ATTITUDES TOWARDS THE ESTABLISHMENT OF A LOCAL CASINO IN THREE VICTORIAN COMMUNITIES

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ABSTRACT

It is the intent of the attached report to identify existing gambling trends prior to the establishment of a local casino, and to then assess the consequential effects upon the community.

The three communities which comprise the sample population for this study are Keilor, Kew and Geelong. Each of the aforementioned had proposed a casino development for their respective community, and were selected on the basis of their geographic and demographic differences.

It was the opinion of the author that a broader cross-section of the community at large would provide a diversity of views on the matter at hand, and subsequently form a more comprehensive database for analysis.

Main Findings of Analysis

* Approximately 69% of the total sample were participative across a diverse range of gambling activities.

* In order of ranking, lotto, poker machines and casino games were considered the most popular activities amongst the aforementioned "gambling population".

* Men were found not only more involved in gambling pursuits than women, but showed a propensity to spend a greater amount.

ABSTRACT

Main Findings of Analysis

- * Amongst the various gambling forms, lotto players appeared to be the most loyal with 70% of players indicating that they would not allocate any of their lotto budget to spend at a local casino.

- * It was revealed that 39% of the total sample would spend beyond their present level of gambling expenditure, if local casino games were available.

- * It appears that a local casino would have some effect in confining gambling expenditure within the state. Approximately 19% of the total sample indicated that their level of spending "across the border" would decrease in preference to a closer alternative.

- * There was evidence to suggest that the accessibility of a local gaming establishment, and the variety of gambling alternatives available, would encourage a higher level of participation from the community.

- * As an indicator of repeat patronage, 55% of the total sample stated their inclination to visit a local casino more than once a year. The number of multiple visits ranged from a minimum of two visits to a maximum of seventy-five visits per annum.

ABSTRACT

Main Findings of Analysis

* In an attempt to identify the extent of compulsive gambling within the total sample, it was found that whilst 86% would play within the confines of their gambling budget, 8% admitted their persistence in recovering losses by either playing a different game, or borrowing money to continue.

* In terms of proximity, 42% of the respondents expressed that they would be most concerned if a local casino was established within 1 kilometre of their residence. It was perceived to have a deleterious effect on their present quality of life.

* More specifically, increased traffic in the area attracted the highest level of concern, closely followed by the potential contribution of a local casino to excessive gambling in the community.

  These social issues should be addressed by virtue of community consultation to ensure that adequate control mechanisms are implemented to minimise the negative effects of a local casino operation.

* The creation of job opportunities, along with the increased volume of business in the immediate area, were perceived as the most favourable consequences of a local casino operation.

ABSTRACT

Main Findings of Analysis

* Of the total sample, 40% were in favour of a local casino, whilst 34% indicated to the contrary. The remainder were indifferent to the proposal.

  It was observed from the results that the level of acceptance was highest in Geelong, with Keilor also expressing a favourable opinion. A greater resistance to the proposed casino development was noted from the Kew respondents.

* Whilst the negative aspects associated with a gambling establishment in each of the respective areas were acknowledged, it appears that a greater priority was placed on the community benefits to be derived from the project.

SECTION 1 - INTRODUCTION

Casino gambling is often a highly contentious issue, traditionally linked with organised crime and connotations of immoral behaviour.

Each of the states in Australia contemplating its legislation have entered into active debate over the introduction of casinos, often with polarised points of view emerging.

Access to new sources of tax revenue, stimulating tourism and service industries, creation of job opportunities are particularly attractive from an economic perspective.

The potential contribution casinos may have in this respect appear to be more significant during times of economic downturn, to the extent that the establishment of a casino is at times, perceived to be a panacea for the State's financial ills.

Whilst the economic arguments often provide the main source of justification, the possible social implications associated with casino gambling should also be addressed.

One of the key concerns expressed by welfare groups is the recognition that casino legislation will also lead to some less favourable consequences.

SECTION 1 - INTRODUCTION

It is felt that casinos are likely to attract undesirable elements into the community. Financial hardship induced by excessive gambling, greater incidence of violent and criminal activity, alcoholism and promiscuity, are amongst the anticipated social ramifications, which in general, will not only compromise the quality of life of the individual, but may also be detrimental to the character of the community at large.

In light of the above, it is the aim of this paper to acknowledge a casino's contribution in quantitative terms, however, the greater emphasis will be placed on the qualitative impacts of casino gambling upon the community.

The desirability of a casino in the community is perhaps best guided by its residents. It is imperative that the views of the individual and the community are sought before decisions are implemented to incorporate such an establishment into the community.

Primary data relating to the awareness of both the positive and negative aspects of casino gambling, as well as the extent to which they are perceived in the community, provide the statistical base for analysis and discussion in SECTION 6 - ANALYSIS OF DATA.

SECTION 2 - THE TOURISM INDUSTRY

It is appropriate at this preliminary stage to define "tourism".

Mathieson and Wall [1982:1] offer the following explanation...

"Tourism is the temporary movement of people to destinations outside their normal places of work and residence, the activities undertaken during their stay in those destinations, and the facilities created to their needs...it also incorporates those who travel for recreational purposes in their leisure time..."

The tourism industry in Australia, is considered to be one of the country's fastest growing industries and a major contributor to export earnings [EIU Report No.4 1990:63].

The significance of tourism in this respect, will be dealt with more comprehensively in the discussion to follow.

2.1 Overview of Australian Tourism Industry

Table 1 .. International Tourism

	1986	1987	1988	1989	1990
Number of Arrivals [millions]	1.429	1.784	2.249	2.080	2.214

[source :- BTR Tourism Statistical Review 1990]

Table 2.. Domestic Travel

	1986	1987	1988	1989	1990
Number of Trips [millions]	45.144	44.963	46.725	46.017	49.962

[source :- BTR Australian Tourism Data Card 1991]

Although the annual total inbound tourists of slightly more than 2 million is relatively modest on an international scale, growth rates in recent years have been amongst the highest in the developed countries of the world
[EIU Report No.4 1990:63].

In particular, during the "boom phase" from 1983 to 1988, inbound tourism rose from 944,000 to almost 2.25 million. This represented an average growth rate of 19% per annum during this period [ABS catalogue 3402 - table 4].

Australia's drawing power was enhanced by hosting the America's Cup in 1987, the Bi-Centennial celebrations, along with the World Expo in 1988.

Whilst record levels of visitations were attained in 1988, 1989 signalled a downturn in the rate of inbound tourism growth.

No special events were scheduled in Australia during 1989-90, and the pilots' dispute in the same year, also proved to be detrimental to a more rapid growth in inbound tourism.

From the 1990 statistics in Table 1, a moderate recovery appears to be underway, with the number of international visitors rising almost to the record levels of 1988.

With reference to Table 2, similar trends are reflected in the level of domestic tourism, which is measured by the total number of trips undertaken within Australia.

As with international arrivals, domestic tourism peaked in 1988, but less favourable results were recorded for 1989. The 1990 statistics show a marked improvement, surpassing the highest levels previously attained.

It is evident from the aforementioned that despite a relatively short-lived decline, the tourism industry has continued to expand, from both a domestic and international perspective.

2.2 The Economic Impact of Tourism

A reference to statistical information from the Bureau of Tourism Research [BTR], may assist in establishing the contribution of tourism to the Australian economy.

A summary of key indicators is presented below :-

Table 3.. The Contribution of Tourism To The Australian Economy

	1987-88	1988-89	1989-90
TOURIST EXPENDITURE [$million]			
* international	4,860	6,200	6,200
* domestic	14,975	15,900	17,300
TOTAL	$19,835	$22,100	$23,500
EMPLOYMENT GENERATED			
* international	104,900	125,000	116,000
* domestic	321,400	318,000	325,000
TOTAL	426,300	443,000	441,000
CONTRIBUTION TO GDP			
* international	1.4%	1.5%	1.4%
* domestic	4.1%	3.8%	3.8%
TOTAL	5.5%	5.3%	5.2%

[source :- BTR Australian Tourism Data Card 1989 and 1990]

According to the BTR statistics, during 1989-90 tourist expenditure amounted to $23.5 billion, approximately 6% higher than the previous year. The income generated was equivalent to 5.2% of the Gross Domestic Product, and approximately 441,000 jobs were either directly or indirectly, attributed to the tourism industry. The latter two reflect a marginal decrease when compared to the results of 1988-1989.

Whilst international arrivals make a notable impact, Table 3 highlights the importance of domestic tourism to the national economy, with respect to each of the aforementioned categories.

2.2 The Economic Impact of Tourism

The sudden growth of inbound tourism during the 1980's resulted in rapid increases in the inflow of foreign currency. This represented an average annual increase in tourism exports for the period from 1982 to 1988, of approximately 11%.

When compared to an average annual increase of 5% for other exports in the same period, the importance of tourism to the Australian economy becomes apparent [Carroll 1991:16].

Table 4.. Tourism's Contribution to Foreign Exchange

year	visitors	foreign exchange earnings [$ billions]
1970	338,400	not available
1975	516,000	not available
1980	904,600	1.40
1981	936,700	1.57
1982	954,700	1.84
1983	943,900	1.99
1984	1,015,100	2.15
1985	1,142,600	3.47
1986	1,429,400	missing
1987	1,784,900	4.58
1988	2,249,300	6.15
1989	2,080,300	5.79
1990	2,214,900	7.07

[source :- Cohen 1991:3]

Australia's foreign exchange earnings from tourism in 1990 totalled $7.07 billion.

This is based on a combination of :-

* expenditure by overseas travellers within Australia
* airfares earned by Qantas
* expenditure by foreign airlines in Australia

  [EIU Report No.4 1990]

2.2 The Economic Impact of Tourism

According to BTR estimates, it is envisaged that by the year 2000, the number of international arrivals should escalate to approximately 4.8 million. This projection is quite conservative in comparison to the Australian Tourist Industry Association estimate of of 7.5 million [Cohen 1991:3].

With regard to economic benefit, this represents export earnings within the vicinity of $20 to $30 billion dollars, along with the creation of 200,000 to 300,000 additional jobs [Cohen 1991:3].

SECTION 3 - THE AUSTRALIAN CASINO INDUSTRY

3.1 Overview of Gambling in Australia

The significance of gambling in Australia is universally acknowledged, and the perception of its population as a "nation of gamblers", is one which has been widely promoted by both the media and popular literature [Caldwell 1988:7].

Whilst gambling is regarded as a national obsession, it is also recognised as an integral part of Australian history, since the first convicts and settlers gambled with coins, cards and dice [Wilson 1990:1].

It has been claimed that almost 90% of the Australian population gamble on anything, from two-up to the Melbourne Cup sweep; from glittering casinos to frog-jumping contests in the remote parts of the country [O'Hara 1988:i].

The most popular forms of gambling in Australia include:-

* Book-making
* Lotteries
* Poker Machines
* Two-Up
* Casinos

Historically, the aforementioned activities were objected to on moralistic grounds. However, government attitudes gradually changed from prohibition to support for commercial gambling, due to its revenue-raising capabilities [Wilson 1990:1].

3.1. Overview of Gambling in Australia

With regard to current developments of this kind, the proposed gambling reforms for Victoria announced on the 19th December 1990, represented a reversal of long-standing policies opposing the operation of casinos within the state. The approval for initially two casinos, one large open casino and one smaller European club-style casino, was primarily justified on the basis of its perceived economic contribution [Lesman 1991:1].

3.2 Types of Casinos

Originally, the term "casino" was used to describe a public hall for music and dancing, however, according to a more recent definition, it refers to the same as a collection of gaming rooms [The Concise Oxford Dictionary].

It is essentially a gambling house or club, where gamblers can risk their money against a common gambler, "the banker" or "the house".

The casino typically accepts all bets made by its patrons within an established limit, to ensure that a patron cannot win more than "the house" can afford to pay.

Every game offered gives the casino a mathematical expectancy of winning in the long run. Subsequent to this virtual assurance of gross revenue, casinos are usually in a position to offer their "high rollers" extravagant incentives. These may be in the form of free entertainment, transportation, and accommodation.

All casinos are designed to be attractive, exciting, stimulating and self-contained. There are no clocks and seldom any windows to avoid any indications of time. The atmosphere of comfort and pleasure is provided to induce patrons to stay as long as possible. One other subtlety is the use of multi-coloured chips to de-emphasize the use of cash [Beagle 1986:84].

In broad terms, there are two main divisions in the types of casinos which operate throughout the world; the "European" or "Club" model and the "American" model [Caldwell 1988:30].

3.2.1 The "European" or "Club" Model

Characteristics which are considered distinctively "European" include their unobtrusive, elegant appearance and their sophisticated ambience. This is attributed to their origins as playgrounds of the aristocracy and wealthy middle classes [Caldwell 1988:30].

In present times, elitism to this degree is no longer the case. Whilst dress codes may apply to maintain the prestigious atmosphere, such premises are generally accessible to the public.

Apart from strict dress standards, European practices also include entry restrictions for local residents, entrance fees, and attempts by governments to strike a balance between social and commercial considerations [Caldwell 1988:31].

Casinos of this nature operate mainly for social purposes, and are not intended to be major sources of revenue. The emphasis is predominantly on discretion and elegance, rather than commercial viability [NZ report 1989:24].

This cultured image may be regarded as more desirable, as it appears to be a less likely source of adverse impacts upon the local community than its American counterpart [Caldwell 1988:30].

