITIES



The breakdown of respondent expenditure on gambling by location may explain the higher median expenditure levels for Western Australian residents. Overall, people who gambled and lived in major metropolitan regions gambled to an annual median level of \$191. This compares to \$156 and \$146 for respondents living in other urban

centres or on a rural property or farm. It should be noted that 80% of respondents for Western Australia resided in the Perth metropolitan area, a rate much higher than the 55% reported across Australia. However, again, Western Australian respondents living in the metropolitan area had a much higher expenditure level on gambling than metropolitan respondents in other States.

A further explanation is the level of participation and spending on various forms of gambling activities. The proportion of those sampled outside of Western Australia who played poker machines in a club was approximately 39%, as opposed to 8% of those sampled within Western Australia (were it not for interstate travel, this figure would be zero). The proportion of those outside of Western Australia who played at the gaming tables or machines in a Casino was 17%, as opposed to 26% for Western Australia. The total proportion of people who played at a gaming table or a machine at either a Casino or Club among the Non-Western Australian group was 43%, as compared to 27% for the Western Australian group.

It should be mentioned, however, that the total proportion of people who had engaged in one form of gambling or another (including wagering, lotteries, etc.) was approximately 80% for both groups, with the weighted median (which is the median of the positives, expressed relative to the total population) total annual spend being \$215 in Western Australia, as compared with \$150 overall, with the difference being accounted for by the difference in spending on Lotteries (\$160 in Western Australia, as opposed to \$75 elsewhere).

Thus, if respondents' reporting is accurate, it appears that limited access to certain forms of gambling in Western Australia did relate to decrease in gambling activity on those forms, but not relate to an overall decrease in gambling activity due to an increase in activity in other forms.

Finally, the age and gender analysis showed respondents aged 25-34 and 45-54 years old reported the highest expenditure on gambling activities. Males were found to spend twice as much per annum on gambling than females.

4.6 ACCESS TO GAMBLING

Eighty-one percent of people surveyed indicated it would take them up to 10 minutes to get from their home to the nearest venue that some form of gambling activity. Sixty percent indicated a trip of 5 minutes or less.

Residents of Western Australia suggested they had the furthest to travel, with 31% suggesting the trip would take 16 minutes or more.

People surveyed in rural areas also reported longer trips to the nearest gambling venue, with 39% indicating the trip would take 16 minutes or more. The length of trip was also biased towards people aged 55 years and above, suggesting mobility is likely to be an issue amongst this group.

TABLE 4.8: TIME REQUIRED TO REACH NEAREST GAMBLING VENUE
(% of respondents in group shown)

	5 minutes or Less	6-10 minutes	11-15 minutes	16 minutes or More
State				
NSW/ACT	61	24	7	8
VIC/TAS	62	19	6	13
QLD	59	21	6	15
SA/NT	62	21	8	9
WA	37	21	12	31
<i>Aust</i>	59	22	7	13
Location				
Metro	61	22	8	10
Other Urban	63	22	6	9
Rural	36	18	8	39
Age				
18-24 yrs	62	17	7	14
25-34 yrs	68	20	5	7
35-44 yrs	65	20	6	9
45-54 yrs	57	20	8	15
55-64 yrs	48	26	9	17
65+ yrs	44	27	9	21
Gender				
Male	59	22	6	13
Female	58	21	8	13

Question: How long would it take to get from your home to the nearest venue that offered either gambling tables, poker machines, betting on the races or sports events or some other gambling activity, excluding lotteries, lotto etc?

Respondents were asked how much effort it would require for them to get to a gambling venue if you wanted to, compared to other trips that you usually make, like to the shops, entertainment venues etc. Table 4.9 shows that 84% of people surveyed indicated it would take the "same or less" effort to reach a gambling venue. Again, Western Australian respondents indicate the highest level of difficulty in reaching a gambling venue, even so, a large 70% suggested it would take the same or less effort.

No age, location or gender bias was established.

TABLE 4.9: COMPARISON OF TRIP TIME TO GAMBLING VENUE WITH TRIPS TO SHOPS, OTHER ENTERTAINMENT ETC.
(% of respondents in group shown)

	Less	Same	More
State			
NSW/ACT	24	63	13
VIC/TAS	15	70	15
QLD	20	66	14
SA/NT	17	71	13
WA	5	65	31
<i>Aust</i>	<i>18</i>	<i>66</i>	<i>15</i>
Location			
Metro	18	66	16
Other Urban	21	66	13
Rural	11	72	18
Age			
18-24 yrs	23	63	14
25-34 yrs	21	64	16
35-44 yrs	18	69	13
45-54 yrs	17	67	16
55-64 yrs	11	72	18
65+ yrs	18	65	17
Gender			
Male	18	68	14
Female	19	65	17

Question: How much effort would it require for you to get to that kind of gambling venue if you wanted to, compared to other trips that you usually make, like to the shops, entertainment venues etc?

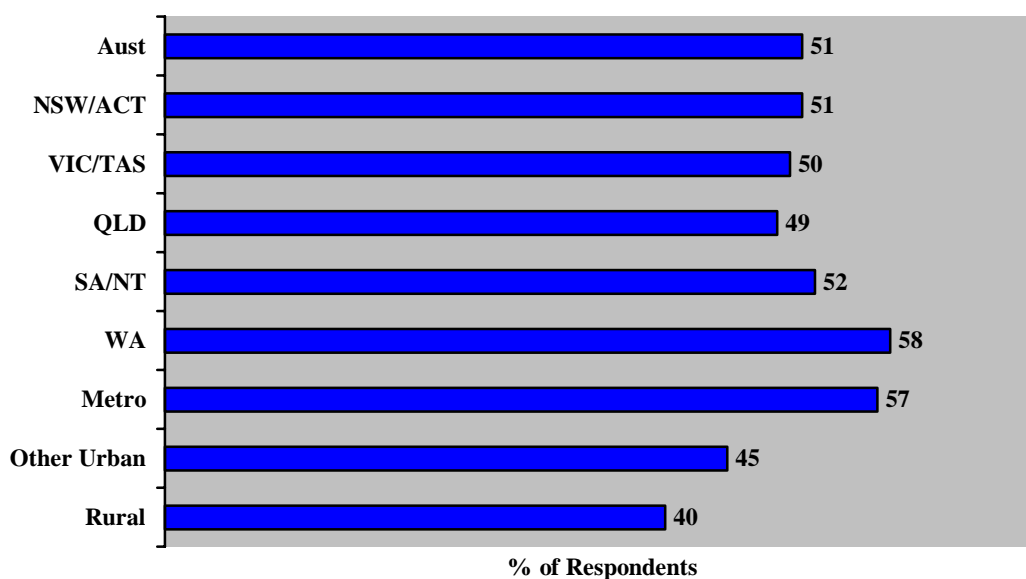
5.0 USAGE OF THE INTERNET

5.1 LEVEL OF USAGE

Fifty-one percent of people surveyed indicated they accessed to the Internet over the past 12 months Rates of access were slightly higher amongst residents of Western Australia, which again is likely to be linked with the concentration of people residing in the State's metropolitan area.

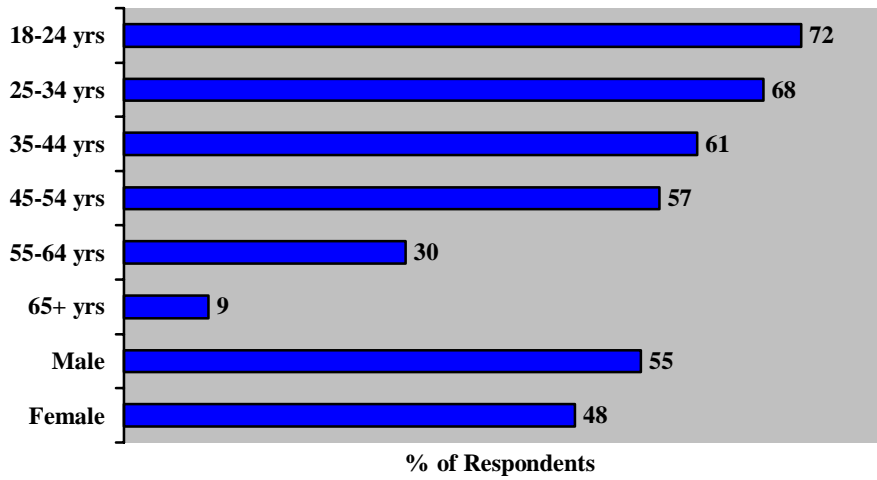
Respondents living in metropolitan areas reported an Internet access rate of 57%, well above respondents living in other urban centres (45%) or on a rural farm or property (40%).

FIGURE 5.1: ACCESS THE INTERNET IN LAST 12 MONTHS BY STATE AND LOCATION



A significant relationship was found between accessing the Internet and age of respondent. Younger people reported a higher usage of the Internet over the past 12 months. A slight gender bias was also established, with males reporting higher Internet usage levels.

FIGURE 5.2: ACCESS TO INTERNET IN LAST 12 MONTHS BY AGE AND GENDER



5.2 POINT OF ACCESS

Seventy-five percent of people who had accessed the Internet over the past 12 months indicated they accessed from home. Western Australia respondents reported the highest access rates from home with 82%.

Work was the next most popular avenue to access the Internet with 36% of respondents indicating they utilised the Internet at work. People living in metropolitan areas reported the highest access rates to the Internet from work. People in the workforce dominated 25-45 year age group also reported much higher levels of access to the Internet at work.

