

RESEARCH REPORT

Shutdown periods for electronic gaming machines

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Shutdown periods for electronic gaming machines

Research report

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1. EXECUTIVE SUMMARY

1.1 Key conclusions of the study

Target audience

- > The shutdown is a policy response that only seems required for community members who struggle with serious gambling issues (problem and higher-end moderate-risk gamblers).
- > It seems that any late-night shutdown is most likely to impact those gamblers for whom the policy has been designed – problem gamblers are significantly more likely than any other group to be gambling after midnight, and to be playing for longer periods overall.

Support for a shutdown

- > Conceptually, a clear majority of NSW gamblers believe that a shutdown period is a positive. 68 per cent of problem gamblers believe that a shutdown is a good idea.
- > A break in play is felt by gamblers to create a significant number of benefits for those who are 'in the zone'. It is clear that there are some players who require the venue to make poker machines unavailable (usually by closing) in order to prompt a break in play.

Likely impact of a shutdown

- > It seems that in the vast majority of cases, a shutdown would likely result in gamblers going home to rest, with few indicating that other forms of gambling could truly replace pokies.
- > However, venue hopping appears to be most likely among problem gamblers in response to poker machines not being available, and this group are also most likely to travel the farthest (an average of 10.6km in order to play their favourite pokie).

Optimal shutdown period

- > Late at night seems to be the best time to consider any shutdown. Gamblers identify that late-night play often occurs in an environment where the atmosphere is more intense compared to other times of the day, and there are a range of drawbacks identified by gamblers which are specific to late-night play.
- > A majority of gamblers appear to support the current time periods for the shutdown, though problem gamblers are most likely to believe that it should be shorter and at other times of the day. Based on the responses across the research, it would seem that this is largely driven by a desire to be able to gamble for longer periods without interruption.
- > A minimum shutdown period of four hours seems to be supported by most gamblers, although again problem gamblers are significantly more likely to believe that a shorter shutdown period is sufficient.
- > Conceptually, all gamblers believe that a shutdown period that is longer and affects a greater number of people would be more effective in reducing harm, though in reality it seems clear that there would potentially be push-back against this if it started to affect more gamblers, particularly those at lower risk levels. Ultimately, most are happy for a shutdown to exist, provided it does not impact them personally.

Uniformity of shutdown periods

- > As a result of this venue hopping, it seems that a critical consideration to ensure the success of any shutdown is to maintain a uniform time period – gamblers themselves express that a non-uniform shutdown makes little sense if the aim is to minimise harm.

1.2 Project background

Under the *Gaming Machine Act 2001*, registered clubs and hotels must not operate gaming machines between 4:00am and 10:00am each day of the week. Registered clubs and hotels may apply to the Independent Liquor & Gaming authority for an exemption to vary the shutdown period or apply for a three-hour shutdown period. These shutdown arrangements have been in operation since April 2002. The intention of this requirement is to limit the opportunity for continuous gaming machine play and provide a 'break-in play' for gaming machine players.

Liquor & Gaming NSW identified a need to conduct research to further understand the benefits of shutdowns, and the optimum time of day to shut down electronic gaming machines (EGMs) to reduce gambling by at-risk and problem gamblers. The overall objective of this study was to examine the harm-reduction impact of time-based access to EGMs, from the perspective of current literature as well as EGM players.

1.3 Research methodology

The program of research included: a detailed set-up workshop with LGNSW; a scan of available literature; qualitative research, including four group discussions with recreational and low-risk gamblers (a total of 26 participants) and 24 in-depth interviews with moderate-risk and problem gamblers; and an online survey with NSW gamblers (n=312).

1.4 Findings from literature scan

The literature appears to indicate that there are benefits of shutdown periods when it comes to reducing harm, particularly among problem and moderate-risk gamblers. However, the literature indicates that the impact of these shutdown periods is likely quite limited – the times where shutdowns occur tend to be very late in the evening, where the number of people who are gambling is fairly low.

The literature indicates that community attitudes, both in NSW and other Australian jurisdictions, broadly support the idea of greater regulation of poker machines.

1.5 Gambling behaviour

The findings in this section are drawn from the quantitative online survey.

Frequency of play

In both pubs and clubs, moderate, low-risk and recreational gamblers claim to be playing poker machines relatively infrequently compared to problem gamblers. In both venues, problem gamblers are significantly more likely to play at least once every 2-3 days than other PGSI types.

The Casino is the least frequented venue for playing poker machines across all PGSI segments. However, similar differences in frequency between PGSI types can be seen at the Casino, with problem gamblers being significantly more likely to play more often.

Times of play

Early evening is the most popular time for all PGSI groups to play poker machines, both in clubs and pubs. However, the data show that problem gamblers are significantly more likely than any other PGSI groups to be playing poker machines later in the evening - in both pubs and clubs.

Duration of play

Most moderate and lower-risk gamblers (including recreational gamblers) claim to be playing for up to an hour across venues, while problem gamblers are usually playing for much longer. A problem gambler is significantly more likely than any other PGSI type to play for more than four

hours across all venues, with all other PGSI types significantly more likely than problem gamblers to play for up to 30 minutes.

Distances travelled to play EGMs

Most recreational, low-risk and moderate-risk gamblers travel no more than 5km to play EGMs in a pub or club environment, while problem gamblers are more likely to travel up to 10km. Unsurprisingly given its physical location, gamblers are far more likely to travel longer distances to visit the Casino.

1.6 Late night EGM play

Profile of late-night EGM players

When the demographic profile of those who usually play poker machines after midnight (n=52) is compared to those who do not usually play after midnight (n=260), some significant differences between the two groups are evident.

Those playing EGMs after midnight are significantly more likely to be aged 25-44 years, and to live in metropolitan NSW. This group also have a slightly higher household income than those who do not play after midnight. In addition late night EGM players are significantly more likely to be problem gamblers, with almost 6 in 10 classified as this type.

Types of late-night play

These findings are drawn from the qualitative research elements. There appear to be two very different types of late-night play evident among gamblers.

'Social' late night play tends to be with a group of friends, and often involves considerable consumption of alcohol. Typically, this type of gambling is part of a bigger night out – just one element in a night that can include dinner, drinks, and dancing.

In contrast, 'Solitary' late-night play is by definition undertaken alone. It is not always linked to alcohol consumption - though even if alcohol is involved, the focus is very squarely on gambling, with alcohol in a secondary role. This type of gambling tends to be a very focused experience – the player often reports single-minded attention on the machine itself.

The late-night play environment

Gamblers often believe that very late-night play (i.e. after 3am) occurs in an environment where the atmosphere is different compared to other times of the day. Those who do play later at night often report that the pokie room is not a place for partying or socialising – rather, it is about very focused, serious gambling.

There can also be a sense among late-night gamblers that there is a greater chance of a 'big win' later at night. On reflection, many late-night gamblers openly and fairly quickly acknowledge that they are more likely to chase losses and take greater risks as the night wears on.

1.7 Awareness of gambling harms

Gamblers are generally very aware of a wide range of harms which can stem from heavy use of poker machines. These include financial harm which can range from minor to significant and life-changing; a risk of addiction; challenges to mental health including from a 'gambling hangover'; and social isolation.

Harms perceived to be specific to late-night play

Perceived risks relating to diminishing capacities include tiredness contributing to a lack of focus and poor decision making; a 'loss of time' where players do not realise how long they have been playing; and among those who drink, a sense of taking greater risks as they become more inebriated. Ultimately, these risks are believed to amount to a greater likelihood of losing money, and doing so fairly quickly.

Late-night gamblers can report that the atmosphere late at night can often begin to feel tinged with a sense of desperation. In this context, where other gamblers can perhaps be seen as slightly unsavoury, gamblers can report concerns about their personal safety.

Individual personal susceptibility to risks

Overall, it appears that most gamblers are somewhat mindful of their own susceptibility to the different types of risks and harms associated with poker machines. Moderate-risk and problem gamblers are often quite open about their own susceptibility to harms – there is a sense of acknowledgement about these, even if this is only for a fleeting moment. However, most are quick to identify 'someone else' who is at greater risk of harm than they are personally, which often provides these gamblers with the ability to self-exempt from any personal concerns.

Strategies to mitigate risk

Moderate-risk and problem gamblers talk about a range of strategies they employ as a means of minimising their own risk. These can include setting financial limits; making a verbal commitment about their limits to other people; setting time limits and watching the clock; leaving their wallet in the car and only taking as much cash as they are prepared to lose; or making a pact with a friend whereby the friend is empowered to help moderate their own gambling behaviour. While these methods are readily identified, they are also often acknowledged to be unsuccessful. Many believe that the only thing which stops them from gambling is when a venue closes.

1.8 The EGM shutdown period

Awareness of the shutdown period

Only around one quarter of recreational, low-risk and moderate-risk gamblers claim to be aware of the shutdown. Problem gamblers are significantly more likely to be aware of the shutdown, with almost half claiming to be aware of it. In line with their higher levels of awareness about the shutdown period, problem gamblers are also significantly more likely to be able to correctly identify the timing of the shutdown period.

Very few gamblers claim to have had any personal experience of the poker machine shutdown period. Problem gamblers are significantly more likely to claim they have encountered the shutdown, 31 per cent claiming to have had their gambling interrupted by the shutdown.

It is worth noting here that the majority of venues are required to close before the shutdown commences, which likely limits the chances of the shutdown personally impacting respondents.

Perceptions of the shutdown period

The shutdown period is generally viewed as a positive, with similar levels of agreement across the different gambler types. At least two in three problem gamblers believe that it is a very good idea or a good idea, while three in four recreational gamblers hold this belief.

Ultimately, most believe that a break in play is a genuine positive for those who have become entrenched in play, or who are chasing their losses. Enforcing a break in play in this way is generally believed to be the only way that some players would stop in some circumstances.

However, on a practical level, many problem gamblers claim they would be frustrated if forced to stop as a result of a shutdown. While conceptually the idea of taking a break is appreciated, many believe that in reality it could be quite different.

Perceived benefits of an enforced break in play

Almost universally, taking a break is believed to be quite important for giving players the space and time to reduce their exposure to harm. Certainly, there are some problem gamblers who would continue gambling in the absence of a forced break in play. Current evidence suggests that closing time or the shutdown is the point at which many problem gamblers walk away from the poker machines and have a rest – indeed, some openly acknowledge they would continue to play otherwise, particularly if they were ‘in the zone’.

Action taken or likely to be taken as a result of the shutdown

Of these problem gamblers who have had personal experience of the shutdown, there does appear to be a likelihood to ‘venue-hop’ in order to continue playing EGMs despite the shutdown period.

Those who did not have any personal experience of the shutdown were asked what their hypothetical response would be. Responses clearly demonstrate that problem gamblers are the most likely to claim they would go elsewhere during the shutdown to continue playing EGMs.

1.9 The ideal EGM shutdown period

Consistency of approach

Gamblers generally believe that a mandatory, uniform shutdown is required if behaviour change is the desired aim. Certainly, at a rational level, the majority believe that a shutdown mandated by legislation is required in order to truly impact behaviour. Few believe that venues would switch poker machines off on their own accord.

Equally, most believe that a shutdown with uniform time parameters is a must in order to drive behaviour change. Most believe that whenever it is possible to shift venues, people will do so.

Ideal shutdown period

The prevailing view among gamblers is that the ideal shutdown period would run for at least four hours. This sentiment is most strongly held by recreational gamblers. Problem gamblers are the least likely to believe this – with a significantly larger proportion (46 per cent) believing a shutdown should last from between 1-3 hours.

From a theoretical perspective, many suggest that a longer shutdown period would likely increase its effect, given that it would impact a likely larger group of people. But, it seems that few would support a significantly more impactful shutdown – it seems to be an idea that is good in theory, but potentially frustrating in practice.

2. PROJECT BACKGROUND

2.1 Overview

Liquor & Gaming NSW (L&GNSW) is responsible for the regulation of liquor, wagering, gaming and registered clubs in NSW. The agency sits within the NSW Department of Customer Service, and its responsibilities include compliance, enforcement and licencing functions, as well as the provision of policy advice, program evaluation and executive support to the NSW Government.

Gambling is a common recreational pursuit, and an enjoyable one for many. In 2019, L&GNSW published research about the prevalence of gambling and problem gambling in NSW (Browne et al, 2019). This research showed that 53 per cent of the NSW adult population had participated in at least one gambling activity in the previous 12 months. The most popular gambling activities were lottery products (37 per cent), poker/gaming machines (16 per cent), horse and greyhound racing (13 per cent), buying instant 'scratchies' (13 per cent) Keno (9 per cent), sports betting (6 per cent) and table games in a casino (5 per cent).

The majority of people gamble with enjoyment and without harm, and many gambling forms are benign. However, there is potential for significant harm from some types of gambling, including lowered work productivity, depression, relationship breakdown, job loss, bankruptcy, crime and in some cases suicide (Productivity Commission, 2010).

Problems relating to electronic gaming machines (EGMs) are typically the most common issue for those presenting for treatment - although given the rise in online wagering, there are concerns about its potential future impact. The term 'problem gambling' is used in Australia to describe harms associated with difficulties in limiting time or money spent on gambling, and is intended to encompass a continuum of severity (Rodda et al, 2012). Problem gambling is characterised by difficulties in limiting money and/or time spent gambling which leads to adverse consequences for the gambler, others, or for the community (Neal, Delfabbro, & O'Neill, 2005).

The Problem Gambling Severity Index (PGSI) is a reliable and standardised measure of problem gambling, which closely resembles the DSM-IV criteria. It is the most commonly used tool in Australia to screen for problem gambling. Adults rate a range of behavioural and attitudinal measures which are scored to create a single index.

The 2019 NSW prevalence study identifies the breakdown of PGSI types among the NSW adult population, as follows:

- > problem gamblers (defined by a PGSI of 8 or higher) – 1 per cent of the total adult population;
- > moderate-risk gamblers (defined by a PGSI of 3-7) – 2.8 per cent of the total adult population;
- > low-risk gamblers (a PGSI of 1-2) – 6.6 per cent of the total adult population.

There is considerable stigma in Australia when it comes to problem gambling (Hing et al, 2015). The general public tend to view problem gambling as a condition resulting from the characteristics of an individual's personality or circumstance – but one that is recoverable. However, people with an identified gambling problem often feel that others see their condition as their own fault due to failures of character. They often also report significant self-stigma, including feeling disappointed with themselves, ashamed and embarrassed. Critically, stigma can be an obstacle to help seeking and behaviour change.

Under the *Gaming Machines Act 2001*, registered clubs and hotels must not operate gaming machines between 4:00am and 10:00am each day of the week. This restriction is referred to as the gaming machine shutdown requirements, often shortened to 'the shutdown' more colloquially. During the shutdown period, gaming machines must not be operated however venues may stay open to provide other services to their customers.

The intention of the shutdown requirements is to limit the opportunity for continuous gaming machine play and provide a 'break-in play' for gaming machine players. This gambling harm minimisation measure was introduced in 2001, with an interim three hour 6:00am to 9:00am shutdown period imposed from April 2002 and a full six hour 4:00am to 10:00am shutdown period imposed from May 2003.

Under the limited exemptions provided in the Act, registered clubs and hotels may apply to the Independent Liquor & Gaming authority to vary the shutdown period or apply for a reduced three-hour shutdown period.

2.2 Need for research

LGNSW identified a need to conduct research to further understand the benefits of shutdowns, and the optimum time of day to shut down EGMs to reduce gambling by at-risk and problem gamblers. This project was designed to inform the development of policy and assist in developing an approach that minimises the risk of gambling-related harm. The research may also inform the directions of a future review into the existing NSW EGM shutdown period which will be carried out independently. Critically, this research was not intended to be a review or evaluation of the current regulatory shutdown arrangements in NSW – it was a broader piece of research that sought to build and update the evidence base into this type of harm-minimisation activity.

3. OBJECTIVES

The overall objective of this study was to examine the harm-reduction impact of time-based access to EGMs, from the perspective of current literature as well as EGM players. Specifically, the research sought to:

- > examine what is currently known about the range and extent of gambling-related harms experienced by EGM players across PGSI categories, gaming venues and time of play;
- > determine the broad demographic profile of late-night EGM players, as well as their behaviours when it comes to using EGM venues (e.g. travelling out of area, playing at different times);
- > establish the extent to which a shutdown is necessary to create a break in play;
- > identify the optimum time, duration and day of the week (or weekend) for a shutdown to minimise gambling-related harm and maintain satisfaction in other patrons and venue owners;
- > examine the likelihood that gamblers would stay in a gambling venue if food / non-alcoholic drinks were still available during the EGM shutdown;
- > explore to what extent there might be any 'rolling-on' effect of gamblers moving from one venue to another if shutdown hours were not uniform (including which types of venues would be attended, and how this might vary across PGSI categories); and
- > determine whether there are any new technologies or complementary strategies that could be used to enhance harm minimisation in relation to continuous accessibility of EGMs.

4. RESEARCH METHODOLOGY

4.1 Overview

The program of research included:

- > a detailed set-up workshop with LGNSW;
- > a scan of available literature;
- > qualitative research, including:
 - a series of 4 group discussions with recreational and low-risk gamblers;
 - a series of 24 in-depth interviews with moderate-risk and problem gamblers; and
- > a 10 minute online survey with n=312 EGM users.

4.2 Set-up workshop

The project commenced with a full set-up workshop involving the team at Snapcracker as well as key stakeholders from LGNSW. During this session the research team received a comprehensive briefing from LGNSW as to the background of the study, as well as more detail about the desired research outcomes.

We also used this session to fine-tune the research approach, including sampling tweaks and further refinement of key areas of investigation. As part of this, LGNSW provided some starting points for the literature scan.

4.3 Literature scan

Overview

The literature scan was intended to provide a brief overview of the evidence around shutdown periods with regard to EGMs. As such, it is deliberately not claimed to be an exhaustive review of the available literature. This literature scan helped guide the direction of primary research conducted with gamblers.

Approach

A senior researcher from Snapcracker Research + Strategy conducted a scan of relevant literature. A broad internet search was conducted using Google, which identified a limited amount of grey literature. This was supplemented by a detailed examination of resources available on the Gambling Research Australia website (www.gamblingresearch.org.au), as well as the provision of some literature by L&GNSW.

In addition, a number of searches were conducted using academic databases including Medline, Psycinfo, Proquest, Informit, Sage and Academic Search Complete. These searches yielded hundreds of journal articles relevant to the topic of EGM gambling, but with very few specifically related to shutdown periods.

Search terms used across both the internet and academic searches were: 'electronic gaming machines'; 'slot machines'; 'poker machines'; 'gambling'; in conjunction with 'shutdown'; 'break in play'; 'harm minimisation'; 'harm reduction'; and 'responsible gambling'.

Any material which was published between 2009 and the present was included in the scan. In addition, two sources from prior to this date were also included, given their direct relevance to the topic – these included an evaluation of the NSW shutdown conducted in 2008, as well as an evaluation of a similar shutdown in the Australian Capital Territory, conducted in 2005.

Evaluation of sources

Sources were only included in the review if published:

- > in peer-reviewed journals;
- > by relevant government departments (e.g. the ACT Government); or
- > on the Gambling Research Australia website.

The journals which yielded relevant material included *Harm Reduction Journal*; *Journal of Gambling Studies*; and *Addiction*. Each of these journals are peer reviewed; have a specialist focus and are published by highly reputable academic publishing houses.

4.4 Qualitative research

Overview

The qualitative elements of the study involved both group discussions and individual interviews with NSW gamblers. We conducted four group discussions with recreational and low-risk gamblers. Each group included between 6 and 8 participants, with 26 participants taking part in total. Each group ran for 1.5 hours. The qualitative research also included a total of 24 individual in-depth interviews with moderate-risk and problem gamblers. These interviews ran for approximately one hour.

Research sample

Our sample for the group discussions was as follows:

Grp	Segment	Gambling Context	Age	Gender	Location
1	Recreational	Mix	18 – 39	Male	Sydney
2	Recreational	Mix	40 – 65	Female	Wollongong
3	Low-Risk	Mix	18 – 39	Female	Parramatta
4	Low-Risk	Mix	40 – 65	Male	Port Macquarie

Our sample for the in-depth interviews was as follows:

I'View	Segment	Gambling Context	Age	Gender	Location
1	Moderate-Risk	Casino	18 – 24	Male	Sydney
2	Moderate-Risk	Club	18 – 24	Female	Parramatta
3	Moderate-Risk	Pub	18 – 24	Male	Tamworth
4	Moderate-Risk	Casino	25 – 34	Female	Sydney
5	Moderate-Risk	Club	25 – 34	Male	Wollongong
6	Moderate-Risk	Pub	25 – 34	Female	Parramatta
7	Moderate-Risk	Club	35 – 44	Female	Sydney
8	Moderate-Risk	Pub	35 – 44	Male	Tamworth
9	Moderate-Risk	Pub	45 – 54	Female	Sydney
10	Moderate-Risk	Club	45 – 54	Male	Port Macquarie

I'View	Segment	Gambling Context	Age	Gender	Location
11	Moderate-Risk	Pub	55 – 64	Female	Sydney
12	Moderate-Risk	Casino	55 – 64	Male	Parramatta
13	Problem Gambler	Casino	18 – 24	Female	Sydney
14	Problem Gambler	Club	18 – 24	Male	Parramatta
15	Problem Gambler	Pub	18 – 24	Female	Port Macquarie
16	Problem Gambler	Casino	25 – 34	Male	Parramatta
17	Problem Gambler	Club	25 – 34	Female	Tamworth
18	Problem Gambler	Pub	25 – 34	Male	Sydney
19	Problem Gambler	Pub	35 – 44	Female	Wollongong
20	Problem Gambler	Club	35 – 44	Male	Sydney
21	Problem Gambler	Club	45 – 54	Female	Tamworth
22	Problem Gambler	Pub	45 – 54	Male	Sydney
23	Problem Gambler	Casino	55 – 64	Female	Parramatta
24	Problem Gambler	Pub	55 – 64	Male	Sydney

Sampling considerations

A range of considerations informed the composition of the qualitative sample. These are discussed below.

Age

To ensure a broadly even representation across our sample, we used age bands. The sample was slightly skewed toward the younger end of the spectrum (under 45 years) given that gambling overall is more prevalent among younger age groups.

Gender

The sample was evenly split according to gender. In group discussions, we used gender as a variable to ensure that groups were exclusively male or female.

Risk level

The sample was designed to ensure coverage of the different gambling classifications according to the PGSI. All participants had gambled at least three times in the previous 12 months. During screening, all potential participants completed the PGSI questionnaire, with gamblers classified as follows:

- > Recreational – PGSI of 0;
- > Low-Risk – PGSI of 1-2;
- > Moderate-Risk – PGSI of 3-7;
- > Problem Gambler – PGSI of 8 or more.

Type of gaming

All participants claimed to use electronic gaming machines as their primary or secondary form of gambling. Critically, all participants had to have engaged in late night EGM usage at least twice in the past six months after midnight.

Gambling context

During recruitment, participants were asked to identify the context in which they primarily gamble (either pubs/hotels, clubs or the casino). This determined the context they were recruited against. For group discussions, participants came from a broadly even mix of gambling contexts (though outside Sydney this mix did not include the Casino).

As part of the recruitment process, we also asked about the size of the venue (e.g. a large club vs a small community club). While we did not specify the size of each venue against individual interviews, the sample included a mix of different sized venues across the sample for both the pub and club context.

Locations

The research included those who live in Inner Sydney (east of Parramatta), Western Sydney (west of Parramatta), Wollongong, as well as Tamworth and Port Macquarie.

Cultural backgrounds

There were no specific criteria around cultural background included in the sample specifications. However, consistent with most market research, our sample included people from a wide range of cultural backgrounds.

Approach to discussions

Both individual interviews and group discussions followed a semi-structured discussion guide, which was developed in consultation with LGNSW. A copy of the discussion guide can be found in the Appendix.

Recruitment of participants

All participants were recruited by specialised market and social recruitment partners. Recruitment used existing panels of research participants, and in some cases used methods such as snowballing and social media advertising to supplement these panels.

Recruiters used a screening questionnaire to determine the suitability of potential candidates, which was developed by the research team, in consultation with LGNSW. The screening questionnaire included questions around gambling behaviour, as well as the PGSI screening tool. A copy of the recruitment questionnaire can be found in the Appendix. Participants were paid \$80 in cash to reimburse their travel and other expenses.

Fieldwork timing

All interviews and group discussions were conducted between 14 and 23 October 2019.

4.5 Quantitative research

Overview

The quantitative element of the study involved n=312 online surveys among last 12 month EGM players in NSW.

Sample structure

The target audience for the online survey was NSW residents who gamble using EGMs. To qualify, participants had to have gambled using EGMs in the past 12 months at either a pub, club or the casino. The sample was deliberately structured to ensure the inclusion of a relatively even number of the four different PGSI categories. As a result, the sample is not representative of the NSW population, but rather is a snapshot of these very specific audiences.

The final sample included:

- > n=81 recreational gamblers;
- > n=75 low-risk gamblers;
- > n=78 moderate-risk gamblers; and
- > n=78 problem gamblers.

Questionnaire

A questionnaire was developed by the research team in consultation with LGNSW. The questionnaire was designed to help validate the findings from the qualitative phase and to provide additional rigour regarding the behaviours, attitudes and preferences of EGM players. A copy of the questionnaire can be found in the Appendix.

Quantitative fieldwork

The sample was obtained from a proprietary research-only panel. The panel provider also scripted and hosted the online survey and collated and processed the final data set.

Significance testing

Any statistically significant differences between independent groups at the 95 per cent confidence level are highlighted throughout the report. The confidence level used in significance testing qualifies a statistical statement by stating the probability that the observed result cannot be explained simply by sampling error. To state that the observed result is significant at the 95 per cent confidence level is to say that there is a 95 per cent chance that the difference is real and not just a coincidence of sampling.

A z-test was used to determine whether the proportions of two independent populations (subgroups of the total sample) are the same or not. A z-test is commonly used as a means of establishing whether two proportions (or means) from independent samples are significantly different from one another, especially when the sample size of the populations is greater than n=30.

The figure below provides a key to understanding how differences between independent subgroups are labelled throughout the report.

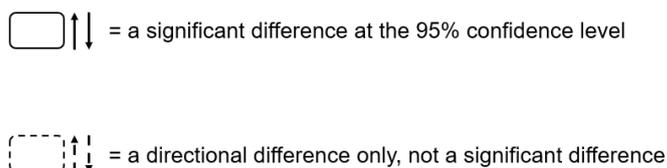


Figure 1: Notation of differences throughout the report

5. FINDINGS FROM LITERATURE SCAN

5.1 Previous evaluation of EGM shutdown periods in NSW

Evaluation in 2008 (Tuffin & Parr, 2008)

In 2008, a comprehensive review of the six-hour shutdown of electronic gaming machines in NSW was conducted. This evaluation included a range of different research approaches including qualitative and quantitative consultations with gamblers, venues, wider industry including gambling support agencies, and the wider community.