The Club casino of British origin, is a variation of the European model. It is usually a smaller, more exclusive venue restricted to "members only", Further, in an effort to minimise impulsive gambling, application for membership must be presented 48 hours in advance, and advertising in any form, is prohibited.

3.2.1 The "European" or "Club" Model

It is interesting to note the British stance. In recognition of the social costs of wide-spread gambling, it should not be stimulated for commercial gain. Accordingly, a more responsible attitude prevails [Caldwell 1988:31].

3.2.2 The "American" Model

Casinos in this category are typically larger scale operations, neon-lit and opulent. Night-clubs, cabaret shows, restaurant and bar facilities, table games and slot machines are considered standard features in such establishments.

Marketing and advertising is more aggressive for the American-style casino, as priority is placed on the maximisation of profits. This "commercial stimulation" has been criticised on the grounds that an increase in social problems, crime and corruption, would be inevitable under this approach [Caldwell 1988:32].

3.2.3 The "Australian" Model

Casinos presently in operation, do not appear to have characteristics or features which are uniquely Australian.

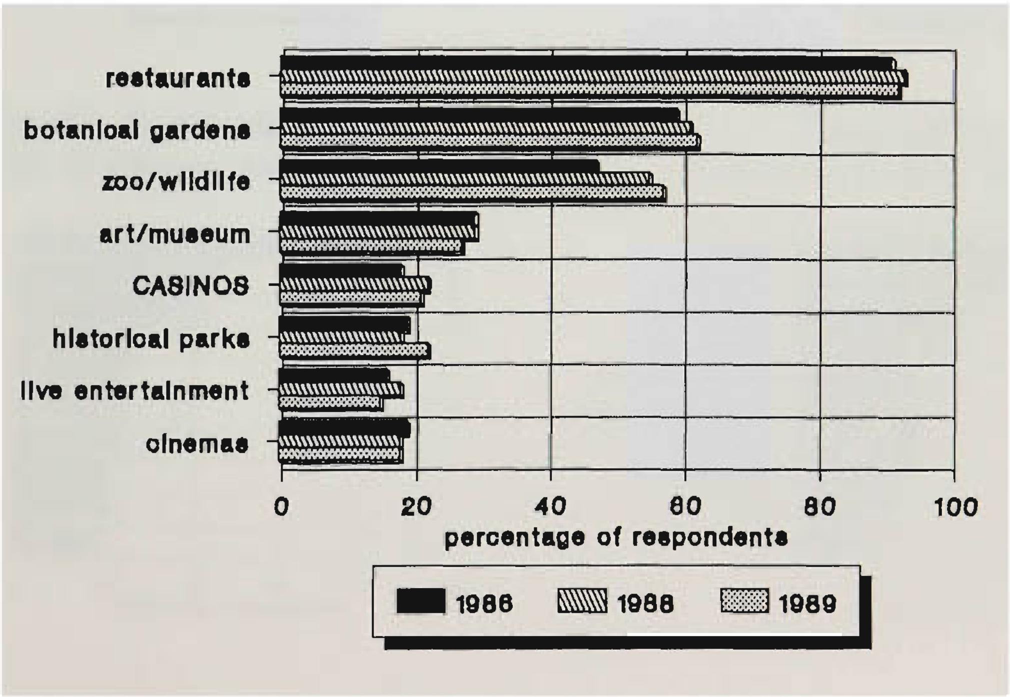
Jupiters Casino on the Gold Coast and the Burswood Casino in Perth may be categorised as Australian adaptations of the American-style establishments, whilst the Adelaide Casino is more European in style.

Irrespective of the style, all Australian casinos operate along similar lines. Patrons of suitable age and dress may enter and participate. There is no entry fee, nor joining fee to become a member, and upon entry patrons are not compelled to gamble. In fact, many non-gamblers frequent the premises for the atmosphere and the extensive range of facilities available [Beagle 1986:79].

Whilst data relating to casino patronage amongst domestic travellers was not attainable, statistics compiled in the International Visitors Survey 1989, was considered an alternative source in gauging the significance of casinos with the Australian tourism industry.

According to Figure 1, casinos were regarded as one of the more popular sources of entertainment by approximately 20% of the respondents to the survey. In comparison to the results of the previous years, casinos appear to have maintained a consistent level of popularity amongst international visitors.

Figure 1 .. Sources of Entertainment

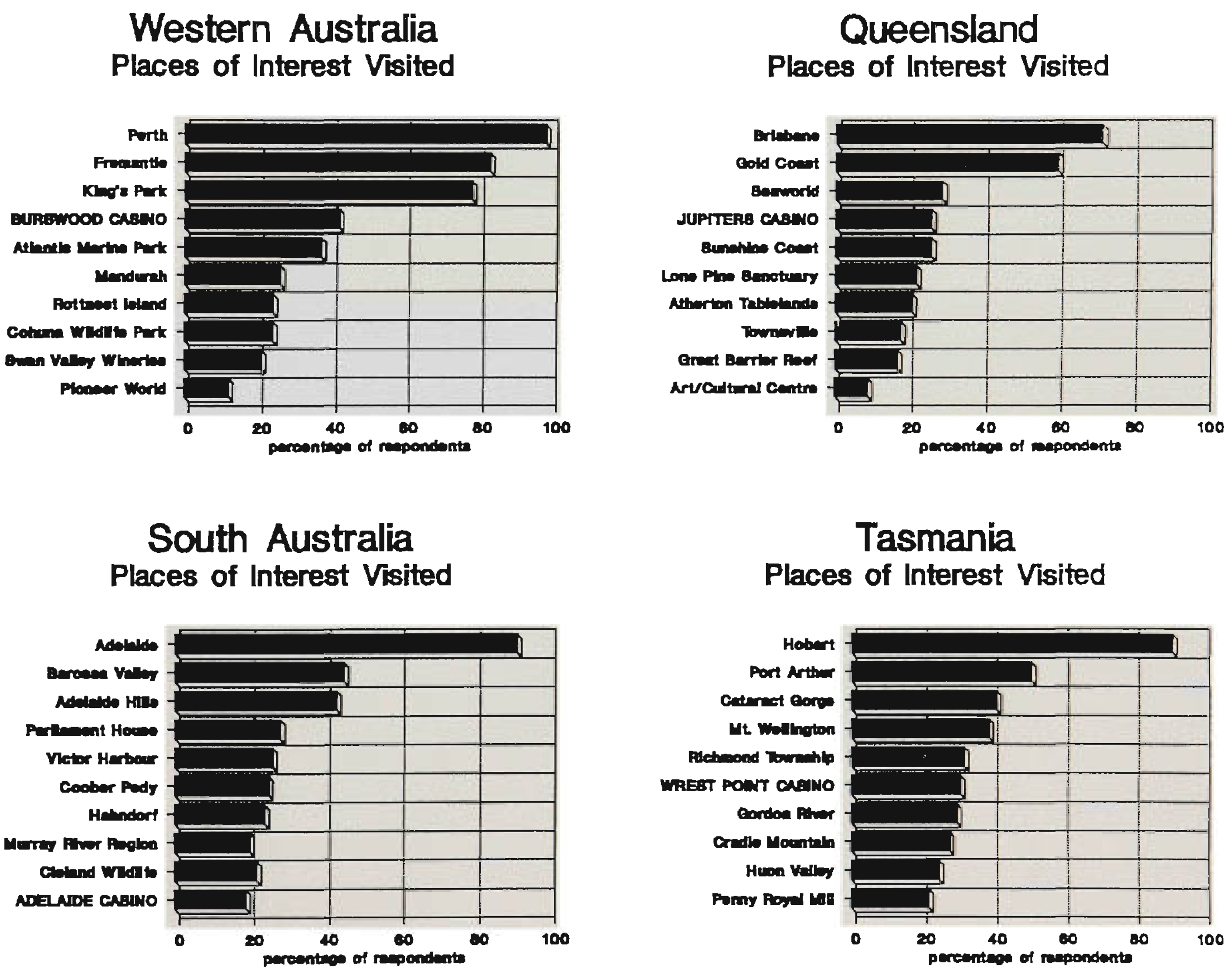


[source:- International Visitors Survey 1989]

3.3 The Significance of Casinos Within The Australian Tourism Industry

It has been suggested that casinos have a powerful symbolic value to regional or state tourism [Mc Millen 1991:164]. This appears to be supported by the prominence of casinos in Figure 2, as a place of interest in their respective state of operation.

Figure 2 .. The Prominence of Casinos in Australia



[source :- International Visitors Survey 1989]

3.3 The Significance of Casinos Within The Australian Tourism Industry

With reference to information presented, of the ten most frequented attractions in Western Australia, the Burswood Casino was rated number four, and in Queensland, it appears that Jupiters Casino attained a similar level of popularity.

Whilst Tasmania's Wrest Point ranked sixth, the Adelaide Casino seemed to make a lesser, but nonetheless, a notable impact on international visitors with its ranking of ten.

The smaller scale operations, Lassetters Casino in Alice Springs, and the Diamond Beach Casino in Darwin, did not feature within this classification for their respective region.

3.4 Overview of Casino Operations in Australia

Historically, the first states to legalise casinos were those states or territories seeking a catalyst for regional development.

The first phase of development occurred in the early part of 1970, with a European-style casino proposed by Federal Hotels for a struggling hotel operation in Hobart.

As a result, Wrest Point Casino, Australia's first legalised casino commenced operation in 1973 [Chenoweth 1991:16].

The rationale for legalisation was primarily to strengthen the Tasmanian economy by stimulating an underdeveloped tourism industry at a time when some of its more traditional sources of revenue were at risk [O'Hara 1988:202].

Following the success of the Wrest Point Casino, the Darwin, Alice Springs and Launceston casinos which followed, were constructed along similar lines, and also managed by Federal Hotels. These were relatively small casino-hotel operations, which initially placed a marketing emphasis on convention tourism, rather than gambling per se [Mc Millen 1991:157].

The next phase of development coincided with the recession of 1982. Approvals were granted for Townsville, the Gold Coast, Adelaide and Perth, with one casino operational in each region.

The Burswood Casino in Perth and Jupiters Casino on the Gold Coast, were more typical of the large American-style casino, aiming to attract the local population, as well as the domestic and international tourist market.

3.4 Overview of Casino Operations in Australia

The third phase of development comprises casino licences for Melbourne and Sydney, with the possibility of two casinos each. Similar projects have also been proposed for Cairns, Canberra and the Christmas Islands [Brown 1991:1].

According to Mc Millen, casinos are regarded as "creatures of recession" as "it's a quick way to handle a fiscal shortfall" [Chenoweth 1991:15].

The attraction of casinos to the government, is mainly economic, as it is considered an efficient way of taxing leisure pursuits. With the characteristics of a consumption tax, it has the merits of taxing only those who use the product or service [Lesman 1991:14].

The casino tax is a state tax, and the rates applicable are negotiated by the government in each state. This tends to vary from state to state, due to the size and nature of the casino, along with the types of incentives offered by the operator.

The amount of tax payable to the state government is calculated on the basi of gross casino revenue earned. As an indication of the government's share of casino revenue, a table of tax rates applicable to each of the Australian operations is provided in Table 5.

3.4 Overview of Casino Operations in Australia

Table 5.. Casinos in Australia

Opened	Name and Location	Operator	tax rate
1973	Wrest Point Casino HOBART	Federal Pacific Hotels [Australian]	15% of general gaming 20% of video gaming
1980	Diamond Beach Casino DARWIN	Federal Pacific Hotels to 1984 Diamond Venture Pty. Ltd. [British]	8%
1981	Lasseters Casino ALICE SPRINGS	Federal Pacific Hotels to 1984 TP Trust 1986 Ford Dynasty Pty. Ltd. [Australian]	8%
1982	Launceston Country Club LAUNCESTON	Federal Pacific Hotels [Australian]	15% of general gaming 20% of video gaming
1985	Jupiters Casino GOLD COAST	Conrad Hilton [United States]	20% plus 1% community benefit levy
1985	Burswood Casino PERTH	Genting Berhad [Malaysian]	15%
1986	Adelaide Casino ADELAIDE	AITCO Pty. Ltd. Genting Berhad as consultant [Malaysian]	20%
1986	Breakwater Casino TOWNSVILLE	Sheraton Hotels [United States]	10% plus 1% community benefit levy

[source:- adapted from Mc Millen 1991:158 and Silvester and Hewitt 1991:4]

3.4 Overview of Casino Operations in Australia

From the summary of operations presented in Table 6, the "key players" in the Australian casino industry are readily identifiable by the number of tables and machines within their respective "gaming mix", which in turn, determines the extent of each casino's revenue base.

The Burswood Casino, Jupiters Casino, along with the Adelaide Casino, appear as the top three casinos in the country, with regard to the gaming facilities available, and the level of revenue generated.

As a further indicator of their significance, the aggregate number of tables and machines operational in each of these casinos, account for approximately 70% of the industry total. In monetary terms, their combined gross casino revenue represents 84% of the industry total.