In contrast, education facilities and the library were found to be popular avenues for young people to access the Internet.

TABLE 5.1: WHERE ACCESSED THE INTERNET

	% Access in 12mths	% of users in group shown accessing from ...				
		Home	Work	Educ. Est/ Library	Internet Cafe	Friends/ Relative
State						
NSW/ACT	51	75	39	16	7	12
VIC/TAS	50	73	33	17	4	12
QLD	49	71	31	15	3	16
SA/NT	52	70	52	13	2	12
WA	58	82	31	11	4	8
<i>Aust</i>	<i>51</i>	<i>74</i>	<i>36</i>	<i>15</i>	<i>5</i>	<i>12</i>
Location						
Metro	57	77	39	17	4	11
Other Urban	45	67	33	14	4	16
Rural	40	76	28	9	9	7
Age						
18-24 yrs	72	72	20	45	8	16
25-34 yrs	68	69	44	6	4	16
35-44 yrs	61	75	39	14	3	13
45-54 yrs	57	79	44	6	3	5
55-64 yrs	30	84	25	4	7	7
65+ yrs	9	76	11	6	5	18
Gender						
Male	55	77	37	15	5	13
Female	48	70	34	16	4	11

Question: Where have you accessed the Internet from over the past 12 months?

Forty-two percent of households surveyed Australia wide stated they had the Internet connected at home (refer to table 5.2). The connection rate for Western Australia increased to 50%.

Higher Internet home connection rates were reported by households located in metropolitan areas.

Examining home Internet connection rates by age of respondent suggest rates remain reasonably constant in the family formative years, and only fall markedly once the respondent was aged 55 years or more. A slight gender bias was also established.

The home Internet connection rates found were higher than the May 2000 survey findings of Australian Bureau of Statistics. However, given the different time period, varying methodologies and error rates of the respective samples, the results are not in conflict.

TABLE 5.2: CONNECTION OF THE INTERNET AT HOME
(% of respondents in group shown)

	Internet Connected - Don't Use	Currently Connected - Use	Total Connection Rate
State			
NSW/ACT	5	38	43
VIC/TAS	3	37	40
QLD	5	35	40
SA/NT	6	36	42
WA	2	48	50
<i>Aust</i>	4	38	42
Location			
Metro	4	44	48
Other Urban	4	30	34
Rural	9	30	39
Age			
18-24 yrs	2	52	54
25-34 yrs	3	47	50
35-44 yrs	6	46	52
45-54 yrs	6	45	51
55-64 yrs	7	25	32
65+ yrs	2	7	9
Gender			
Male	4	42	46
Female	5	34	39

5.3 FREQUENCY OF ACCESS

Of people who had accessed the Internet in the past 12 months, 44% used the Internet at least three times a week. The most frequent users of the Internet were located in South Australia/Northern Territory.

Respondents aged 18-24 years and males in general tended to be more frequent users of the Internet.

TABLE 5.3: FREQUENCY OF INTERNET USAGE

	% Access	% of Internet Users in group shown				
		Less than Once a Month	1-3 Times a Month	1-2 Times a Week	3-5 Times a Week	6-7 Times a Week
State						
NSW/ACT	51	20	17	18	16	29
VIC/TAS	50	19	16	24	19	22
QLD	49	25	17	14	21	24
SA/NT	52	24	10	12	40	15
WA	58	23	14	23	20	21
<i>Aust</i>	<i>51</i>	<i>21</i>	<i>16</i>	<i>19</i>	<i>20</i>	<i>24</i>
Location						
Metro	57	19	13	20	20	27
Other Urban	45	22	20	17	21	19
Rural	40	32	14	18	16	20
Age						
18-24 yrs	72	13	18	19	20	30
25-34 yrs	68	22	17	18	18	26
35-44 yrs	61	25	12	21	21	22
45-54 yrs	57	22	18	17	21	23
55-64 yrs	30	21	12	18	28	21
65+ yrs	9	40	18	19	17	5
Gender						
Male	55	17	15	17	25	27
Female	48	26	17	21	15	22

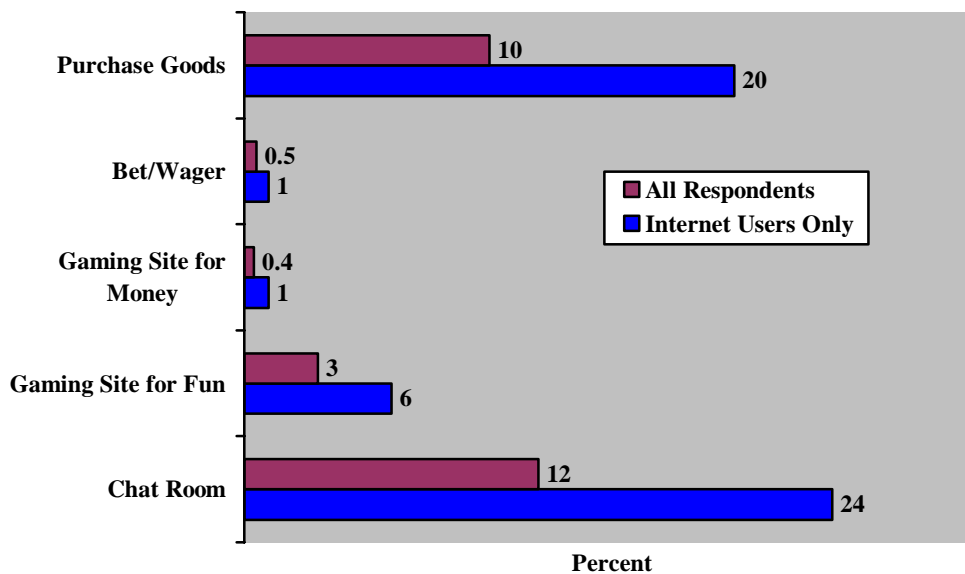
Question: On how many days out of the past 12 months would you have used the Internet?

5.4 TYPES OF USAGE

People who had accessed the Internet in the last 12 months were asked if they had used the Internet to purchase goods or access gambling sites. The results for the nominated uses are shown in Figure 5.3.

Interestingly, 20% of Internet users had purchased goods over the Internet in the past 12 months, which represents 10% of the respondent base in this survey. Only 1% of users (0.4% of respondents) had placed a bet or wager with a betting agency or played a gaming site for money. Six percent had played a gaming site for fun, but not for money.

FIGURE 5.3: TYPE OF INTERNET USAGE - AUSTRALIA



As an exercise, the characteristics of people who had accessed an Internet gambling site were examined, (i.e. bet/wager with a betting agency, play gaming site for money or gaming site for fun). The analysis showed the following:

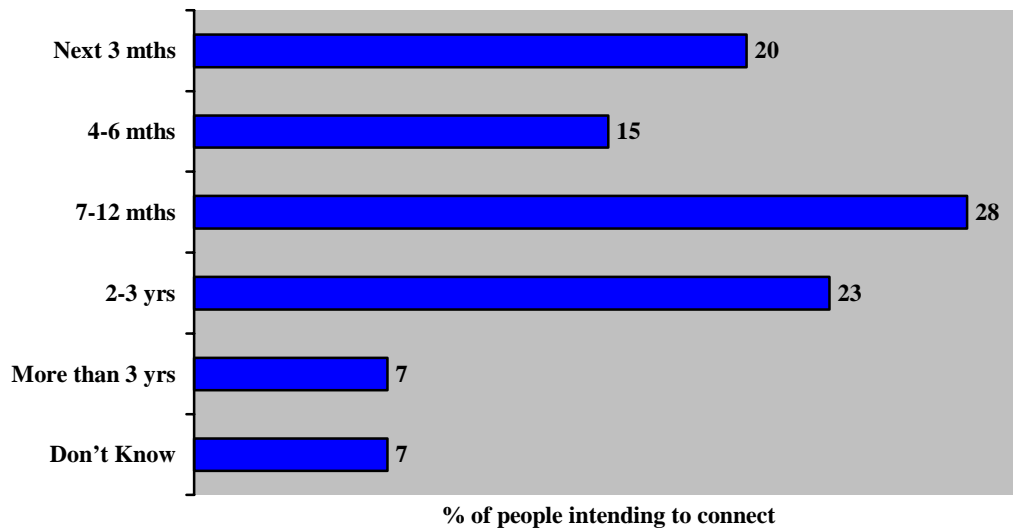
- 4% of all people surveyed fell into this group;
- The profile of respondents generally reflected the distribution of the population by State and location.

- the group was slightly biased towards 18-24 year olds, (compared to the proportion that this group is of the total population). The popularity amongst this age group for playing gaming sites for fun contributed significantly to this result;
- the group was significantly biased towards males, (compared to the proportion that this group is of the total population);
- the group was biased toward people who are involved in gaming and wagering activities as opposed to people who buy lottery tickets, scratchies, lotto, pools etc;
- The group was slightly biased towards people who gamble more regularly and spend larger amounts on gambling activities.

5.5 FUTURE INTENTIONS FOR CONNECTING

Twelve percent of all respondents (28% of households yet to connect) indicated they were likely to connect to the Internet sometime in the future. Of this group, about two thirds suggested they would connect within the next 12 months, with 86% intending to be connected in the next 3 years (refer to figure 5.4).