The review concluded that the shutdown was effective in reaching problem gamblers that are playing at the time of the shutdown. The evaluation identified that 29 per cent of EGM players at venues in the times surrounding the shutdown were problem gamblers according to the PGSI, while a further 27 per cent were categorised as moderate risk.

A majority of these players indicated they intended to go home when the shutdown came into effect – suggesting that the shutdown achieves its objective of providing a break in play for problem gamblers and encouraging them to go home.

Venues were generally of the view that the shutdown had little impact on problem gamblers and more of an impact on recreational gamblers. It was common for venues and related stakeholders to quote the statistic that less than one per cent of the NSW population were categorised as problem gamblers.

The evaluation also concluded that the shutdown does not reach all problem gamblers – the research highlighted that problem gamblers can play at any time of the day. However, the evaluation concluded that the shutdown does reach many gamblers and for this group it provides the necessary impetus to discontinue EGM play – and that the shutdown is a key factor contributing to this decision.

Among support agencies and some gamblers, the evaluation identified a strong call for the effect of the mandatory shutdown to be maximised by moving it to other times of the day when more gamblers are playing. However, for venues changing the time of the shutdown was unlikely to be considered economically viable. While many venues would prefer the shutdown not to exist at all, the period from 4am until 10am was felt to have the least impact on their businesses overall.

The evaluation identified support from all groups for increased primary prevention measures, and more targeted secondary measures to complement the shutdown. In particular, the use of a broad community education campaign on the availability of assistance for problem gamblers was almost universally endorsed as a way of helping problem gamblers.

5.2 Evaluations of shutdown periods in other jurisdictions

There appears to be limited evidence of evaluations of shutdown periods in other jurisdictions outside of NSW. However, during the review of available literature, some examples were uncovered.

The Australian Capital Territory (McMillen & Pitt, 2005)

In 2005 a review was conducted to examine a suite of gambling harm minimisation measures in place in the ACT. The review included a mandatory three-hour shutdown of gaming machines each day, between the hours of 4am and 7am. The evaluation included a desktop review as well as in-depth interviews with problem gamblers and their families, recreational gamblers, ACT club managers as well as community organisations, counsellors and expert analysts.

Club managers claimed to support the shutdown but a majority did not consider the shutdown to be an effective harm minimisation measure. In part, this is due to a perception among club managers that the shutdown mostly affects recreational gamblers rather than problem gamblers. Club managers generally reported a 'shoulder' period either side of the shutdown, where patronage declined. No club managers reported any compensatory behaviour by patrons, such as larger bets prior to the shutdown period.

Recreational gamblers appeared to be largely unaffected by the shutdown period. From a sample of 45 patrons, 20 per cent had previously played EGMs between 4am and 7am before the shutdown came into force and of these, a majority were shift workers or finished work near those times. A very small proportion of recreational gamblers claimed to have changed the amount of time or money spent gambling on EGMs as a result of the shutdown.

The shutdown period was rated as effective by 40 per cent of recreational gamblers, while 33 per cent felt the measure was ineffective. Ultimately, while the concept of a shutdown was perceived as a positive measure by the majority of recreational gamblers interviewed, most were sceptical of the benefits given the shutdown was timed to occur when very few people would be in clubs.

A very small number of problem gamblers reported the shutdown as having a positive effect – this group indicated that their gambling was less of a problem as a result of the measure. By providing a break in play, the shutdown had been effective. Ultimately however, the timing of the shutdown was such that most problem gamblers claimed not to be affected.

Community organisations and counsellors considered that the shutdown was beneficial for a small number of problem gamblers because it enforced a break in play. However, all agencies and expert analysts were critical of the measure, believing that the timing reduces its efficacy. Most believed that it would be more effective if it occurred during times when gambling is more popular.

Norway (Rossow & Hansen, 2015)

Prior to 2006, EGMs in Norway were relatively unregulated – they had no age limit and were freely available in supermarkets, petrol stations, kiosks and bars etc. In 2005, turnover on gambling reached a peak – €1424 per inhabitant aged 16 years and over, and 4.8 per cent of disposable household income. During this period EGM gambling accounted for two thirds of gross turnover.

On 1 January 2006 a ban on banknote acceptors took effect, and from 1 January 2007 a shutdown period was enacted – EGMs were banned between midnight and 6am across the country. Subsequently, a complete ban on EGMs was enacted on 1 July 2007, which was in place for approximately 1.5 years.

From 2005 to 2006 (6 months with a ban on banknote acceptors), there was a 17 per cent reduction in gross turnover from EGMs, and a very small increase of 3 per cent on turnover from other forms of gambling. From 2006 to 2007 the note acceptor ban and the shutdown period were in place for the first six months and the full ban was in place for the second six months. During this period, turnover on EGMs decreased by a further 55 per cent, though turnover on other forms of gambling increased by 13 per cent.

Data from the national helpline service for gamblers and their relatives showed that the number of callers with EGM gambling as their main problem decreased substantially (by 62 per cent) in the second half of 2006, when the ban on banknote acceptors was in place. In the second half of 2007 and in 2008 (when the full ban was in place), few calls at all were placed by gamblers reporting EGMs as their main problem. The number of calls by other gamblers increased, though not nearly to the extent that it counterbalanced the reduction in calls from EGM gamblers.

It is important to be mindful that the policy context in Norway during this period was very fast-moving and included multiple interventions in a short period of time. Therefore, attributing any shift directly to the shutdown period is not possible.

Nova Scotia (reported in Gainsbury, Blankers, Wilkinson, Schelleman-Offermans and Cousijn, 2013)

The authors examined evidence of best-practice policies to provide recommendations for international guidelines for harm-minimisation policies for gambling. As part of this review, evidence from Nova Scotia was cited (Corporate Research Associates, 2007) which this review has been unable to source. However, Gainsbury et al. (2013) indicate that the hours of EGMs were restricted after midnight in Nova Scotia in response to data suggesting that problem gamblers were playing in the early morning.

Evaluation of this modification found that some higher-risk gamblers reduced their expenditures, while some gamblers shifted to other venues after midnight. Overall, gambling revenues were found to have decreased by 5-9 per cent. Gainsbury et al. (2013) suggest that a restriction of opening hours for gambling venues appears to have a small but potentially important impact on reducing gambling-related harms.

5.3 Other research relevant to shutdown periods

The Influence of Venue Characteristics on a Player's Decision to Attend a Gambling Venue (Hing and Haw, 2010)

Hing and Haw (2010) conducted a study seeking to examine the interaction between the patron and the venue, and specifically what characteristics of the venue are major influences on a player's decision to attend a particular venue. As part of this study, the researchers examined the features of venues that contribute risk factors for problem gamblers and at-risk gamblers.

The researchers conducted a national telephone survey of 501 gamblers (general population of gamblers), as well as an online/telephone survey with 186 people who had recently commenced counselling for gambling related problems.

Venue characteristics that were identified as risk factors were those which were considered important by the gambler and which were significantly and positively correlated with PGSI score; and characteristics which were present in a gambler's most frequently visited venue, and which were positively and significantly correlated with PGSI score.

This analysis identified that risk factors for the general population of gamblers who most frequented a hotel, club or casino were that a venue had extended opening hours; and that the venue had the gambler's favourite gaming machines. For those who had recently commenced counselling a number of risk factors were identified – these included extended opening hours; convenient physical access to the venue; easy access to an ATM; specific features of gaming machines such as linked jackpots and bonus features; a large choice of machines; a layout that allows privacy; and an atmosphere that reflects the glitz of Las Vegas.

The authors concluded that extended venue opening hours were a potential risk factor for the national sample of gamblers and those in treatment for gambling problems. The authors noted that despite some reforms in this area, 24 hour gaming is possible in all jurisdictions in Australia and that mandated, consistent and reasonable shutdown periods would reduce this risk factor.

5.4 Community attitudes toward gambling harm-minimisation measures

A number of Australian studies have sought to examine community attitudes toward gambling harm minimisation and reduction strategies. Bestman, Thomas, Randle, Pitt and Daube (2018) sought to examine how residents of NSW perceive EGMs in their communities and the extent to

which increased regulations to reduce the harms associated with EGMs are supported by the community. The study involved an online survey of 500 individuals aged 16-82 years who were residents of NSW. It is important to note that this study does not address a shutdown period specifically, though it does provide some indication of prevailing attitudes toward regulation of EGMs more broadly.

Just under two thirds of the sample claimed to be mindful of at least one negative impact of having EGMs in the community – these tended to be around negative financial consequences, gambling addiction and negative social impacts on communities. Around one third described positive impacts of EGMs, which were focused around employment and that profits are used to fund community projects, taxes and community-based sports.

A majority (81 per cent) of participants in the survey agreed or strongly agreed that the NSW government should increase the regulation of EGMs in some way – including 77 per cent who agreed that the number of EGMs in NSW should be reduced overall.

This study was also conducted in Victoria (Thomas, Randle, Bestman, Pitt, Bowe, Cowlshaw and Daube, 2017). Again, this study used an online survey of 500 Victorian residents aged 16-88 years. This study identified that participants perceived all gambling to be harmful to some degree, although EGMs and Casino gambling were perceived as significantly more harmful than horse betting and sports betting.

In this study, factors associated with EGM harm included perceptions that EGMs are both harmful and exploitative, as well as a belief that EGMs create a perception that they are not especially risky products. Some participants referred to the accessibility and availability of EGMs in community environments, with some suggestion that harms associated with EGMs are related to the saturation of EGMs in communities.

Similarly to the NSW study, there were high levels of agreement with policies aimed at reducing and restricting the number of venues which offer opportunities to gamble. More than 80 per cent of the sample agreed with the proposition that the Victorian government should increase the regulation of EGMs.

5.5 Potential complementary harm minimisation strategies

A number of potential harm minimisation strategies are evident in the literature. It is important to note that these are largely represented in the literature as strategies in and of themselves – and in no cases are they presented as complementary strategies to be used in conjunction with a shutdown period.

Harris and Griffiths (2016) conducted a critical review of harm minimisation tools available for electronic gambling, and key findings from this review are detailed below.

Messaging (static vs dynamic)

According to the authors, dynamic messages which pop up on screen and deliver harm minimisation messages have been the subject of considerable attention. Empirical research has demonstrated that when secondary information is delivered in a way that interrupts a primary task, this has an orienting and focusing impact on attention that can positively impact performance on the primary task. Harris and Griffiths (2016) argue that this approach is advantageous over a static messaging approach which requires gamblers to divert their attention away from the primary task of gambling and process harm minimisation messages in a separate location. Previous research (Monaghan and Blaszczynski, 2007, cited in Harris and Griffiths, 2016) has demonstrated that message content for dynamic messages is significantly more likely to be recalled compared to static messages.

Different approaches to messaging (informative vs self-appraisal messaging vs normative feedback)

Harris and Griffiths (2016) also examined the literature on different styles of messaging. The authors concluded that while pop-up messaging may be an effective means to communicate with gamblers during a session, the type of message delivered would likely play a critical role in determining its harm minimisation impact.

The review identified that informative messaging (such as highlighting the risks and potential odds of winning) has received some empirical support, however despite some positive results, the authors argue that informative messaging has a consistent impact on correcting erroneous cognitions, but that this effect alone is insufficient to influence gambling behaviour.

The review also considered self-appraisal messaging, whereby messages directly encourage players to self-appraise the time and money spent gambling within a session, rather than simply describing risks or probabilities. The authors identified that this style of message has received some attention in recent years, and some positive but limited empirical support.

Harris and Griffiths (2016) also identified normative feedback (that is, correction of an individual's perception about normal levels of engagement in behaviours by other people) as a potential way to facilitate behavioural change, and note that this has begun to receive attention in gambling literature. The authors identify some studies which have demonstrated that this style of message has been shown to exert both perceptual and behavioural influence. However, the review notes that several limitations exist in the studies investigating normative feedback to date.

Other harm-minimisation approaches

Beyond messaging delivered via static or pop-up approaches, there are a wide range of alternative harm minimisation approaches identified in the literature examined as part of this review. It is important to note that the review did not seek to exhaustively review harm minimisation approaches beyond shutdown periods – for this reason, the list provided below is by no means exhaustive, and there is no critical examination of the different approaches identified.

Potential other approaches (listed here in no particular order, and with no commentary on their effectiveness) are: limit-setting techniques and pre-commitment approaches; behavioural tracking tools which allow gamblers to better understand their behaviour and track it as necessary; the prohibition and modification of note acceptors thereby reducing the amount that individual gamblers can add to an EGM at any one time; a ban on ATMs in gaming areas; limits on the number of poker machines in any venue; a ban on smoking in gaming areas; a reduction in the number of lines on each game; a reduction in bet per spin.

5.6 Conclusions from the literature scan

Efficacy of shutdown periods

The literature appears to indicate that there are benefits of shutdown periods when it comes to reducing harm, particularly among problem and moderate-risk gamblers. Essentially, the literature suggests that a shutdown period can create a forced break in play, which in some instances results in gamblers going home. It is likely that this break in play results in a lower expenditure on EGMs overall, which in turn has potential to reduce a number of other harms which can stem from this (these are identified in the primary research - Section 10 of this report). The literature is unclear as to whether the benefits of any shutdown are especially experienced by problem gamblers vs moderate or low-risk gamblers.

More broadly, the evidence appears to suggest that extended trading hours of gambling venues are attractive for those who may be experiencing issues with their gambling.

However, it is also clear from the literature that the impact of these shutdown periods is likely quite limited – the times where shutdowns occur tend to be very late in the evening, where the number of people who are gambling is fairly low.

A consistent call from various stakeholders appears to be for shutdown periods to be extended to enhance their reach and impact – by curbing the behaviour of a greater number of gamblers, a shutdown is often felt to have a greater chance of reducing harm. However, industry have considerable concerns about the impact of an extended shutdown, both on the profitability of venues, but also on the amenity and enjoyment of gamblers for whom poker machines do not represent a significant issue.

Community attitudes

The literature suggests that community attitudes, both in NSW and other Australian jurisdictions, broadly support the idea of greater regulation of poker machines. The evidence suggests that a significant proportion of people believe that poker machines do carry significant risks of harm, both for individuals and society more broadly. In this context, there does appear to be some appetite among the general community for greater action to regulate these products. A logical extension of this is that there is likely to be considerable public support for a shutdown period and may even be support for an enhanced shutdown regime.

Complementary strategies

While the literature scan was not intended to focus on complementary strategies, a number of studies were reviewed which examined a range of harm-minimisation approaches. Ultimately, it seems that there are several potentially interesting harm minimisation strategies which could complement a shutdown, though there is certainly none which stand out as being especially successful in achieving harm minimisation outcomes than others.

6. A SNAPSHOT OF GAMBLERS IN THE SAMPLE

6.1 Demographic profile of gamblers

The table below shows a breakdown of the quantitative sample by demographics – including gender, age, location and household income. It is important to remember that the quantitative sample was deliberately made up of people who had gambled using EGMs in the past 12 months and is therefore not representative of the broader NSW population.

Recreational gamblers are significantly more likely to be aged between 55-74 years, and more likely to live in regional NSW while problem gamblers are significantly more likely to be aged 18-34 years and to live in metropolitan NSW (defined in the questionnaire as Sydney region, Northern Sydney region, Western Sydney region or South Western Sydney region).

%		Total (n=312)	Recreational (n=81)	Low risk (n=75)	Moderate risk (n=78)	Problem (n=78)
Gender	Male	51	51	49	51	53
	Female	49	49	51	49	47
Age	18-34	20	5 ↓	15	18	42 ↑
	35-54	40	37	32	47	44
	55-74	40	58 ↑	53 ↑	35	14 ↓
Location	Metro NSW	61	52	59	62	73 ↑
	Regional NSW	39	48 ↑	41	38	27
Household income*	Under \$25,000	11	12	16	9	9
	\$25,000 – 59,999	27	33	24	28	22
	\$60,000 – 99,999	25	19	25	28	27
	\$100,000 – 199,999	31	31	31	29	35
	\$200,000 +	6	5	4	7	6
	Average HH income	\$90,995	\$85,513	\$89,816	\$91,645	\$96,948

Table 1: Demographic profile of gamblers

6.2 Gambling behaviour by PGSI category

The research examined a range of different gambling behaviours by the different PGSI categories. The table below shows the percentage of each gambler type who engaged in a range of behaviours in the past 12 months. The data show that problem gamblers are significantly less likely to buy lottery tickets than other PGSI groups, but significantly more likely to have played a poker machine in a pub or hotel; placed a sports or racing bet with an online betting company; and played a poker machine in a casino.

%		Total (n=312)	Recreational (n=81)	Low risk (n=75)	Moderate risk (n=78)	Problem (n=78)
In the last 12 months	Played a poker machine in a club	77	78	79	82	71
	Bought lottery tickets, either online or in-person, for Lotto, Powerball or other lottery	72	75	73	78	60 ↓
	Played a poker machine in a pub / hotel	55	48	52	54	68 ↑
	Placed a bet at the TAB in a club, pub / hotel or casino	52	41	41	56	71
	Played Keno in a club, pub / hotel or casino	36	35	37	32	40
	Placed a sports / racing bet with an online betting company	33	17 ↓	28	40	46 ↑
	Played a poker machine in a casino	29	17 ↓	21	29	47 ↑

Table 2: Gambling behaviour by PGSI category

6.3 Differences between PGSI categories

The qualitative research looked closely at the differences between people who fall into the different PGSI types. Certainly, from a qualitative perspective it appears that differences between the PGSI types can at times be difficult to immediately identify.

While there can be some differences in attitudes and behaviours between recreational gamblers (a score of 0 on the PGSI) and low-risk gamblers (a score of 1-2 on the PGSI), these are often subtle.

Moderate-risk gamblers tend to be the group with the broadest range of attitudes and behaviours, which largely makes sense given that a score between 3-7 on the PGSI indicates membership of this group. Qualitatively, the individuals in this group tended to be either quite similar to low-risk gamblers, or to be very close in attitudes and behaviour to problem gamblers.

Problem gamblers appear to be the most defined group from a qualitative perspective. Among our sample, this group tend to exhibit obvious attitudes and behaviours which identify them as someone who is experiencing difficulties with gambling.

6.4 Recreational gamblers

Ultimately, it appears that recreational gamblers see poker machines as a form of entertainment. For the vast majority, gambling on EGMs is a secondary activity that supplements other activities such as having a meal, or socialising with alcohol.

Gambling on EGMs tends to be a fairly social activity for this group. Most claim to play only with friends, and in some cases recreational gamblers even share a machine between a group of friends, with one person 'pushing the buttons' for the enjoyment of everyone else in the group.

Poker machines tend to be played at relatively low stakes for this group – usually there is a maximum bet in a session of \$50, and recreational gamblers tend to be entirely happy to walk

away once this initial cash is gone. Occasionally there may be an extension of play after a win, but this group are the most likely to take their winnings and leave.

Overall, this group are rarely emotional about play or winning – most acknowledge that it is simply about luck and few are really excited at the prospect of a big win.

6.5 Low-risk gamblers

At first glance, this group are often highly similar to recreational gamblers in their attitudes and behaviours, although they can be slightly more emotional overall about poker machines. While they are still largely quite rational in their approach to EGMs, there can be a greater focus on the thrill of play, and more excitement on the prospect of a win.

Low-risk gamblers are also more likely to play on their own than recreational gamblers. Often this appears to be while they are waiting to meet someone at a licenced venue, and in some cases this group play while they are smoking, particularly if other members of their group do not smoke.

Finally, there also appears to be a slightly greater propensity to spend more in each individual gambling session than recreational gamblers. Low-risk gamblers also seem somewhat more likely to become entrenched in play as they win.

6.6 Moderate-risk gamblers

As noted above, this group are the most difficult to neatly characterise – ultimately, they exist on a fairly broad spectrum that bridges the gap between low-risk and problem gamblers, and this is driven by the broad range of scores that qualify an individual as a moderate-risk gambler on the PGSI.

At one end of the spectrum, this group can exhibit behaviours and attitudes that are consistent with the low-risk group, perhaps with higher levels of emotion around gambling, and a greater likelihood to become entrenched in play – either due to a win, or to chase losses.

At the other end of the spectrum, moderate-risk gamblers can exhibit many of the same characteristics as problem gamblers, in terms of their attitudes toward gambling, their gambling behaviours, and the level of emotion they attach to their gambling.

Within our qualitative sample, we encountered individuals at either end of the spectrum, with many exhibiting a range of attitudes and behaviours slightly in the middle of the two.

6.7 Problem gamblers

Problem gamblers tend to be highly focused on gambling per se. For most problem gamblers, gambling is *the* activity – while sometimes the occasion may involve dinner or drinks with friends, poker machines are almost always at the heart of it for this group.

In most cases, gambling is a solitary activity, where players are able to focus on their machine and the experience with minimal distractions. However for some young men there seems to be a social element to problem gambling, where they almost binge on gambling in a single occasion – pushing one another to test their limits and increase the stakes as the session progresses.

In any case, gambling is often quite hidden from other people, including sometimes from a problem gambler's immediate family. This group are generally very mindful of being judged by others, and actively seek to avoid or minimise this.

Problem gamblers often have a very strong emotional relationship with poker machines. Members of this group often claim to have a favourite machine that they gravitate towards, and they often talk about developing a sense of connection with a particular machine as a session progresses.

The experience of playing tends to be highly emotional – the sounds, lights and adrenaline rush of winning often tends to overshadow more rational considerations. In fact, many talk about an emotional intensity to play where they almost develop an intimate relationship with their machine.

This intense playing experience often provides a strong sense of escape from everyday life – players can encase themselves in their own worlds and talk openly about 'losing themselves' from the stresses and pressures of everyday life.

6.8 Case studies of problem gamblers

The case studies below have been included to better illustrate the experience of problem gamblers. Names have been changed to protect the identities of participants.

Julie*

Julie is 38, and a mother of two children under 10. She plays at least five times per week, with a daily average spend of \$150 - \$200. Her heaviest play days are Tuesdays during the day while her children are both in care. Julie claims to sometimes leave home when her family is asleep to play the pokies at the local club until close. In order to pay for her poker machine usage, Julie curtails spending in other aspects of her life. For example, grocery budgets are often cut, and she avoids driving too far to save on petrol.

Dave*

Dave is 30, single and a nursing student. He plays the pokies at least three times per week, often with a group of friends and claims to spend up to \$500 in a session. He prefers to play pokies on quieter nights (Monday, Tuesday) when there are fewer other patrons and a greater choice of machines. He and his friends know the venues which open the latest and play there until the venue closes. Dave often drinks fairly heavily during these gambling sessions, and his group of friends have 'recovery sessions' the following day, where they self-dose with intravenous fluids. Dave recognises that he has 'gambling hangovers' which can last for multiple days after heavy losses, and negatively impact on a number of different aspects of his life.

Melissa*

Melissa is 45 and lives with her partner. She gambles daily at local clubs, spending between \$300 - \$600 per day on poker machines. She is currently funding this via a sizable inheritance, though she is expecting this to run out at some point in the future, at which point she anticipates a return to a more stressful life of living from hand to mouth and juggling bills in order to fund her time on the pokies. She often travels between venues and claims that the club closing is the only reason to stop. She claims to recognise that her gambling is an issue but says that she feels largely powerless to do anything about it.

7. PERCEPTIONS OF GAMBLING VENUES

7.1 Pubs

Overall, it appears that pubs can be seen as something of a 'casual' gambling venue. While most gamblers certainly see gambling as a large part of pub culture, there is a strong sense among this group that gambling is only one small part of the pub experience.

Poker machines are widely regarded to be housed in a very separate part of most pubs – they tend to be in a specific area, that patrons must choose to visit, and as a result gamblers rarely see them as being 'front and centre' in the broader pub space.

Among those who prefer to gamble in pubs, there can be a strong sense that pubs have a smaller and more local feel, which is often appreciated by this group. As a result, pub gambling is often felt to offer a more private gaming experience than can be found in other venues.

However, there are some drawbacks to pub gambling that can be quickly identified by gamblers. In some cases, the atmosphere can be seen as slightly 'dingy', and while this obviously varies across different establishments there appears to be a sense among gamblers that pubs are slightly dingier overall. There is also a perception that pub gambling rooms can often attract a slightly 'rougher' crowd, although again this is likely to vary by establishment. Certainly, gamblers report that the gambling scene in pubs often has a stronger focus on alcohol than it does in clubs.

7.2 Clubs

Clubs are often spontaneously identified by gamblers as being central to people's social lives and their communities. Clubs are believed to hold this position by virtue of the range of different experiences that tend to be available in clubs – gamblers talk about meal, entertainment and drinking options that are often suitable to the whole family.

For many gamblers, 'the club' is felt to be a very strong anchor point for their community. Clubs are widely regarded as natural meeting places where a sense of community is fostered, and there is also a strong belief that many clubs also deliver significant financial contributions to community projects.

Unlike pubs however, poker machines are widely regarded to be a central component of clubs – gamblers regularly report a belief that the machines take 'centre stage' and are highly visible within the club environment, and many believe that clubs simply would not survive without them. Indeed, some slightly more cynical gamblers believe that clubs are essentially all about poker machines, with many other elements of the clubs being designed purely to draw people in to play the pokies.

7.3 The Casino

Gambling is widely acknowledged by gamblers to be the primary purpose of the Casino – its wide choice of gambling options is felt to create an environment where people can go to 'have a real blowout' on their gambling. However, the Casino is widely felt to offer a range of other entertainment options, too. For many, the Casino is a venue of choice later at night, and this has only increased in people's minds since the lockout laws.

Ultimately, many gamblers associate the Casino with a sense of fun, excitement and glamour. These associations appear to enhance the appeal of the Casino as a venue for a big night out among gamblers. Gamblers from outside of Sydney can often indicate that a trip to the Casino can be an exciting event that they plan ahead for – including setting aside a considerable budget to ensure they are able to 'blow out' as much as possible.

7.4 Perceptions around gambling inducements

Gamblers appear to believe that inducements to gamble provided by venues are quite structural in nature, rather than being more ad-hoc. Certainly, gamblers acknowledge that venues do provide amenities such as free tea, coffee and snacks, and that in some cases they might not need to pay for all of their soft drinks. Overall however, gamblers often indicate that these 'inducements' rarely have a significant impact on players – a majority claim they do not take advantage of them, while those who do suggest that they are rarely the reason they would continue playing.

“Oh look, they do have the sad old basket of snacks in the corner but I never even look at it and I don't think anyone is staying in the room to take advantage of all that stuff” (Moderate-risk gambler, Tamworth)

Rather, many identify things such as member points on club cards which can act as a reason to play the poker machines, and a reason to play at one venue over another. Additionally, some indicate that it can feel like clubs use things like raffles to entice patrons into venues, and then draw these out over as much time as possible to maximise the time spent by people on the poker machines.

8. GAMBLING BEHAVIOUR

8.1 Frequency of play

Clubs

Most moderate, low-risk and recreational gamblers claim to be playing poker machines relatively infrequently compared to problem gamblers. The figure below shows self-reported frequency of play, split by the different PGSI categories.