Table 6.. Australian Casinos - Size of Operation

		opened	tables	machines	1989/90 gross casino revenue $m
Burswood Casino	Perth	1985	109	1,160	145
Jupiters Casino	Gold Coast	1985	111	998	144
Adelaide Casino	Adelaide	1986	97	750	83
sub-total		--->	317	2,908	372
expressed as a percentage of industry total		--->	70%	71%	84%
Wrest Point Casino	Hobart	1973	29	272	24
Breakwater Casino	Townsville	1986	34	182	19
Launceston Casino	Launceston	1982	30	188	17
Lasseters Casino	Alice Springs	1981	14	215	7
Diamond Beach Casino	Darwin	1980	29	346	5
INDUSTRY TOTAL			453	4,111	444

[source :- Celey 1991:3]

3.4 Overview of Casino Operations in Australia

Table 7 .. Gross Casino Revenue - Comparative Results

	[$ millions]					
	1987/88		1988/89		1989/90	
Queensland	118	* 100%	143	121%	163	114%
Western Australia	77	100%	113	147%	145	128%
South Australia	61	100%	75	123%	83	111%
Tasmania	32	100%	40	125%	41	103%
Northern Territory	25	100%	33	132%	12	36%
TOTAL	313	100%	371	119%	432	138%

[source:- adapted from Toy 1991:3]

Explanatory Notes

[*] column 1 - Gross Casino Revenue
column 2 - Percentage Change From Previous Year

With reference to Table 7, significant improvements in turnover had been noted for the casino states and territories during 1988/89.

This may have been partially attributed to a "flow-on" effect from the record levels of international and domestic tourism attained in the same year.

Although the results for the consecutive period 1989/90 continued to reflect an increasing trend, a slower rate of growth was observed.

The only exception was the Northern Territory, which experienced a 64% decline, in comparison to the gross casino revenue earned in the previous year.

Despite the latter, the casino industry in general, is regarded as one of Australia's fastest expanding industries, with scope for continued growth.

3.5 Total State Government Revenue From Gambling

From Table 8, the significance of gambling revenue as a source of state government revenue becomes apparent.

With regard to the Victorian situation, gambling revenue represented almost 10% of total taxation receipts for the state in 1989/90 [Lesman 1991:14].

The distinction between "casino" and "non-casino" states is particularly interesting in highlighting their respective revenue-raising capabilities over the term of comparison.

For a more accurate indication of change, the 1989/90 figures have been adjusted to "real dollars" based on 1972/73 values.

As a general observation, it is clear that the "casino states" have, in each instance, out-performed their "non-casino" counterparts, in the contribution of gambling revenue to the state treasury.

It is also important to recognise that the revenue derived from gambling has risen in all states, the only difference being the magnitude of the increase.

It may be inferred that total gambling revenue has grown in "real" terms since the introduction of casinos in 1972/73, and not merely the substitution of one form of gambling for another.

3.5 Total State Government Revenue From Gambling

This is in accordance with one of the conclusions drawn by Connor [1983]. It was stated that the introduction of a new form of gambling tended to slow the rate of growth for some existing forms of gambling, whilst increasing in money terms, the overall expenditure on gambling [Connor 1983: para. 9.11].

Table 8.. Total State Government Revenue From Gambling

	1972/73	1989/90 real dollars*	% increase
NON-CASINO STATES	$MILLIONS	$MILLIONS	%
- Victoria	37.495	94.670	152%
- New South Wales	98.455	160.489	63%
- ACT	15.758	44.298	181%
CASINO STATES	$MILLIONS	$MILLIONS	%
- Queensland	8.070	29.860	270%
- South Australia	6.565	22.781	247%
- Western Australia	1.926	7.097	268%
- Tasmania	n/a	2.391	n/a
- Northern Territory	.138	4.862	3423%

[source:- adapted from Lesman 1991:14]

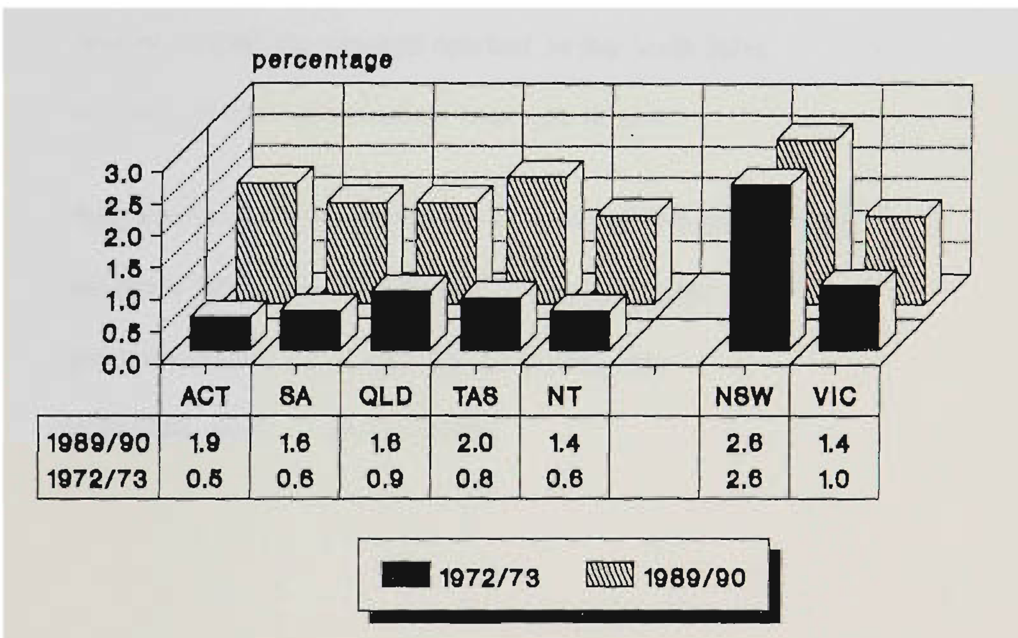
[*] note "real dollars" deflated to 1972/73 dollars

3.6 The Level of Disposable Income Spent on Gambling

Whilst the previous discussion is indicative of the economic impact of casino operations, certain social effects should also be considered.

One of the concerns of social welfare organisations is that in the "casino states", the percentage of household disposable income spent on gambling has risen markedly since 1973, when Australia's first casino, Wrest Point opened and poker machines were introduced to the ACT [Warneminde 1991:80].

Figure 3 .. The Level of Disposable Income Spent on Gambling



	ACT	SA	QLD	TAS	NT		NSW	VIC
1989/90	1.9	1.6	1.6	2.0	1.4		2.6	1.4
1972/73	0.5	0.6	0.9	0.8	0.6		2.6	1.0

[source :- Warneminde 1991:80]

It may be observed from Figure 3 that between 1972 and 1990, a higher percentage of disposable income was attributed to gambling within the "casino states".

3.6 The Level of Disposable Income Spent on Gambling

The more significant differences were noted in South Australia from 0.6% to 1.6%, and Tasmania with increases from 0.8% to 2.0%. Changes in Queensland and the Northern Territory were less apparent, with the amount of disposable income spent on gambling rising from 0.9% to 1.6% and 0.6% to 1.4%, respectively.

In contrast, the "non-casino" states appear to have experienced a relatively small percentage increase. The exception is the ACT, in which poker machines are operational. A change from 0.5% to 1.9% was recorded.

According to the statistics, the level of disposable income devoted to gambling remained constant in New South Wales at 2.6%, whilst Victoria moved from 1.0% to 1.4%.

This trend seems to reinforce the views of Kallick et al [1979], and Moran [1970], which in general terms, state that the greater availability of gambling activities, the higher the degree of participation.

3.6 The Level of Disposable Income Spent on Gambling

There is statistical support for the reputation of Australians as a nation of people who like to bet. The evidence shows that Australia leads the Western World in their enthusiasm for gambling.

The most recent survey implemented by Australian Gambling Statistics, showed that per capita expenditure on gambling activities in Australia, was 60% higher than the amount spent in the United States, and almost 647% and 716% higher than the levels incurred in Britain and Canada, respectively [Warneminde 1991:80].

With regard to future casino operations, consideration should also be made of its impact on other forms of gambling.

"Racing", a collective term for horses, grey-hounds and trotting, has experienced a down-turn in its market share, whilst "gaming" which is predominantly casinos, lottos and poker machines, has emerged as the preferred choice amongst Australian gamblers.

A further observation is that whilst this trend is evident throughout Australia, a more significant effect is noted in those states, in which either casinos or poker machines are operational.

Using 1972/73 as a base year, the accompanying Table 9 demonstrates the changing pattern in expenditure, relative to these two forms of gambling. Whilst the market share of racing expenditure has declined, gaming has consequently increased over the same period.

Table 9.. Market Share of Racing Expenditure

NON-CASINO STATES	1972/73	1989/90
Victoria	88%	48%
New South Wales	28%	28%
A.C.T.	50%	17%

CASINO STATES	1972/73	1989/90
Queensland	81%	39%
South Australia	48%	31%
Western Australia	85%	29%
Tasmania	66%	28%
Northern Territory	NA	31%

[source:- Lesman 1991:26]

This appears to support the prediction made in the Report of the Board on Inquiry into Casinos in the State of Victoria - 1983, in which Connor commented that even without casinos in Victoria, there was clearly a decline in racing expenditure in recent years, and that to introduce a casino industry would "aggravate and accelerate" the decline in gambling, and "that damage to racing would be substantial" [Connor 1983:para 15.15].

Presented below is a state comparison of the "gambling dollars" spent per capita.

Table 10.. 1989/1990 Gambling Expenditure Per Capita [$] Per Annum

ACT	NSW	VIC	NT	QLD	SA	TAS	WA
364.76	464.15	416.00	194.85	158.50	151.11	222.80	217.19

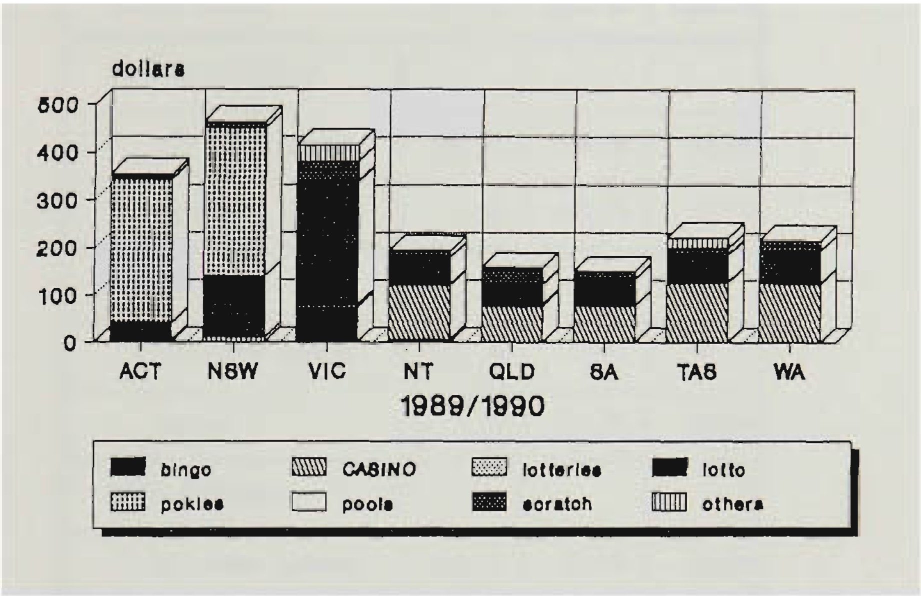
[source:- Australian Gambling Statistics]

In order to provide a further insight into the increasing popularity of casino gambling, the details presented in Figure 4 indicate the individual components of expenditure.

3.7 The Impact of Gaming Upon Racing

With reference to Figure 4, it may be seen that casinos attract at least 50% of the "gambling dollar" in each of the "casino states".

Figure 4.. Components of Gambling Expenditure Per Capita



[source :- Australian Gambling Statistics]

3.8 The Impact of Casinos Upon Other Forms of Gaming

The adverse effect upon market share has not been confined to racing alone, as casino operations have also caused a decline in "other gaming expenditure", which include poker machines, lotto, pools and bingo, within their state of operation.

Table 11.. Market Share Of Gaming Expenditure

CASINO STATES	1984/85	1985/86	1989/90
WESTERN AUSTRALIA			
all other gaming	100.0%	54.5%	43.0%
casino	.0%	45.5%	57.0%
QUEENSLAND			
all other gaming	100.0%	70.1%	51.5%
casino	.0%	29.9%	48.5%
SOUTH AUSTRALIA			
all other gaming	100.0%	70.7%	59.2%
casino	.0%	29.3%	40.8%
TASMANIA			
all other gaming	51.2%	49.4%	43.6%
casino	48.8%	50.6%	56.4%
NORTHERN TERRITORY			
all other gaming	26.4%	25.4%	42.0%
casino	73.6%	74.6%	58.0%

[source:- Lesman 1991:27]

SECTION 4 - LITERATURE REVIEW

In order to gain an insight and an appreciation of the research previously undertaken in the social impacts of gambling, a review of the major studies and literature in the area follows.

In accordance with the scope and nature of the thesis topic, the focus, where possible, will be confined to the effects of casino gambling upon the community.

A computerised search via APAIS, the Australian Leisure Index and the American Leisure Index, facilitated the identification of articles pertinent to the issue.

Further investigation included the review of the following journals :-

* Annals of Tourism Research
* Journal of Travel Research
* Journal Of Leisure Research
* The Cornell H.R.A. Quarterly
* Travel and Tourism Analyst

The bibliographies of relevant articles also provided a valuable source of information.