FIGURE 5.4: WHEN HOUSEHOLD LIKELY TO CONNECT
(% of all persons who intend to connect)



Question: When is your household likely to connect?

Table 5.4 shows estimates of the potential home connection rate of the Internet within the next three years. The analysis reveals that 53% of homes will be connected to the Internet, which is an increase of 11 percentage points over the next three years. Growth is anticipated to be strong amongst respondents living on a farm or rural property.

Dwellings where the household heads are 65 years old or over show very low levels of Internet connection and very little inclination to connect in the foreseeable future. The other age group to lag behind is 55-64 years, however some 14% of dwellings containing these individuals intend to connect in the next 3 years.

TABLE 5.4: POTENTIAL INTERNET USERS AT HOME (WITHIN 3 YEARS)
 (% of respondents in group shown)

	Internet Connected - Don't Use	Likely to Connect within 3 Years	Currently Connected - Use	Potential Connection Rate
State				
NSW/ACT	5	12	38	55
VIC/TAS	3	12	37	52
QLD	5	11	35	51
SA/NT	6	7	36	49
WA	2	8	48	58
<i>Aust</i>	4	11	38	53
Location				
Metro	4	9	44	57
Other Urban	4	11	30	45
Rural	9	15	30	54
Age				
18-24 yrs	2	8	52	62
25-34 yrs	3	9	47	59
35-44 yrs	6	16	46	68
45-54 yrs	6	9	45	60
55-64 yrs	7	14	25	46
65+ yrs	2	7	7	16
Gender				
Male	4	10	42	56
Female	5	11	34	50

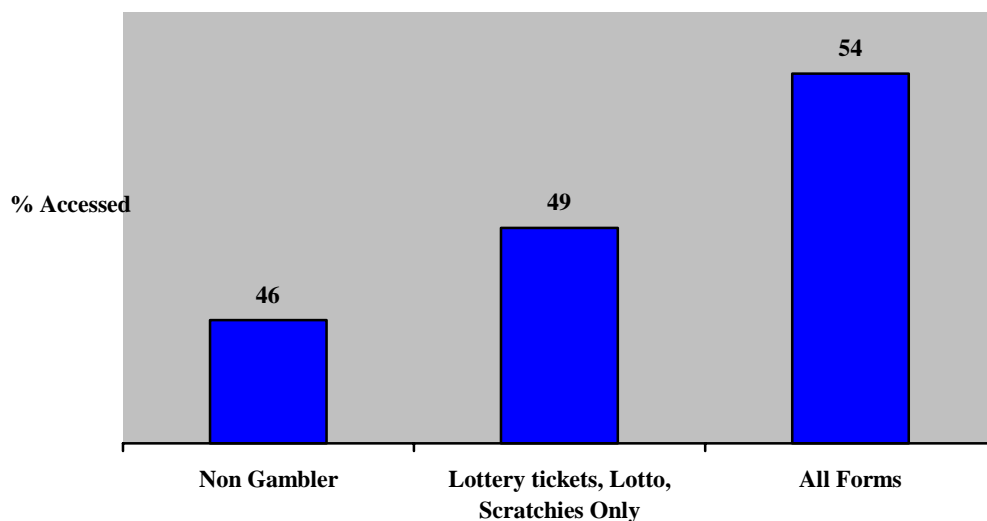
'Don't use' represents a dwelling that is connected to the Internet, which was not used by the respondent in the past 12 months.

5.6 GAMBLING, ACCESS AND THE INTERNET

This section looks at usage of the Internet in relation to people's gambling behaviour, as a means of determining whether there are any links or differences in their habits and that of people who hadn't used the Internet. Figure 5.5 shows the relationship between access to the Internet and forms of gambling undertaken by the respondent. Interestingly, people who did not gamble reported a slightly lower use of the Internet in the past 12 months. When classifying "gambler" into those respondents who only buy lottery, scratchies and lotto tickets, and those respondents who also participate in wagering and gaming activities, slightly different access rates were found. The differences reported proved significant at the 90% confidence level.

This finding however simply shows an association between the characteristics of people who currently use the Internet and those who are involved in the harder forms of gambling (wagering and gaming). Generally a greater rate of involvement by the younger age groups and males rather than females provides the basis of the explanation.

FIGURE 5.5: ACCESS TO INTERNET BY TYPE OF GAMBLER



A further analysis of the frequency and amount of spending on gambling actually reveals that the more regular or big spending gamblers were in fact less likely to be an Internet user. Figure 5.6 shows this association. Some 59% of people who gambled less than once a month had accessed the Internet, compared to a much lower 28% who gambled more than 3 times a week.

FIGURE 5.6: INTERNET ACCESS BY TOTAL FREQUENCY OF GAMBLING IN PAST 12 MONTHS

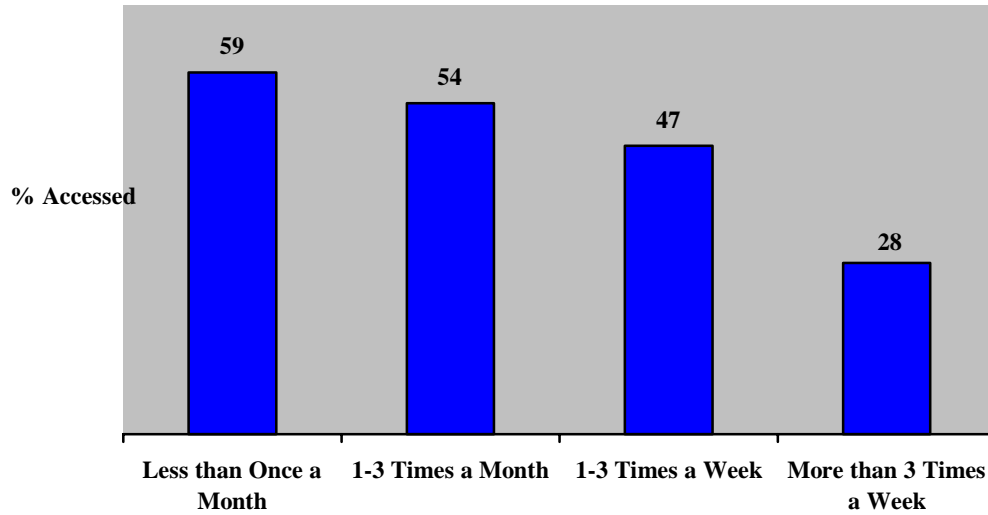
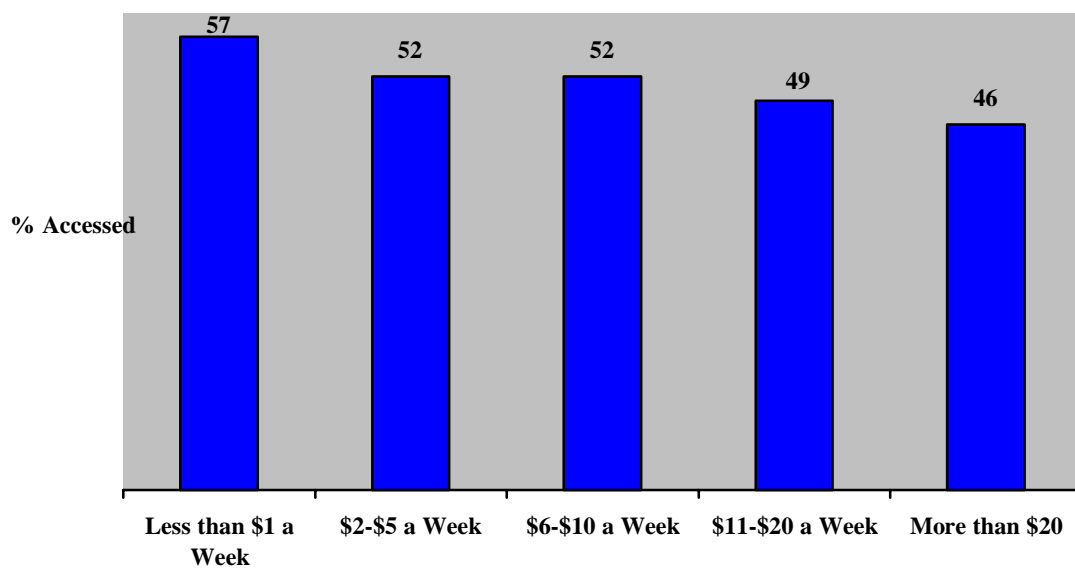


Figure 5.7 shows slight reductions in Internet access rates as the amount spent per week on gambling increases. However, this association was not significant at the 90% confidence level.

FIGURE 5.7: INTERNET ACCESS BY TOTAL AMOUNT GAMBLED IN LAST 12 MONTHS



6.0 ATTITUDES OF THE TARGET GROUP

6.1 CLASSIFYING THE TARGET GROUP

The project brief required an analysis of general attitudes to both gambling and the Internet for a specified target group of respondents. This core target group was defined as, people 18 years old or over, who had either used the Internet or gambled in the past 12 months (in any form except raffles). Overall, 89% of the respondents fell into this target group, which was equivalent to 1,051 persons. Percentages in this chapter therefore only relate to these people and not the full 1,183 respondents.

Seventy-one percent of the target group indicated they were aware that you could use the Internet to lodge bets on horse racing or sporting events. A lower 60% indicated they were aware that there are sites on the Internet where you can gamble on gaming tables or poker machines.

The level of awareness of the possibility of using the Internet for gambling was similar throughout the States and Territories of Australia. Results were also similar irrespective of respondents' physical location.