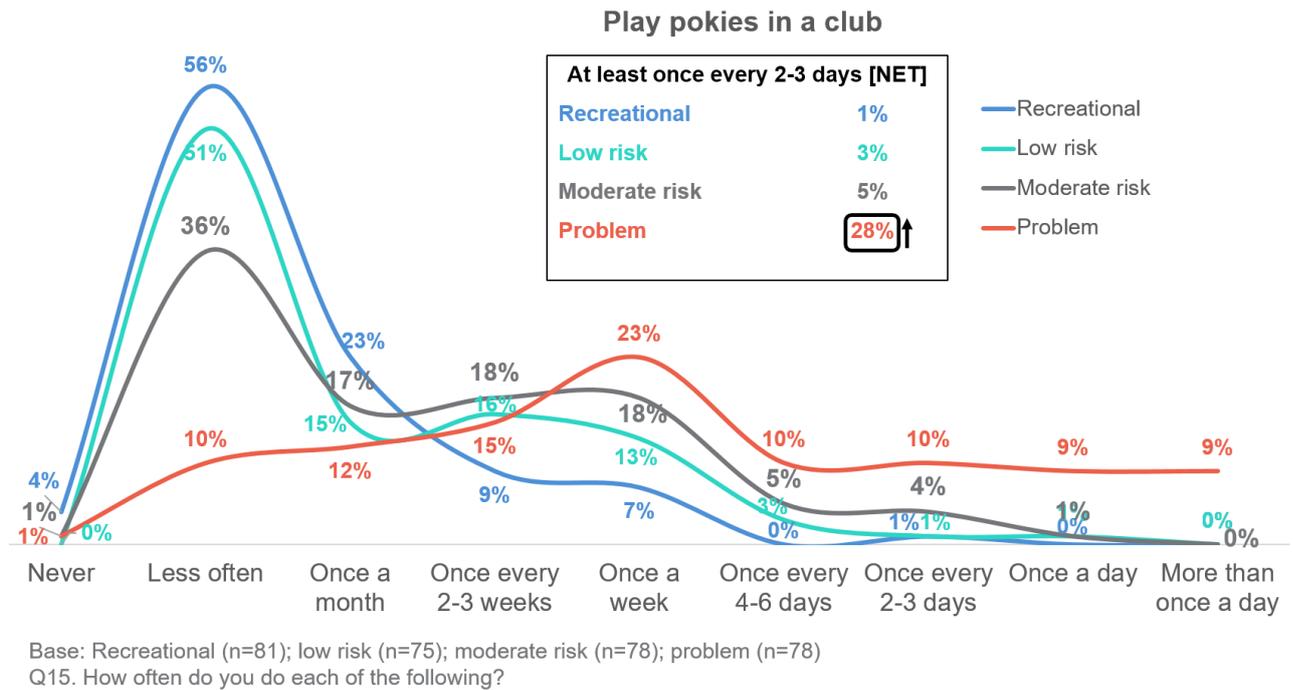


Figure 2: Self-reported frequency of play in clubs

When responses for any frequency above at least once every 2-3 days are aggregated, there are significant differences apparent between problem gamblers and other PGSI types. 28 per cent of problem gamblers claim to play at least this frequently, with far lower rates among other types - 5 per cent of moderate risk gamblers, 3 per cent of low-risk gamblers and 1 per cent of recreational gamblers.

Pubs

Self-reported frequency of play in pubs is fairly similar to that of clubs, with problem gamblers exhibiting a significantly higher frequency of play than all other PGSI types. The figure below shows frequency of play by PGSI type.

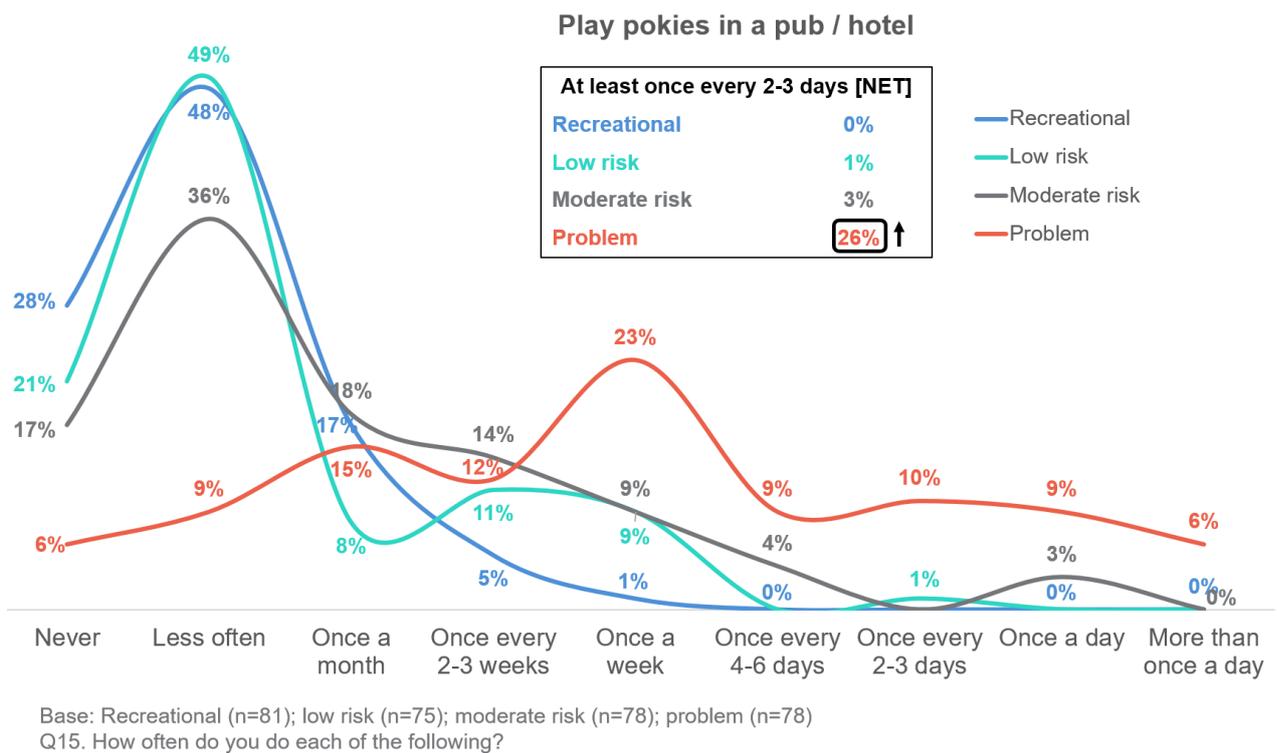
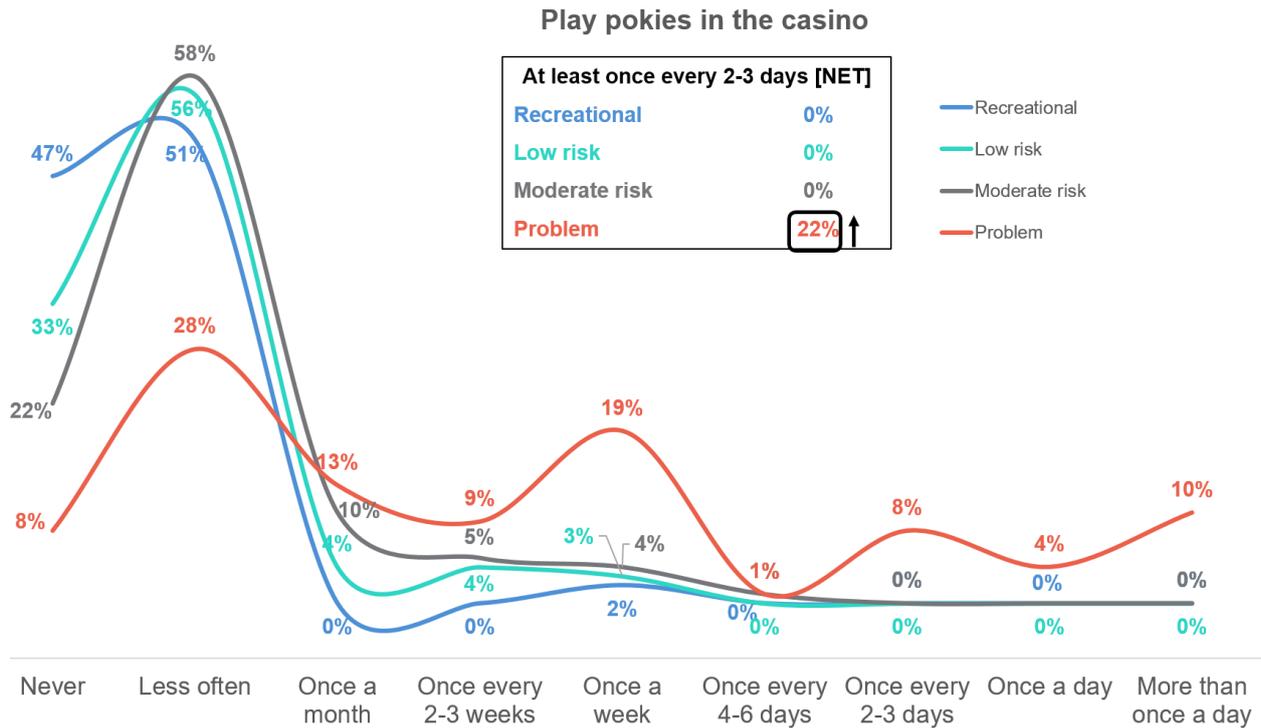


Figure 3: Self-reported frequency of play in pubs

Again, when responses for any frequency above at least once every 2-3 days are aggregated, there are significant differences apparent between problem gamblers and other PGSI types. 26 per cent claim to play at least this frequently, with far lower rates among other types – 3 per cent of moderate risk, 1 per cent of low risk and 0 per cent of recreational gamblers.

The Casino

The Casino is the least frequented venue for playing poker machines across all PGSI segments. The figure below shows self-reported frequency of play among all PGSI types in the Casino.



Base: Recreational (n=81); low risk (n=75); moderate risk (n=78); problem (n=78)
 Q15. How often do you do each of the following?

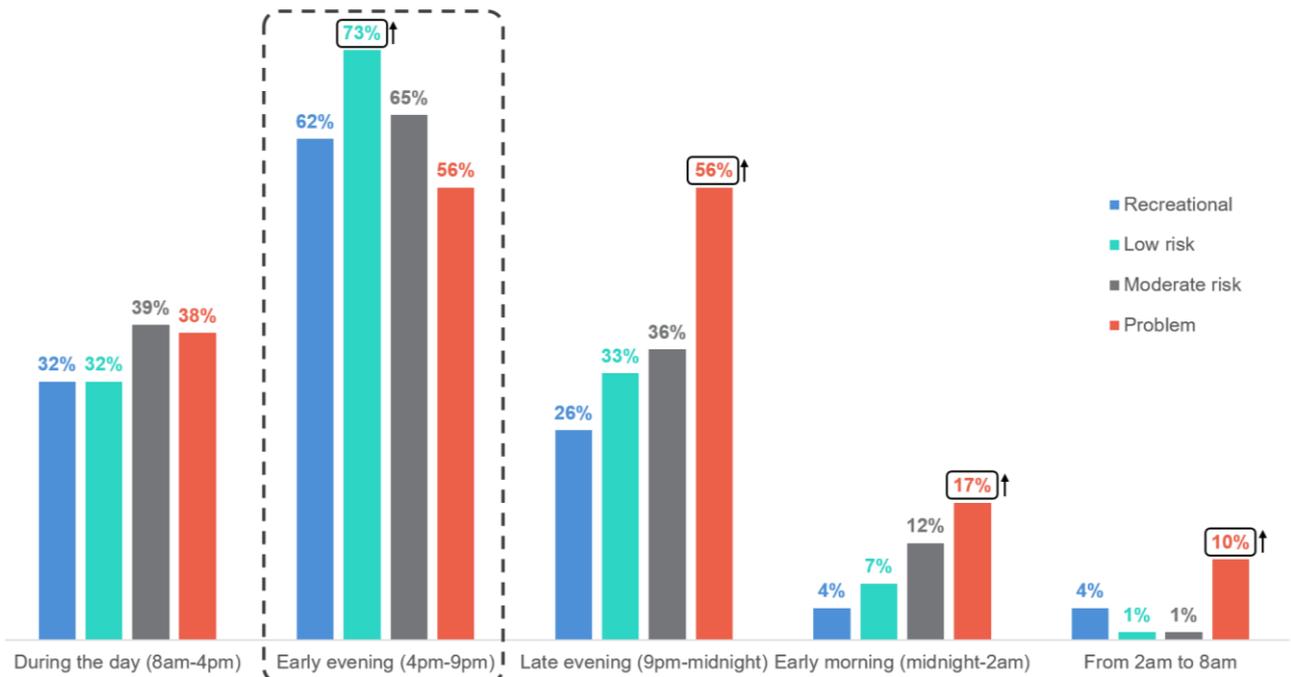
Figure 4: Self-reported frequency of play in the Casino

While frequency overall is far lower than for other types of gambling venue, the same significant differences can be seen between problem gamblers and other PGSI types. When responses of at least once every 2-3 days or higher are aggregated, it shows that 22 per cent of problem gamblers play at the casino with this frequency, while 0 per cent of all remaining PGSI groups play this regularly at the Casino.

8.2 Times of play

Early evening is the most popular time for all PGSI groups to play poker machines (represented by the dotted line in Figures 5 and 6.), both in clubs and pubs. The figures below show the times when gamblers have ever played poker machines in a pub, or a club. Each figure is split by PGSI categories.

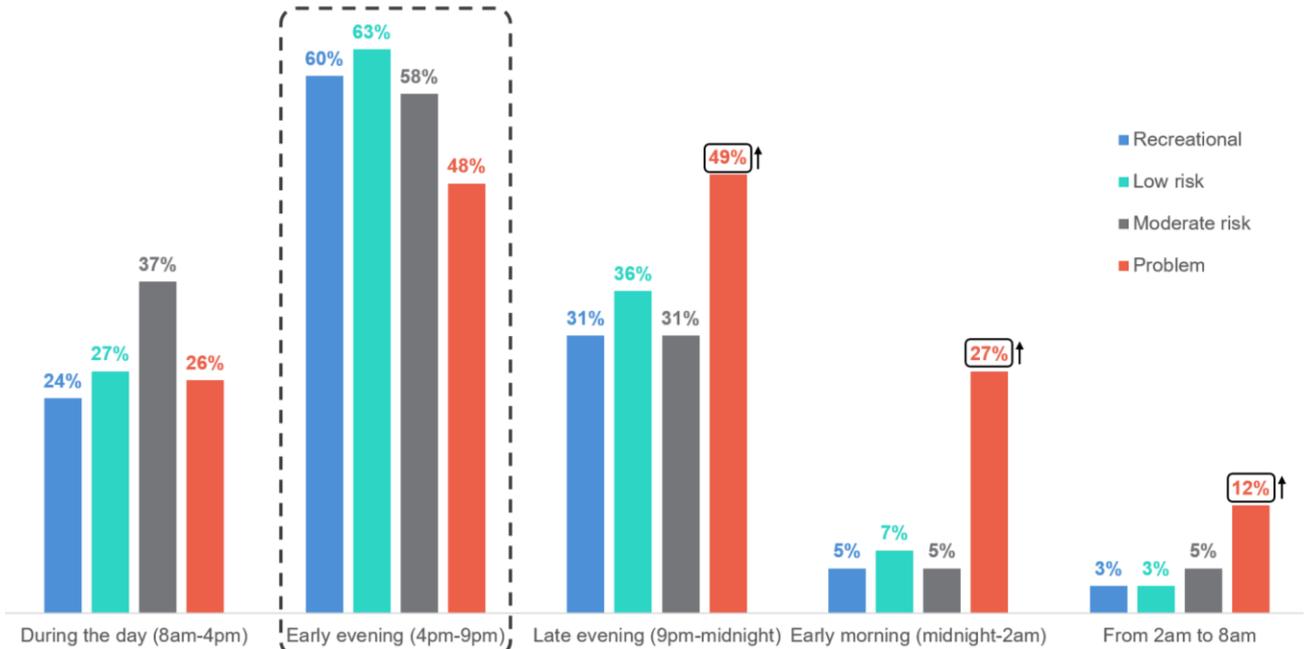
At which of the following times have you ever played the pokies in a club?



Base: Ever played pokies in a club; recreational (n=78); low risk (n=75); moderate risk (n=77); problem (n=75)
 Q16. At which of the following times have you ever played poker machines (pokies) in each of these venues? (Multichoice)

Figure 5: Claimed times of play in clubs

At which of the following times have you ever played the pokies in a pub / hotel?



Base: Ever played pokies in a pub / hotel; recreational (n=58); low risk (n=59); moderate risk (n=65); problem (n=73)
 Q16. At which of the following times have you ever played poker machines (pokies) in each of these venues? (Multichoice)

Figure 6: Claimed times of play in pubs

These data show that problem gamblers are significantly more likely than any other PGSI groups to be playing poker machines later in the evening - in both pubs and clubs.

Given its opening hours, playing times at the Casino skew slightly later, especially for moderate-risk and problem gamblers (represented by the dotted line in Figure 7). The figure below shows times when gamblers have ever played poker machines in the Casino, by PGSI category. While later play is more common among all PGSI groups, problem gamblers are again significantly more likely than other types of gamblers to be playing in the early morning, and from 2am until 8am.

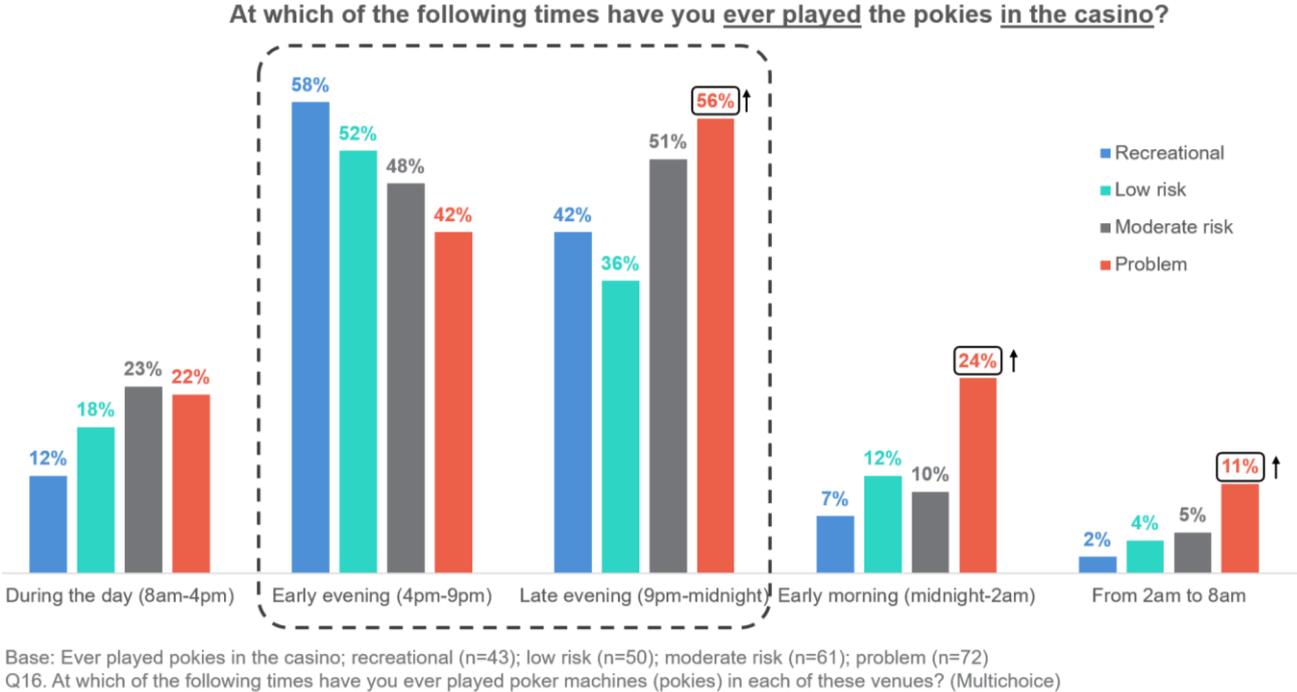
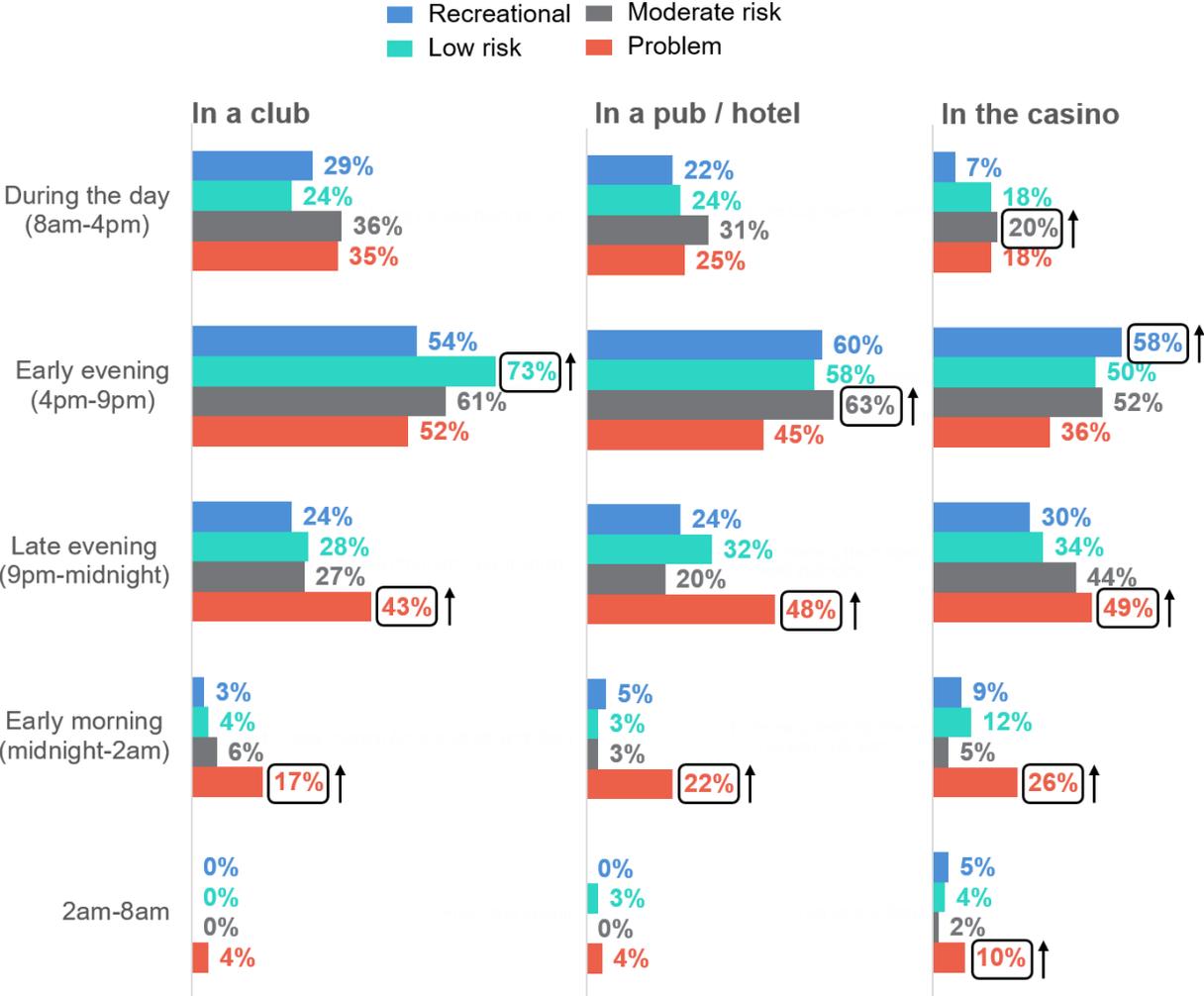


Figure 7: Claimed times of play in the Casino

When participants are asked about when they usually play the poker machines across different venues, early evening is again the most popular time across all venues, though the Casino clearly offers the opportunity for late night EGM play. The figure below shows when gamblers usually play the pokies, by venue and by PGSI type.

When do you usually play the pokies in each of these venues?



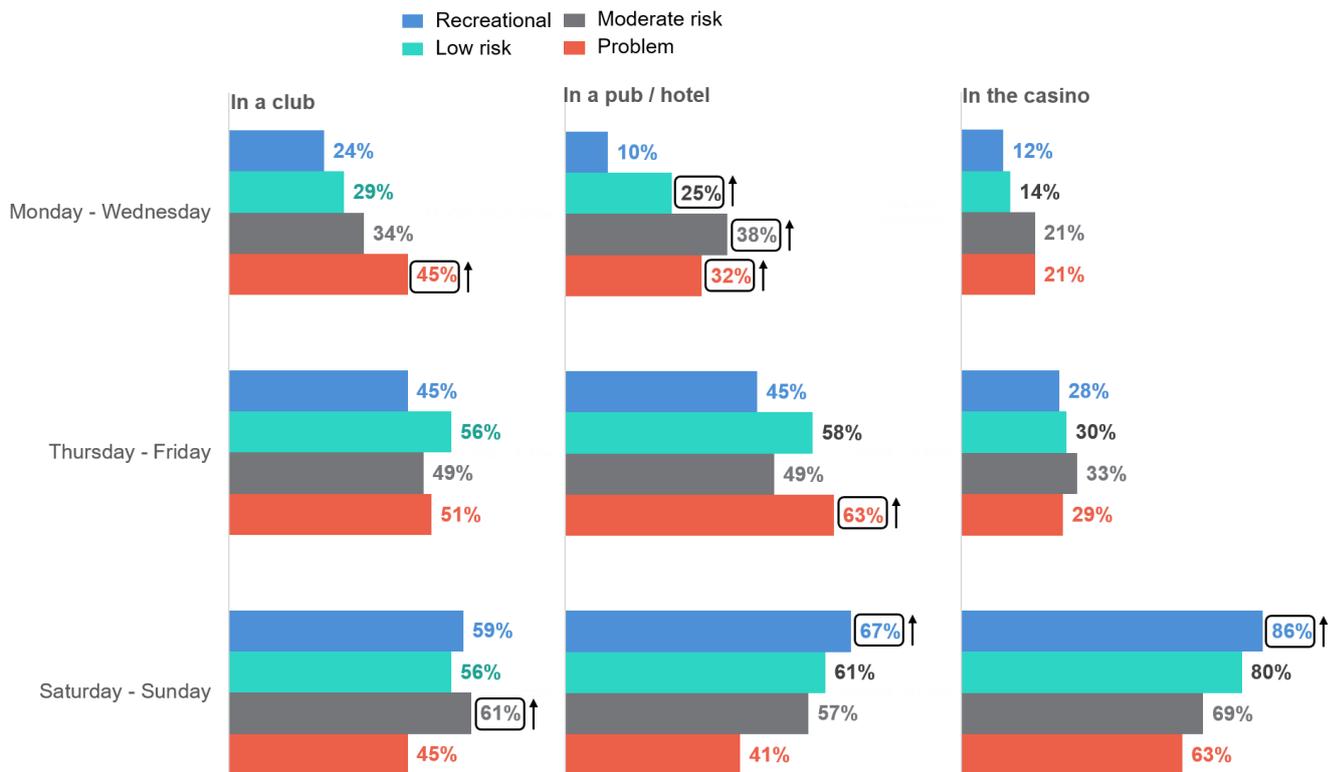
Base: Ever played pokies in a club / pub or hotel / casino; recreational (n=78/58/43); low risk (n=75/59/50); moderate risk (n=77/65/61); problem (n=77/73/72)
 Q17. When do you usually play poker machines (pokies) in each of these venues? (Multichoice)

Figure 8: Usual times of EGM play, by venue

8.3 Weekday vs weekend play

Recreational gamblers are noticeably more active on the poker machines at weekends, especially in the Casino. In contrast, problem gamblers are significantly more likely to play earlier in the week (Monday – Wednesday) in a club, while low-risk, moderate-risk and problem gamblers are significantly more likely to play earlier in the week at a pub than a recreational gambler. The figure below shows self-reported times of the week when each type of gambler plays, split by venue type.