4.1 Perceptions of Gambling

"Gambling" may be defined as a "re-allocation of wealth on the basis of deliberate risk, involving gain to one party and loss to another, usually without the introduction of productive work on either side" [Halliday et al 1977:12].

A view to the contrary states that gambling actually creates wealth as patrons are prepared to pay for their entertainment. Within this context, casino gambling is merely another service industry [Street 1991:12].

From a moralistic perspective, gambling is said to be against the work ethic. It not only promotes the belief that one can get rich for little effort, but also encourages greed and avarice [NZ Report 1989:129].

It is apparent from the aforementioned, that views on gambling vary considerably, however, changing social attitudes, along with the development of tourism and leisure service industries, have led to a more positive perception of gambling [Eadington 1987:11].

This is evident from the marketing approach to activities of this kind. Lotto is promoted as a "game", not "gambling" per se. Similarly, casinos are presented as "entertainment", racing is regarded as "sport", whilst poker machines are referred to as "charity fund-raisers" [NZ Report 1989:102].

Irrespective of the stance taken, it is generally conceded that gambling in its various forms, contributes significantly to both the public and private sector.

Gambling is described as a method of voluntary taxation which provides a source of revenue to the government without imposing additional public taxes. The proceeds are regarded as purely discretionary, as individuals are given the option to choose their own level of contribution [Choice 1979:200].

In Victoria, the revenue accrued from gambling sources in 1989/90 represented approximately 10% of the state's taxation receipts [Lesman 1991:14].

Apart from the revenue it generates, casino legislation has also been justified on the belief that the gambling industry, if illegal, would be operational in any case. Legislation, is therefore, a means of diverting revenue from illegal operations to the state [Mathieson and Wall 1982:152].

A similar argument was presented in the Report on the Inquiry into the Legalisation of Gambling Casinos in New South Wales - 1977. One of the primary purposes of casino legislation, was to "strive to avoid and eliminate the proliferation of illegal casino gambling" [Lusher 1977:96].

As to the effectiveness of legislation in curtailing operations of this kind, it has been suggested that the incidence of illegal gambling may vary from one community to another, as it is dependent upon a number of influential factors. These include the size of the ethnic population and the policing priorities of the area [Caldwell 1988:153].

Casinos are considered to have a powerful symbolic value to regional and state tourism. The unique character and appeal of each of the Australian casinos feature prominently in tourism marketing, with images of the host city as an exciting and progressive destination to visit. Promotion of this type, is seen to be influential in generating tourist activity from local, domestic and international sources [Mc Millen 1991:164].

Improved foreign exchange earnings attributed to increased international visitations, is another of the anticipated benefits derived from casino operations. The importance of inbound tourism to the economy was perhaps most evident during the 1980's, in which the rapid growth of international arrivals, led to the tourism sector becoming the main contributor to foreign exchange earnings in 1988/89 surpassing wool, Australia's traditional source of export earnings [EIU Report No.4 1990:63].

According to research undertaken on the impact of Wrest Point Casino, upon the Tasmanian community, its operation had provided the opportunity for regional development. This was apparent from the growth of infrastructure and support services, which included quality restaurants and taxis. An increased demand for local farm produce and labour was also noted [King and Hyde 1989:161].

4.2 Economic Issues

From the American experience, it is cautioned by Eadington that the establishment of a casino will not always guarantee a remedy for economic malaise. Due to inadequate infrastructure and other problems, the casino boom has yet to alter Atlantic City on the east coast of the United States, from the deteriorated and depressed community it was prior to the casino with the exception of the areas within the immediate vicinity of the casinos [Eadington 1987:9].

Two studies carried out by Samuels in 1981 and 1984, reinforced the findings of Eadington. It was explained that the lack of supporting attractions and facilities attributed to the failure to restore Atlantic City's popularity as a tourist destination [Samuels 1986:42].

The significance of casino operations to the economy was also emphasised in the Coopers and Lybrand Report, which outlined the effects of legalising casinos in Victoria [Coopers and Lybrand 1982:33]. Its impact may be regarded as two-fold; initially as a catalyst to tourism and regional development, and then reinforced with the multiplier effect on employment and consumption [Grichting 1984:iv].

The casino trade, in particular, is one which is labour intensive and consequently creates substantial employment opportunities either directly or indirectly, across a broad range of industries such as hospitality, tourism, transport and retail.

Jupiters Casino on Queensland's Gold Coast, for example, employs between 2,200 and 2,400 people, which represents a significant proportion of the entire Gold Coast population [Devine 1991:23].

A different scenario was presented in the Victorian Board of Inquiry into Casinos [1983:7], in which it was stated that the establishment of a casino does not necessarily auger well for the local economy. It was found that in the case of Darwin's Diamond Beach casino, its operation was actually detrimental to local businesses offering entertainment and leisure facilities.

Similarly, in South Australia, it was noted that due to the casino trade and other factors, restaurant patronage had dropped 2.5%, and staff numbers were reduced accordingly. It is therefore of importance to also recognise the possible off-set loss of employment opportunities in other areas [Street 1991:11].

With regard to employment opportunities, it has been argued by Eadington that a casino operation has little impact upon the community as the particular skills required are not always found amongst its local residents. This was reported in a study on the rejuvenation process of Atlantic City. Although 40,000 jobs had been created, these were mainly held by commuters rather than locals [Eadington 1987:9].

The aforementioned may have limited relevance to the Australian situation. It is acknowledged that higher levels of casino management are often brought in from overseas operations, due to the specialist skills required. This is usually the rationale for involving foreign operators in new casino ventures. In the Australian casinos, however, it is noted that all other labour requirements, which include dealers and support staff are filled from the local population [NZ Report 1989:139].

According to Skolnick [1979], one of the dangers associated with the increasing number of legal casinos, is that each is trying to profit from a limited population. Paradoxically, the expansion of legal casino gambling, may in fact, contain the seeds of its own destruction.

Whilst casino gambling was a novelty in Australia in the 1970's, the second phase of development in the 1980's, created more intense market competition between the states [Mc Millen 1991:163].

This point was reinforced in a more recent study - The Inquiry Into The Establishment Of Operation Of Legal Casinos - 1991. It was noted that of the legal casinos operating in Australia, many are experiencing a noticeable drop in the turnover of patrons. It could be argued that Australia may have reached its saturation point for legalised casinos, however, this may also be reflective of the current recession [Street 1991:15].

4.2 Economic Issues

An article by [Williams 1991:19] revealed that in recent months, the Adelaide Casino had :-

* reduced staffing levels by 150
* ended weekday 24-hour trading just 3 months after it was introduced
* suffered reduced attendances
* average value of the bets have decreased
* closed public gaming area during the day

If, in fact, this is the case, whereby the casino industry is fully exploited and in a downturn, the Victorian Government may have left its bid too late.

It has been contended that casinos are a stimulus to gambling, and incorporate the worst attributes of gambling. In general, stakes are high, games are frequent, and it is relatively easy to lose a substantial amount over a short period of time [NZ Report 1989:104].

The nature of casino gambling is such that it is continuous and accessible up to 24 hours a day, time and day are removed from the "real world", as there is no apparent night and day, chips are used for gambling rather than cash, and alcohol is readily available. Furthermore, every effort is made to keep the casino gambler inside the casino, by providing food and entertainment, in addition to the myriad of games offered [Skolnick 1984:51].

With regard to participation, a British study by Downes et al [1976] indicated that more men were involved in casino gambling than women. It was also observed that the propensity to gamble was highest for the young and declined progressively. The sector of the population belonging to the less affluent and poorly educated, on average, appeared to be less attracted to casinos.

With reference to the anticipated effect of a casino upon the community, it was inferred by Suits [1979:58], that the legislation of an additional form of gambling, would contribute to the total acceptance of gambling. Furthermore, this would tend to increase total gambling participation.

4.3 Social Issues

In an American study on gambling attitudes and behaviour [Kallick:1979], it was indicated that a positive relationship exists between the level of participation and the number of gambling outlets. Similar observations were also made in a British study conducted by Moran in 1970 [Wilson 1990:4].

This was supported in a more recent Australian study, in which it was argued that people are more likely to indulge in activities of this kind, if the opportunities to gamble are expanded and become more accessible. Consequently, the higher the proportion of the community that gambles, the greater the likelihood that social problems will occur [Blasczynski 1987:307].

Although there is an absence of reliable information on the prevalence and impact of excessive gambling on Australians, it is generally accepted that problems associated with excessive gambling may be severe and costly to both the individual, and the community in general [Blasczynski 1987:308].

One of the more serious outcomes of excessive gambling is the desire to recover one's losses, this is referred to as "chasing" [Lesieur 1984].

More specifically, this term describes the impulse of regular gamblers to play again and with increasingly higher stakes when they have undergone a series of losses. This is based on the belief that the only way to recoup such losses is to continue to gamble in the hope of a change in fortune.

As explained by Oldman [1978], the rationale of this behaviour is based on the reasoning .."to stop, the losses are fixed and immutable; to continue, keeps open the prospect, however improbable, that a big win can retrieve the situation" [Caldwell 1988:42].

It has been suggested that the problem of compulsive gambling is closely associated with "continuous" forms of gambling, which include off and on-course betting, poker machines and casino games rather than "non-continuous" alternatives, such as lotteries, lottos and pools. This is attributed to the rapid turn-around of being able to "stake and play". The turn-around time of poker machines is almost instantaneous, and the reinforcement of relatively frequent rewards further enhance player interest [Wilcox 1983:para 7.02].

A psychological profile prepared by Gamblers Anonymous of typical compulsive gamblers appeared to support the above. It was revealed that off and on-course betting accounted for 40% of problem bettors, whilst poker machines had claimed approximately 25 to 30% of its victims [Warneminde 1991:79].

4.3 Social Issues

With the increasing number of casino operations, it is feared that Australia may be heading in the same direction as America's casino state, Nevada, where there are three times more compulsive gamblers per head, than most states in America. In Darwin, since the Diamond Beach Casino opened in 1979, it had been reported that financial assistance to needy families had risen markedly, and similar trends were reflected in the number of bankruptcies filed during the same period [Devine 1991:23].

It must also be acknowledged, that due to the lack of conclusive evidence in this regard, it is not feasible to argue that the operation of a casino is the direct cause of financial distress as outlined above. Other factors, including the economic climate may have attributed to the same.

It is interesting to note that casinos in Adelaide and the Gold Coast have attracted a development of pawn-shops nearby. In Perth, the dramatic increase from two to thirty-seven pawn-shops within close proximity of the Burswood Casino, tends to be reflective of the substantial losses incurred by some of its patrons [Street 1991:15].

Prostitution is considered an associated element, whereby "casinos and prostitution go hand-in-hand",..."world experience, is that, where there is already prostitution, the introduction of a casino will give the industry a boost". This is said to be partially attributed to "the good time philosophy behind casinos" [Connor 1983:95].

Crime and corruption were also cited as inevitable, as legal casinos are generally acknowledged as prime targets for organised crime. In Queensland, it had been alleged that there had been an infiltration of Japanese organised crime into the state. Based on police reports, it is noted that an organised crime group, Yakuza, the equivalent of the mafia, had been carrying out substantial money laundering operations in Queensland, via property development and tourist ventures. Furthermore, it was claimed that some members and leaders of the syndicate had attended Jupiters Casino, on several occasions, with all expenses paid by courtesy of the casino [Street 1991:8].

These aforementioned concerns are reiterated in the most recent Victorian Inquiry, also chaired by Connor, in which he stated that ...

> "I am of the opinion that Victoria would be better off without casinos, I do not have any real confidence that in the long term, crime will be kept out of casinos... I do not think that the government should stimulate gambling...."
> [Connor 1991:135]

Whilst the primary attraction is the tax revenue generated from a casino operation, the possible infiltration by organised crime cannot be overlooked. It has been argued that the anticipated economic benefit derived from casino gambling, may be eroded by the cost of strengthening the police force, increasing under-cover activities, and dealing with other areas associated with organised crime. This may include references to prostitution, drug-trafficking and the like [Street 1991:9].

4.3 Social Issues

According to recent Queensland police statistics [Devine 1991:23], since the opening of Jupiters Casino in 1985, increases in the following criminal activities on the Gold Coast have been noted :-

*	false pretences	65% increase
*	stealing other than motor vehicles	20% increase
*	reported robberies	32% increase
*	consumer fraud	80% increase

Whilst it is generally inferred that the "crime wave" on the Gold Coast, is attributed to the establishment of Jupiters Casino, caution must be taken in the interpretation of such information, as it does not necessarily indicate that the casino is the sole cause of increased criminal activity. This may also be explained by the influx of visitors to the area and compounded further by the high level of unemployment on the Gold Coast. Like all places of entertainment, it is inevitable that such trends emerge [Mc Millen 1991:168].

With regard to the Adelaide Casino, South Australian police.data seemed to suggest a situation to the contrary. Since the establishment of the casino, there has been an apparent decline in community crime in the immediate vicinity.

Improved street lighting, the attraction of different clientele, an increase and re-location of policing resources, were cited as influential in reduction of localised street crime. It was also stated that criminal activity may not have decreased overall, but merely re-located to avoid detection [Caldwell 1988:150].

In Hobart, the operation of Wrest Point Casino had not caused any significant changes in community life, or any lowering of social or moral standards [Grichting 1984:10].