While no age bias was established, females in general tended to have lower awareness of these issues.

Not surprising, current Internet users had a higher awareness of gambling possibilities on the Internet.

TABLE 6.1: AWARE YOU CAN USE INTERNET FOR GAMBLING
 (% of respondents in group shown)

	% aware you can	
	Bet on Racing/ Sporting Events	Gamble on Gaming Tables/ Poker Machines
State		
NSW/ACT	73	59
VIC/TAS	67	60
QLD	74	63
SA/NT	64	61
WA	74	58
<i>Aust</i>	<i>71</i>	<i>60</i>
Location		
Metro	70	62
Other Urban	72	56
Rural	73	63
Age		
18-24 yrs	66	58
25-34 yrs	70	62
35-44 yrs	76	66
45-54 yrs	73	60
55-64 yrs	72	57
65+ yrs	65	52
Gender		
Male	79	70
Female	63	50
Internet Usage		
Current Internet User	78	69
Not Current Internet User	62	48

Question: Are you aware that you can use the Internet to lodge bets on horse racing or sporting events? Are you aware that there are sites on the Internet where you can gamble on gaming tables or poker machines?

6.2 GENERAL ATTITUDE TO GAMBLING

Respondents were asked to indicate the extent to which they agreed or disagreed with a number of statements (refer to Table 6.2) relating to gambling in general. Respondents were asked to rate the statement on a score of 1 to 5, where 1 is strongly disagree and 5 is strongly agree. For comparison purposes the percent 'agreed' (score of 4 or 5) is shown in the tables. Comments have been made within the text when a diverse range scores was found.

Of the statements tested, only the issue of gambling operators' responsibilities received a mixed opinion. Forty-four percent of the target group interviewed agreed (score of 4 or 5) with the statement gambling operators are not responsible for protecting gamblers from over spending. A further 17% provided a non-committal rating (score of 3), while 37% disagreed (score of 1 or 2) with the statement.

TABLE 6.2: AGREEMENT WITH GAMBLING STATEMENTS BY STATE
(% of respondents in group shown)

Statement	NSW/ACT	VIC/TAS	QLD	SA/NT	WA	Aust
In the long run you can't really win with gambling	81	81	80	83	74	80
The establishment of Casinos has been good for Australia	15	20	19	20	18	18
Gambling is a good form of recreation or leisure	12	12	12	10	14	12
There is too much opportunity for gambling in Australia	71	78	74	73	58	72
Govts have a responsibility to minimise the harmful effect of gambling	62	70	58	68	59	64
It is up to the individual to make sure they don't get into financial difficulties from gambling	78	76	82	75	84	78
Gambling operators are not responsible for protecting gamblers from over spending	42	46	49	37	46	44

Question: Do you agree or disagree that.....?

Table 6.3 presents the "agreement" findings by location of the respondent. No significant differences in attitudes were found at the 95% confidence level.

TABLE 6.3: AGREEMENT BY LOCATION
(% of respondents in group shown)

Statement	Metro	Other Urban	Rural
In the long run you can't really win with gambling	82	78	76
The establishment of Casinos has been good for Australia	19	16	15
Gambling is a good form of recreation or leisure	12	12	13
There is too much opportunity for gambling in Australia	72	74	69
Govts have a responsibility to minimise the harmful effect of gambling	64	63	64
It is up to the individual to make sure they don't get into financial difficulties from gambling	78	78	80
Gambling operators are not responsible for protecting gamblers from over spending	43	47	44

Question: Do you agree or disagree that.....?

People aged 18-24 years disagreed more strongly with statement "in the long run, you can't really win with gambling". This group tended to agree more strongly with the statement "the establishment of casinos has been good for Australia".

While no clear gender bias was found, the breakdown of the ratings for the statement "gambling operators are not responsible for protecting gamblers from overspending" showed that males tended to disagree with this statement more strongly than females.

TABLE 6.4: AGREEMENT BY AGE AND GENDER
(% of respondents in group shown)

Statement	18-24	25-34	35-44	45-54	55-64	65+	Male	Female
In the long run you can't really win with gambling	70	78	83	87	83	79	79	82
The establishment of Casinos has been good for Australia	21	20	18	16	13	17	20	16
Gambling is a good form of recreation or leisure	10	11	11	12	12	17	13	12
There is too much opportunity for gambling in Australia	69	75	74	72	69	73	71	74
Govts have a responsibility to minimise the harmful effect of gambling	65	66	63	63	66	60	63	64
It is up to the individual to make sure they don't get into financial difficulties from gambling	82	79	74	77	79	82	77	80
Gambling operators are not responsible for protecting gamblers from over spending	41	46	45	41	47	48	43	45

Question: Do you agree or disagree that.....?

Table 6.5 shows a strong association between gambling attitudes and the frequency of gambling by the respondent. Some of the interesting results include:

- The more the respondent gambled, the more positive the attitude to the statements "establishment of casinos is a good thing", and "gambling is a good form of recreation and leisure" was established.
- The more the respondent gambled the more likely they would disagree with the statement "in the long run you can't really win with gambling".
- the more the respondent gambled, the more likely the respondent disagreed with the statements on "there is too much opportunity for gambling" and "governments have a responsibility to minimise the harmful effect of gambling";

- the more the respondent gambled, the more likely they were to agree with the statement "it is up to the individual to make sure they don't get into financial difficulties from gambling"; and
- The more the respondent gambled the more likely they agreed with the statement "gambling operators are not responsible for protecting gamblers from over spending".

TABLE 6.5: AGREEMENT BY FREQUENCY OF GAMBLING
(% of respondents in group shown)

Statement	Non Gamblers	Less than Once a Month	1-3 Times a Month	1-3 Times a Week	More than 3 Times a Week
In the long run you can't really win with gambling	86	79	83	77	70
The establishment of Casinos has been good for Australia	10	16	15	26	21
Gambling is a good form of recreation or leisure	4	7	11	19	42
There is too much opportunity for gambling in Australia	81	72	76	67	58
Govts have a responsibility to minimise the harmful effect of gambling	74	66	65	57	58
It is up to the individual to make sure they don't get into financial difficulties from gambling	66	77	80	82	86
Gambling operators are not responsible for protecting gamblers from over spending	36	43	44	47	70

Question: Do you agree or disagree that.....?

6.3 GENERAL ATTITUDE TO THE INTERNET

People in the target group were also asked the extent to which they agree or disagree with a number of statements relating to the Internet. The same rating scale as illustrated in the previous section was used.

Interestingly, amongst the target group, the general perception was that the Internet was an unsafe and risky medium to purchase goods or register personal details. Table 6.6 shows similar attitudes were found irrespective of State or location of respondent.

**TABLE 6.6: AGREEMENT WITH INTERNET STATEMENTS BY STATE/TERRITORY
(% of respondents in group shown)**

Statement	NSW/ ACT	VIC/ TAS	QLD	SA/NT	WA	Aust	Metro	Other Urban	Rural
Overall you are comfortable using the Internet	50	50	48	52	48	50	54	43	46
It is safe to register your personal details with sites on the Internet	13	11	11	10	16	12	13	10	10
There is no risk in buying something over the Internet from Aust. based sites	15	13	14	12	14	14	14	15	9
It can be risky buying something over the Internet from Overseas based sites	65	65	75	72	70	68	68	70	63
Using your credit card over the Internet is risky	73	78	76	74	69	74	71	80	74

Question: Do you agree or disagree that.....?

The age and gender breakdown shown in Table 6.7 reveals that people aged 18-24 years were more comfortable with registering personal details or purchasing on the Internet. However, a clear majority in all age groups believed an element of risk existed in this behaviour.

In line with usage, the "comfort factor" of using the Internet declined substantially as the respondent became older.

TABLE 6.7: AGREEMENT BY AGE & GENDER
(% of respondents in group shown)

Statement	18-24	25-34	35-44	45-54	55-64	65+	Male	Female
Overall you are comfortable using the Internet	72	65	56	49	30	11	53	46
It is safe to register your personal details with sites on the Internet	22	13	10	10	11	8	12	12
There is no risk in buying something over the Internet from Aust. based sites	21	13	12	15	11	14	14	14
It can be risky buying something over the Internet from Overseas based sites	70	63	73	70	68	62	67	69
Using your credit card over the Internet is risky	72	70	75	81	72	76	72	77

Question: Do you agree or disagree that.....?

7.0 ATTITUDES TO INTERNET GAMBLING

7.1 OPINION ON INTERNET ISSUES

Only six percent of people surveyed believed gambling sites being available on the Internet was a good idea. This finding was consistent irrespective of the respondents' location. Overall, almost three-quarters of respondents were concerned with the honesty of gambling sites, irrespective of whether they were Australian or overseas based.

Interestingly, 76% of people surveyed agreed with the statement that Internet gambling should be licensed by the government if it were to be introduced. A further 8% neither agree nor disagreed, while 11% disagreed.

TABLE 7.1: AGREEMENT WITH INTERNET GAMBLING STATEMENTS
(% of respondents in group shown)

Statement	NSW/ ACT	VIC/ TAS	QLD	SA/NT	WA	Aust	Metro	Other Urban	Rural
Having gambling sites available on the Internet is a good idea	7	5	7	4	6	6	6	5	9
There could be some concern about the honesty of overseas based gambling sites	73	72	78	68	75	73	72	76	74
A gambling site that was based in Australia would be more trustworthy than overseas sites	28	23	34	28	34	28	29	28	28
Internet gambling should be licensed by the Government	75	79	77	69	72	76	76	77	73
Question:	Do you agree or disagree that.....?								