When during the week do you play the pokies in each of these venues?



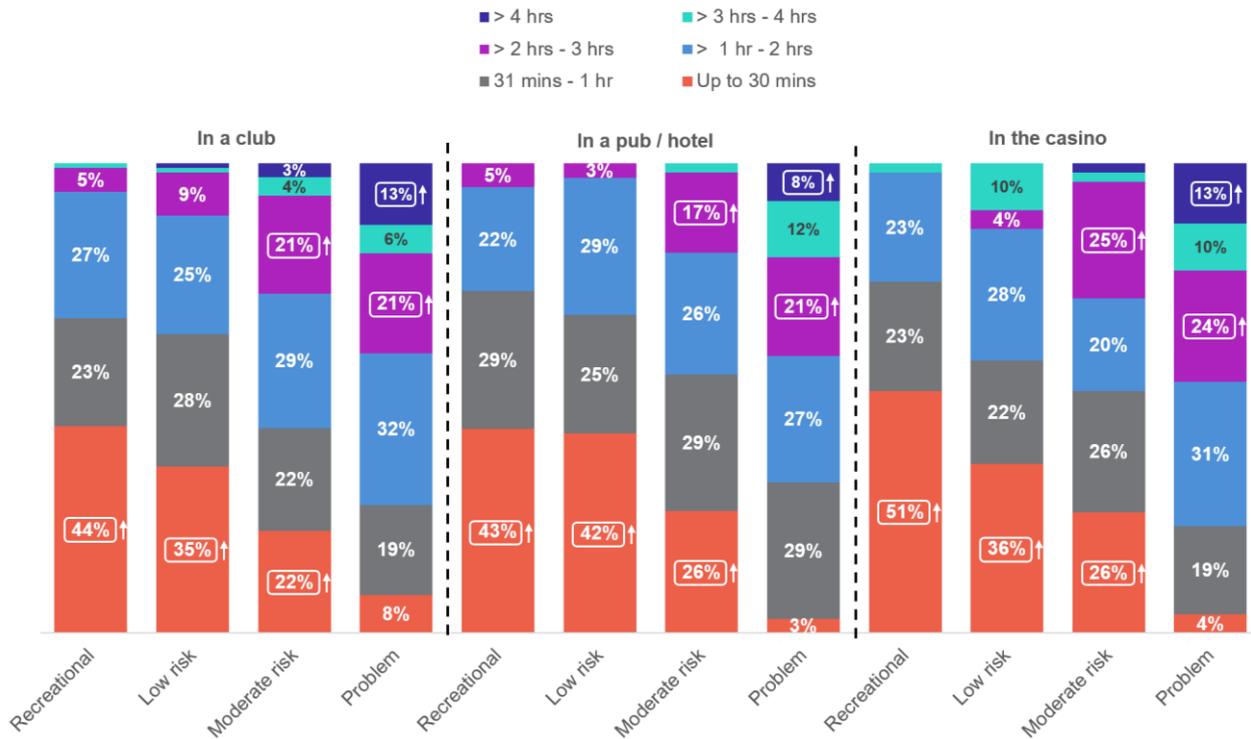
Base: Ever played pokies in a club / pub or hotel / casino; recreational (n=78 / 58 / 43); low risk (n=75 / 59 / 50); moderate risk (n=77 / 65 / 61); problem (n=77 / 73 / 72)
 Q18. And when during the week do you play poker machines in each of these venues?

Figure 9: Days of week played, by venue

8.4 Duration of play

Most moderate and lower-risk gamblers (including recreational gamblers) claim to be playing for up to an hour across venues, while problem gamblers are usually playing for much longer. A problem gambler is significantly more likely than any other PGSI type to play for more than four hours across all venues, with all other PGSI types significantly more likely than problem gamblers to play for up to 30 minutes. The figure below shows the length of time that players typically spend playing poker machines, by venue type and PGSI category.

Approximately how long would you typically play the pokies for in each of these venues?



Base: Ever played pokies in a club / pub or hotel / casino; recreational (n=78 / 58 / 43); low risk (n=75 / 59 / 50); moderate risk (n=77 / 65 / 61); problem (n=77 / 73 / 72)
 Q19. And approximately how long would you typically play the pokies for in each of these venues?
 NB. Data labels for figures ≤ 2% have been removed

Figure 10: Time spent typically playing poker machines, by venue

When these data are viewed in a slightly different way, they show that on average, problem gamblers are spending roughly twice as long playing the pokies as low-risk and recreational gamblers, across all venues. The table below shows the average time spent by each PGSI type in pubs, clubs and the Casino.

Average time spent playing the pokies for in each of these venues

	Recreational (n=81)	Low risk (n=75)	Moderate risk (n=78)	Problem (n=78)
In a club	52 mins	61 mins	85 mins ↑	119 mins ↑
In a pub / hotel	48 mins	49 mins	69 mins ↑	117 mins ↑
In the casino	44 mins	68 mins ↑	78 mins ↑	126 mins ↑

Base: Ever played pokies in a club / pub or hotel / casino; recreational (n=78 / 58 / 43); low risk (n=75 / 59 / 50); moderate risk (n=77 / 65 / 61); problem (n=77 / 73 / 72)

Q19. And approximately how long would you typically play the pokies for in each of these venues?

Table 3: Average time spent playing EGMs by PGSI types

8.5 Playing alone vs socially

Problem gamblers are the most likely to play poker machines by themselves, with lower-risk gamblers generally more sociable when they choose to play. The figure below shows who gamblers usually play with, across each of the three venue types.

Who do you usually play the pokies with in each of these venues?

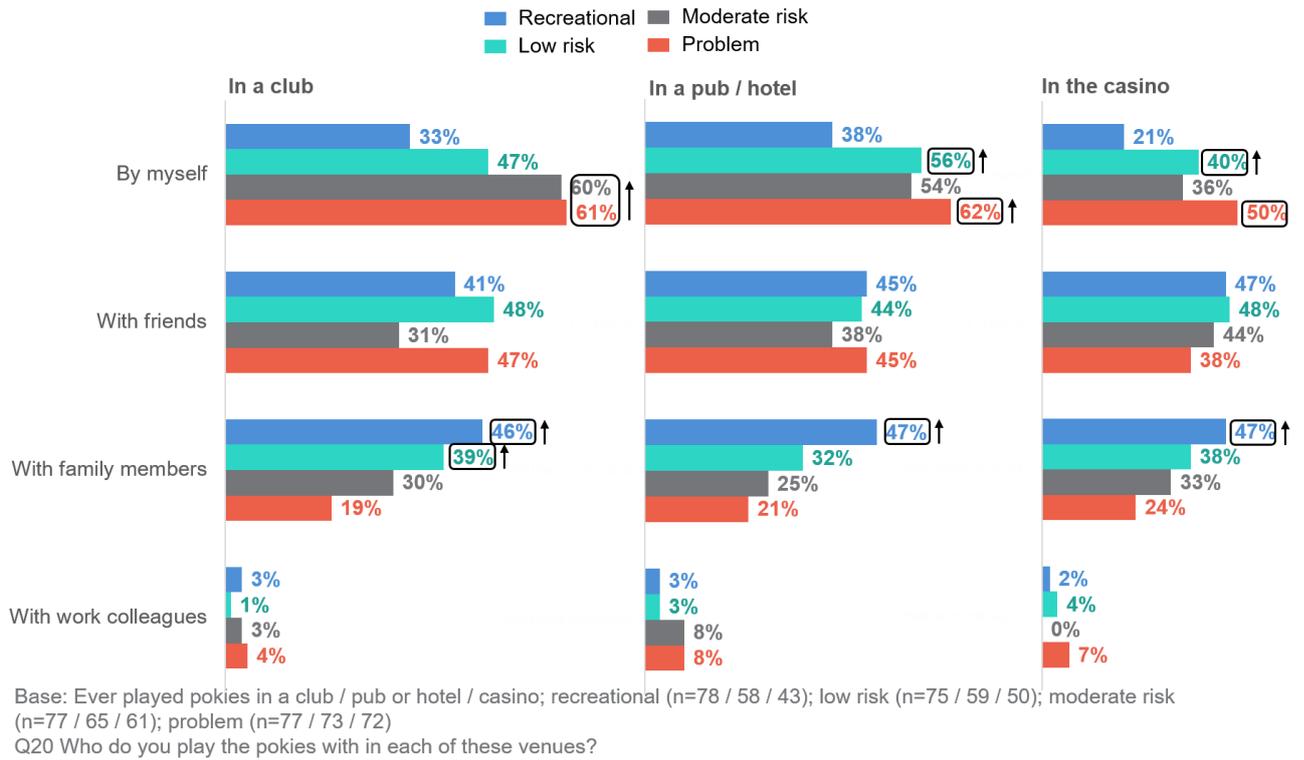


Figure 11: Who EGM players usually play with

8.6 Alcohol and tobacco use

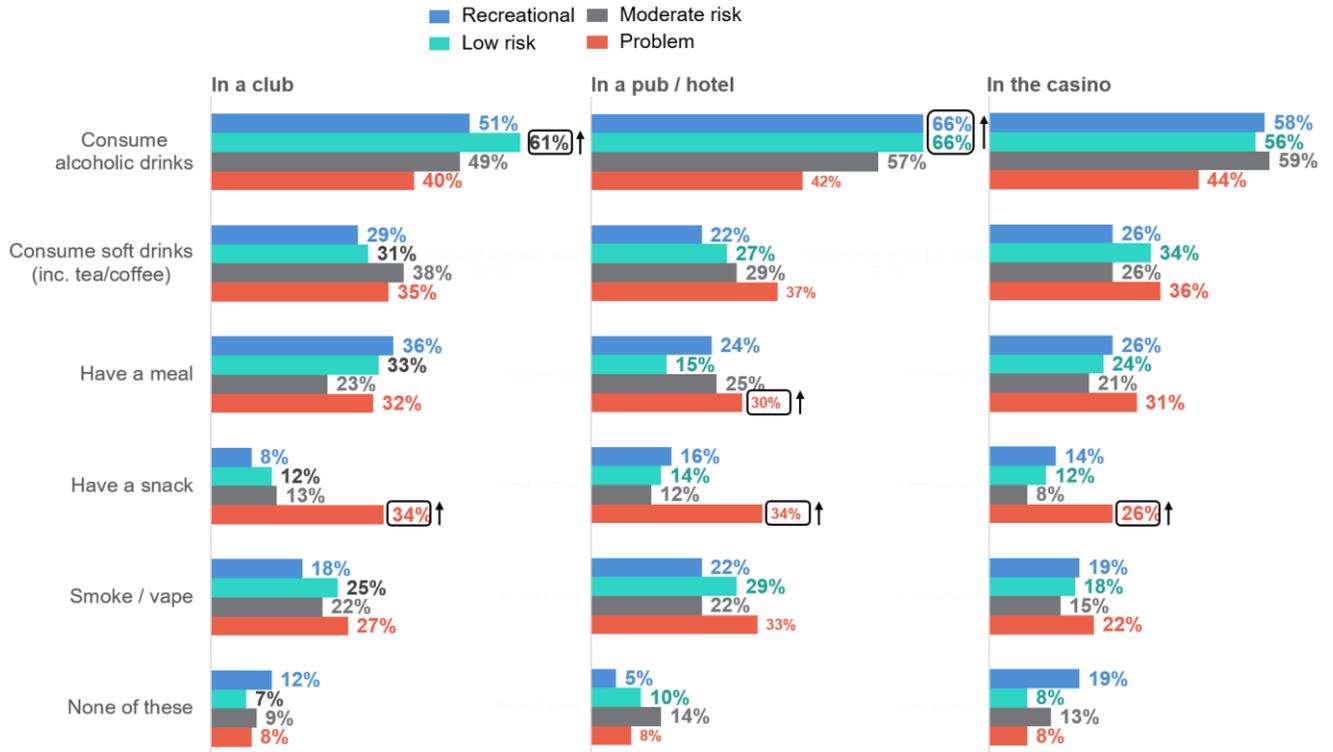
Qualitatively, it appears that alcohol is not always a central feature of gambling for many problem gamblers. Some members of this group claim not to drink at all during their gambling sessions, or to stop at one or two drinks. Many claim to prefer a ‘clear head’ during play, so that they can focus more fully on the task at hand. Alcohol is also felt by gamblers to inhibit ‘staying power’ – so by avoiding alcohol, they are able to play for longer periods of time without feeling tired.

However, it is also clear qualitatively that there are some problem gamblers who are also experiencing issues with alcohol – for this group, alcohol and gambling tend to go hand in hand. Among this group there is recognition that risk-taking increases with respect to gambling as more alcohol is consumed, though this recognition tends to be after the fact.

This finding is supported by the quantitative data, which shows that across all venue types, problem gamblers are the least likely to consume alcoholic drinks while they gamble, although this difference is not significant.

Certainly, for all PGSI types, alcohol consumption is the most popular activity while playing poker machines – with greater numbers of gamblers claiming to engage in this than any other type of behaviour, including consuming soft drinks (including tea and coffee); having a meal or a snack; or smoking. The figure below shows the breakdown of these data.

Which of the following do you do when playing the pokies in each of these venues?



Base: Ever played pokies in a club / pub or hotel / casino; recreational (n=78 / 58 / 43); low risk (n=75 / 59 / 50); moderate risk (n=77 / 65 / 61); problem (n=77 / 73 / 72)
 Q21 Which of the following do you do when playing the pokies in each of these venues?

Figure 12: Activities undertaken while playing EGMs, by venue

When these data are analysed according to those who play EGMs after midnight vs those who do not, a number of differences are apparent. Late night players are significantly more likely to smoke while playing the pokies, in a pub and the Casino. The table below details these differences.

% who engage in these activities when playing the pokies (by venue)	Usually play the pokies between midnight – 8am	Do not usually play the pokies between midnight – 8am
In a club		
Consume alcohol drinks	{57} ↑	49
Consume soft drinks (incl. tea / coffee)	35	33
Have a snack	{27} ↑	14
Smoke / vape	35	21
In a pub / hotel		
Consume alcoholic drinks	64	55
Consume soft drinks (incl. tea / coffee)	34	28
Have a snack	26	18
Smoke / vape	{50} ↑	21
In the casino		
Consume alcoholic drinks	58	52
Consume soft drinks (incl. tea / coffee)	35	30
Have a snack	{25} ↑	13
Smoke / vape	{35} ↑	14

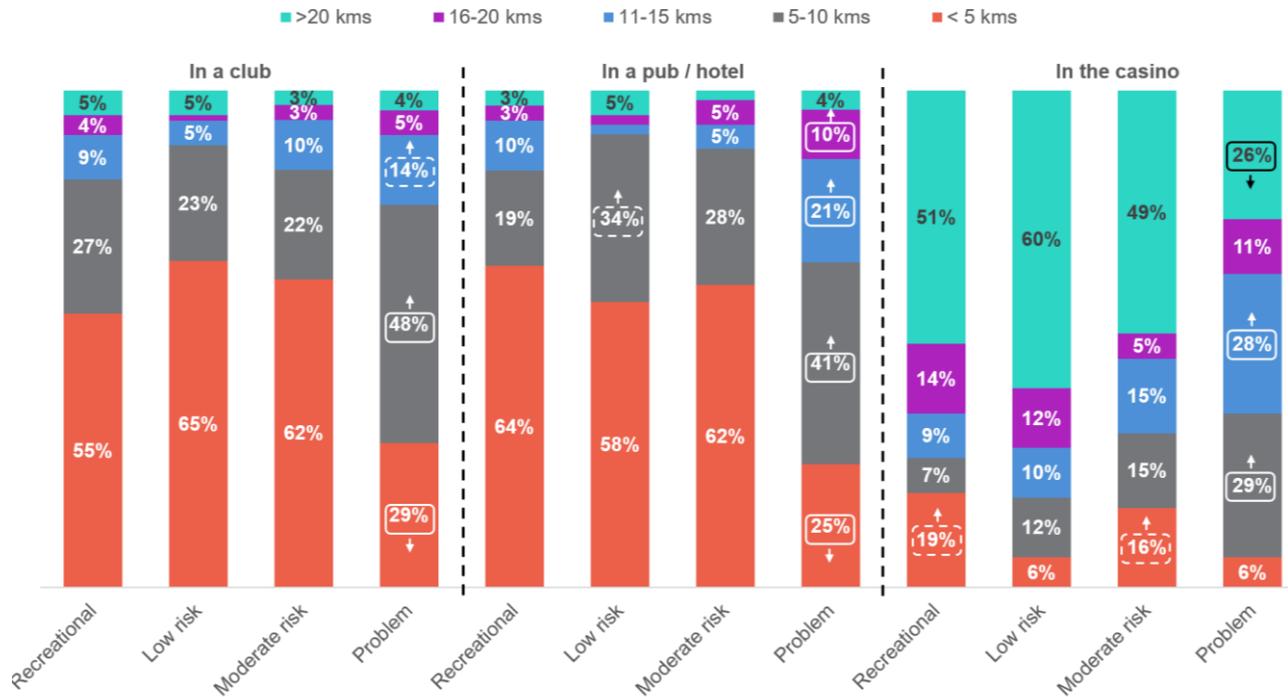
Base: Usually play the pokies in a club / pub or hotel / casino after midnight – 8am / do not usually play the pokies in a club, pub or hotel / casino after midnight – 8am in a club (n=51 / 256); in a pub / hotel (n=50 / 205); in the casino (n=48 / 178)

Table 4: Activities undertaken while playing EGMs - late night players vs others

8.7 Distances travelled to play EGMs

Most recreational, low-risk and moderate-risk gamblers travel no more than 5km to play EGMs in a pub or club environment, while problem gamblers are more likely to travel up to 10km. Unsurprisingly given its physical location, gamblers are far more likely to travel longer distances to visit the Casino. The figure below shows the distance typically travelled by each gambler type to play in each of the three venue types.

Roughly how far do you typically travel to play the pokies at each of these venues?

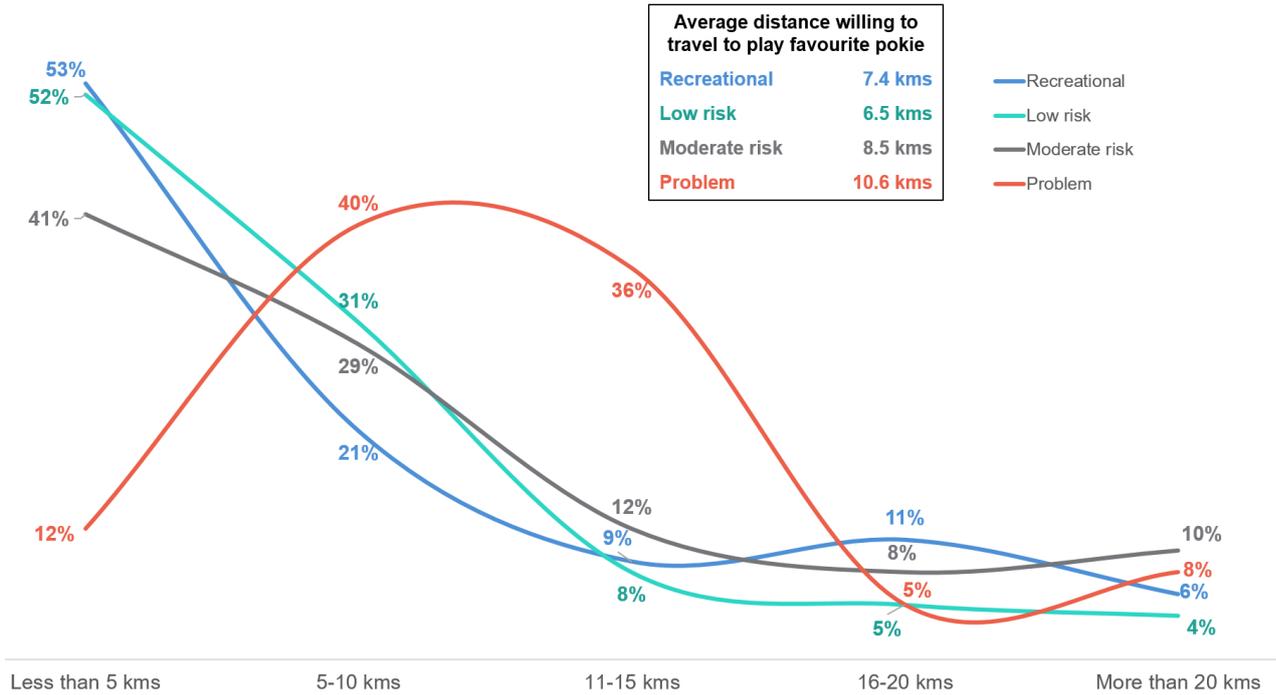


Base: Ever played pokies in a club / pub or hotel / casino; recreational (n=78 / 58 / 43); low risk (n=75 / 59 / 50); moderate risk (n=77 / 65 / 61); problem (n=77 / 73 / 72)
 Q22. Roughly how far do you typically travel to play the pokies at each of these venues?
 NB. Data labels for figures ≤ 2% have been removed

Figure 13: Distance travelled to play EGMs at each venue type

When the question of distance is framed a different way, it sheds further light on the question of how far different types of gamblers are prepared to travel in order to play EGMs. Participants were asked how far they would travel to play *their favourite* poker machine game. The results are clear that problem gamblers are far more willing to travel further to play their favourite game than other types of gamblers. This may in part be due to the greater level of emotional connection witnessed between problem gamblers and specific machines. The figure below shows the distance each PGSI type would travel for their favourite machine. The average distance that a problem gambler would be prepared to travel is 10.6km.

How far would you be willing to travel to play your favourite pokie?



Base: Recreational (n=81); low risk (n=75); moderate risk (n=78); problem (n=78)
 Q23. How far would you be willing to travel to play your favourite pokie?

Figure 14: Distance players are prepared to travel for their favourite machine

Further analysis of these data show that residents of metropolitan Sydney are most likely to travel further to play their favourite machine than residents of regional NSW. The table below shows the breakdown of average distance each PGSI type is prepared to travel, split by regional and metro areas.

%	Total	Metro	Regional
Recreational Gambler	7.4	7.8	7.1
Low Risk Gambler	6.5	7.0	5.8
Moderate Risk Gambler	8.5	8.6	8.3
Problem Gambler	10.6	11.0	9.6

Table 5: Distance players are prepared to travel split by metro / regional gamblers

9. LATE-NIGHT EGM PLAY

9.1 Profile of late-night EGM players

When the demographic profile of those who usually play poker machines after midnight (n=52) are compared to those who do not usually play after midnight (n=260), some significant differences between the two groups are evident.

Late night EGM players are significantly more likely to be aged 25-44 years, and to live in metropolitan NSW. This group also have a slightly higher household income than those who do not play after midnight. The table below details the demographic profile of these two groups.

%	Usually play the pokies between midnight – 8am	Do not usually play the pokies between midnight – 8am
Male	50	51
Female	50	49
18-24	4	4
25-34	33 ↑	12
35-44	35 ↑	20
45-54	12	19
55-64	12	23
65-74	6 ↓	22
Metro NSW	81 ↑	57
Regional NSW	19	43 ↑
Under \$25,000	12	11
\$25,000 – 59,999	16	29 ↑
\$60,000 – 99,999	26	24
\$100,000 – 199,999	38	30
\$200,000 +	8	5
Average household income	\$102,200 ↑	\$88,745

Base: Usually play the pokies in a club / pub or hotel / casino after midnight – 8am (n=52); do not usually play the pokies in a club, pub or hotel / casino after midnight – 8am (n=260)

Table 6: Demographic profile of late-night (after midnight) EGM players

In addition to these demographic profiles, late night EGM players are significantly more likely to be problem gamblers, with almost 6 in 10 classified as this type. The table below shows PGSI categorisation according to late night play vs others.

PGSI segment classification

%	Usually play the pokies between midnight – 8am (n=52)	Do not usually play the pokies between midnight – 8am (n=260)
Recreational gambler	12	29 ↑
Low risk gambler	17	25
Moderate risk gambler	13	27 ↑
Problem gambler	58 ↑	18

Base: Usually play the pokies in a club / pub or hotel / casino after midnight – 8am (n=52); do not usually play the pokies in a club, pub or hotel / casino after midnight – 8am (n=260)

Table 7: Late night players by PGSI type

9.2 Types of late-night play

Qualitatively, there appear to be two very different types of late-night play evident among gamblers. The first type of play is quite social, while the other type of late-night play is very solitary. Each different type of play is unpacked in more detail below.

‘Social’ late night play

This type of late-night play tends to be with a group of friends, and often involves considerable consumption of alcohol. Typically, this type of gambling is part of a bigger night out – just one element in a night that can include dinner, drinks, and dancing. It seems that the ultimate aim of this type of gambling is to stay out for as long as possible, and continue having fun.

“Whenever I play the pokies late at night, it’s usually with the boys after we’ve had an afternoon of golf and carried on afterwards... it’s just a part of the night, and we’re usually more than half cut by the time we get to it!” (Low-risk gambler, Port Macquarie).

While this type of gambling does take place after midnight, it is often finished by 3am, and is far less likely to continue into the very early hours of the morning. It is also far more likely to occur on weekends and Friday nights.

Generally, this type of gambling is undertaken by recreational and low-risk gamblers.

‘Solitary’ late-night play

This type of gambling is by definition undertaken alone. It is not always linked to alcohol consumption - though even if alcohol is involved, the focus is very squarely on gambling, with alcohol in a secondary role. This type of gambling tends to be a very focused experience – the player often reports single-minded attention on the machine itself.