4.4 Perceived Effects of Casino Operation

Research by Dielman [1979] found that the perceived effects of casinos in Nevada, varied in relation to the gambling habits of the respondent. The results of the investigation seemed to indicate that non-gamblers anticipated more ill-effects than gamblers.

In a study conducted by Pizam and Pokela [1985], it was acknowledged that whilst a casino was regarded as a means of economic recovery, and a catalyst to the community's declining tourist trade, it was also perceived to have a variety of negative social impacts. These included corruption, organised crime and family disruption.

4.5 Work Ethic and Quality of Life

Pro-casino lobbyists contend that gambling may lead to a more constructive use of leisure time, as the addition of casino games will increase the consumer's choice of recreational pursuits. This will not only enhance the life-style of the individual, but also that of the community at large [Grichting 1984:iv].

A counter-point often argued by Church representatives, is based on the Protestant work ethic, which regards all gambling as inherently wrong, as it promotes a "get something for nothing" mentality. This is considered an immoral and hedonistic attitude, harmful to society in general [Lesman 1991:32].

4.6 Conclusion

In summary, the essence of the contentious casino issue is aptly described by Eadington ...

> "The major question which needs to be analysed is, if a state legalises casino gambling, will the benefits it receives from increased tourism, job creation, greater tax revenue, et cetera, outweigh the social and economic costs which will be generated"...
> [Eadington 1976:86].

The aforementioned quote provides the line of inquiry undertaken in this present study, with its aim to gauge the community's perception of the social and economic implications of a local casino operation.

The literature reviewed has identified the issues, ideas and concepts, which have been incorporated within. These are outlined in SECTION 5 - RESEARCH METHODOLOGY.

SECTION 5 - RESEARCH METHODOLOGY

5.1 Research Objectives

This research paper aims to gauge the community attitude toward a local casino development within three designated regions in Victoria- Australia, which are geographically and demographically diverse.

Specific aims of the research :-

[1] identify the demographic characteristics of each region and its relevance to community attitude toward a local casino development

[2] establish the community's pattern of expenditure on the major forms of gambling, prior to the establishment of a local casino, then identify its consequential effect.

[3] determine the residents' perception of both the positive and negative impacts of a casino in their community

[4] determine the residents' overall attitude toward a casino within their community

5.2 Limitations of The Survey

Due to the availability of human and financial resources at the time of survey implementation, the sample size for each of the regions was restricted to fifty respondents.

Consequentially, it is acknowledged that the findings of the research may be biased, and may not be truly representative of the community at large. However, attention had been given to ensure that the method of sampling was appropriate in attaining an equitable representation of the diverse groups within the community.

Whilst the data-base is adequate for the purpose of "inter-cluster" analysis, it was not considered sufficient as a basis for an "intra-cluster" break-down analysis. As such, the latter has been omitted from this study.

The basis of this study may be regarded as exploratory in nature, therefore ample scope exists for further investigation into the more complex issues relating to the social impacts of casino operation.

The timing of the survey may itself impose limitations upon the accuracy of the data acquired. Regarded as the worst recession for twenty-one years, all gambling revenues may have been adversely affected by the economic climate, with less disposable income available to spend on the "entertainment dollar" [Williams 1991:19].

In an effort to identify and address the main concerns relating to the casino issue at a community level, this study may also provide base-line data, by which future developments may be gauged.

5.3 Development of Survey Instrument

The design of the survey instrument was facilitated by the initial literature review. Information sought from previous research relating to social impacts and the behavioural aspects of gambling, provided a guide to the line of inquiry undertaken in this present study.

For the general lay-out of the demographic details required in the first section of the questionnaire, the 1991 Census Form issued by the Australian Bureau of Statistics, proved to be useful.

The second section, which relates to gambling expenditure patterns trends and opinions, was developed as an adaptation, and/or an extension of issues raised in current literature.

The works of Grichting:1984, Caldwell:1988 and Mc Millen:1991, were considered most influential in the contents of this section.

The attitudinal profile featured in the last section, was based on a concept derived from an American-based study [Pizam and Pokela:1985], in which the social impacts of tourism on two communities in Massachusetts were addressed.

Valuable input was also received from representatives of the Keilor City Council and the Victorian Gaming Commission.

5.4 Pilot Study

In drafting the survey questionnaire, it was considered appropriate to seek comment from representatives of a council in one of the communities in which a casino was planned. Feedback was also sought from the Victorian Gaming Commission.

Their input was incorporated, wherever possible, to improve the focus of the issues raised within the questionnaire.

This resulted in the inclusion or amendment of questions relating to the following factors :-

* both the status of home ownership and associated financial committment was considered pertinent to inferences the respondent's level of disposable income

* in addition to identifying the respondent's employment status, the main source of income was also considered a relevant factor

* the time-frame on questions which were initially asked from a monthly perspective were amended to a weekly basis to facilitate response

To test the survey questionnaire, a pilot study comprising a sample of twenty respondents was conducted during the first week of September 1991. The suburb of Avondale Heights within the City of Keilor, was randomly selected for this purpose. Refer to sub-section 5.7 for further details on sampling procedure.

The overall response indicated the clarity of the questions to be satisfactory, however, there was concern over the time required to complete the questionnaire, which was approximately 25 minutes. Further editing of its content reduced the response time to a more acceptable limit of 20 minutes.

From the results collected, it became apparent that a greater differentiation between income levels would provide a more informative basis for analysis. This was also incorporated into the final revision.

5.5 Description of Survey Samples

Whilst there were various casino sites proposed for Victoria, the areas of Keilor, Kew and Geelong were selected on the basis of their geographical and demographical diversity.

A brief description of each of these survey areas follows.

5.5.1. City of Keilor

Keilor is an outer residential suburb, situated 16 kilometres North-West of Melbourne. Spanning over 97 square kilometres, it has a population of approximately 106,000.

Located on the northern fringe of Keilor amidst a natural parkland setting, Sydenham Park was potentially a more aesthetic alternative to a city-based casino site.

Its proximity to the Organ Pipes National Park, golf courses and other recreational facilities, were cited amongst the area's main attributes.

Accessibility to and from Tullamarine Airport, and its comfortable driving distance from the city, were also regarded as influential factors.

As a further justification, it was anticipated that the operation of a casino would not only boost employment and business in the locality, but also provide a valuable source of revenue for council projects [Borrell 1991:24].

5.5.2. City of Kew

Located 10 kilometres East of Melbourne, Kew is an older residential suburb with a population of 30,000, and a coverage of 14 square kilometres.

For the former Willsmere Hospital, a building of historical significance, the casino project was regarded as an opportunity to restore the site to its original grandeur.

Its suitability was argued on the basis of its proximity to the city of Melbourne.

The proposed site is readily accessible to residents and visitors from surrounding areas. The capacity of the existing road network to disperse increased traffic and the ample parking within the Willsmere grounds, were also considered favourable attributes [Tabain 1991:3].

5.5.3. City of Geelong

72 kilometres South-West of Melbourne, the City of Geelong is a modern seaport which extends over 13.4 square kilometres and has a population of 13,100.

The Farrow Building, noted as Geelong's most architecturally attractive complex, is further enhanced by its waterfront location.

A casino was also keenly sought by Geelong to assist the city's bid for a tourist-led recovery. It presented itself as an opportunity to re-establish the local economy after the Pyramid Building Society collapse of 1990.

5.6 Sample Size

The total sample size for the three surveys amounted to one hundred and fifty, comprising fifty respondents from each of the designated regions of Keilor, Kew and Geelong. It is contended that the sample size is representative of a reasonable proportion of the population for the purposes of random sampling.

5.7 Sampling Procedure

In order to identify the segments of the population from which the sample was to be drawn, a map of the designated region highlighting the different demographic attributes of the community, was requested from the town planner for each of the respective municipalities.

The residential areas of each region were marked with a grid reference. Each grid was numbered sequentially, in order to identify the possible sample population, which was confined to residential zones. Random numbers generated within the aforementioned parameters were used to select the areas for sampling.

The demographic overview provided by the respective town planners enabled a cursory check as to whether these areas were representative of the lower, middle and upper levels of the social stratum of each region.

For each of the three regions, ten areas were chosen to enable a broader cross-section of the community to participate in the survey.

Within each of the ten areas, the main street intersections were numbered sequentially, and to ensure consistency, a random digit process was again used, to identify the co-ordinates for each starting point.

This was also the case in "targeting" the individual house-holds to participate in the survey.

From this selection, residents from five house-holds were personally interviewed in order to complete the information required on the questionnaire.

Prior to the interview, each of the ten research assistants were carefully instructed on how to conduct the survey. The importance of alternating between female and male respondents, where possible, was also explained, in an effort to attain a gender balance in the survey results.

The surveys were conducted over three consecutive weekends during the month of September 1991.

5.8 Scaling Methods

The first section of the questionnaire is mainly descriptive in nature, as it provides a socio-economic profile of the respondents, individually, and of their respective commununity, collectively. A nominal scale was used in most cases, to allocate values to descriptions.

The second section of the questionnaire addresses a variety of issues, ranging from expenditure patterns, behavioural responses, through to personal points of view. Nominal, ordinal and interval scales were selected accordingly.

The third section of the questionnaire was designed to measure the extent to which the respondents perceived various factors as negative or positive effects upon the community. A seven-point scale was considered a span sufficient in highlighting the variation in response. The mid-point was assigned "0" and interpreted as "no effect", whilst the extremeties of "Negative" and "Positive" were rated as "-3" and "+3" respectively. This interval scale enabled appropriate statistical analysis.

SECTION 6 - DATA ANALYSIS

6.1.1 Socio-Economic Profile - TOTAL SAMPLE

To gain an overview of the socio-economic status of the TOTAL survey sample, a brief description of the demographic variables which appear in Table 12 follows.

For specific details pertaining to each AREA, refer to Table 13.

Gender

Whilst a gender balance was intended, the actual results indicate a slight bias toward the male population representing 53% of the total sample, as opposed to the 47% female population.

Age

A substantial proportion of the total sample were classified within two age brackets.

Almost 39% of the total sample were within the "25-39" age bracket, whilst 19% fell into "40-49" category.

There was also a significant number of respondents aged 60 and above. This group accounted for approximately 17% of the total sample.

6.1.1 Socio-Economic Profile - TOTAL SAMPLE

Residential Status

Over 63% of the respondents had lived in the area for more than 5 years, and a further 25% had a term of residence between 1 and 5 years.

This factor was taken into account as it was felt that those respondents more transient in nature, may not consider the impacts of a local casino as important if they are only short-term residents, or relatively new to the area.

This segment which represented 10% of the total sample, comprised residents who had lived in the area for less than 12 months.

Marital Status

The total sample consisted of 62% who were either married or living in a de facto relationship and 26% of the respondents were single.

A further 9% had been married, but presently separated or divorced.

This factor was considered influential in the gambling behaviour of individuals.

6.1.1 Socio-Economic Profile - TOTAL SAMPLE

Home Ownership

It was found that almost 47% of the sample owned their home outright, with 25% in the process of paying off their home.

20% of respondents were residing in rented premises, and the remaining 8% were either boarding or living with their parents.

Type and Amount of Financial Committment [PER WEEK]

From the previous question, it was determined that 20% of the sample were "tenants", and 25% were "mortgagees". For these two groups, the extent of their weekly financial committment was sought.

29% indicated financial obligations in the lower category, which ranged from under $100 to $150 per week. Almost 9% had committments in the mid-range between $150 and $250, and the remaining 7% had payments over $250 per week.

Number of Dependants

The sample consisted of 60% who did not have any dependants [those under the age of 17] living at home, 17% of respondents with 1 dependant, and 11% with 2 dependants.

Those house-holds with 3 and 4 dependants accounted for 7% and 5% of the sample, respectively.

6.1.1 Socio-Economic Profile - TOTAL SAMPLE

Employment Status

The proportion of the sample employed was approximately 65%. This included 47% full-time and 13% part-time employees, with 5% self-employed. The sample also included 5% who were unemployed at the time of the survey.

Home-duties represented 6%, student participation amounted to 8% and retirees totalled 15% of the sample.

Source of Income

Amongst the sample, the main sources of income were evenly distributed between salary and wage earners, which combined, comprised 64% of the total.

Pension and unemployment benefits were relied upon by 12% and 4% of the sample respectively, whilst government allowance provided a source of income for 1% of the sample.

The "other" sources disclosed included investments, inheritance, as well as compensation in its various forms. This was the primary source of income for 19% of the sample.

Annual Total Income

It was found that 25% of the sample received an annual income below $15,000. It is likely that this group would mainly comprise part-time employees, recipients of unemployment benefits, pensions, or other forms of government allowances.

Another 25% earned between $15,000 and $25,000 per annum. These two segments, which may be referred to as the "lower income" bracket, account for 50% of the total sample.

The "middle income" bracket, ranging from above $25,000 to $45,000 per annum, classifies 31% of the sample, whilst a minority of 10% fall within the parameters of the "upper income" bracket, which categorises those earning above $45,000 per annum.

Due to the sensitivity of this question, approximately 9% of respondents declined to answer.

Highest Level of Education

For 5% of the sample, primary education was the highest level of education achieved.

Approximately 49% of the sample had completed their secondary education, whilst 28% had attained a tertiary qualification.

Technical or vocational courses accounted for 17% of the sample, and 1% expressed that they did not attend school in any form.