Table 7.2 shows no strong associations existed between attitudes to gambling on the Internet and age of respondent. The only significant difference found was that a higher proportion of people aged below 35 years indicated a rating of 3 (neither agree nor disagree) for the statement "having gambling sites available on the Internet is a good idea", compared to respondents aged above 35 years. It appears male respondents aged below 35 years were the major factor in this outcome. However,

overall, all age groups and both sexes reported a minimal positive response to the question.

TABLE 7.2: AGREEMENT BY AGE & GENDER
(% of respondents in group shown)

Statement	18-24	25-34	35-44	45-54	55-64	65+	Male	Female
Having gambling sites available on the Internet is a good idea	9	7	5	6	7	4	7	6
There could be some concern about the honesty of overseas based gambling sites	77	67	79	77	77	65	74	73
A gambling site that was based in Australia would be more trustworthy than overseas sites	36	27	21	25	35	31	32	24
Internet gambling should be licensed by the Government	75	76	76	79	76	72	77	74

Question: Do you agree or disagree that.....?

Attitudes to a number of statements were found to be stronger amongst gamblers. People that gamble agreed more strongly with the statements on the "honesty of overseas based gambling sites", the "trustworthiness of Australian sites", and interestingly the need to "license Internet gambling" (refer to Table 7.3).

TABLE 7.3: AGREEMENT BY GAMBLER TYPE
(% of respondents in group shown)

Statement	Non Gambler (n=242)	Lottery Tickets, Scratchies Only (n=332)	Gaming, Wagers etc (n=609)
Having gambling sites available on the Internet is a good idea	7	5	7
There could be some concern about the honesty of overseas based gambling sites	64	75	76
A gambling site that was based in Australia would be more trustworthy than overseas sites	18	26	34
Internet gambling should be licensed by the Government	69	77	77

Question: Do you agree or disagree that.....?

7.2 GENERAL INTEREST IN INTERNET GAMBLING

Ninety-six percent of people surveyed indicated they had either very little or no interest in accessing any type of gambling site on the Internet. Three percent indicated a medium level of interest and 1% showed high interest.

Albeit minimal in nature, interest was the highest amongst respondents for NSW/ACT. No relationship was found with interest in Internet gambling and location of respondent. While no age bias was established, males showed more interest in Internet gambling sites than their female counterparts.

In addition, people who gambled on other gaming and wagering activities, apart from only purchasing lottery tickets, scratchies, lotto pools etc., showed the highest level of interest in accessing Internet gambling sites.

TABLE 7.4: INTEREST IN INTERNET GAMBLING
(% of respondents in group shown)

	Low	Medium	High
State			
NSW/ACT	94	5	2
VIC/TAS	98	2	0
QLD	99	1	0
SA/NT	97	2	1
WA	96	1	3
<i>Aust</i>	96	3	1
Location			
Metro	96	3	1
Other Urban	97	2	1
Rural	95	4	1
Age			
18-24 yrs	93	5	2
25-34 yrs	95	4	1
35-44 yrs	97	2	1
45-54 yrs	96	4	1
55-64 yrs	96	4	0
65+ yrs	100	0	0
Gender			
Male	94	4	2
Female	98	2	0
Type of Gambler			
None	99	1	0
Lottery etc	99	1	0
Gaming, Wager etc	94	4	2

Question: How much interest do you personally have either now or perhaps in the future in accessing any type of gambling site on the Internet?

7.3 ATTITUDE TO A POTENTIAL BAN

Respondents were presented with the following scenario relating to the potential introduction of a ban on Internet gambling in Australia. They were then asked whether they would support or oppose the introduction of such a ban.

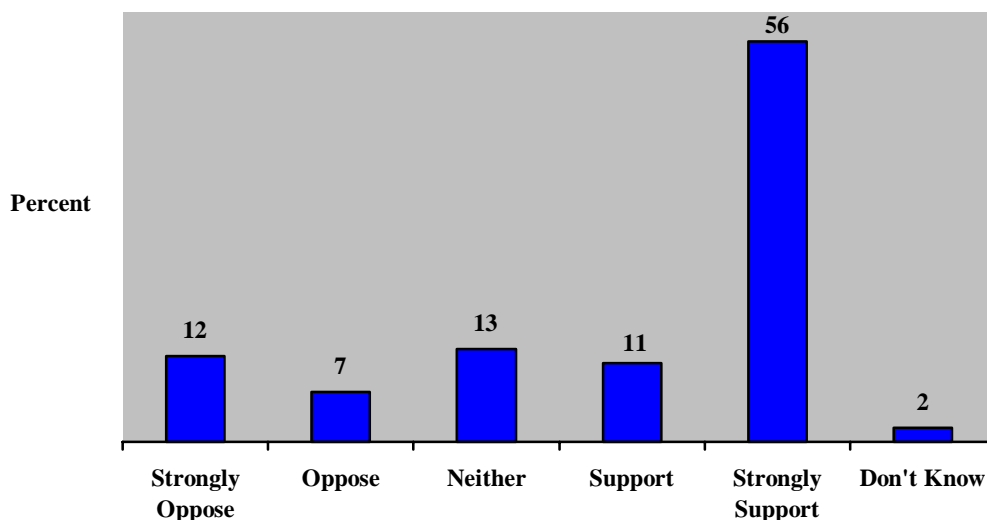
“Currently Australians have access to some Australian-based gambling sites on the Internet, as well as a range of overseas sites. The Australian sites are regulated by various state governments, while the overseas sites may or may not be regulated.

The Commonwealth Government is currently investigating the feasibility of banning Internet gambling. A ban may be imposed either by blocking access to gambling sites or by disallowing credit card or other financial transactions to gambling sites.

Do you support or oppose a ban being placed on Internet Gambling in Australia. Use a scale of 1 to 5 where 1 is strongly oppose a ban and 5 is strongly support a ban.”

Two-thirds of people surveyed indicated they support a ban being placed on Internet gambling in Australia. Nineteen percent indicated they oppose this ban (refer to Figure 7.1).

FIGURE 7.1: DEGREE OF SUPPORT FOR BAN ON INTERNET GAMBLING



While slight differences existed between States regarding support or opposition to the ban, these differences were not significant at the 95% confidence level.

On a location basis, the strongest support for the ban was shown by respondents living in urban centres outside major metropolitan areas.

No significant age bias was established, however, females reported significantly higher levels of support for a ban on Internet gambling.

As expected, a greater proportion of more frequent gamblers opposed the ban, although even amongst these people, support for a ban sat at around 60%.

TABLE 7.5: ATTITUDE TO POTENTIAL BAN ON INTERNET GAMBLING
(% of respondents in group shown)

	Oppose Ban	Neither Oppose/ Support	Support Ban
State			
NSW/ACT	21	13	65
VIC/TAS	18	12	70
QLD	15	15	70
SA/NT	17	13	70
WA	21	13	66
<i>Aust</i>	19	13	68
Location			
Metro	21	13	66
Other Urban	14	15	71
Rural	21	10	69
Age			
18-24 yrs	14	19	67
25-34 yrs	22	16	63
35-44 yrs	20	14	66
45-54 yrs	15	13	72
55-64 yrs	23	8	69
65+ yrs	18	8	73
Gender			
Male	23	19	58
Female	15	8	78
Type of Gambler			
None	22	8	70
Lottery etc	15	12	73
Gaming, Wager etc	20	16	65
Frequency Gambled			
Less than 1 a mth	16	12	72
1-3 times a month	15	16	70
1-3 times a week	23	17	61
More than 3 a week	35	7	59

Question: Do you support or oppose a ban being placed on Internet Gambling in Australia?

As a means of determining whether a ban would be effective, or whether people would have both the skill and the desire to search the Internet for other available gambling sites, all respondents were asked a follow-up question:

“If Internet gambling was banned in Australia and you happened to find a gambling site on the Internet, what would you most likely do?”

Overall, only 1% of total respondents indicated they would play the site, while a further 9% suggested they would have a look. Younger respondents and males in general were more likely to examine the gambling site. One in five respondents said they would report the site to the authorities, while 60% indicated they would just avoid the site in the future. Attitudes of the 10 respondents who had previously used the Internet for gambling are documented in Appendix III. While the response is only small, the overview is interesting.

TABLE 7.6: RESPONSE TO LOCATING A BANNED INTERNET GAMBLING SITE
(% of respondents in group shown)

	Play Site	Have a Look	Report to Authority	Avoid the Site	Do Not Use Internet	Don't Know
State						
NSW/ACT		10	20	58	9	2
VIC/TAS	1	7	21	58	11	2
QLD	1	7	18	65	7	3
SA/NT	2	6	27	55	9	1
WA	1	16	14	58	11	1
Aust	1	9	20	59	9	2
Location						
Metro	1	10	20	59	8	2
Other Urban	1	6	19	61	11	2
Rural	1	10	22	55	10	2
Age						
18-24 yrs	2	19	10	68	1	2
25-34 yrs	1	12	15	67	4	1
35-44 yrs	1	7	25	62	3	2
45-54 yrs	0	9	19	64	7	1
55-64 yrs	1	4	28	47	17	3
65+ yrs	0	3	24	41	28	4
Gender						
Male	2	12	18	61	6	2
Female	0	7	22	57	12	2
Type of Gambler						
None	0	2	24	57	13	3
Lottery etc	0	4	23	60	11	2
Gaming, Wager etc	2	14	17	60	6	1

Question: If Internet gambling was banned in Australia and you happened to find a gambling site on the Internet, what would you most likely do?