In many cases this type of gambling can involve chasing earlier losses – particularly on a single machine if a gambler has been playing for some time and has a belief that it ‘is due to pay soon’.

This type of gambling appears to occur any time after midnight, although it is more likely to be after 3am than social late-night play. It tends to occur on any day of the week, and may in fact be less likely to occur on weekends, given that venues can be perceived to be too busy during these periods.

In contrast to social late-night play, this type of gambling appears to be more likely engaged in by moderate-risk and problem gamblers.

9.3 The late-night play environment

Gamblers often believe that very late-night play (i.e. after 3am) occurs in environment where the atmosphere is different compared to other times of the day. Those who do play later at night often report that the pokie room is not a place for partying or socialising – rather, it is about very focused, serious gambling. The atmosphere is often described as being quieter and more private – gamblers claim to withdraw into their own experiences, focussing ever more intently on their chosen machine.

There can also be a sense among late-night gamblers that there is a greater chance of a ‘big win’ later at night. For some, this is because they believe that the stakes are generally higher – so when there is a win, it tends to be a big one. Others believe that there is simply a greater chance of winning at all – there is less competition from other players for machines, and often these machines are believed to have been working all day and therefore more likely to pay out.

On reflection, many late-night gamblers openly and fairly quickly acknowledge that they are more likely to chase losses and take greater risks as the night wears on. However, this tends to be something that gamblers think about after the fact, rather than in the moment.

9.4 Late-night venue staff

Late-night gamblers often believe that the venue staff are friendlier and more personable late at night. Staff are believed to change their manner toward players as the night wears on and there are fewer patrons in the vicinity.

Most gamblers believe that in this context, staff have more time available – and so as a result, they tend to deliver service that is more personal and tailored to the needs of players. Among some late-night gamblers, this extra attention is often related to ‘feeling like a VIP’, which many acknowledge makes them feel quite special as people.

*“You definitely notice a change in the staff once it gets later and things quieten down a bit. It’s much more personal... I quite like the way that it feels actually.”
(Problem gambler, Wollongong).*

9.5 Stigma around late-night play

There is believed to be some sense of stigma around playing late. Certainly, solitary late-night players believe that their family and friends would think poorly of them if they were aware of their late-night play. In this context, late-night play (or certainly the full extent of it) is often concealed from friends and family as a means of avoiding any sense of judgement.

In venues themselves, there can often be some wariness about judgement, even from other players. Many claim to take active steps to simply let other people in the space get on with their own business, by avoiding eye contact and choosing machines farther away from others, for example. Ultimately, most believe that having fewer interactions reduces the likelihood of being judged by others.

However, while gamblers believe there to be some level of stigma around late-night play, most gamblers believe that stigma is at its worst during the early part of the day. There is a clear sense that anyone 'knocking on the door of the club at opening time' is generally thought of as having more of an issue than someone who might simply be staying a little later than usual.

10. AWARENESS OF GAMBLING HARMS

10.1 Financial harm

For everyone, the biggest harm from poker machines is financial. The majority are quick to identify a range of different dimensions of financial harm that can result from poker machines:

- > spending more than you have;
- > living paycheque to paycheque;
- > juggling bills; and
- > generally failing to meet commitments.

In turn, these financial difficulties are widely seen by gamblers to have a significant impact on personal relationships, work and other aspects of life. Among those who have dependents, there can often be a significant sense of guilt for placing their loved ones into these types of situations.

At the most extreme, gamblers all recognise the potential for financial damage to be significant and long-lasting. Ballooning debt is something that many envisage as a potential outcome of heavy gambling, and this is the lived experience for some problem gamblers in our sample. At worst, total financial ruin is seen as a genuinely possible outcome from gambling – almost everyone has at least one second or third-hand story of someone who has lost everything as a result of their gambling.

“My biggest fear is that we can’t keep our heads above water any more... before we got married we bought furniture on hire-purchase and had car loans and stuff... we just didn’t pay those bills because we were gambling so much, and yeah. We’re still trying to recover from that really.” (Problem gambler, Sydney).

10.2 Addiction

There is a clear sense among gamblers that addiction to poker machines can be powerful and quite scary. Addiction is very widely recognised as a risk when it comes to playing poker machines – problem gamblers are often quite open about a belief that they themselves have an addiction. For some moderate-risk gamblers, a sense of looming addiction is something they are mindful of – it is often seen as something of a slippery slope, which can be quite difficult to avoid.

Among recreational and low-risk gamblers, there is rarely a sense of personal concern about addiction, though many claim to know others who experience it and often talk about these people with a strong sense of sadness and in some cases pity.

10.3 Mental health

Most recognise that gambling can strongly impact mental health. The ‘gambling hangover’ is often identified as something that is very real, and something that can be quite difficult to endure. It tends to eventuate in circumstances where individuals have gambled more than they can afford and is characterised by a very strong sense of regret.

Gamblers indicate that a gambling hangover can have potential to last for days afterwards, depending on the scale of the loss. The negative feelings are often re-triggered when gamblers experience a sense of financial insecurity, such as when a large bill arrives.

In addition to the personal feelings of regret that can characterise a gambling hangover, many also talk about a strong social dimension. Suffering a heavy loss is often believed by gamblers to place significant boundaries on their ability to socialise. Often, invitations to events like dinners

or nights out are refused, with excuses such as car registration offered as reasons why they cannot afford to attend.

10.4 Social isolation

Many gamblers also believe that social isolation can be a danger of gambling – one clear dimension of this is the social aspect of a gambling hangover. There is also a sense that gambling can become quite habitual among those who are playing very regularly – and coupled with the secrecy that often goes with it, there is a sense among gamblers that excessive gambling can begin to take the place of other forms of socialising, to the point where it creates social isolation.

Some problem gamblers report a feeling of disconnection from friends and family – often, these gamblers have missed events with friends and family, to the point in some cases where people have simply stopped inviting them to things. Conceptually, some recognise that this could have potential to lead to a downward spiral, where isolation is managed and mitigated by more gambling.

10.5 Harms perceived to be specific to late-night play

Gamblers easily identify a range of drawbacks and potential harms that relate to late-night play. Some are related to the likelihood of diminishing cognitive capacity and judgement, while others are related to a perceived decline in the gambling environment.

Risks relating to diminishing capacities include tiredness contributing to a lack of focus and poor decision making; a 'loss of time' where players do not realise how long they have been playing; and among those who drink, a sense of taking greater risks as they become more inebriated. Ultimately, these risks are believed to amount to a greater likelihood of losing money and doing so fairly quickly.

Risks related to the environment are ultimately tied to a belief that the environment can often begin to feel quite desperate, especially in pubs. Related to this are concerns about the presence of 'creeps and weirdos' – among many women this can lead to concerns about personal safety. There is also a strongly perceived risk that as people consume more alcohol, there is an enhanced risk of aggression and violence, particularly if those who are drinking experience heavy losses.

"I do worry about getting to the car late at night after I've been at the club and it's almost closing time." (Moderate-risk gambler, Sydney).

10.6 Individual personal susceptibility to risks

Overall, it appears that most gamblers are somewhat mindful of their own susceptibility to the different types of risks and harms associated with poker machines.

Recreational and low-risk gamblers tend to believe that they personally are not at great risk of harm from their gambling. Rather, this group tend to be concerned about others they know who might be more at risk based on their gambling behaviours.

Moderate-risk and problem gamblers are often quite open about their own susceptibility to harms – there is a sense of acknowledgement about these, even if this is only for a fleeting moment. However, most are quick to identify 'someone else' who is at greater risk of harm than they are personally, which often provides these gamblers with the ability to self-exempt from any personal concerns.

"I think it's definitely important for people who need help that those signs and stuff are on the side of the pokies, there are definitely people out there who probably do need to get some help" (Problem gambler, Tamworth).

10.7 Strategies to mitigate risk

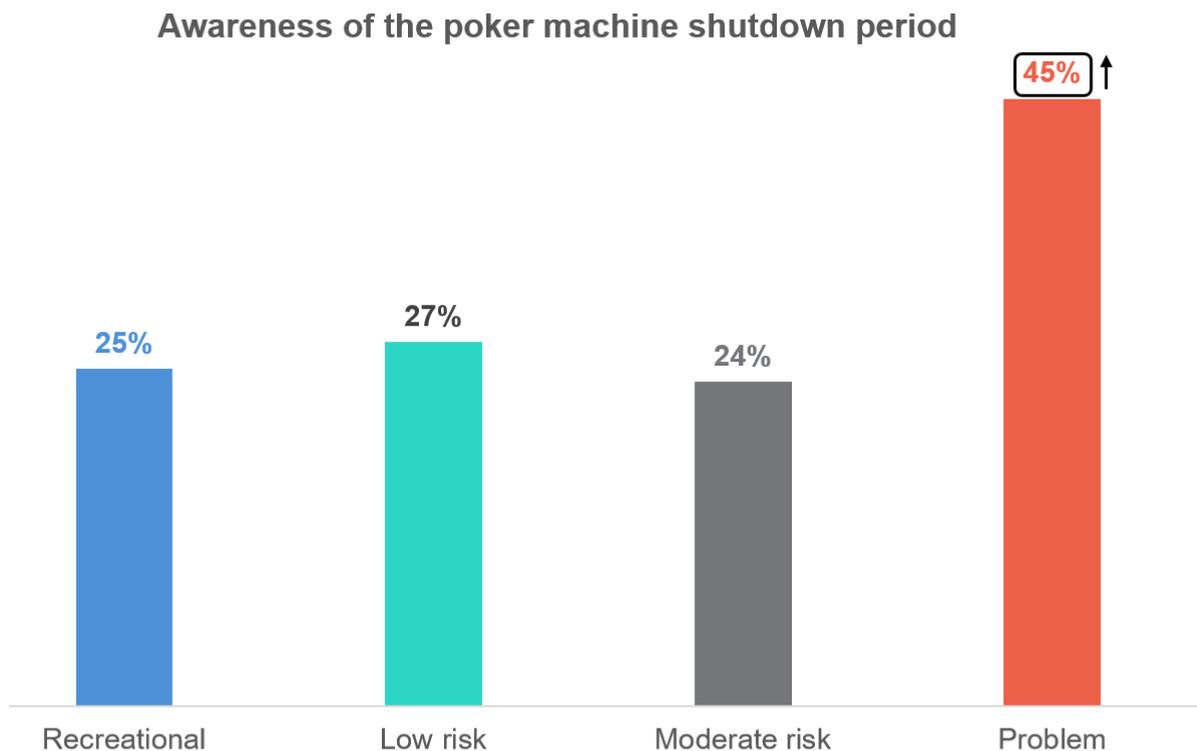
Moderate-risk and problem gamblers can generally talk about a range of strategies they employ as a means of minimising their own risk. These can include setting financial limits; making a verbal commitment about their limits to other people; setting time limits and watching the clock; leaving their wallet in the car and only taking as much cash as they are prepared to lose; or making a pact with a friend whereby the friend is empowered to help moderate their own gambling behaviour.

These methods are usually very quickly identified by moderate-risk and problem gamblers, and they are generally believed to be useful to a point. However, they are often spontaneously identified as being unsuccessful, and many simply say that the only thing which stops them from gambling is when the doors of the venue close and the machines are simply no longer available.

11. THE EGM SHUTDOWN PERIOD

11.1 Awareness of the shutdown period

Only around one quarter of recreational, low-risk and moderate-risk gamblers claim to be aware of the shutdown. Problem gamblers are significantly more likely to be aware of the shutdown, with almost half claiming to be aware of it. The figure below shows awareness by PGSI type.

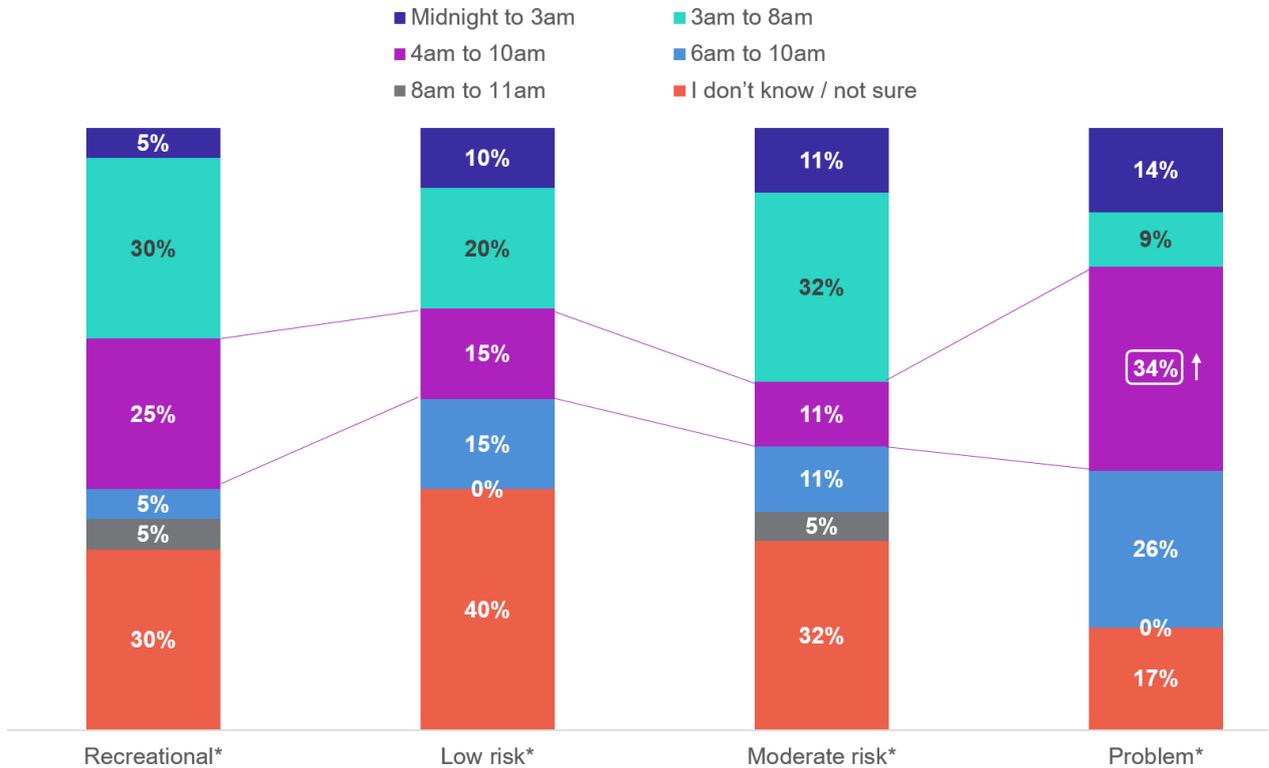


Base: Recreational (n=81); low risk (n=75); moderate risk (n=78); problem (n=78)
Q24. Before today, were you aware that the law requires clubs and pubs / hotels in New South Wales to shut down poker machines for a fixed number of hours each day?

Figure 15: Awareness of the shutdown period

In line with their higher levels of awareness about the shutdown period, problem gamblers are also significantly more likely to be able to correctly identify the timing of the shutdown period. The figure below shows the various times that each gambler type believes the shutdown to be in operation. Note that this is only among those who claim to be aware of the shutdown, and that as a result the sample sizes are quite low, so results should be interpreted with some caution.

Do you know what time the shutdown period is in place?



Base: Aware of the shutdown period; recreational (n=20); low risk (n=20); moderate risk (n=19); problem (n=35)

*CAUTION: LOW BASE SIZE

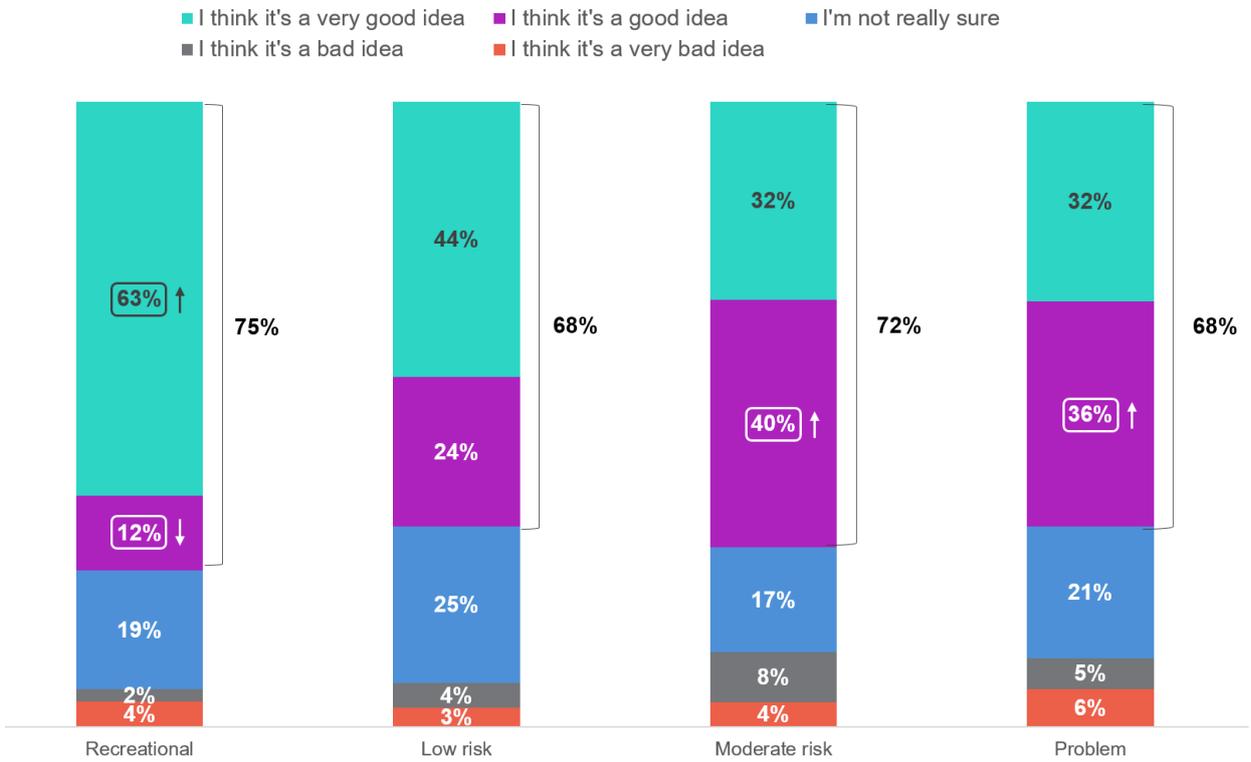
Q25. Do you know what time the shutdown period is in place?

Figure 16: Perceived shutdown times among those aware of the shutdown

11.2 Perceptions of the shutdown period

The shutdown period is generally viewed as a positive move, with similar levels of agreement across the different gambler types. At least two in three problem gamblers believe that it is a very good idea or a good idea, while three in four recreational gamblers hold this belief. The figure below shows the breakdown of support for the shutdown by PGSI type.

What do you think about poker machines having to shut down for a fixed number of hours each day?

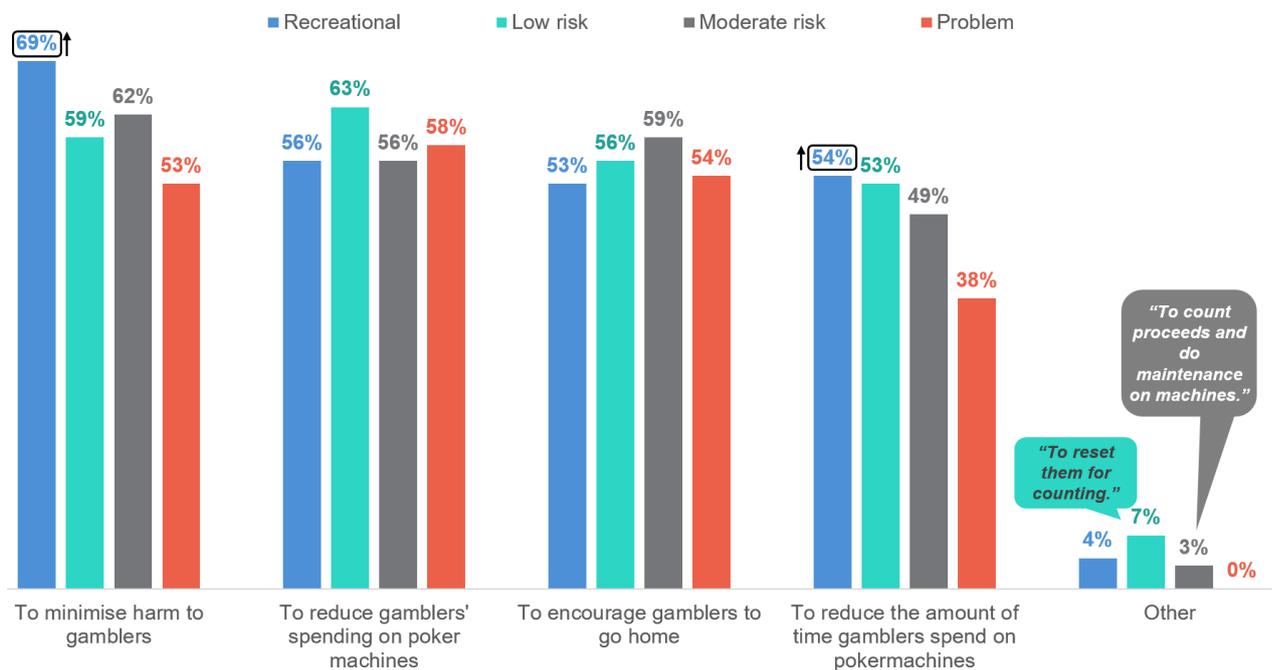


Base: Recreational (n=81); low risk (n=75); moderate risk (n=78); problem (n=78)
 Q26. What do you think about poker machines having to shut down for a fixed number of hours each day in New South Wales?

Figure 17: Support for a shutdown by PGSI type

Participants were asked about what they believed the purpose of the shutdown to be. The figure below shows the levels of response for each option available in the survey. Just over half acknowledge the role of the shutdown in harm minimisation – which may suggest some uncertainty about its purpose. The figure below shows responses to this question by PGSI type.

What do you think is the purpose of the poker machine 'shutdown period'?



Base: Recreational (n=81); low risk (n=75); moderate risk (n=78); problem (n=78)
Q28. What do you think is the purpose of the poker machine 'shutdown period'?

Figure 18: Perceived purpose of the shutdown

Qualitatively it seems that conceptually, the idea of the shutdown is generally seen by gamblers as a positive. Across all PGSI types, the idea of a shutdown is seen as something worthwhile as a way to reduce the risk of gambling harm.

Ultimately, most believe that a break in play is a positive for those who have become entrenched in play, or who are chasing their losses. Enforcing a break in play in this way is generally believed to be the only way that some players would stop in some circumstances.

However, on a practical level, many problem gamblers claim they would be frustrated if forced to stop as a result of a shutdown. While conceptually the idea of taking a break is appreciated, many believe that in reality it could be quite different.

Being forced to stop is often reported to be quite stressful, especially if they are on a winning streak or if they are waiting on a machine to pay after a streak of losses. Many suggest that in this context, they would likely be quite aggrieved if forced to abandon play.

However, this is ultimately what happens in venues now when they close. While gamblers often find this frustrating, most claim to simply accept that it is closing time and make their way out of the venue.

11.3 Perceived benefits of an enforced break in play

Certainly, gamblers are able to identify a number of benefits in taking a break. Almost universally, taking a break is believed to be quite important for giving players the space and time to reduce their exposure to harm.

A break is also believed to be an effective way of interrupting the connection between a player and their machine – in effect, to help pull gamblers 'out of the zone'. Coming back to reality in

this way is often believed to have a sobering effect, with many claiming to use a break as an opportunity to assess their current situation and their losses.

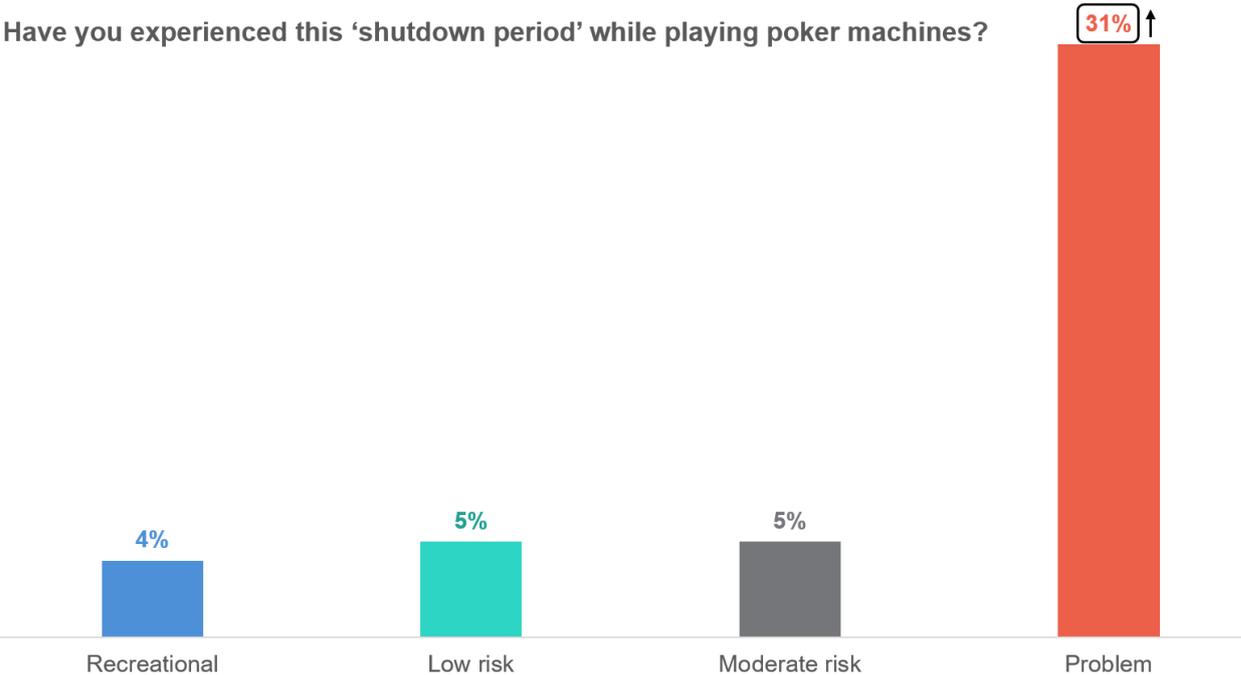
Ultimately, many gamblers perceive a break as being critical in providing players with enough space and ‘clear air’ in order to realise they have had enough and walk away.

Certainly, there are some problem gamblers who would continue gambling in the absence of a forced break in play. Current evidence suggests that closing time or the shutdown is the point at which many problem gamblers walk away from the poker machines and have a rest – indeed, some openly acknowledge they would continue to play otherwise, particularly if they were ‘in the zone’. This is reinforced by behaviour in the Casino, where many openly acknowledge that they play well past dawn from the night before.