6.1.1 Socio-Economic Profile of Respondents - TOTAL SAMPLE

Table 12 .. Socio-Economic Profile of Respondents in Percentage Terms

* TOTAL SAMPLE SIZE = 150 [all areas]

Gender	frequency	%	cumulative %
Female	71	47.3%	47.3%
Male	79	52.7%	100.0%
Age			
under 18	2	1.3%	1.3%
18 - 24	20	13.3%	14.7%
25 - 39	58	38.7%	53.3%
40 - 49	29	19.3%	72.7%
50 - 59	16	10.7%	83.3%
over 60	25	16.7%	100.0%
Residential Status			
less than 6 months	4	2.7%	2.7%
6mths - 1 year	13	8.7%	11.3%
1 - 5 years	38	25.3%	36.7%
more than 5 years	95	63.3%	100.0%
Marital Status			
single	39	26.0%	26.0%
married/de facto	93	62.0%	88.0%
been married but single now	13	8.7%	96.7%
other	5	3.3%	100.0%
Home Ownership			
Rent	30	20.0%	20.0%
Paying Off	38	25.3%	45.3%
Own	70	46.7%	92.0%
Boarding/With Parents	12	8.0%	100.0%
Type of Financial Committment			
Rental	30	20.0%	20.0%
Mortgage	38	25.3%	45.3%
Other	82	54.7%	100.0%
Amount of Financial Committment for Accommodation [PER WEEK]			
under $100	23	15.3%	15.3%
$100 - $150	21	14.0%	29.3%
$151 - $200	6	4.0%	33.3%
$201 - $250	7	4.7%	38.0%
over $250	11	7.3%	45.3%
not applicable	82	54.7%	100.0%

[source:- Statistical Database - Survey Questionnaire]

6.1.1 Socio-Economic Profile of Respondents - TOTAL SAMPLE

Table 12 .. Socio-Economic Profile of Respondents in Percentage Terms

* TOTAL SAMPLE SIZE = 150 [all areas]

Number of Dependants	frequency	%	cumulative %
0	90	60.0%	60.0%
1	25	16.7%	76.7%
2	16	10.7%	87.3%
3	11	7.3%	94.7%
4	8	5.3%	100.0%
Employment Status			
full-time	71	47.3%	47.3%
part-time	20	13.3%	60.7%
unemployed	7	4.7%	65.3%
retired	23	15.3%	80.7%
home-duties	9	6.0%	86.7%
student	12	8.0%	94.7%
self-employed	8	5.3%	100.0%
Source of Income			
wage	48	32.0%	32.0%
salary	48	32.0%	64.0%
pension	18	12.0%	76.0%
unemployment benefits	6	4.0%	80.0%
government allowance	1	.7%	80.7%
other	29	19.3%	100.0%
Annual Total Income			
below $15,000	38	25.3%	25.3%
$15,000 - $25,000	37	24.7%	50.0%
$25,001 - $35,000	26	17.3%	67.3%
$35,001 - $45,000	20	13.3%	80.7%
$45,001 - $55,000	7	4.7%	85.3%
above $65,000	9	6.0%	91.3%
declined to answer	13	8.7%	100.0%
Highest Level of Education			
primary	8	5.3%	5.3%
secondary	73	48.7%	54.0%
technical/vocation	25	16.7%	70.7%
tertiary	42	28.0%	98.7%
other	2	1.3%	100.0%

[source:- Statistical Database - Survey Questionnaire]

6.1.2 Socio-Economic Profile of Respondents by AREA

Table 13 .. Socio-Economic Profile of Respondents by AREA

* SAMPLE SIZE = 50 for each AREA

FREQUENCY DISTRIBUTION

Gender	TOTAL SAMPLE		KEILOR	KEW	GEELONG
Female	47%	71	22	25	24
Male	53%	79	28	25	26
Age					
under 18			0	0	2
18 - 24			3	8	8
25 - 39			23	14	21
40 - 49			13	7	10
50 - 59			6	7	3
over 60			5	14	6
Residential Status					
less than 6 months			1	3	0
6mths - 1 year			7	3	3
1 - 5 years			16	10	12
more than 5 years			26	34	35
Marital Status					
single			6	13	20
married/de facto			44	29	21
been married but single now			0	6	7
other			0	2	2
Home Ownership					
Rent			2	10	18
Paying Off			17	11	10
Own			28	26	16
Boarding/With Parents			3	3	6
Type of Financial Committment					
Rental			2	10	18
Mortgage			17	11	10
Other			31	29	22
Amount of Financial Committment for Accommodation [PER WEEK]					
under $100			4	7	12
$100 - $150			6	5	11
$151 - $200			0	3	3
$201 - $250			4	2	1
over $250			7	1	3
not applicable			29	32	20

[source:- Statistical Database - Survey Questionnaire]

6.1.2 Socio-Economic Profile of Respondents by AREA

Table 13 .. Socio-Economic Profile of Respondents by AREA

* SAMPLE SIZE = 50 for each AREA

FREQUENCY DISTRIBUTION

Number of Dependants	KEILOR	KEW	GEELONG
0 dependants	25	33	32
1 dependant	14	5	6
2 dependants	7	7	2
3 dependants	1	2	8
4 dependants	3	3	2
Employment Status			
full-time	30	15	26
part-time	4	8	8
unemployed	4	1	2
retired	4	13	6
home-duties	4	4	1
student	1	9	2
self-employed	3	0	5
Source of Income			
wage	23	11	13
salary	16	16	17
pension	4	11	3
unemployment benefits	2	1	3
government allowance	5	1	14
other	0	10	0
Annual Total Income			
below $15,000	4	19	15
$15,000 - $25,000	15	9	13
$25,001 - $35,000	16	2	8
$35,001 - $45,000	8	8	4
$45,001 - $55,000	3	3	1
above $65,000	2	6	1
declined to answer	2	3	8
Highest Level of Education			
primary	7	1	1
secondary	23	18	32
technical/vocation	8	9	8
tertiary	12	22	9

[source:- Statistical Database - Survey Questionnaire]

6.2 Existing Level of Participation in Gambling Activities

It has been quoted in O'Hara that Australia is regarded as a "nation of gamblers", with approximately 90% of the population participating in at least one form of gambling activity [O'Hara 1988:i].

More specific market research recently undertaken by Tattersalls found that the participation rate of Victorians in gambling activities was approximately 70% [Mortimore 1991:3].

The greater portion of this was attributed to "soft" gambling, which include lottos and bingo, whilst the remainder were active in "hard" gambling options of racing and casino gaming.

From the total sample of this study, the results indicated that 69% of the respondents were participative across a diverse range of gambling alternatives. This group shall be referred to as "gamblers".

The remaining 31% will be categorised as "non-gamblers", which comprise those respondents who were neither active nor interested in such activities.

Table 14 .. Gambling Status of Survey Respondents

gamblers	104	69%
non-gamblers	46	31%
Total Sample	150	100%

6.2 Existing Level of Participation in Gambling Activities

For the 104 respondents who participated in at least one form of gambling activity, a summary of their chosen activity/activities follows.

Table 15 .. Participation by Activity

	respondents	percentage
horse-racing	15	14% *
trotting	3	3%
greyhounds	3	3%
lottos	86	83%
pools	1	1%
bingo	2	2%
cards	6	6%
Tabaret	12	12%
poker machines	45	43%
CASINO GAMES	33	32%

Please Note :-

* the percentages are based on the sample size of 104 respondents

** due to the nature of the question, multiple responses were possible

The most popular choice amongst the "gambling population" was by far, lotto in its various forms, accounting for 83%, followed by poker machines for 43%, and casino games ranked third with 32%.

In its first year of operation, Tabaret appears to have made a favourable impact, attracting 12% of the "gambling population", marginally behind the 14% for horse-racing, one of the more traditional forms of gambling.

It should be noted that "racing" collectively, horse-racing, trotting and greyhounds, comprises 20% of this sample.

The results in Table 16 appear to give support to a British study conducted by Downes et al [1976], which found that more men were involved in casino gambling than women.

The figures suggest that this is not only the case with casino gambling, but applies to each of the gambling pursuits, with the exception of bingo.

Segregation by gender also reveals what may be regarded as the more traditional, male-oriented activities. This is perhaps most obvious with regard to horse-racing, trotting, and greyhound racing. One of the more recent additions, Tabaret, appears to attract a similar clientele.

Poker machines, casino gambling and lotto, are the activities which indicate a broader appeal, and consequently a greater gender balance amongst its participants.

Table 16 .. Participation in Gambling Activities By Gender

Activity	Female	Male	total
horse-racing	3	12	15
trotting	0	3	3
greyhounds	0	3	3
lottos	42	44	86
pools	0	1	1
bingo	1	1	2
cards	2	4	6
Tabaret	2	10	12
pokies	21	24	45
casino	15	17	32

Further to the information provided in Table 15, frequency distributions are presented in Table 17 and 18, to illustrate the regularity of participation in each of the listed activities.

It is clear from Table 17, that lotto is the activity which not only attracts the highest level of participation, but also the one which is played most frequently on a weekly basis.

Table 17.. Frequency of Participation in Gambling Activities - TOTAL SAMPLE

	Number of Times Played Per WEEK					
Activity	0	1	2	3	4	5
horse-racing	135	10	3	1	1	1
trotting	147	0	2	0	0	1
greyhounds	147	1	2	0	0	0
lottos	64	66	18	1	1	1
pools	149	0	1	0	0	0
bingo	148	2	0	0	0	0
cards	144	5	1	0	0	0

6.2 Existing Level of Participation in Gambling Activities

With regard to those gambling activities enjoyed on a less frequent basis, it is evident from Table 18, that poker machines showed the greatest level of appeal. Whilst the majority of its participants played once or twice a year, a sizeable number of poker machine players indicated that they would make the visit approximately three to five times a year.

Whilst casino players were less in number, similar visitation patterns were observed.

Table 18 .. Frequency of Participation in Gambling Activities - TOTAL SAMPLE

	Number of Times Played Per ANNUM					
Activity	0	1	2	3	4	5
Tabaret	138	8	1	0	1	2
pokies	105	25	10	4	3	1
casino	118	21	5	1	3	0

Average expenditure was calculated on the basis of totalling gambling expenditure and using the number of "gamblers" as the divisor. Whilst this measure attempts to provide an overview of gambling patterns, the limitations and possible biases due to sample size are acknowledged.

Despite this, the emphasis was placed on identifying trends in the data collected.

By relating participation by gender and the average expenditure incurred in each form of gambling, it may be inferred that men are more involved, and show a propensity to spend a greater amount than women in activities of this kind.

Table 19 .. Average WEEKLY Expenditure on Gambling

Activity	Female	Male	Average
horse-racing	$6.00	$82.54	$72.33
trotting	$.00	$183.33	$183.33
greyhounds	$.00	$30.00	$30.00
lottos	$8.83	$11.66	$10.28
pools	$.00	$25.00	$25.00
bingo	$5.00	$5.00	$5.00
cards	$30.00	$175.00	$126.67

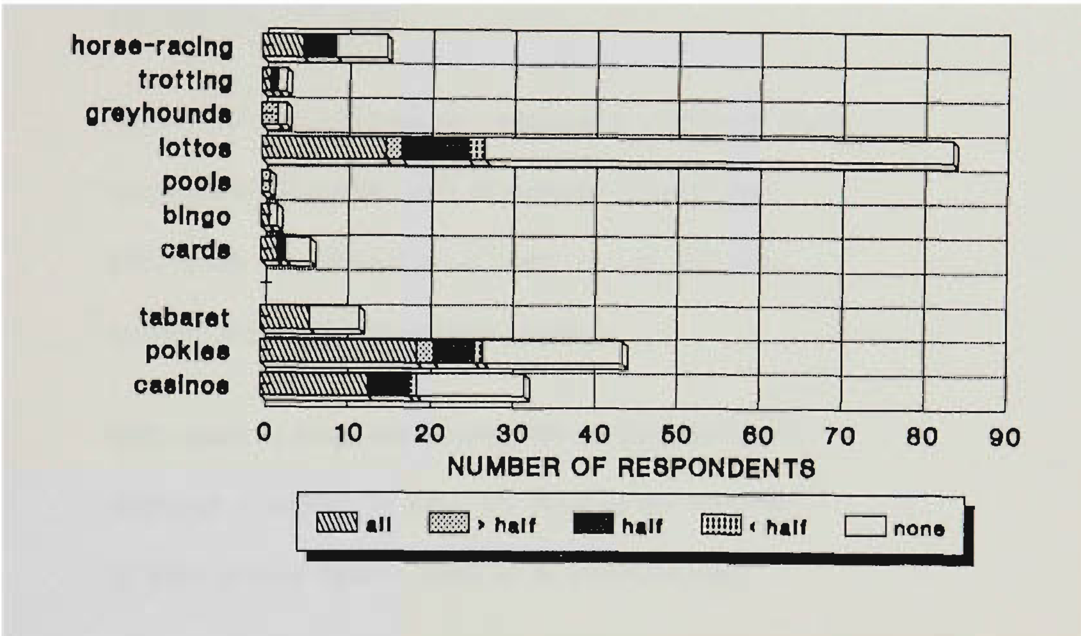
Table 20 .. Average ANNUAL Expenditure on Gambling

Activity	Female	Male	Average
Tabaret	$10.00	$36.00	$31.67
pokies	$39.52	$50.00	$45.11
casino	$218.00	$388.06	$310.76