APPENDIX I
THE QUESTIONNAIRE

1 Variable (CPHONE)

Hello, my name is from IRIS Research in Wollongong, we're doing a survey on community attitudes to gambling. It is important that we speak to all people whether they gamble or not.
Is this a private dwelling that is permanently occupied for a majority of the year. [TERMINATE IF NO] .
Phone Number

TARGET A RESIDENT AGED 18 YEARS OR OVER AND COMMENCE INTERVIEW.

For your information, this call may be monitored by my supervisor for quality control purposes, however all responses remain confidential.

2 Variable

Which of the following activities have you participated in over the past 12 months?

READ OUT ITEM 1 TO 7 AND TICK THOSE THAT APPLY

- Q1A 1. Played gaming tables, poker machines or other gambling pursuits at a Casino.
- Q1B 2. Played poker machines, Keno or other gaming machines at a club or hotel.
- Q1C 3. Bet on horse or dog racing including the trots.
- Q1D 4. Placed bets on sporting or other events through a registered betting agency.
- Q1E 5. Bought a lottery ticket or scratchie, or played lotto, the pools etc.
- Q1F 6. Played other forms of gambling like bingo etc, but excluding raffles
- Q1G 7. Any other forms of gambling I have not mentioned(specify)
- Q1H 8. Did not gamble

3 Variable (A1) [Skip if Q1A <> 1]

YES TO CASINO

How many times have you been gambling at a Casino in the past 12 months?

4 Variable [Skip if Q1A <> 1]

Which activities do you play when you visit the Casino?

READ OUT ITEMS 1 TO 6 AND TICK THOSE THAT APPLY

- A21 The Gaming tables
- A22 Poker Machines
- A23 Bet on Horse racing
- A24 Keno or other electronic games
- A25 Other sports betting
- A26 Anything else (specify)

5 Variable (A3) [Skip if Q1A <> 1]

On average how much would you spend on gambling when you visit the Casino

6 Variable (B1) [Skip if Q1B <> 1]

YES TO CLUBS, HOTELS

On how many days in the past 12 months have you played poker machines, Keno or other gaming machines in Clubs or Hotels?

7 Variable (B2) [Skip if Q1B <> 1]

Do you mainly visit the Club or Hotel to play the gaming machines or do you simply play them while you are there?

- 1 Yes to play
- 2 Sometimes to play
- 3 No, play while there

8 Variable (B3) [Skip if Q1B <> 1]

How much would you spend on gambling per visit when playing poker machines, Keno or other gaming machines in Clubs or Hotels?

9 Variable (C1) [Skip if Q1C <> 1]

YES TO HORSE OR DOG RACING

How many days in the past 12 months have you bet on the horse or dog races?

10 Variable [Skip if Q1C <> 1]

Which of the following facilities have you used to place bets on the horse or dog races in the past 12 months?

READ OUT EACH ITEM AND TICK THOSE THAT APPLY

- C21 Bookmakers or Tote at the track
- C22 In person at the TAB
- C23 By telephone with the TAB
- C24 Electronic betting through the Internet
- C25 Some other means (specify)

11 Variable (C3) [Skip if Q1C <> 1]

On average how much would you spend per day when you bet on the horse or dog races

12 Variable (D1) [Skip if Q1D <> 1]

YES TO SPORTS BETTING

On how many days in the past 12 months have you bet on sport or other events through a betting agency?

13 Variable [Skip if Q1D <> 1]

Which of the following means have you used to place those kind of bets over the past 12 months?

READ OUT EACH ITEM AND TICK ALL THAT APPLY

- D21 By phone to a specific betting agency
- D22 In person at the TAB
- D23 By telephone with the TAB
- D24 Electronic betting through the Internet
- D25 Other means (specify)

14 Variable (D3) [Skip if Q1D <> 1]

How much would you spend per day when betting on sporting or other events?

15 Variable (E1) [Skip if Q1E <> 1]

YES TO LOTTERIES ETC

How often have you bought a lottery ticket, scratchie, lotto, pools entry etc, in the past 12 months?

16 Variable (E3) [Skip if Q1E <> 1]

On average how much would you spend per visit when buying lottery tickets, scratchies, lotto, pools entries etc?

17 Variable (F1) [Skip if Q1F <> 1]

YES TO BINGO ETC

How often have you played bingo, housie or other games of chance in the past 12 months?

18 Variable (F3) [Skip if Q1F <> 1]

On average how much would you invest per visit on bingo, housie or other games of chance?

19 Variable

How long would it take to get from your home to the nearest venue that offered either gaming tables, poker machines, betting on the races or sports events or some other gambling activity, excluding lotteries, lotto etc? PROMPT IF

- aACC1 5 minutes or less
- aACC2 6 to 10 mins
- aACC3 11 to 15 mins
- aACC4 16 to 20 mins
- aACC5 21 to 25 mins
- aACC6 26 to 30 mins

- aACC7 31 to 35 mins
- aACC8 36 to 40 mins
- aACC9 41 to 45 mins
- aACC10 46 to 50 mins
- aACC11 51 to 55 mins
- aACC12 56 to 60 mins
- aACC13 Over 1 hour
- aACC14 No idea - dont gamble
- aACC15 Dont know

20 Variable (aACCB)

How much effort would it require for you to get to that kind of gambling venue if you wanted to, compared to other trips that you usually make, like to the shops, entertainment venues etc? READ OUT RESPONSES 1 TO 5 AS NECESSARY

- 1 Much less
- 2 A little less
- 3 About the same
- 4 A little more
- 5 Much more
- 6 Dont know

21 Variable (Q2)

Have you accessed the Internet over the past 12 months?

- 1 Yes [Jump to 25]
- 2 No
- 3 Dont know

22 Variable (Q2A)

Do you have the Internet connected at home?

- 1 Yes [Jump to 30]
- 2 No

23 Variable (Q2B1)

Is your household likely to connect to the Internet sometime in the future?

- 1 Yes
- 2 No [Jump to 30]

24 Variable (Q2B2)

When is your household likely to connect? READ OUT AS NECESSARY.

- 1 In next 3 months [Jump to 30]
- 2 In 4 to 6 months [Jump to 30]
- 3 7 to 12 months [Jump to 30]
- 4 Next 2 to 3 years [Jump to 30]
- 5 More than 3 years [Jump to 30]
- 6 Dont know [Jump to 30]

25 Variable

Where have you accessed the Internet from over the past 12 months? PROMPT: Anywhere else?

MULTIPLE RESPONSE POSSIBLE

- Q3A At home
- Q3B At work
- Q3C Educational Establishment or public Library
- Q3D Internet Cafe or other commercial service
- Q3E At a friend or relatives place
- Q3F Any other place (specify)

26 Variable (Q4)

On how many days out of the past 12 months would you have used the Internet? RECORD THE NUMBER OF DAYS

27 Variable

Have you used the Internet for any of the following activities over the past 12 months?
READ OUT ITEMS 1 TO 5 AND TICK THOSE THAT APPLY

- Q5A1 1. To purchase goods
- Q5A2 2. Place a bet or wager with a betting agency
- Q5A3 3. Play a gaming site for money
- Q5A4 4. Play a gaming site for fun but not money
- Q5A5 5. Participate in a chat room
- Q5A6 6. None of those

28 Variable (Q5B) [Skip if Q5A1 <> 1]

When you purchased goods, were they from sites within Australia or from overseas?

- 1 Australia
- 2 Overseas
- 3 Both Aust and Overseas

29 Variable (Q5C) [Skip if Q5A1 <> 1]

Have you ever experienced any problems making purchases on the Internet?

- 1 Yes
- 2 No
- 3 Dont know

30 Variable [Skip if Q1H = 0]OR[Q2 = 1]

From what you have told me, you have not participated in any gambling pursuits in the past 12 months, nor have

you accessed the Internet over the same period. Is that correct?

IF NOT THEN EITHER REVIEW GAMBLING AT SCREEN 2 OR INTERNET DETAIL AT SCREEN 21.

NOJUMP Yes, correct [SELECT BOX]

31 Variable

We'd now like to ask you about your general attitudes to Gambling. Please indicate whether you agree or disagree with each of the following statements using a scale of 1 to 5 where 1 is strongly disagree and 5 is strongly agree.

Remember when I say gambling this includes Casino gaming, poker machines and betting on racing or sports events. READ OUT EACH STATEMENT AND REINFORCE RESPONSE SCALE

32 Variable (Q6A)

Do you agree or disagree that

In the long run you cant really win with gambling.

- 1 Strongly disagree
- 2 .
- 3 .
- 4 .
- 5 Strongly agree
- 6 Dont know

33 Variable (Q6B)

Do you agree or disagree that

The establishment of Casinos has been good for Australia.

- 1 Strongly disagree
- 2 .
- 3 .
- 4 .

- 5 Strongly agree
- 6 Dont know

34 Variable (Q6C)

Do you agree or disagree that
Gambling is a good form of recreation or leisure.

- 1 Strongly disagree
- 2 .
- 3 .
- 4 .
- 5 Strongly agree
- 6 Dont know

35 Variable (Q6D)

Do you agree or disagree that
There is too much opportunity for gambling in Australia.