“Nah. Once I’m in the zone, the only thing that’s going to make me leave is if they kick me out. That’s why I love a trip to the Casino, you can just keep going until you decide you’ve had enough. Or more likely, you run out of cash.”
(Problem gambler, Sydney).

11.4 Personal experience of the shutdown period

Very few gamblers, apart from problem gamblers, claim to have had any personal experience of the poker machine shutdown period. The figure below shows personal experience of the shutdown period by PGSI type.



Base: Recreational (n=81); low risk (n=75); moderate risk (n=78); problem (n=78)
Q29. Have you experienced this ‘shutdown period’ while playing poker machines?

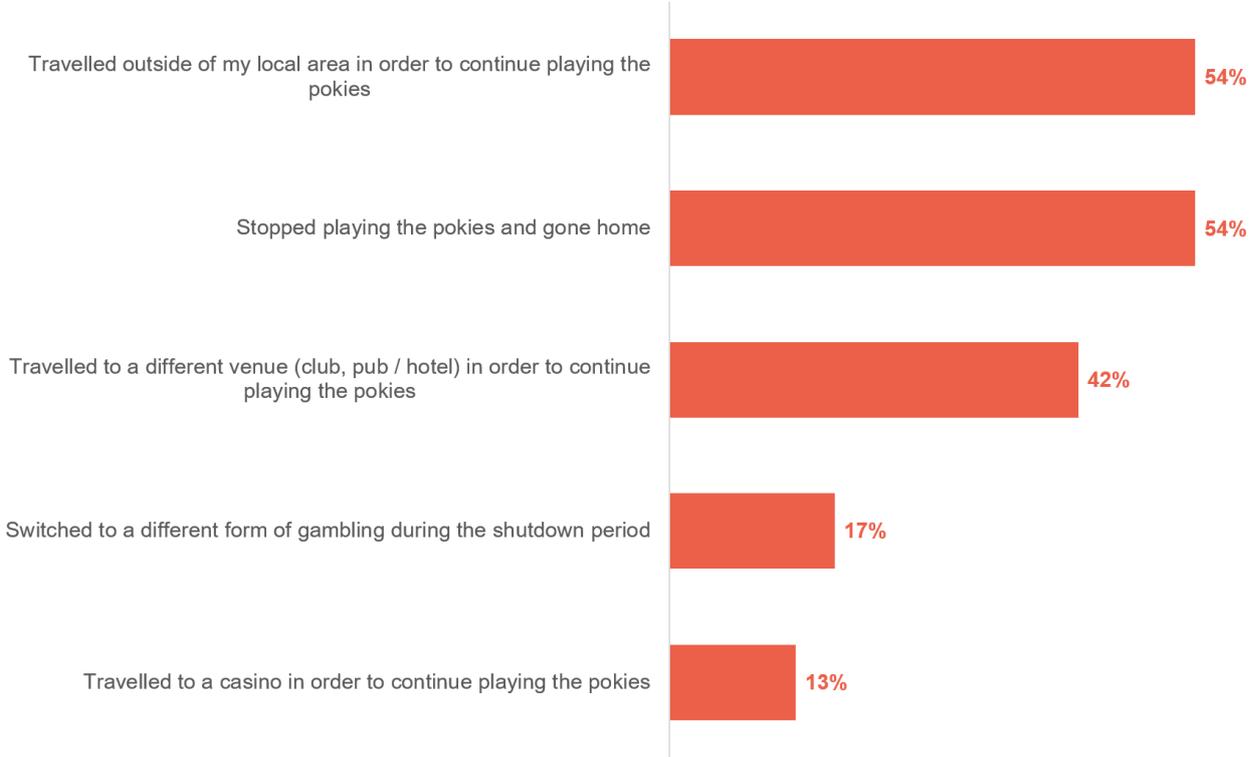
Figure 19: Personal experience of the shutdown

11.5 Action taken or likely to be taken as a result of the shutdown

Of these problem gamblers who have had personal experience of the shutdown, there does appear to be a likelihood to ‘venue-hop’ in order to continue playing EGMs in spite of the shutdown period. The figure below shows what actions problem gamblers have taken as a result of the

shutdown. The sample size is relatively low, so caution should be taken in interpreting these results.

Which of the following have you done as a result of the pokies 'shutdown period'?*



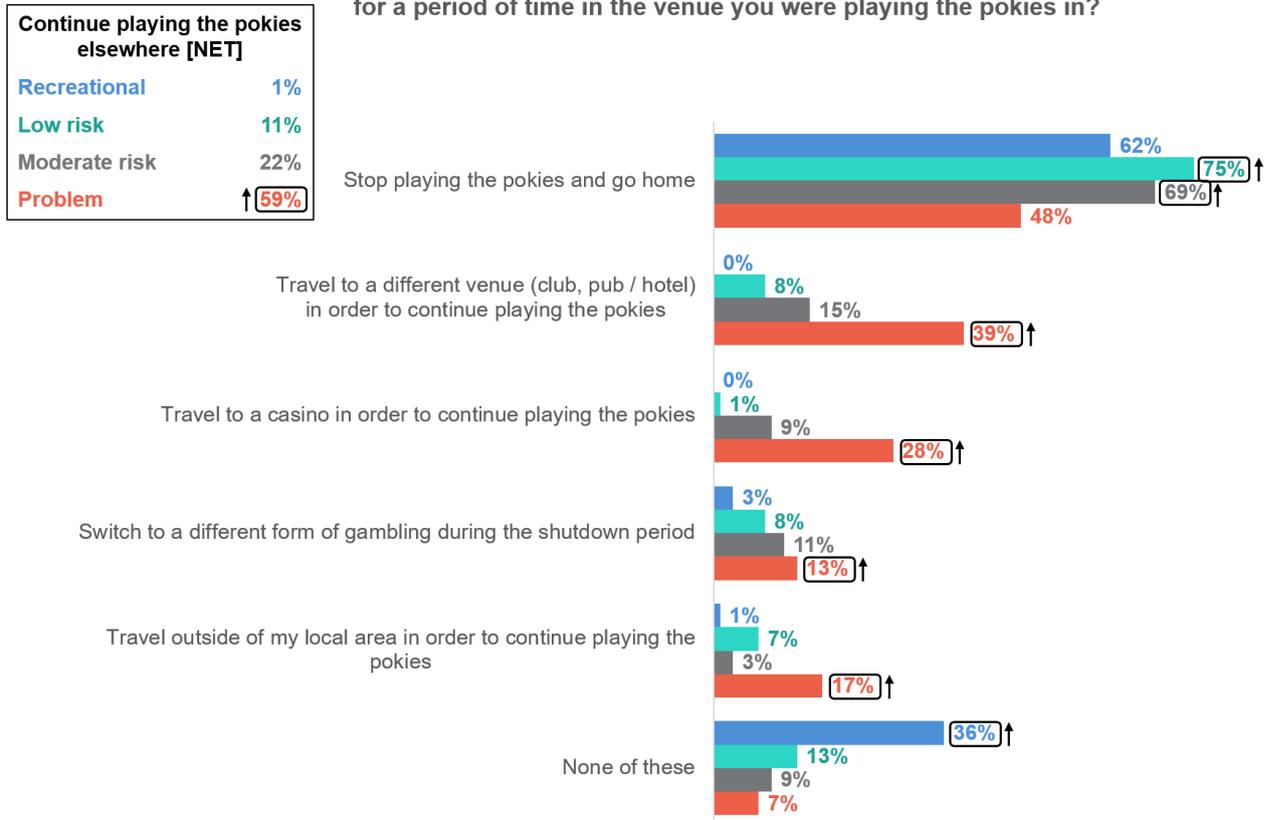
Base: Had personal experience of the pokies' shutdown period – problem gamblers (n=24)
Q30. Which of the following, if any, have you done as a result of the poker machine 'shutdown period'

*CAUTION: LOW BASE

Figure 20: Actions taken by problem gamblers as a result of the shutdown

Those who did not have any personal experience of the shutdown were asked what their hypothetical response would be to a venue closing their poker machines as a result of the shutdown. Responses clearly demonstrate that problem gamblers are the most likely to claim they would go elsewhere during the shutdown to continue playing EGMs. The figure below shows detailed responses.

Which of the following do you think you would do if the pokies' shut down for a period of time in the venue you were playing the pokies in?



Base: Not had personal experience of the pokies' shutdown period; recreational (n=78); low risk (n=71); moderate risk (n=74); problem gamblers (n=54) Q31. Which of the following do you think you would do if the poker machines shut down for a period of time in the venue you were playing the pokies in?

Figure 21: Actions likely to be taken in response to the shutdown

When these data are analysed according to those who usually play poker machines after midnight, it is clear that late-night players are significantly more likely to say they would seek to continue playing poker machines at a different venue. The table below shows the breakdown of this analysis.

Which of the following do you think you would do if the pokies' shut down for a period of time in the venue you were playing the pokies in?

%	Usually play the pokies between midnight – 8am	Do not usually play the pokies between midnight – 8am
Stop playing the pokies and go home	64	64
Would continue playing the pokies elsewhere [NET]	47 ↑	17
<i>Travel to a different venue (club, pub / hotel) in order to continue playing the pokies</i>	42 ↑	10
<i>Travel outside of my local area in order to continue playing the pokies</i>	25 ↑	3
<i>Travel to a casino in order to continue playing the pokies</i>	17	7
Switch to a different form of gambling during the pokies shutdown period	19 ↑	7
None of these	3	20 ↑

Base: Not personally experienced the poker machine shutdown period. Usually play the pokies in a club / pub or hotel / casino after midnight – 8am (n=36); do not usually play the pokies in a club, pub or hotel / casino after midnight – 8am (n=241)

Table 8: Breakdown of actions taken in response to the shutdown by late-night players vs others

11.6 Replacement of EGMs with other forms of gambling during the shutdown

Qualitatively, it appears that other forms of gambling are unlikely to replace EGMs during any shutdown period in a considerable way. There is only a slight indication that gamblers may investigate other forms, such as sports betting or Keno – most gamblers indicate that if they were unable to play the pokies, they would probably go home.

Some gamblers indicate an interest in continuing to play Keno, although this game is generally felt to be too slow, and as a result few gamblers believe that it can generate enough interest to truly replace poker machines. Likewise sports betting is very occasionally seen as a viable alternative, though most gamblers indicate they would likely engage with this online rather than in a licenced venue in any case.

11.7 Relevance of the shutdown in areas outside Sydney

For those who live in regional areas (including Wollongong), the shutdown is generally seen in fairly academic terms, with the majority of gamblers in these areas indicating that the shutdown is not something that would have much effect on them in its current form.

Most regional gamblers believe that venues in their areas tend to close at around 3am at the latest – this is what is believed to drive people home from gambling, rather than any legislation around poker machine shutdowns. As a result, responses to the idea of a shutdown in these areas tend to be largely hypothetical.

12. THE IDEAL EGM SHUTDOWN PERIOD

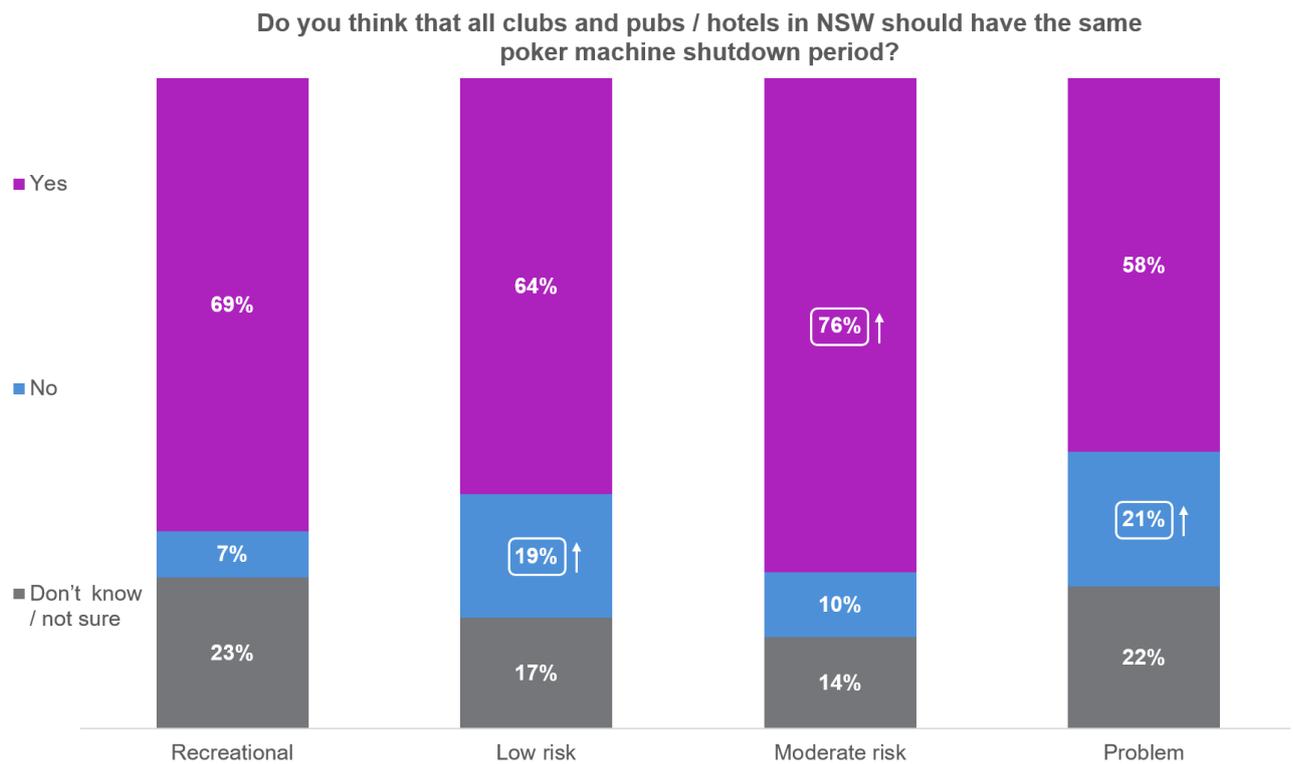
12.1 Consistency of approach

Many gamblers indicate that a mandatory, uniform shutdown required if behaviour change is the objective. Certainly at a rational level, the majority of gamblers believe that a shutdown mandated by legislation is required in order to truly impact behaviour. Few believe that venues would switch poker machines off of their own accord – these are recognised to be income generating assets, and none believe that any sensible business owner would choose to switch them off.

Equally, most believe that a shutdown with uniform time parameters is a must in order to drive behaviour change. Most believe that whenever it is possible to shift venues, people will do so. In fact, the idea of a non-uniform shutdown is widely seen by gamblers to be fairly pointless if the stated objective is to minimise harm.

*“Isn’t the whole thing a bit ridiculous if it doesn’t apply across the board?
People are just going to go down the road otherwise!” (Low-risk gambler,
Sydney)*

This findings is backed up by the survey results. When asked whether all pubs, clubs/hotels should have the same poker machine shutdown, a clear majority agree. This is slightly less pronounced among problem gamblers, who as a group appear to be less convinced by this proposition. The figure below shows responses by PGSI category.



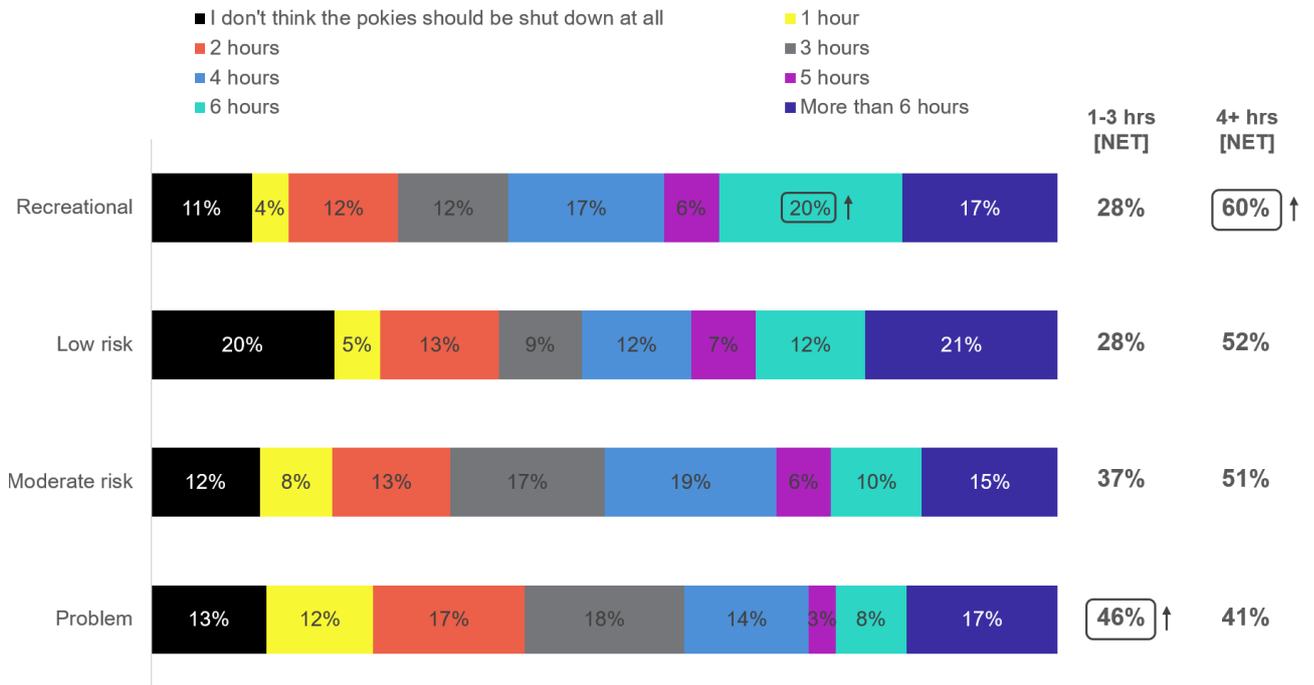
Base: Recreational (n=81); low risk (n=75); moderate risk (n=78); problem (n=78)
 336. Do you think that all clubs and pubs / hotels in New South Wales should have the same poker machine 'shutdown period'?

Figure 22: Agreement with a uniform shutdown period by PGSI type

12.2 Ideal shutdown period

Survey participants were asked about what they believe to be the ideal time period for poker machines to shut down. The prevailing view among gamblers is that the ideal shutdown period would run for at least four hours. This sentiment is most strongly held by recreational gamblers, with 60 per cent indicating an ideal period of four hours or more. Problem gamblers are the least likely to believe this – with a significantly larger proportion (46 per cent) believing a shutdown should last from between 1-3 hours. The figure below shows the detailed breakdown of responses by PGSI type.

How long would the ideal shutdown period be for pokies each day, in your opinion?



Base: Not had personal experience of the pokies' shutdown period; recreational (n=78); low risk (n=71); moderate risk (n=74); problem gamblers (n=54) Q31. Which of the following do you think you would do if the poker machines shut down for a period of time in the venue you were playing the pokies in?

Figure 23: Perceived ideal length of shutdown by PGSI type

When asked about the ideal time of day for a shutdown period, problem gamblers provide significantly different responses to other types of gamblers. This group are significantly less likely to agree that the ideal time period is between 4am and 10am, with a considerably larger proportion than any other group believing that the ideal time would be between 10am and 4pm. The figure below shows the detailed breakdown of responses.

When do you think would be the ideal time of day for a pokies 'shutdown period'?

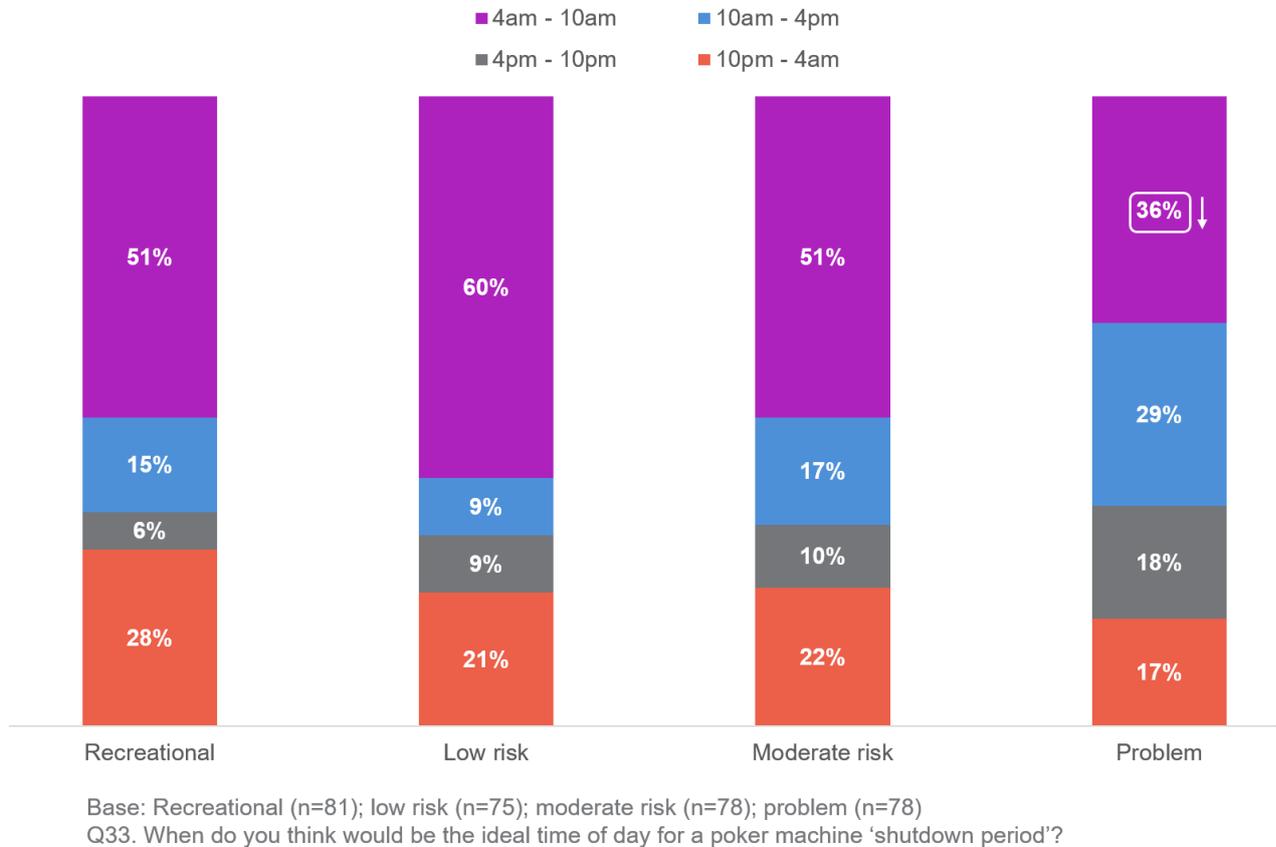


Figure 24: Ideal time of day for a shutdown, by PGSI type

Rationally, many gamblers believe that the shutdown would ideally be for a longer period, perhaps at a different time of day. Most are very quick to identify that a shutdown period from 4am until 10am is unlikely to have a significant impact on a large number of people.

From a theoretical perspective, many suggest that a longer shutdown period would likely increase the effect of any shutdown, given that it would impact a likely larger group of people. But, in reality it seems that few would support a significantly more impactful shutdown – it seems to be an idea that is good in theory, but likely quite frustrating in practice.

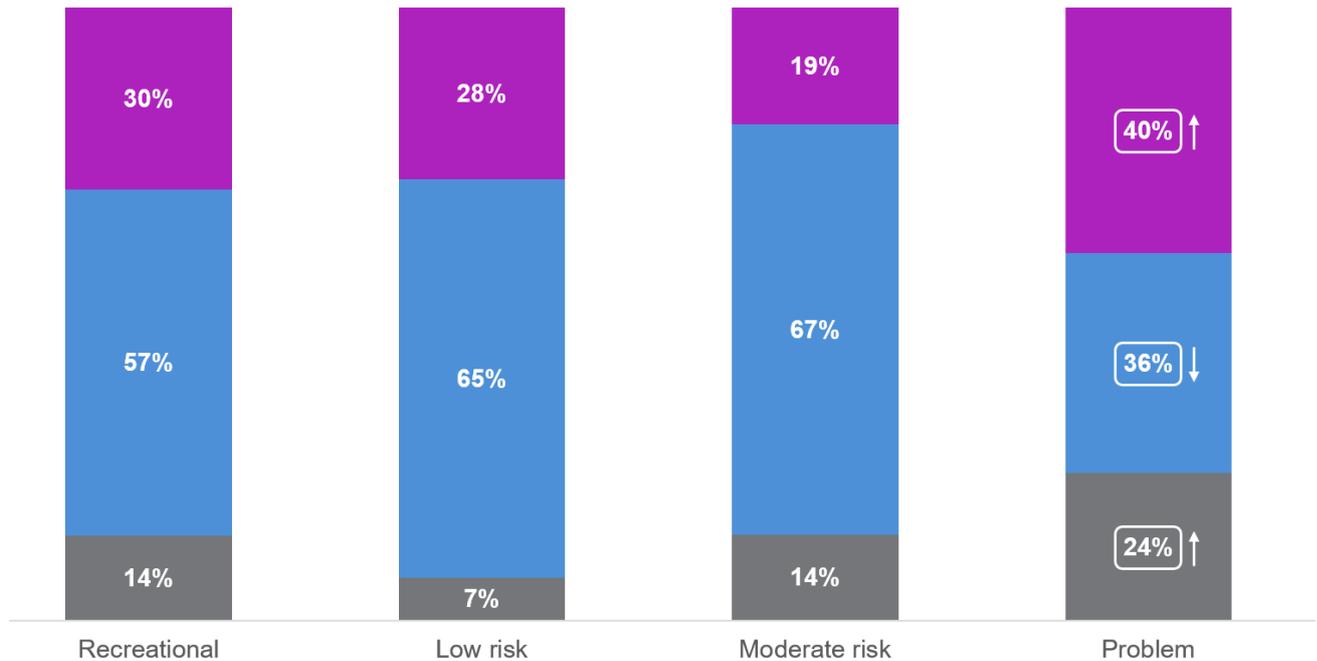
12.3 Weekdays vs weekends

The research examined the extent to which gamblers believe there should be a consistent shutdown across all days of the week, vs a different shutdown approach on weekends and weeknights.

A majority of recreational, low-risk and moderate-risk gamblers believe that the shutdown should be consistent across weekends and weeknights. Problem gamblers are far more split, with a significantly higher 40 per cent of problem gamblers indicating a preference for different arrangements on weekends vs weekdays. The figure below shows the breakdown of responses.

Do you think there should be a difference in the pokies shutdown period for weekdays vs. weekends?

- The weekday shutdown period should be longer than the weekend shutdown period
- They should be the same length of time
- The weekend shutdown period should be longer than the weekday shutdown period



Base: Recreational (n=81); low risk (n=75); moderate risk (n=78); problem (n=78)

Q34. Do you think there should be a difference in the poker machine 'shutdown period' for weekdays (Mon-Fri) compared to weekends (Sat-Sun)?