6.3.1. Shift in Existing Expenditure

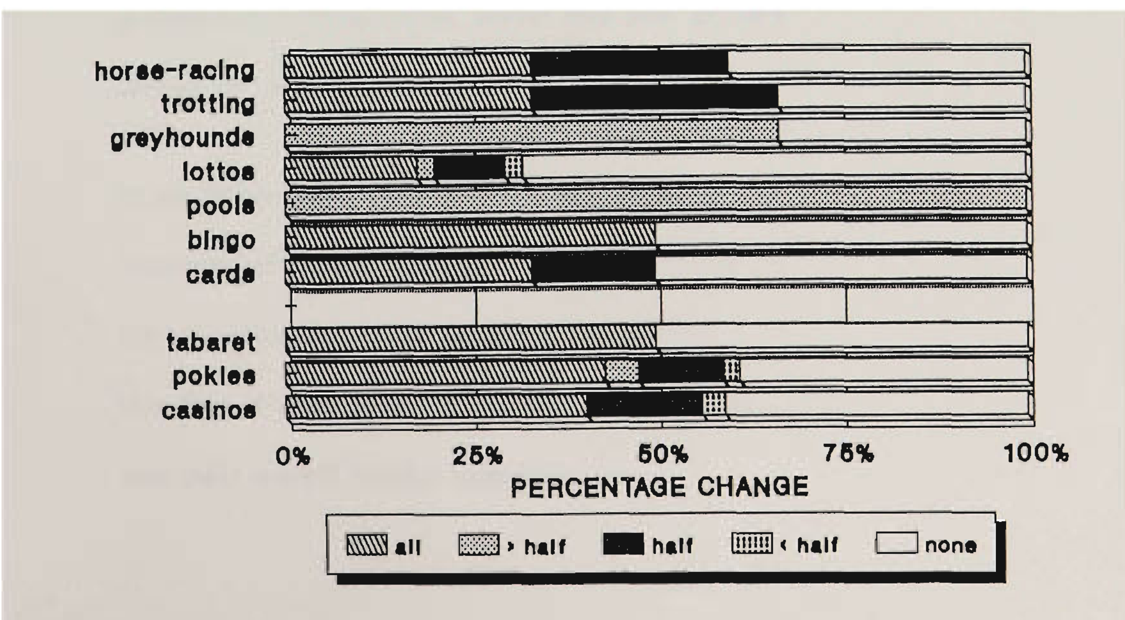
The perceived effect of a local casino upon the propensity to shift spending from existing expenditure may be seen in Figure 5, which illustrates the trends based on the actual number of respondents.

Figure 5 .. Shift in Existing Expenditure - Number of Respondents



To facilitate analysis, Figure 6 depicts the change in percentage terms, and provides the basis for the commentary to follow.

Figure 6 .. Shift in Existing Expenditure - Percentage Change



6.3.1. Shift in Existing Expenditure

It is interesting to note the differing degrees of "loyalty" attached to the various forms of gambling.

From the total sample, it appears that those with a preference for lottos, are least influenced by a local casino, with approximately 70% of players indicating their continuation with lottos.

However, of the remaining 30%, approximately 25% seem highly transitional in nature, with respondents showing their willingness to spend all or at least one-half of their existing expenditure at a local casino.

With regard to bingo and Tabaret, 50% of the respondents indicated a tendency to forgo the total amount incurred in their present form to spend at an alternate venue.

In the case of poker machines and casino players, a lesser resistance was apparent, with approximately 60% of respondents willing to change their current expenditure pattern. This consisted of approximately 30% expressing the likelihood to spend all of their present gambling allowance at a local casino, whilst more than 10% were willing to spend at least one-half of this amount.

It was acknowledged that those who remained loyal to "crossing the border" to play, in general, enjoyed the travelling and social component attached to this form of gambling, as it was often incorporated into their overall holiday experience.

6.3.1. Shift in Existing Expenditure

Respondents to horse-racing, trotting and greyhounds also appear to be influenced by a local casino operation, with a range between 65-70% of current followers showing an inclination to channel expenditure towards an alternate form of gambling. Of these respondents, the majority were prepared to spend all of their current expenditure, whilst the balance expressed their willingness to forgo one-half of their present budget.

6.3.2. Additional Expenditure

One of the important issues, is whether the operation of a local casino will lead to an expansion of the gambling dollar [Caldwell 1988:75].

It has been argued that the establishment of an alternate form of gambling will not actually create "new" gambling revenue, it will be merely a re-distribution of the same.

It is important to clarify at this point, that the preceding section accounted for the nature of change in existing expenditure, whilst this section attempts to identify any additional expenditure a local casino may encourage.

Table 21 .. Additional Expenditure in Gambling Activities

	Keilor	Kew	Geelong	Total	%
no change	24	34	33	91	61%
insignificant increase	17	13	5	35	23%
moderate increase	9	3	12	24	16%
significant increase	0	0	0	0	0%
TOTAL SAMPLE	50	50	50	150	100%

6.3.2. Additional Expenditure

With reference to the frequency distribution in Table 21, 61% of the total sample indicated that the operation of a local casino would not change their current level of gambling expenditure.

This was mainly attributed to respondents confined to a limited "entertainment" allowance, or in other cases, the respondents were strictly "non-gamblers" who were neither interested nor enticed to incur expenditure of this kind.

The remaining 39% of respondents gave indication to increasing the gambling budget to cater for a broader range of gambling activities, if available.

It is acknowledged that of this total, the expenditure level for 23% of respondents reflected an insignificant increase only. The change for 16% of respondnents was recorded to be more substantial, however, there was not a single case in which a significant increase was identified.

This appears to support the conclusion drawn by Connor [1983], which states that the introduction of a new form of gambling tended to slow the rate of growth for some existing forms of gambling, while at the same time increasing in money terms, the overall expenditure on gambling [Connor 1983:para 9.11].

6.3.3 Expenditure Outside Victoria

"... a significant portion of the net expenditure on gambling by Victorians in other states would remain within the state, particularly if casinos, for example, were suitably located so as to exploit the whole extent of the potential Victorian market..."
[Coopers and Lybrand 1982:9]

The aforementioned quote seemed particularly pertinent as it is one of the main arguments presented in the justification of a casino operation. The presence of a Victorian casino may also enable the state to maintain a competitive edge with other "casino states".

Table 22 .. Future Expenditure Outside Victoria

	Keilor	Kew	Geelong	Total	
significant decrease	10	4	8	22	15%
decrease	3	1	2	6	4%
increase	0	0	2	2	1%
significant increase	0	0	2	2	1%
no change	37	45	36	118	79%
TOTAL SAMPLE	50	50	50	150	100%

With reference to Table 22, it is noted that of the total sample, 79% of the respondents stated that the establishment of a local casino would not have any impact upon their future expenditure on clubs and casinos outside Victoria. It is also important to clarify that of this segment, 31% of the respondents were classified as "non-gamblers".

In the majority of cases, this was attributable to the travel and social component. A visit to a club or casino was considered only a part of their holiday itinerary, rather than the primary purpose.

For the remainder of the sample, 15% of the respondents stated that the convenience of a local casino would significantly decrease their expenditure "across the border". A further 4% of respondents also expressed to a lesser extent, their inclination to patronise a local casino in preference to an interstate alternative.

It was also interesting to acknowledge attitudes to the contrary, whereby 2% of respondents indicated that the operation of a local casino, would in fact, increase their future expenditure in clubs and casinos outside Victoria. In general terms, it was explained that its accessibility would increase the number of local casino visits and consequently encourage future visits outside Victoria.

Overall, it appears that a local operation will have some effect in confining gaming activities within the state, however, whether it constitutes a "significant portion" is a matter which is difficult to quantify.

6.3.4. Gambling Preferences

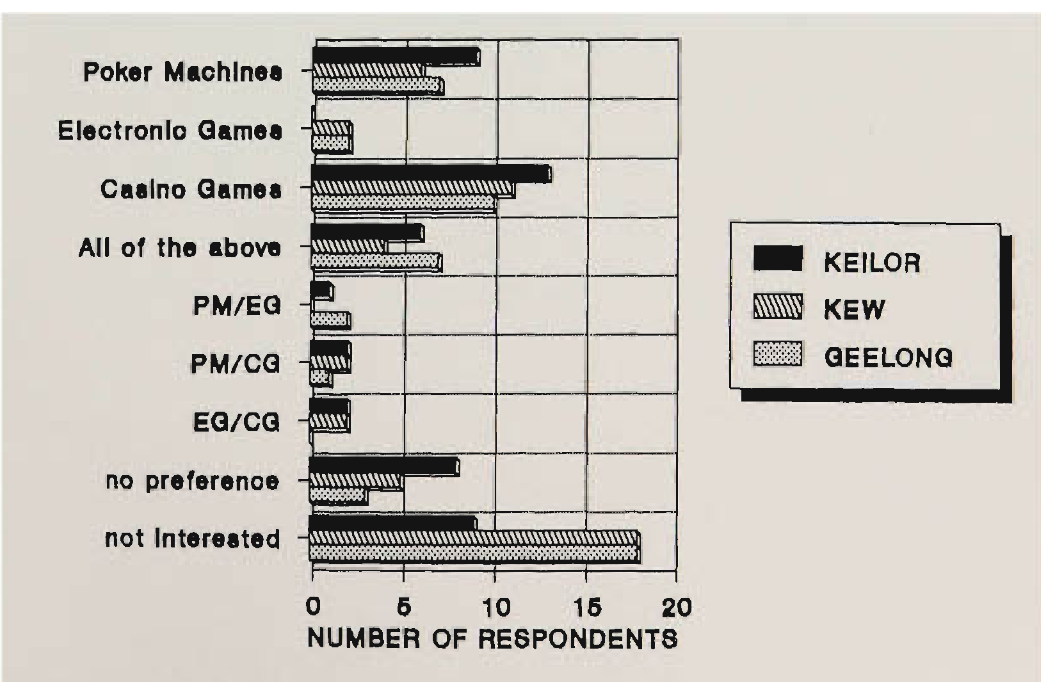
[1] Types of Games - BY AREA

A factor applicable to all Australian casinos, is that the local community represents an integral source of gambling revenue. Expenditure incurred by interstate and international tourist is merely supplemental.

As a bench-mark, in Australia it is generally concurred that around 75% of casino patrons are local residents, which account for approximately 65% of total expenditure [Mc Millen 1991:164].

It is important to recognise the potential of its most accessible market, and consideration of the local community's preferences, is therefore imperative. The survey findings are presented in Figure 7.

Figure 7 .. Local Casino Games - Preference By Area



[1] Types of Games - BY AREA

Across all three regions, casino games were found to be the most popular of the individual gambling options accounting for 22% of the total sample, poker machines were preferred by nearly 15%, whilst electronic games were favoured by only 3%.

With regard to the possible combinations and permutations, more than 11% indicated their choice of "all of the above". The preferences for poker machines/casino games and electronic games/casino games, each accounted for approximately 3% of all respondents, with 2% in favour of poker machines/electronic games only.

A greater flexibility was expressed by almost 11% of the total respondents, who were interested in participating in the activities described, but had no particular preference.

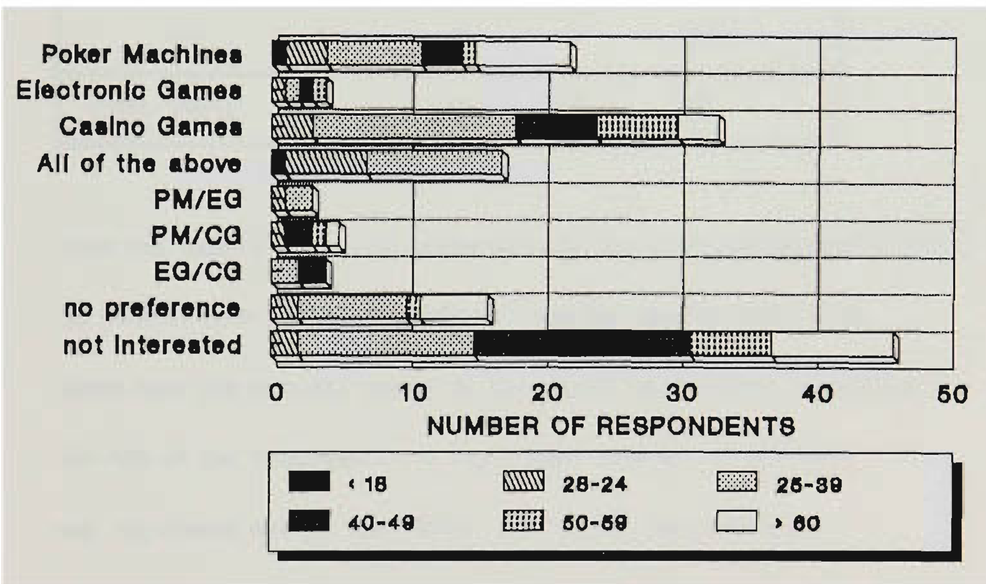
This is differentiated from the 30% of "non-gamblers" who were "not interested" in any of the gambling alternatives.

6.3.4. Gambling Preferences

[2] Types of Games - BY AGE GROUP

For the purposes of maximising appeal, and catering to the needs of potential clientele, it is necessary to have an awareness of the age groups most likely to patronise particular forms of gambling. The gambling preferences of the survey sample, classified by age, are illustrated in Figure 8.