- 1 Strongly disagree
- 2 .
- 3 .
- 4 .
- 5 Strongly agree
- 6 Dont know

36 Variable (Q6E)

Do you agree or disagree that
Governments have a responsibility to minimise the harmful effects of gambling.

- 1 Strongly disagree
- 2 .
- 3 .
- 4 .
- 5 Strongly agree
- 6 Dont know

37 Variable (Q6F)

Do you agree or disagree that
It is up to the individual to make sure they dont get into financial difficulties from gambling.

- 1 Strongly disagree
- 2 .
- 3 .
- 4 .
- 5 Strongly agree
- 6 Dont know

38 Variable (Q6G)

Do you agree or disagree that
Gambling operators are not responsible for protecting gamblers from over spending.

- 1 Strongly disagree
- 2 .
- 3 .
- 4 .
- 5 Strongly agree
- 6 Dont know

39 Variable

We now have a few questions that relate to your general attitude to the Internet.
Please indicate whether you agree or disagree with each of the following statements, using the same scale of 1 to 5 where 1 is strongly disagree and 5 is strongly agree.

40 Variable (Q7A)

Do you agree or disagree that
Overall you are comfortable using the Internet.

- 1 Strongly disagree
- 2 .
- 3 .
- 4 .
- 5 Strongly agree
- 6 Dont know

41 Variable (Q7B)

Do you agree or disagree that
It is safe to register your personal details with sites on the Internet.

- 1 Strongly disagree
- 2 .
- 3 .
- 4 .
- 5 Strongly agree
- 6 Dont know

42 Variable (Q7C)

Do you agree or disagree that
There is no risk in buying something over the Internet from Australian based sites.

- 1 Strongly disagree
- 2 .
- 3 .
- 4 .
- 5 Strongly agree
- 6 Dont know

43 Variable (Q7D)

Do you agree or disagree that
It can be risky buying something over the Internet from Overseas based sites.

- 1 Strongly disagree
- 2 .
- 3 .
- 4 .
- 5 Strongly agree
- 6 Dont know

44 Variable (Q7E)

Do you agree or disagree that
Using your credit card over the Internet is risky.

- 1 Strongly disagree
- 2 .
- 3 .
- 4 .
- 5 Strongly agree
- 6 Dont know

45 Variable (Q8)

Are you aware that you can use the Internet to lodge bets on horse racing or sporting events?

- 1 Yes
- 2 No
- 3 Dont know

46 Variable (Q9)

Are you aware that there are sites on the Internet where you can gamble on gaming tables or poker machines?

- 1 Yes
- 2 No
- 3 Dont know

47 Variable

Given that gambling is currently available on the Internet, please indicate whether you agree or disagree with each of the following statements, using a scale from 1 to 5, where 1 is strongly disagree and 5 is strongly agree.

Remember gambling includes Casino gaming, poker machines, racing and sports betting sites.

48 Variable (Q10A)

Do you agree or disagree that

Having gambling sites available on the Internet is a good idea.

- 1 Strongly disagree
- 2 .
- 3 .
- 4 .
- 5 Strongly agree
- 6 Dont know

49 Variable (Q10B)

Do you agree or disagree that

There could be some concern about the honesty of overseas based gambling sites.

- 1 Strongly disagree
- 2 .
- 3 .
- 4 .
- 5 Strongly agree
- 6 Dont know

50 Variable (Q10C)

Do you agree or disagree that

A gambling site that was based in Australia would be more trustworthy than overseas sites.

- 1 Strongly disagree
- 2 .
- 3 .
- 4 .
- 5 Strongly agree
- 6 Dont know

51 Variable (Q10D)

Do you agree or disagree that

Internet gambling sites should be licensed by the Government

- 1 Strongly disagree
- 2 .
- 3 .
- 4 .
- 5 Strongly agree
- 6 Dont know

52 Variable (Q11)

How much interest do you personally have either now or perhaps in the future in accessing any type of

gambling site on the Internet? Use a scale of 1 to 5 where 1 is none at all, and 5 is a great deal of interest.

CONFIRM SCALE

- 1 None at all [Jump to 54]
- 2 .
- 3 .
- 4 .
- 5 A great deal
- 6 Dont know [Jump to 54]

53 Variable

Which types of gambling sites would you mainly be interested in?

READ OUT EACH ITEM AND TICK THOSE THAT APPLY

- Q12A Poker machine or Casino type games.
- Q12B Placing bets on horse racing or sporting events
- Q12C Any other types of Internet gambling (specify)

54 Variable

Currently Australians have access to some Australian-based gambling sites on the Internet, as well as a range of overseas sites.

The Australian sites are regulated by various state governments, while the Overseas sites may or may not be regulated.

The Commonwealth Government is currently investigating the feasibility of banning Internet gambling. A ban may be imposed either by blocking access to gambling sites or by disallowing credit card or other financial transactions to gambling sites.

55 Variable (Q13)

Do you support or oppose a ban being placed on Internet Gambling in Australia. Use a scale of 1 to 5 where 1 is strongly oppose a ban and 5 is strongly support a ban. **CONFIRM SCALE**

- 1 Strongly oppose
- 2 .
- 3 .
- 4 .
- 5 Strongly support
- 6 Dont know

56 Variable (Q14A)

If Internet gambling was banned in Australia and you happened to find a gambling site on the Internet, what would you most likely do? **READ OUT RESPONSES 1 TO 4**

- 1 Play the site
- 2 Have a look at the site
- 3 Report it to the authorities
- 4 Avoid the site
- 5 Not Applic - dont use Internet
- 6 Dont know

57 Variable (Q14B) [Skip if Q13 > 2]AND[Q13 < 6]

If sites were banned in Australia, would you actively try and find Internet gambling sites elsewhere to use?

- 1 Yes, definitely
- 2 Yes, probably
- 3 No, probably not [Jump to 59]
- 4 No, definitely not [Jump to 59]
- 5 Dont know [Jump to 60]

58 Variable [Skip if Q13 > 2]AND[Q13 < 6]

Which of the following describe the reasons why you would try to access Internet gambling sites elsewhere, if

banned in Australia?

READ OUT ITEMS 1 TO 3 AND TICK THOSE THAT APPLY

- Q15A 1. You simply like gambling on the Internet
- Q15B 2. It would be a challenge to get around the ban
- Q15C 3. Access to gambling on the Internet should not be banned
- Q15D 4. Any other reason? (specify)

59 Variable [Skip if Q13 > 2]AND[Q13 <> 6]

Which of the following describe the reasons why you would not try to access other interactive gambling sites, if there was an Australian ban?

READ OUT ITEMS 1 TO 4 AND TICK THOSE THAT APPLY

- Q16A 1. Internet gambling is not that important to you
- Q16B 2. You would be worried about legal consequences
- Q16C 3. The remaining gambling sites may not be trustworthy
- Q16D 4. Sites may be difficult to access if there is a ban
- Q16E 5. Any other reason (specify)

60 Variable (AGE)

Which of the following age groups do you fall into? [READ OUT AS NECESSARY]

- 1 18 - 24 yrs
- 2 25 - 34 yrs
- 3 35 - 44 yrs
- 4 45 - 54 yrs
- 5 55 - 64 yrs
- 6 65 + yrs
- 7 Not stated

61 Variable (SEX)

And you are a? [CONFIRM SEX FROM RESPONDENT]

- 1 Male
- 2 Female

62 Variable (PEOPI)

Including yourself, how many people aged 18 years or older live in your dwelling? PROBE: Is that including you?

- 1 1
 - 2 2
 - 3 3
 - 4 4
 - 5 5
 - 6 6
 - 7 7 or more
 - 8 None
 - 9 Not Stated
- [Jump to 64]

63 Variable (PEOPI)

How many people aged 17 years or younger live in your dwelling?

- 1 1
- 2 2
- 3 3
- 4 4
- 5 5
- 6 6
- 7 7 or more
- 8 None
- 9 Not Stated

64 Variable (ADULT)

Are you one of the key adult decision makers for this household? PROMPT: That is, Mother,Father,
Wage earner etc

- 1 Yes
- 2 No

65 Variable (PSTCOD)

What is the postcode for this dwelling? TYPE NAME OF SUBURB OR TOWN IF UNSURE

66 Variable (RURAL)

Do you live in a Capital City, other Urban area, or on a rural farm or property?