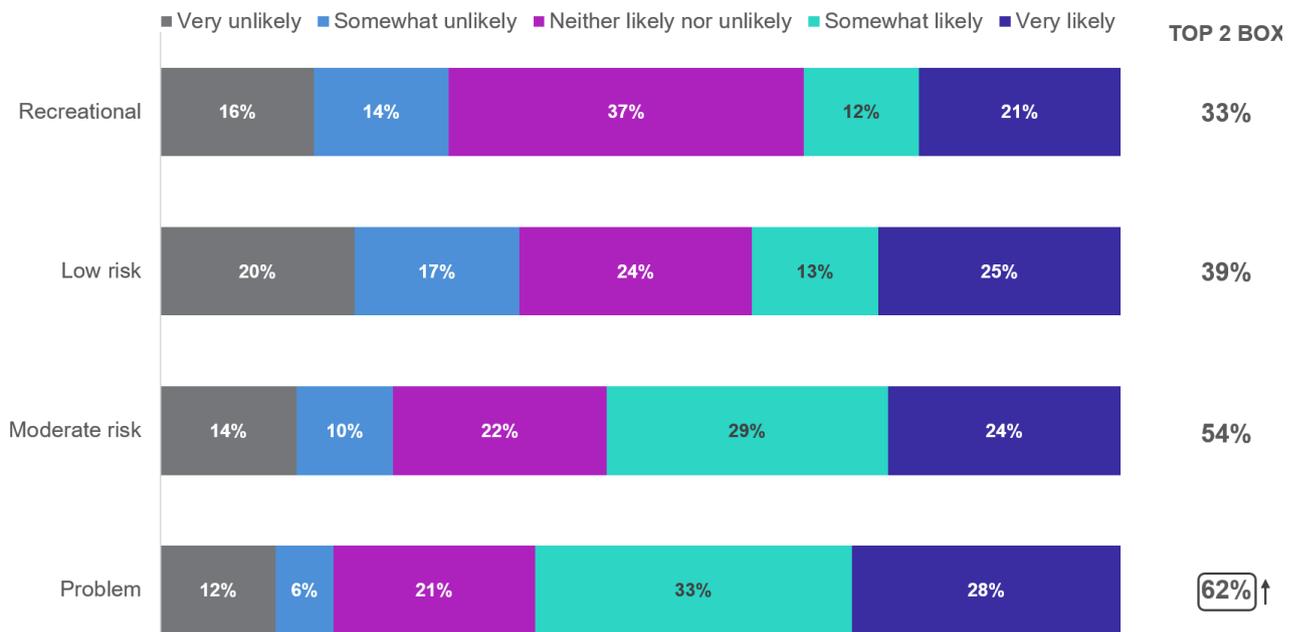
Figure 25: Ideal shutdown approaches on weekends vs weekdays

12.4 Interaction between the shutdown and alcohol service

The research sought to understand the role that alcohol service (or the absence thereof) might play on behavioural outcomes of any shutdown. The survey asked two questions – the first examined the likelihood of gamblers *staying* in a venue playing the pokies if alcohol service was stopped, and the second sought to understand the likelihood of gamblers choosing to attend a venue where they knew alcoholic beverages would not be available.

The role and importance of alcohol clearly diminishes with increases in PGSI scores. Problem gamblers are significantly more likely to continue playing the poker machines in a venue without alcohol than recreational gamblers, and the likelihood of doing so steadily increases with each PGSI category. The figure below provides details.

Likelihood of staying in a venue if the service of alcohol stopped for a number of hours while you were playing



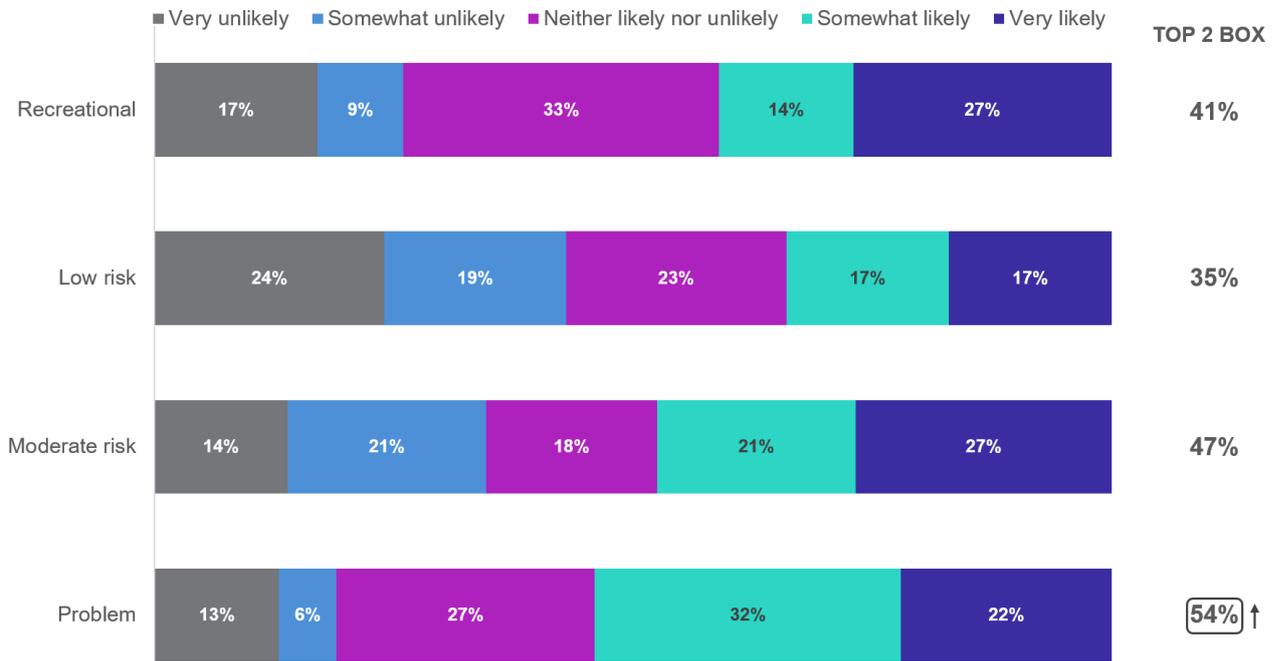
Base: Recreational (n=81); low risk (n=75); moderate risk (n=78); problem (n=78)

Q37 How likely would you be to stay in a club or pub / hotel playing the pokies if the service of alcoholic drinks stopped for a number of hours while you were playing?

Figure 26: Likelihood of staying in a venue to gamble without alcohol

Unsurprisingly, the absence of alcohol at a venue is far less of a barrier to attending a venue to play the pokies for problem gamblers. Again, this group are significantly more likely than recreational gamblers to attend a venue to play if alcohol were not available. The figure below provides details.

Likelihood of going to a club or pub / hotel to play the pokies if alcoholic drinks were not available at that time



Base: Recreational (n=81); low risk (n=75); moderate risk (n=78); problem (n=78)

Q38. How likely would you be to go to a club or pub / hotel to play the pokies if alcoholic drinks were not available at that time?

Figure 27: Likelihood of attending a venue to play EGMs if alcohol were not available

12.5 Role of soft-drinks and food during any shutdown

Qualitatively, the research examined what might happen if food and soft drinks were available during a poker machine shutdown period. It seems clear that few gamblers believe that venues need to fully close in order for the shutdown to achieve its objectives. Certainly, there is widespread belief that serious gamblers would be unlikely to wait at a venue for a period of hours while the shutdown is in force. Given the often single-minded focus on gambling, most problem gamblers believe they would go home to get some sleep.

The prospect of soft drinks and snacks being available during the shutdown is generally seen by gamblers to have insufficient appeal to change this perspective.

*“Soft drinks and snacks? Nah, if I can’t gamble, then I’m going home to bed!”
(Moderate-risk gambler, Wollongong).*

13. POTENTIAL COMPLEMENTARY STRATEGIES

The research briefly examined a range of other complementary strategies to reduce harm from EGMs. The figure below shows the extent to which each PGSI type believes these interventions could be effective in reducing harm for gamblers.

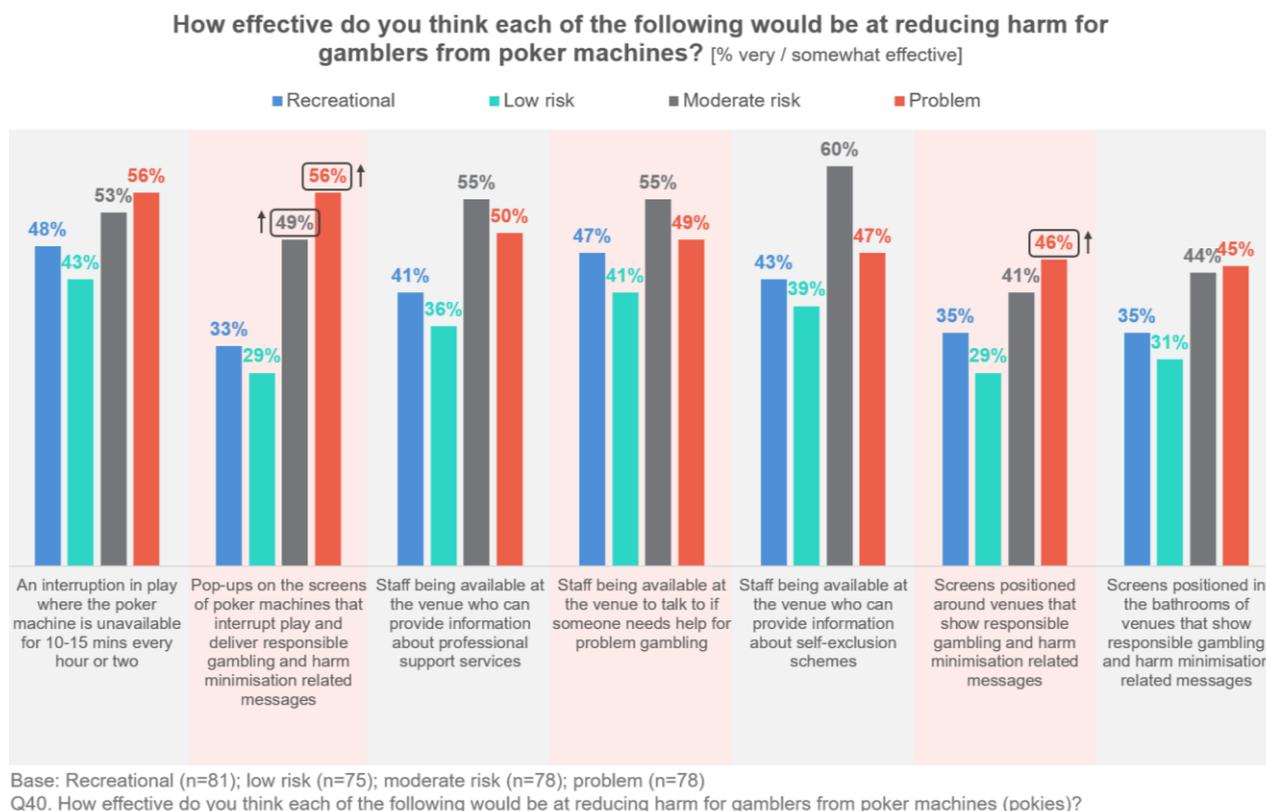


Figure 28: Potential impact of complementary harm reduction strategies

13.1 Interruption in play

During the qualitative sessions, some gamblers spontaneously suggested that regular interruptions in play, whereby the machine ‘pauses’ for 10-15 minutes every hour or two, may be effective in minimising harm from poker machines. Essentially, this is believed to have potential because it would force a brief break in play that would give gamblers the space and time to get ‘out of the zone’ for a brief period and re-evaluate their gambling choices.

Just under half of all gamblers indicate that this would be somewhat or very effective in reducing harm, with scores being slightly (but not significantly) higher among moderate-risk and problem gamblers.

13.2 Pop-up harm minimisation messages

The idea of dynamic harm-minimisation messages that pop up during play was also examined in the qualitative research. This approach is often believed to be potentially impactful – and certainly more so than static harm-minimisation messages in gaming venues, given that the message is delivered in a way that interrupts play and must be actively avoided by players.

However, many gamblers are quick to point out that they would likely become quickly accustomed to these messages, and very quick to ignore them, especially if there was a way to make the

message disappear from the screen (e.g. by pressing a button). Critically, most gamblers agree that this type of dynamic messaging would be most effective if it were to be delivered in a way that was not overly regular, and relatively unpredictable.

In the quantitative research, both moderate-risk and problem gamblers are significantly more likely to agree that this type of intervention could be effective, compared to recreational and lower-risk gamblers. This may be due to the fact that these PGSI types tend to play for longer periods and would therefore be more likely to be interrupted and consider their gambling choices.

13.3 Potential role of staff

The research also briefly explored the potential role of staff in reducing harm among gamblers. Interventions included staff being available to provide information about professional support services; staff being available to talk to people who may need help with their gambling; and staff being available to provide information about self-exclusion schemes.

Ultimately, these ideas rely on some sort of personal connection between a gambler and the venue staff. Moderate-risk gamblers are most likely to appreciate this type of intervention, with higher scores than all other gambler types on against all three of these measures (though not significantly so).

13.4 Screens presenting information in venues

The research also examined the potential for screens to be located in venues to display responsible gambling and harm minimisation messages, including in bathrooms. There is some support for this type of strategy, although gamblers often claim to believe that they are less effective overall than other strategies.

The key benefit of this type of approach is believed to be that different information can be delivered at different times. Rather than a static message, such as a poster, a message on a screen is widely regarded to be more dynamic – with greater scope to change messages frequently, and therefore greater likelihood that messages might cut-through in the busy gambling environment.

Again, it appears that problem gamblers are significantly more likely to believe that this type of approach could be effective, with 46 per cent of all problem gamblers believing that screens around venues could be somewhat or very effective.

14. SHIFT WORKERS

Shift workers were of particular interest to this study. This section details findings specific to this group. For the purposes of this analysis, shift workers were defined as working full or part time, and not typically at work between 8am and 7pm.

14.1 Limitations of this section

These findings should be interpreted with caution – the total number of shift workers included in the sample was n=30 vs n=282 classified as non-shift workers. Given the low sample size, these findings should be considered as indicative rather than statistically reliable.

14.2 Demographic profile of shift workers vs non-shift workers

The demographic profile of the shift workers in our sample shows that this group are less likely to be aged 55-74 years, and likely to have a lower household income than non-shift workers. The table below details the demographic profiles of the two groups.

%		Shift workers* (n=30)	Non-shift workers (n=282)
Gender	Male	60	50
	Female	40	50
Age	18-34	33	18
	35-54	50	39
	55-74	17 ↓	43
Location	Metro NSW	67	61
	Regional NSW	33	39
Household income*	Under \$25,000	14	11
	\$25,000 – 59,999	28	27
	\$60,000 – 99,999	38	23
	\$100,000 – 199,999	21	33
	\$200,000 +	-	6
	Average HH income	\$74,397 ↓	\$92,778

NB. N=13 responses removed for those who selected 'Prefer not to say' at the household income question

*CAUTION: Low base

Table 9: Demographic profile of shift workers

14.3 Shift worker PGSI types

In our sample, shift workers are more likely to be moderate-risk and problem gamblers, and less likely to be recreational gamblers than the non-shift worker group. The table below shows the size of PGSI types among these two groups.

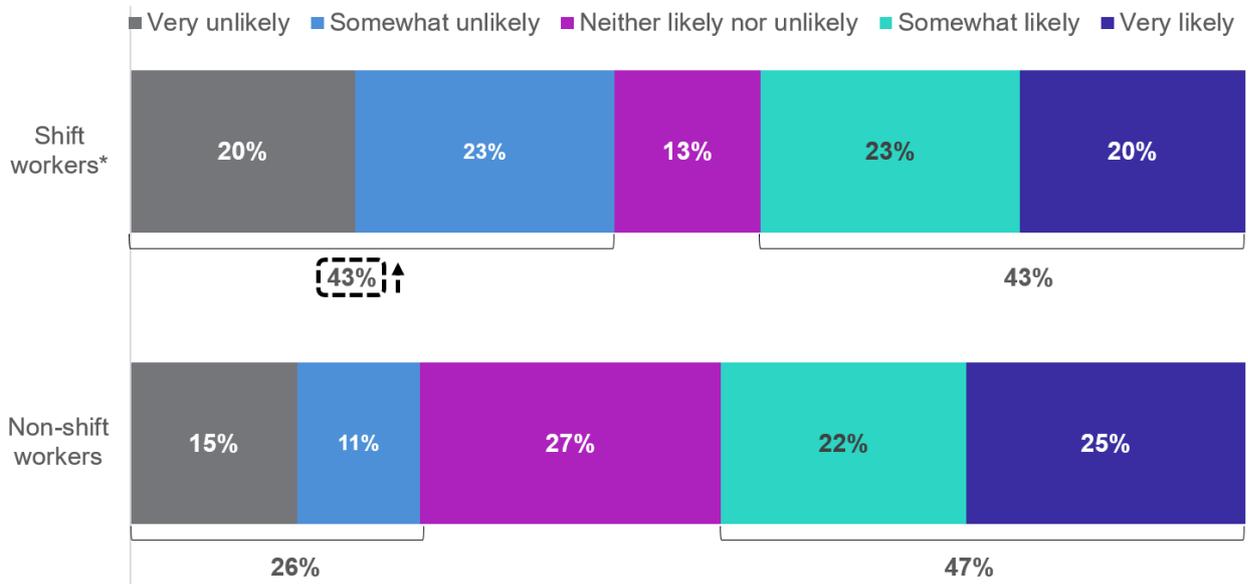
		Shift workers (n=30)	Non-shift workers (n=282)
PGSI segment	Recreational gambler	10 ↓	28
	Low risk gambler	20	24
	Moderate risk gambler	37 ↑	24
	Problem gambler	33	24

Table 10: PGSI types of shift workers

14.4 Role of alcohol service for shift workers

The research sought to understand the likelihood of gamblers staying in a venue if the service of alcohol stopped for a number of hours during play. The data show that the absence of alcohol clearly divides opinion among shift workers – they are just as likely to stay and play as they are to leave in a situation where alcohol service stops.

Likelihood of staying in a venue if the service of alcohol stopped for a number of hours while you were playing



Base: Shift workers (n=30) ; non-shift workers (n=282)

NB. Shift worker = employed FT or PT but not typically at work between 8am and 7pm

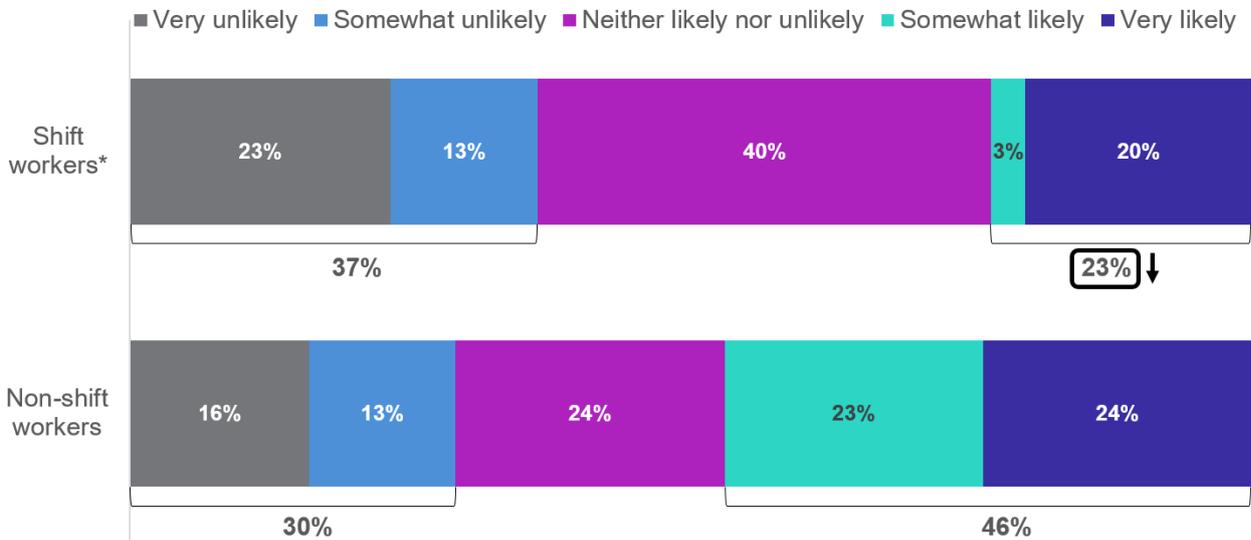
Q37 How likely would you be to stay in a club or pub / hotel playing the pokies if the service of alcoholic drinks stopped for a number of hours while you were playing?

*CAUTION: Low base

Figure 29: Likelihood of continuing play in a venue if alcohol service stops

While shift workers are equally likely to stay vs leave if alcohol service stops in a venue they are already in, they are significantly less likely to go to a venue to play the pokies in the first place if alcohol is not available.

Likelihood of going to a club or pub / hotel to play the pokies if alcoholic drinks were not available at that time



Base: Shift workers (n=30) ; non-shift workers (n=282)

NB. Shift worker = employed FT or PT but not typically at work between 8am and 7pm

Q38. How likely would you be to go to a club or pub / hotel to play the pokies if alcoholic drinks were not available at that time?

*CAUTION: Low base

Figure 30: Likelihood of going to a venue to play EGMs if alcohol is not available

14.5 Impact of the shutdown on shift workers

Qualitatively, many gamblers in this research spontaneously consider the impact of any shutdown on shift workers. Overall, people seem to be mindful that some people finish work at odd hours, and that it is entirely reasonable for them to wind down by having a drink and playing the pokies.

Gamblers indicate that the idea of a shutdown during the early hours of any morning could create a difficulty for those who might finish work when the shutdown is in force. None are able to identify a ready solution to this issue, including shift workers themselves.

Creating any kind of exemption for shift workers is widely seen by gamblers to be unworkable, while scrapping the shutdown entirely is generally perceived to be something that would be detrimental to the community overall.

As a result, the default position of a majority within our sample is that while the shutdown does have potential to be an inconvenience for shift workers, this is an unfortunate cost of a policy which is largely felt to deliver an overall societal benefit.

15. CONCLUSIONS

15.1 Target audience

The shutdown is a policy response that only seems required for community members who struggle with serious gambling issues – problem gamblers and higher-end moderate-risk gamblers.

Equally, it seems that any late-night shutdown is most likely to impact those gamblers for whom the policy has been designed – problem gamblers are significantly more likely than any other group to be gambling after midnight and beyond, and to be playing for longer periods overall.

15.2 Support for a shutdown

Conceptually, a clear majority of NSW gamblers believe that a shutdown period is a positive. 68 per cent of problem gamblers believe that a shutdown is a good idea.

Gamblers often believe that a break in play can create a significant number of benefits for those who are ‘in the zone’. It is clear that there are some players who require the venue to make poker machines unavailable (usually by closing) in order to prompt a break in play.

15.3 Likely impact of a shutdown

It seems that in the vast majority of cases, a shutdown would likely result in gamblers going home to rest, with few indicating that other forms of gambling could truly replace poker machines. Certainly, it does not appear that food or soft drink would be sufficient to keep gamblers at a venue in the early morning, and on this basis it does not seem necessary for venues to close fully in order for a shutdown to be effective.

Venue hopping appears to be most likely among problem gamblers in response to poker machines not being available, and this group are also most likely to travel the farthest in order to gamble (an average of 10.6 km in order to play their favourite poker machine).

15.4 Optimal shutdown period

Late at night seems to be the best time to consider any shutdown. Gamblers indicate that late-night gambling tends to take place in an environment where the atmosphere is often more intense compared with other times of the day, and there are a range of drawbacks identified by gamblers which are specific to late-night play.

A majority of gamblers appear to support the current time periods for the shutdown, though problem gamblers are most likely to believe that the shutdown should be shorter and at other times of the day. Based on the responses of this group across the research, it would seem that this is largely driven by a desire to be able to gamble for longer periods without interruption – even though this type of play is rationally acknowledged by problem gamblers to lead to problematic consequences.

A minimum shutdown period of four hours seems to be supported by most gamblers, although again problem gamblers are significantly more likely to believe that a shorter shutdown period is sufficient.

Conceptually, all gamblers believe that a shutdown period that is longer and affects a greater number of people would be more effective in reducing harm, though in reality it seems clear that there would potentially be push-back against this if it started to affect more gamblers, particularly those at lower risk levels. Ultimately, it seems that a shutdown is generally felt to be a good idea by gamblers, until it has some sort of personal impact.

15.5 Uniformity of shutdown periods

As a result of venue hopping, it seems that a critical consideration to ensure the success of any shutdown is to maintain a uniform time period – gamblers themselves express that a non-uniform shutdown makes little sense if the aim is to minimise harm.

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17. APPENDICES

Qualitative Recruitment Questionnaire

2157 - Recruitment Screener

GENERAL BACKGROUND QUESTIONS

1. What occupations do you and your immediate family have? **OPEN ENDED QUESTION DO NOT READ OUT THE LIST, BUT EXCLUDE IF THEY FIT ANY OF THE FOLLOWING. ALSO USE TO CONFIRM SEG:**

Market research / data collection	1	TERMINATE
Advertising, marketing, public relations	2	
Journalism or media	3	
In a pub, club or the Casino	4	
Gambling industries	5	

2. When was the last time you took part in market research? **WRITE IN**

_____ **TERMINATE IF LESS THAN 6 MONTHS AGO**

3. And what was the topic of your last market research? **WRITE IN**

_____ **TERMINATE IF GAMBLING RELATED**

Recruiter Note:

Please remind potential respondents that the information they provide is totally confidential and will only be used to determine their suitability to participate.

GENERAL SCREENING QUESTIONS

4. Record Gender
5. How old were you last birthday? _____ **CHECK SPECS**
6. What type of hours do you typically work?

I work standard Mon-Fri 9-5 hours		CONTINUE
I work on weekends		
I do shift work which includes working during the evening / night time		CODE AS SHIFT WORKER

7. Which of the following recreational pursuits have you participated in during the **last 6 months**?

Eaten out	1	ALL TO HAVE PLAYED THE POKIES TERMINATE ANYONE WHO CLAIMS TO HAVE DONE EVERYTHING
Been bushwalking	2	
Been to a pub, bar or club	3	
Been to a play / musical	4	
Played the pokies	5	
Been to the cinema	6	
Been to the horse races	7	
Sailing, water skiing or jetskiing	8	
Been to the ballet or symphony	9	
Watched a live sporting match	10	
Been scuba diving	11	
Run or ridden in a race / triathlon	12	

8. In the **last 6 months**, how often would you say that you have played the pokies?

I have played once or twice	1	TERMINATE
I have played every couple of months or so	2	CONTINUE
I have played at least once a month	3	
I have played at least fortnightly	4	
I have played weekly or more	5	

9. And in the **last 6 months**, how often would you say that you have played the pokies at the following times (capture below for each timeslot):

During the day (from 8am until 4pm)	1	TERMINATE UNLESS HAVE PLAYED AT LEAST TWICE AFTER 2AM IN THE LAST 6 MONTHS
In the early evening (from 4pm until 9pm)	2	
In the late evening (from 9pm until midnight)	3	
In the early morning (from midnight until 2am)	4	
After 2am	5	

10. Which of the following types of establishments do you **most frequently** visit to play the pokies?

A hotel or pub	1	CODE AS PUB
A registered club	2	CODE AS CLUB
The casino	3	CODE AS CASINO
Some other location	4	CHECK WITH RESEARCHER

11. How often do you visit the Star Casino in Sydney? (ASK ONLY METRO PARTICIPANTS)

I have never visited the Casino	1	CONTINUE
I've only ever visited once or twice	2	
I've visited in the last 12 months but only once or twice	3	
I've visited in the last 12 months 3 times or more	4	CAN CODE AS CASINO EVEN IF CLAIM TO PREFER A DIFFERENT VENUE

12. ASK PUB/CLUB GAMBLERS ONLY And thinking about your favourite pub / club to gamble, how would you describe the gaming room?

Smaller sized gaming area – up to 30 gaming machines	1	AIM FOR A MIX ACROSS SAMPLE
Medium sized gaming area – between 30-150 gaming machines	2	
Large sized gaming area – more than 150 gaming machines	3	

QUESTIONS TO DETERMINE GAMBLER TYPE

PLEASE NOTE THAT RESPONDENTS SHOULD NOT BE TOLD WHICH CATEGORY THEY LAND IN, AND CATEGORY SHOULD NOT BE INCLUDED ON ANY DOCUMENTATION (E.G. SIGN IN SHEETS) THAT PARTICIPANTS MAY SEE

READ OUT:

I'm now going to ask a series of questions about gambling. Please answer as truthfully as possible and remember that your answers are confidential, and only used to determine whether you are suitable to take part in the study.

All of the questions relate to the last 12 months.

1. Thinking about the last 12 months, have you bet more than you could really afford to lose?

Never	0	TAKE SCORE (either 0,1,2 or 3 depending on response)
Sometimes	1	
Most of the time	2	
Almost always	3	

2. Still thinking about the last 12 months, have you needed to gamble with larger amounts of money to get the same feeling of excitement?

Never	0	ADD SCORE TO TOTAL DEPENDING ON RESPONSE
Sometimes	1	
Most of the time	2	
Almost always	3	

3. When you gambled, did you go back another day to try to win back the money you lost?

Never	0	ADD SCORE TO TOTAL DEPENDING ON RESPONSE
Sometimes	1	
Most of the time	2	
Almost always	3	

4. Have you borrowed money or sold anything to get money to gamble?

Never	0	ADD SCORE TO TOTAL DEPENDING ON RESPONSE
Sometimes	1	
Most of the time	2	
Almost always	3	

5. Have you felt that you might have a problem with gambling?

Never	0	ADD SCORE TO TOTAL DEPENDING ON RESPONSE
Sometimes	1	
Most of the time	2	
Almost always	3	

6. Has gambling caused you any health problems, including stress or anxiety?

Never	0	ADD SCORE TO TOTAL DEPENDING ON RESPONSE
Sometimes	1	
Most of the time	2	
Almost always	3	

7. Have people criticised your betting or told you that you had a gambling problem, regardless of whether or not you thought it was true?

Never	0	ADD SCORE TO TOTAL DEPENDING ON RESPONSE
Sometimes	1	
Most of the time	2	
Almost always	3	

8. Has your gambling caused any financial problems for you or your household?

Never	0	ADD SCORE TO TOTAL DEPENDING ON RESPONSE
Sometimes	1	
Most of the time	2	
Almost always	3	

9. Have you felt guilty about the way you gamble or what happens when you gamble?

Never	0	ADD SCORE TO TOTAL DEPENDING ON RESPONSE
Sometimes	1	
Most of the time	2	
Almost always	3	

TO IDENTIFY GAMBLER TYPE:

Total the scores for each of the 9 questions, and use the following as a guide:

Score	Type
0	Recreational
1-2	Low-level
3-7	Moderate
8 or more	Problem

SPECS

- Use the attached schedule to determine specs for each sample cell
- All to have played the pokies at least every couple of months or so in the past 6 months
- All to have played the pokies at least twice after 2am in the past 6 months
- Those recruited for the Casino context to have visited the Star Casino in Sydney more than 3 times in the past 12 months OR to prefer the Casino as their gambling venue of choice
- Those recruited for pub / club context, ensure a mix of larger and smaller pubs/clubs of choice

Qualitative Discussion Guide

2157 – Discussion Guide

Introductions

10 mins

- > Introduce self and explain research: large study, looking at better understanding how people gamble using poker machines
- > Reinforce no right or wrong answers, confidentiality / no judgement, explain recording / viewing
- > Participant intros: name, age, occupation / hours of work, household setup, suburb

Overview of gaming machines

15 mins

- > When you think of poker machines, what is the first thing that comes to mind?
- > What else comes to mind when you think about pokies? (Probe fully)
- > What do you especially enjoy about playing the pokies?
- > What types of environments do you tend to play the pokies in? (Probe pub vs club)
- > How often would you say that you play the pokies?
- > What are the different situations when you would play the pokies? (Eg out for drinks with friends, after dinner at the club, after work etc)
- > What days of the week do you usually play?
- > What times of day do you usually play?
- > How do the days / times change according to different situations?
- > To what extent is playing the pokies something you do alone or with other people?
- > Who would you play the pokies with usually? Why them?
- > What is the difference for you between playing on your own and playing with others?
- > What role does alcohol play for you when you are playing the pokies? How does this change according to different situations?
- > To what extent do you encounter free extras for people playing pokies (food, coffee, drinks)?
- > How does this change across venues, times of the day etc?

Late night play

10 mins

- > How often would you say that you play later in the evening (After midnight? After 2am?)
- > Tell me about a time when you have played the pokies late in the evening. What was the situation? Where were you? Who were you with? Had you been consuming alcohol? What made you play later in the evening? Can you think of another example? Tell me about it.
- > How is your experience of playing the pokies different when you play late at night compared to other times?
- > How does the role of alcohol / free inducements change when playing later in the evening?
- > How do you think playing the pokies late at night compared to playing at other times is perceived by others?

Gambling harms

10 mins

- > What are some of the drawbacks of playing the pokies?
- > What do you see as the downsides of playing the pokies?
- > How do you see the downsides of playing the pokies changing according to the different situations of play? Play environments?
- > What particular downsides do you see as being relevant for playing late at night?
- > Who do you see as being most vulnerable to these downsides?
- > What harms (if any) are you mindful of when you personally play the pokies?
- > How do you manage these risks for yourself when you play?

Shutdown periods

10 mins

- > Are you aware of any times during the day when poker machines are not available / shut down?
- > What times? When? How does this work as far as you know?
- > Does it apply to all venues, or are there some exceptions?
- > To what extent have you encountered these shutdown periods personally?
- > What impact have they had on your behaviour in the past? (Probe travelling out of area, venue hopping, playing at different times, stopping for the night)

Conceptual review of shutdown periods

15 mins

- > How important do you think it is for people to have a break when they are playing the pokies?
- > What's the purpose of the break (minimise harm, reduce spending, get you to go home etc)?
- > To what extent do you think it is necessary to enforce a break by shutting down machines?
- > How do you feel about the idea of poker machines shutting down for a period of time?
- > What do you see as the main drawbacks for players?
- > What do you see as the benefits of this for players?
- > What impact do you think a shut-down period can have on some of the downsides of playing the pokies that we just talked about?
- > How important do you think it is that this type of shutdown is compulsory? (ie not a decision made by venue management)
- > How important do you think it is that any shutdown period is uniform across all venues with poker machines?
- > What do you think would happen if not all venues shut down at the same time? (Probe for venue hopping)

The optimal shutdown arrangements

10 mins

- > What do you think the ideal shutdown arrangements would look like to minimise harm from poker machines?
- > How long would the ideal shutdown be?
- > What time do you think it would be appropriate to shut down the pokies?
- > When would they ideally re-open?
- > To what extent would the shutdown be uniform across all venues vs variation between venues?
- > What would ideally happen when the pokies shut down? Would the venue close?
- > What impact do you think it would have if the venue remained open, with food and soft drinks available during this time? (Probe for would people just sit and wait?)
- > What impact do you think shutdown periods might have on shift workers?
- > How would these shutdown periods need to be balanced to ensure that people can continue to enjoy the pokies?

Complimentary strategies

10 mins

- > Can you think of any other ways to help minimise harms from pokies?
- > What else could be done in conjunction with a shutdown period to help reduce harm?

Quantitative Questionnaire

2157 - EGM Shutdown Periods - Questionnaire

INTRODUCTION

Thank you for your interest in this survey. Should you qualify for the main survey, it should take around 10 minutes to complete, depending on your answers. Your responses will be kept confidential and will not be used for any purpose other than this study.

Your participation in this survey is completely voluntary. Should you wish to withdraw at any stage then please feel free to do so. Also, if during the survey you feel uncomfortable and want to pause, you can close the survey and resume when you are ready.

To begin with, just a few questions about you.

MULTICHOICE

Q1 Do you or any of your family work in any of the following industries?

Please select all that apply.

Market research / data collection	1
Advertising, marketing or public relations	2
Journalism or media	3
In a pub, club or casino	4
Gambling industry (including sports / racing betting, poker machines, lotteries)	5
Gambling counselling / help services	6
None of these [EXCLUSIVE]	7

[TERMINATE IF ANY OF CODES 1-6 SELECTED AT Q1]

SINGLE CHOICE

Q2 To which gender do you most identify?

Please select one only.

Male	1
Female	2
Non-binary	3

SINGLE CHOICE - RECORD EXACT AGE AND CODE INTO AGE BANDS

Q3 How old are you?

Please select one only.

Under 18 years	1
18-24 years	2
25-34 years	3
35-44 years	4
45-54 years	5
55-64 years	6
65-74 years	7
75 or older	8
Prefer not to say	9

[TERMINATE IF CODE 1, 8 OR 9 SELECTED AT Q3, OTHERWISE CONTINUE]

SINGLE CHOICE

Q4 Which one of the following best describes where you live?

Please select one only.

Hunter-Central Coast region	1
Illawarra-South Coast region	2
New England region	3
North Coast region	4
Northern Sydney region	5
Riverina region	6
South Western Sydney region	7
Sydney region	8
Western Sydney region	9
Central West New South Wales region	10
Far West New South Wales	11
I do not live in New South Wales	12

IF CODES 1-4, 6, 10 OR 11 SELECTED AT Q4 THEN CLASSIFY AS REGIONAL

IF CODES 5 OR 7-9 SELECTED AT Q4 THEN CLASSIFY AS METRO

IF CODE 12 SELECTED AT Q4 THEN TERMINATE

CREATE HIDDEN VARIABLE – METRO / REGIONAL

MULTICHOICE

Q5 Which of the following have you done in the last 12 months?

Please select all that apply.

Placed a bet at a TAB outlet in a club, pub / hotel or the casino	1
Played a poker machine (pokies) in a club	2
Played a poker machine (pokies) in a pub / hotel	3
Played a poker machine (pokies) in a casino	4
Played Keno in a club, pub / hotel or the casino	5
Bought lottery tickets, either online or in-person, for Lotto, Powerball or any other lottery	6
Placed a sports or racing bet with an online betting company (via desktop, mobile or app)	7
None of these [EXCLUSIVE]	8

[CODE 2, 3 OR 4 MUST BE SELECTED AT Q5 TO CONTINUE, OTHERWISE TERMINATE]

QUESTIONS TO DETERMINE GAMBLER TYPE

*****PLEASE NOTE THAT RESPONDENTS SHOULD NOT SEE WHICH CATEGORY THEY LAND IN AT ANY POINT IN THE SURVEY *****

We'd now like to ask you a series of questions about gambling. Please answer as truthfully as possible and remember that your answers are confidential, and only used to determine whether you are suitable to take part in the study.

All of this next set of questions relate to the **last 12 months**

[NOTE TO PROGRAMMER: THE CODES FOR Q6-14 MUST BE 0-3 AS THIS DETERMINES EACH RESPONDENT'S SCORE AND THEIR SUBSEQUENT GAMBLER TYPE - SEE TABLE AFTER Q16]

SINGLE CHOICE

Q6 Thinking about the last 12 months, have you bet more than you could really afford to lose?

Please select one only.

Never	0
Sometimes	1
Most of the time	2
Almost always	3

SINGLE CHOICE

Q7 Still thinking about the last 12 months, have you needed to gamble with larger amounts of money to get the same feeling of excitement?

Please select one only.

Never	0
Sometimes	1
Most of the time	2
Almost always	3

SINGLE CHOICE

Q8 When you gambled, did you go back another day and try to win back the money you lost?

Please select one only.

Never	0
Sometimes	1
Most of the time	2
Almost always	3

SINGLE CHOICE

Q9 Have you borrowed money or sold anything to get money to gamble?

Please select one only.

Never	0
Sometimes	1
Most of the time	2
Almost always	3

SINGLE CHOICE

Q10 Have you felt that you might have a problem with gambling?

Please select one only.

Never	0
Sometimes	1
Most of the time	2
Almost always	3

SINGLE CHOICE

Q11 Has gambling caused you any health problems, including stress or anxiety?

Please select one only.

Never	0
Sometimes	1
Most of the time	2
Almost always	3

SINGLE CHOICE

Q12 Have people criticised your betting or told you that you have a gambling problem, regardless of whether or not you thought it was true?

Please select one only.

Never	0
Sometimes	1
Most of the time	2
Almost always	3

SINGLE CHOICE

Q13 Has your gambling caused any financial problems for you or your household?

Please select one only.

Never	0
Sometimes	1
Most of the time	2
Almost always	3

SINGLE CHOICE

Q14 Have you felt guilty about the way you gamble or what happens when you gamble?

Please select one only.

Never	0
Sometimes	1
Most of the time	2
Almost always	3

[NOTE TO PROGRAMMER: TO IDENTIFY GAMBLER TYPE, TOTAL THE SCORES ACROSS THE 9 QUESTIONS (Q6-Q14) AND USE THE FOLLOWING AS A GUIDE...

SCORE FROM Q6-14	TYPE	TARGET NUMBER OF COMPLETES
0	RECREATIONAL / NON-PROBLEM	n=75
1-2	LOW RISK	n=75
3-7	MODERATE RISK	n=75
8 OR MORE	PROBLEM	n=75

ELECTRONIC GAMBLING MACHINE (EGM) BEHAVIOUR

We'd now like to ask you a few questions about playing the pokies or poker machines.

SINGLE CHOICE GRID

Q15 How often do you do each of the following?

Please select one response per row

ROWS

Play a poker machine (pokies) in a club	1
Play a poker machine (pokies) in a pub / hotel	2
Play a poker machine (pokies) in the casino	3

COLUMNS

More than once a day	1
Once a day	2
Once every 2-3 days	3
Once every 4-6 days	4
Once a week	5
Once every 2-3 weeks	6
Once a month	7
Less often	8
Never [do not show this option if respondent has selected this venue type at Q5]	9

MULTICHOICE GRID

Q16 At which of the following times have you ever played poker machines (pokies) in each of these venues? You may select more than one option for each venue type

Please select all that apply in each row

ROWS

PIPE IN ALL VENUES FOR WHICH CODES 1-8 WERE SELECTED AT Q15
--

COLUMNS

During the day (from 8am to 4pm)	1
In the early evening (from 4pm until 9pm)	2
In the late evening (from 9pm until midnight)	3
In the early morning (from midnight until 2am)	4
From 2am - 8am	5

MULTICHOICE GRID

Q17 When do you usually play poker machines (pokies) in each of these venues? You may select more than one option for each venue type

Please select all that apply in each row

ROWS

PIPE IN ALL VENUES FOR WHICH CODES 1-8 WERE SELECTED AT Q15

COLUMNS

During the day (from 8am to 4pm)	1
In the early evening (from 4pm until 9pm)	2
In the late evening (from 9pm until midnight)	3
In the early morning (from midnight until 2am)	4
From 2am - 8am	5

MULTICHOICE GRID

Q18 And when during the week do you play poker machines (pokies) in each of these venues?

Please select all that apply in each row

ROWS

PIPE IN ALL VENUES FOR WHICH CODES 1-8 WERE SELECTED AT Q15

COLUMNS

Monday - Wednesday	1
Thursday - Friday	2
Saturday - Sunday	3

SINGLE CHOICE GRID

Q19 And approximately how long would you typically play the pokies for in each of these venues?

Please select one response per row

ROWS

PIPE IN ALL VENUES FOR WHICH CODES 1-8 WERE SELECTED AT Q15

COLUMNS

Up to 30 minutes	1
31 minutes to 1 hour	2
More than 1 hour to 2 hours	3
More than 2 hours to 3 hours	4
More than 3 hours to 4 hours	5
More than 4 hours	6

MULTICHOICE GRID

Q20 Who do you play the pokies with in each of these venues?

Please select all that apply in each row

ROWS

PIPE IN ALL VENUES FOR WHICH CODES 1-8 WERE SELECTED AT Q15

COLUMNS

By myself	1
With friends	2
With family members	3
With work colleagues	4

MULTICHOICE GRID

Q21 Which of the following do you do when playing the pokies in each of these venues?

Please select all that apply in each row

ROWS

PIPE IN ALL VENUES FOR WHICH CODES 1-8 WERE SELECTED AT Q15

COLUMNS

Consume alcoholic drinks	1
Consume soft drinks (incl. tea / coffee)	2
Have a meal	3
Have a snack	4
Smoke / vape	5
None of these [EXCLUSIVE]	6

SINGLE CHOICE GRID

Q22 Roughly how far do you typically travel to play the pokies at each of these venues?

Please select one response per row

ROWS

PIPE IN ALL VENUES FOR WHICH CODES 1-8 WERE SELECTED AT Q15

COLUMNS

Less than 5 kms	1
5-10 kms	2
11-15 kms	3
16-20 kms	4
More than 20 kms	5

SINGLE CHOICE

Q23 How far would you be willing to travel to play your favourite pokie?

Please select one only.

Less than 5 kms	1
5-10 kms	2
11-15 kms	3
16-20 kms	4
More than 20kms	5

ELECTRONIC GAMBLING MACHINE (EGM) SHUTDOWN PERIOD

We'd now like to ask you a few questions about the 'shutdown period' for poker machines in New South Wales.

SINGLE CHOICE

Q24 Before today, were you aware that the law requires clubs and pubs / hotels in New South Wales to shut down poker machines for a fixed number of hours each day?

Please select one only.

Yes	1
No	2
Don't know	3

[IF 'YES' SELECTED AT Q24 THEN ASK Q25, OTHERWISE SKIP TO Q26]

SINGLE CHOICE

Q25 Do you know what time the shutdown period is in place?

Please select one only.

Midnight to 3am	1
3am to 8am	2
4am to 10am	3
6am to 10am	4
8am to 11am	5
I don't know / not sure	6

SINGLE CHOICE

Q26 What do you think about poker machines having to shut down for a fixed number of hours each day in New South Wales?

Please select one only.

I think it's a very good idea	1
I think it's a good idea	2
I'm not really sure	3
I think it's a bad idea	4
I think it's a very bad idea	5

Q27 DELETED

MULTICHOICE

Q28 What do you think is the purpose of the poker machine 'shutdown period'?

Please select all that apply.

To minimise harm to gamblers	1
To reduce gamblers' spending on poker machines	2
To encourage gamblers to go home	3
To reduce the amount of time gamblers spend on poker machines	4
Other (please specify)	5

SINGLE CHOICE

Q29 Have you experienced this 'shutdown period' while playing poker machines?

Please select one only.

Yes	1
No	2

[IF CODE 1 SELECTED AT Q29 THEN ASK Q30 OTHERWISE SKIP TO Q31]

MULTICHOICE

Q30 Which of the following, if any, have you done as a result of the poker machine 'shutdown period'?

Please select all that apply.

Travelled to a different venue (club, pub / hotel) in order to continue playing the pokies	1
Travelled to a casino in order to continue playing the pokies	2
Travelled outside of my local area in order to continue playing the pokies	3
Stopped playing the pokies and gone home	4
Switched to a different form of gambling during the pokies shutdown period	5
None of these [ANCHOR & EXCLUSIVE]	6

[IF CODE 2 OR 3 SELECTED AT Q29 THEN ASK Q31 OTHERWISE SKIP TO Q32]

MULTICHOICE

Q31 Which of the following do you think you would do if the poker machines shut down for a period of time in the venue you were playing the pokies in?

Please select all that apply.

Travel to a different venue (club, pub / hotel) in order to continue playing the pokies	1
Travel to a casino in order to continue playing the pokies	2
Travel outside of my local area in order to continue playing the pokies	3
Stop playing the pokies and go home	4
Switch to a different form of gambling during the pokies 'shutdown period'	5
None of these [ANCHOR & EXCLUSIVE]	6

IDEAL EGM SHUTDOWN PERIOD

We'd now like to ask you a few questions about what you think the ideal shutdown period would look like for poker machines in New South Wales.

SINGLE CHOICE

Q32 How long would the ideal shutdown period be for pokies each day, in your opinion?

Please select one only.

1 hour	1
2 hours	2
3 hours	3
4 hours	4
5 hours	5
6 hours	6
More than 6 hours	7
I don't think the poker machines should be shut down at all	8

SINGLE CHOICE

Q33 When do you think would be the ideal time of day for a poker machine 'shutdown period'?

Please select one only.

4am to 10am	1
10am - 4pm	2
4pm - 10pm	3
10pm - 4am	4

SINGLE CHOICE

Q34 Do you think there should be a difference in the poker machine 'shutdown period' for weekdays (Mon-Fri) compared to weekends (Sat-Sun)?

Please select one only.

The weekday shutdown period should be longer than the weekend shutdown period	1
The weekend shutdown period should be longer than the weekday shutdown period	2
They should be the same length of time	3

Q35 DELETED

SINGLE CHOICE

Q36 Do you think that all clubs and pubs / hotels in New South Wales should have the same poker machine 'shutdown period'?

Please select one only.

Yes	1
No	2
Don't know / not sure	3

[NOTE TO PROGRAMMER - ROTATE ORDER OF Q37 AND Q38]

SINGLE CHOICE

Q37 How likely would you be to stay in a club or pub / hotel playing the pokies if the service of alcoholic drinks stopped for a number of hours while you were playing?

Please select one only.

Very likely	1
Somewhat likely	2
Neither likely nor unlikely	3
Somewhat unlikely	4
Very unlikely	5

SINGLE CHOICE

Q38 How likely would you be to go to a club or pub / hotel to play the pokies if alcoholic drinks were not available at that time?

Please select one only.

Very likely	1
Somewhat likely	2
Neither likely nor unlikely	3
Somewhat unlikely	4
Very unlikely	5

Q39 DELETED

SINGLE CHOICE GRID

Q40 How effective do you think each of the following would be at reducing harm for gamblers from poker machines (pokies)?

Please select one response per row

ROWS

Pop-ups on the screens of poker machines that interrupt play and deliver responsible gambling and harm minimisation related messages	1
Screens positioned around clubs and pubs / hotels that show responsible gambling and harm minimisation related messages	2
Screens positioned in the bathrooms of clubs and pubs / hotels that show responsible gambling and harm minimisation related messages	3
Staff being available at the venue to talk to if someone needs help for problem gambling	4
Staff being available at the venue who can provide information about professional support services	5
Staff being available at the venue who can provide information about self-exclusion schemes	6
An interruption in play where the poker machine is unavailable for 10-15 minutes every hour or two	7

COLUMNS

Very effective	1
Somewhat effective	2
Neither effective nor ineffective	3
Somewhat ineffective	4
Very ineffective	5

CLASSIFICATION

Nearly finished, Thanks for all your answers. To finish, there are a few questions about you and your household...

SINGLE CHOICE

Q41 Which one of the following best describes your current living arrangements?

Please select one only.

I live by myself	1
I live with other adults	2
I live with my partner and no children	3
I live with my partner and child / children	4
I live with my child / children	5
Prefer not to say	6

SINGLE CHOICE

Q42 What is the highest level of education you have completed?

Please select one only.

Primary school to Year 9	1
Primary school to Year 10	2
Year 11 or 12	3
Trade / apprenticeship / TAFE / Technical Certificate	4
Diploma	5
Bachelor's degree / Postgraduate degree	6
Other (please specify)	7
Prefer not to say	8

SINGLE CHOICE

Q43 Which of the following best describes your current employment status?

Please select one only.

Employed full-time	1
Employed part-time	2
Unemployed	3
Retired or on a pension	4
A full-time student	5
Full time parent/carer	6
Other (please specify)	7
Prefer not to say	99

[IF CODE 1 OR 2 SELECTED AT Q43 THEN ASK Q44, OTHERWISE SKIP TO Q45]

SINGLE CHOICE

Q44 Which one of the following best describes your current occupation?

Please select one only.

Manager	1
Professional	2
Technician / Trade worker	3
Community / Personal Service worker	4
Clerical / Administrative worker	5
Sales worker	6
Machinery operator / driver	7
Labourer	8

SINGLE CHOICE

Q45 Thinking about your typical working week, are you usually at work between the hours of 8.00am and 7.00pm?

Please select one only.

Yes	1
No	2

SINGLE CHOICE

Q46 What is your combined household income, per year, before tax?

Please select one only.

Under \$25,000	1
\$25,000 - \$39,999	2
\$40,000 - \$59,999	3
\$60,000 - \$79,999	4
\$80,000 - \$99,999	5
\$100,000 - \$149,999	6
\$150,000 - \$199,999	7
\$200,000 - \$249,999	8
\$250,000 - \$300,000	9
Over \$300,000	10
Prefer not to say	11

SINGLE CHOICE

Q47 Is a language other than English regularly spoken in your household?

Please select one only.

Yes	1
No	2
Prefer not to say	3

[IF CODE 1 SELECTED AT Q47 THEN ASK Q48, OTHERWISE SKIP TO Q49]

MULTICHOICE

Q48 What language(s) other than English are regularly spoken at home?

Please select all that apply.

Arabic	1
Cantonese	2
Croatian	3
Filipino	4
French	5
German	6
Greek	7
Hindi	8
Italian	9
Macedonian	10
Mandarin	11
Serbian	12
Spanish	13
Turkish	14
Vietnamese	15
Other (specify)	16

SINGLE CHOICE

Q49 Are you of Aboriginal origin, Torres Strait Islander origin or both?

Please select one only.

Aboriginal	1
Torres Strait Islander	2
Both Aboriginal and Torres Strait Islander	3
Neither	4
Prefer not to say	5

Thanks very much for your time, they are all the questions that we have for you today.



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