- 1 Capital City
- 2 Urban area (City, Town, Village)
- 3 Rural Farm or Property
- 4 Not Stated

67 Variable (CNAME)

Could you please tell me your first name, as my supervisor verifies 1 in 10 of my calls? ENTER
FIRST NAME ONLY

68 Variable

THAT IS THE END OF THE SURVEY. THANK YOU FOR YOUR TIME AND EFFORT.
YOUR RESPONSE IS MOST APPRECIATED

APPENDIX II
FREQUENCY OF PARTICIPATION BY ACTIVITY TYPES

TABLE AII.1 FREQUENCY OF GAMBLING BY STATE (PERCENT)

Gambling Activity/State	Total Participation	Less than Once a Month	1-3 Times a Month	1-3 Times a Week	More than 3 Times a Week
At Least One Activity					
NSW/ACT	78	35	33	27	5
VIC/TAS	78	37	31	29	3
QLD	83	33	31	32	4
SA/NT	80	36	32	31	1
WA	83	24	40	36	1
<i>Aust</i>	80	34	33	30	3
Gambling at a Casino					
NSW/ACT	13	98	2	0	0
VIC/TAS	23	96	3	1	0
QLD	18	87	11	3	0
SA/NT	16	86	9	6	0
WA	27	70	30	0	0
<i>Aust</i>	19	91	8	1	0
Gambling at a club or hotel					
NSW/ACT	43	66	26	6	2
VIC/TAS	35	70	25	5	0
QLD	42	70	23	5	2
SA/NT	28	63	30	3	4
WA	8	100	0	0	0
<i>Aust</i>	36	68	25	5	1
Bet on horse or dog racing					
NSW/ACT	22	73	14	10	3
VIC/TAS	20	71	20	6	3
QLD	22	82	12	6	0
SA/NT	16	77	18	5	0
WA	22	79	15	3	3
<i>Aust</i>	21	75	16	7	2
Bets on sporting events					
NSW/ACT	4	80	20	0	0
VIC/TAS	2	72	28	0	0
QLD	4	81	20	0	0
SA/NT	2	100	0	0	0
WA	5	73	27	0	0
<i>Aust</i>	3	79	21	0	0
Lottery, scratchie, lotto etc.					
NSW/ACT	66	42	44	14	1
VIC/TAS	67	42	34	23	1
QLD	76	40	33	26	1
SA/NT	77	43	33	23	0
WA	78	28	52	20	0
<i>Aust</i>	71	40	39	20	1
Other gambling like bingo etc					
NSW/ACT	3	54	25	21	0
VIC/TAS	5	69	5	26	0
QLD	4	60	27	0	13
SA/NT	4	61	20	20	0
WA	5	76	24	0	0
<i>Aust</i>	4	63	18	17	2

Question: How many times have you been gambling at (activity) in the past 12 months?

TABLE AII.2 FREQUENCY OF GAMBLING BY LOCATION (PERCENT)

Location	Total Participation	Less than Once a Month	1-3 Times a Month	1-3 Times a Week	More than 3 Times a Week
At Least One Activity					
Metro	89	33	34	30	3
Other Urban	83	34	32	30	4
Rural	71	41	28	29	3
Gambling at a Casino					
Metro	22	93	7	0	0
Other Urban	14	90	7	4	0
Rural	16	74	22	5	0
Gambling at a club or hotel					
Metro	34	71	23	5	1
Other Urban	41	66	26	6	2
Rural	31	62	32	7	0
Bet on horse or dog racing					
Metro	19	74	16	8	2
Other Urban	26	77	15	7	1
Rural	16	70	18	4	8
Bets on sporting events					
Metro	3	89	12	0	0
Other Urban	4	64	36	0	0
Rural	2	100	0	0	0
Lottery, scratchie, lotto etc.					
Metro	70	38	42	20	0
Other Urban	74	43	34	22	1
Rural	64	42	38	19	1
Other gambling like bingo etc					
Metro	4	59	24	17	0
Other Urban	5	62	12	20	5
Rural	3	100	0	0	0

Question: How many times have you been gambling at (activity) in the past 12 months?

TABLE AII.3: FREQUENCY OF GAMBLING BY AGE (PERCENT)

Location	Total Participation	Less than Once a Month	1-3 Times a Month	1-3 Times a Week	More than 3 Times a Week
At Least One Activity					
18-24 yrs	78	47	39	14	-
25-34 yrs	85	38	37	23	2
35-44 yrs	84	37	27	32	4
45-54 yrs	79	29	32	36	3
55-64 yrs	73	28	28	40	5
65+ yrs	73	24	33	37	7
Gambling at a Casino					
18-24 yrs	34	87	11	2	-
25-34 yrs	25	94	6	0	0
35-44 yrs	14	91	6	3	0
45-54 yrs	18	88	12	0	0
55-64 yrs	10	100	0	0	0
65+ yrs	11	87	8	5	0
Gambling at a club or hotel					
18-24 yrs	51	76	20	4	0
25-34 yrs	39	73	25	1	1
35-44 yrs	34	72	17	10	1
45-54 yrs	34	65	29	4	3
55-64 yrs	32	58	35	7	0
65+ yrs	38	57	29	10	4
Bet on horse or dog racing					
18-24 yrs	18	88	12	0	0
25-34 yrs	27	73	22	3	2
35-44 yrs	21	83	6	11	1
45-54 yrs	23	83	10	8	0
55-64 yrs	23	52	26	13	10
65+ yrs	11	61	23	11	5
Bets on sporting events					
18-24 yrs	7	78	22	0	0
25-34 yrs	5	82	18	0	0
35-44 yrs	3	100	0	0	0
45-54 yrs	3	41	59	0	0
55-64 yrs	0	0	0	0	0
65+ yrs	1	100	0	0	0
Lottery, scratchie, lotto etc.					
18-24 yrs	55	64	34	2	0
25-34 yrs	74	46	40	14	0
35-44 yrs	78	40	34	26	1
45-54 yrs	75	35	43	21	1
55-64 yrs	66	29	41	30	1
65+ yrs	68	30	41	28	1
Other gambling like bingo etc					
18-24 yrs	7	75	14	11	0
25-34 yrs	5	84	16	0	0
35-44 yrs	4	54	26	20	0
45-54 yrs	2	100	0	0	0
55-64 yrs	3	46	27	27	0
65+ yrs	5	21	20	47	11

Question: How many times have you been gambling at (activity) in the past 12 months?

TABLE AII.4: FREQUENCY OF GAMBLING BY GENDER (PERCENT)

Location	Total Participation	Less than Once a Month	1-3 Times a Month	1-3 Times a Week	More than 3 Times a Week
At Least One Activity					
Male	79	30	33	33	4
Female	80	39	32	27	2
Gambling at a Casino					
Male	18	91	9	0	0
Female	19	91	7	3	0
Gambling at a club or hotel					
Male	36	66	25	7	2
Female	36	71	25	4	1
Bet on horse or dog racing					
Male	25	65	23	10	3
Female	17	90	5	3	2
Bets on sporting events					
Male	5	72	28	0	0
Female	2	93	7	0	0
Lottery, scratchie, lotto etc.					
Male	69	37	39	23	1
Female	72	43	39	18	1
Other gambling like bingo etc					
Male	2	70	9	22	0
Female	6	61	21	15	3

Question: How many times have you been gambling at (activity) in the past 12 months?

APPENDIX III
ATTITUDES OF CURRENT INTERNET GAMBLERS

It is of interest to profile the relatively small number of respondents who had gambled on the Internet.

In the sample, only 3 of the 1183 surveyed had placed a race bet via Internet in the previous 12 months. Of these, 2 had wagered on racing in another manner and 1 had not. For the two that had wagered on sports via Internet this split was 50-50.

Of the 5 respondents who had engaged in Casino/Poker Machine type gambling on the internet, all 5 had also engaged in these activities elsewhere. While sample sizes are small, it might appear that on-line wagering was more likely to include people not involved in non-internet gambling. The geographic distribution, with regard to metro/rural, of internet gamblers appeared to be in line with that of the general population. Of the 10 total who reported internet gambling, 9 were male and 1 female, with the age group being biased towards the 35-44 age group. There was a bias in favour of NSW (6/10, nearly double the 33% proportion of population) and against Victoria (0, as compared to 24% of the population).

Of the 10 total who reported Internet gambling, none were in favour of a ban on internet gambling. On being asked about behaviour if internet gambling were banned, only 1 of the 10 said they would ignore the ban, though 3 others said they would have a look at the site. When asked if they would report the site, none answered in the affirmative. When asked about whether they would seek overseas sites, only 3 of the 10 were definite in the negative, though only 1 was definite in the affirmative.

Of the reasons for cooperating with a ban, the most popular was that gambling was not important enough to bother with (3 responses) followed by legal consequences and trustworthiness (2 responses each), with only 1 respondent of the 10 being concerned about the difficulty of getting around the ban.

The internet gambling group seemed mixed (mean score of 3.4 out of 5) on whether having online gambling sites available in Australia was a good thing, while all showed concern about the trustworthiness of overseas sites.

Again there was mixed opinion (mean of 3.5 out of 5) about the relative trustworthiness of Australian versus overseas sites. There was a general feeling (mean score of 4 out of 5) that licensing gambling sites is a good thing. When those who had reported having gambled on the Internet were asked about their interest in future Internet gambling activity, there appeared to be a balance (mean score of 3 out of 5) between those who had no interest (1) and those with a strong interest (5), with only 2 out of 10 claiming a strong interest.

This group seemed generally moderate on issues of:

- gambling being a good form of leisure activity (mean score of 3 out of 5) (population mean score 2);
- there being too much opportunity to gamble in Australia (mean score of 3.6 out of 5) (population mean score 4);
- whether governments had a responsibility to limit the impact of problem gambling (mean score of 3 out of 5) (population mean score 3.8);
- whether individuals had the responsibility for their own gambling (mean score of 4 out of 5) (population mean score 4.2);
- whether gambling operators were responsible for limiting the impact of problem gambling (mean score of 3 out of 5) (population mean score 3.1).

On the issue of the ban generally, 57% of those sampled selected 'strongly support' (5/5), with the remainder being evenly spread among 'strongly oppose' (1/5) to 'support' (4). There did not seem to be a difference among those who had gambled in Casinos or Hotels/Clubs, nor among those who had bet on racing, but of those who had bet on sports the distribution was evenly balanced (3/5) between supporting and opposing.

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