Figure 8 .. Local Casino Games - Preference By Age



[2] Types of Games - BY AGE GROUP

To enable a greater focus on the main findings, the coverage in this section will be limited to the more popular choices, namely, casino games and poker machines.

Table 23 .. Comparison Between Casino Games and Poker Machines

Age	Casino Games		Poker Machines	
<18	0	0%	1	5%
18-24	3	9%	3	14%
25-39	15	45%	7	32%
40-49	6	18%	3	14%
50-59	6	18%	1	5%
>60	3	9%	7	32%
TOTAL SAMPLE	33	100%	22	100%

From the summary above, the preferences by age group become more evident. In general terms, it may be inferred from the results that casino games have the greatest appeal to the "25-39" age bracket, accounting for 45% of the respondents. A significant interest of 18% each, was registered amongst the "40-49" and "50-59" age bracket.

With regard to poker machines, it is perhaps no surprise that its popularity is mainly with the "over 60" category, however, the results seem to indicate a broadening appeal from the "younger" end of the market. The total number of respondents included 32% from the "over 60" group, and 65% collectively, for those under the age of 50.

6.3.5 Number of Visits

In order to establish the feasibility of a local casino, it is appropriate to ascertain the level of patronage it may attract in each of the proposed areas.

One of the related issues questioned whether the availability of gambling activities would encourage participation. Coverage in earlier discussion categorised 31% of the total sample as "non-gamblers".

From the results in Figure 9, those who would not consider a visit to a local casino amounted to 32 respondents, which account for 21% of the total sample. It may be the case, whereby some of the "non-gamblers" may be sufficiently interested to visit the establishment at least once, to satisfy their curiosity.

More relevant to the question, is the level of repeat patronage a local casino is likely to attract. For ease of analysis, "repeat patronage" refers to those respondents intending to visit more than once.

To simplify further, a summary of "repeat patronage" follows :-

Table 24 .. Repeat Patronage

		respondents	percentage
*	Geelong	28	56%
*	Kew	21	42%
*	Keilor	33	66%
	TOTAL SAMPLE	82	55%

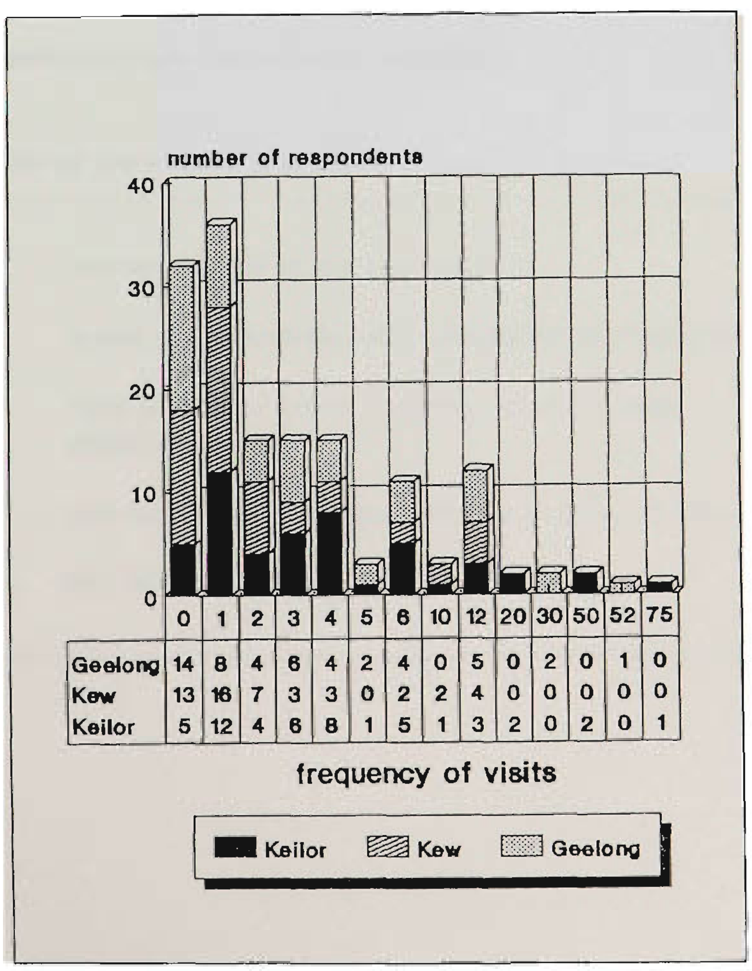
6.3.5 Number of Visits

It was found that 66% of the Keilor sample would be likely to visit a local casino on a more regular basis, with 56% of the Geelong sample expressing the same. A lesser degree of interest was evident from the Kew sample, of which 42% indicated the possibility of visiting a local casino more than once.

It is suggested from the results, that it may be possible to draw a substantial clientele base from the local population to support the casino operation.

A cross-tabulation between the number of visits and the locality is provided in Figure 9, for further detail relating to the frequency distribution of the aforementioned.

Figure 9 .. Local Casino - Number of Visits per Annum - BY AREA



6.3.6. Gambling Behaviour

Another of the key casino issues, is its potential contribution to excessive gambling. In any game of chance, it is inevitable that losses will occur, however, the perpetual desire to recover one's losses - "chasing", may be regarded as a catalyst to excessive gambling.

Due to the unavailability of Australian statistical evidence, the details from an American study conducted by Kallick et al [1979], provide a basis for comparison.

If Kallick's estimates were applied to the Australian situation, it would suggest that almost 1% of the population would be "at risk" and admit to addiction, whilst 3.68% would express some concern over the affordability of their habit [Caldwell 1988:45].

To test the extent of the respondent's gambling compulsion, a response to a hypothetical gambling situation was sought.

The following scenario was presented :-

* imagine yourself at the local casino
* seated at the roulette table, you decide to place a bet
* first you lose a little, but then you win a large amount of cash
* your luck suddenly changes, and then you lose it all...

=> WHAT WOULD YOU DO NEXT ???

6.3.6. Gambling Behaviour

A frequency distribution of the responses to this question appears below :-

Table 25 .. Gambling Behaviour - Summary of Responses [TOTAL SAMPLE]

give up	88	59%
give up only if budget exceeded	41	27%
play different game	8	5%
borrow money to continue	5	3%
other	8	5%
TOTAL SAMPLE	150	100%

The most frequent response, to "give up" accounted for almost 59% of the total sample, with 27% indicating that they would also "give up" only if their gambling budget had been exceeded.

5% of respondents stated that they would try another game to recover their losses, whilst a minority of 3% showed a greater persistence by their willingness to borrow money to continue in an effort to achieve the same.

Whilst this is not sufficient information to determine whether some respondents within the latter group may be "at risk", it may be a question of affordability. The present findings appear to be similar to the observations of Kallick [1979], in detecting a small proportion of the total sample who may be prone to excessive levels of gambling.

6.3.6. Gambling Behaviour

The profile of gambling behaviour by area in Table 26, suggests that the Geelong sample had the most conservative attitude toward gambling, with 34 respondents "giving up" in the first instance, in comparison to 29 respondents from the Keilor sample, and 25 respondents from the Kew sample.

However, if this were to include those respondents continuing to play until their budget is exceeded, the Keilor sample would rank foremost, accounting for 46 respondents, followed by the Geelong sample with 44 respondents, then the Kew sample with 39 respondents.

Table 26 .. Gambling Behaviour [BY AREA]

	Keilor	Kew	Geelong	Total
give up	29	25	34	88
give up only if budget exceeded	17	14	10	41
SUB TOTAL ------>	46	39	44	129
play different game	2	2	4	8
borrow money to continue	1	3	1	5
other	1	6	1	8
TOTAL SAMPLE	50	50	50	150

6.3.7. Concerns

[1] Proximity

In assessing the impact of a local casino, it was considered appropriate to address the issue of proximity.

The respondents were asked whether the development of a casino OUTSIDE their community would be a matter of concern. A summary of their responses appears below.

Table 27 .. Proximity - Level of Concern - TOTAL SAMPLE

	outside the community		within 1 kilometre	
not concerned	122	81%	57	38%
slightly concerned	5	3%	6	4%
moderately concerned	4	3%	17	11%
very concerned	1	1%	16	11%
extremely concerned	9	6%	47	31%
don't know	9	6%	7	5%
TOTAL SAMPLE	150	100%	150	100%

Of the total sample, 81% of the respondents were not at all concerned, 3% showed a slight concern, and a further 3% indicated a moderate concern. A relatively small portion of the sample, 7% expressed a greater level of concern, whilst 6% of the respondents did not forward an opinion.

[1] Proximity

A marked transition in attitude was evident, however, when the respondents were asked if their opinion would still hold, if the development was located WITHIN 1 KILOMETRE of their residence.

In answer to this question, only 38% of respondents maintained their initial response of "not concerned", and a marginal increase to 4% was noted for those who indicated a slight concern.

The most noticeable shift was reflected in the "very concerned" and "extremely concerned" categories, which initially summarised the feelings for 7%, escalated to account for 42% of the sample.

It may be inferred from the above results, that whilst the majority of respondents appear to be in favour of a local casino operation, the "not in my back-yard" attitude still prevails.

[2] Proximity - Nature of Concern

Those respondents who expressed a greater concern over the casino issue were asked to state the main cause for their concern.

In order to facilitate analysis, the comments were coded and summarised in the frequency distribution presented below.

Table 28 .. Proximity - Nature of Concern - TOTAL SAMPLE

REFERENCE	Keilor	Kew	Geelong	Total	
no comment	24	23	41	88	59%
legal/moral issues/crime	4	7	2	13	9%
family life	1	2	0	3	2%
community/individual crime	2	0	0	2	1%
infrastructure	0	5	0	5	3%
quality of life	19	13	7	39	26%
TOTAL SAMPLE	50	50	50	150	100%

For a more comprehensive listing, the actual responses for each area may be viewed in Table 29, 30 and 31.

[2] Proximity - Nature of Concern

With regard to the nature of concern expressed, it was found that 26% of the total sample, considered the development to be detrimental to their present quality of life. This included references to traffic, noise, undesirable and unknown visitors in the vicinity, safety, drunkedness, and parking problems encountered by residents.

Legal and moral issues, as well as criminal activity were considered a primary concern for 9% of respondents.

To a lesser extent, infrastructure in the local community accounted for a further 3% of respondents. It was generally conceded that the prospective sites could be better utilised.

It was the opinion of 2% respondents, that the existence of a local casino would be disruptive to family life, whilst 1% of respondents felt it would adversely effect the individual, as well as the community at large.

[2] Proximity - Nature of Concern

In an open-ended question, respondents were asked to express their particular concerns regarding a casino development within 1 kilometre of their residence. The following responses were recorded from each of the municipalities.

Table 29 .. Proximity - Nature of Concern - Responses [KEILOR]

* traffic and noise
* keep it out of Sydenham Park... Geelong is fine...
* increased incidence of crime
* vandalism
* attracts undesirable people/strangers into the area
* influx of unknown/troublesome people
* would prefer site closer to the city
* not a good influence on the children
* night activities - disturb residents
* disruption and alcoholism - casino should not be a threat

[2] Proximity - Nature of Concern

Table 30 .. Proximity - Nature of Concern - Responses [KEW]

* attract undesirable types into the area
* need to be tightly controlled and well-run
* traffic at night, disruption to young families
* induced to gamble
* safety of children
* crime will increase in the area
* destruction of residential environment
* access to local roads
* ensure sufficient parking
* movement of people, particularly at night
* area is too respectable for a casino
* disruptive/temptation for the young

Table 31 .. Proximity - Nature of Concern - Responses [GEELONG]

* rowdiness
* small community - vulnerable to increased gambling
* unknown people in the streets
* increased noise
* parking problems - traffic congestion
* drunkedness and abuse
* encourages bad behaviour in area

[3] Location - KEILOR

Table 32 .. Opinion of Proposed Location - Sydenham Park

strongly disapprove	7	14%
disapprove	1	2%
indifferent	8	16%
approve	9	18%
strongly approve	21	42%
don't know	4	8%
TOTAL - KEILOR	50	100%

A lesser resistance was noted toward the use of Sydenham Park, for the establishment of a local casino, with 16% of the Keilor sample stating their disapproval of the matter. This comprised 14% showing a greater objection to the same. Inaccessibility, proximity to residential areas and environmental issues, were amongst the major concerns expressed.

A clear majority of 60%, voted in favour of the park-land setting as the designated site for a local casino, 42% of this group were more enthusiastic about the possibility. The most frequent remarks conveyed the need for some form of development for the western region.

Of the Keilor sample, 16% of the were indifferent toward the proposed location, and 8% were indecisive.

[3] Location - KEILOR

In response to an open-ended question seeking their opinion of Sydenham Park as a potential site for casino development, the following comments were collected from the Keilor sample.

Table 33 .. Location - Listing of Comments [KEILOR]

APPROVE

* great for area
* will help develop the west
* area for development - good idea..
* scenic location
* it's far enough away not to worry us
* why not... needs some sort of development
* do not mind a casino in the area
* anywhere will do...

DISAPPROVE

* just too close to home
* loss of open space
* not suitable for residential area
* not a good site - area unsuitable for casino
* out of the way - not easily accessible
* prefer it closer to the city
* effect on the environment

Table 34 .. Opinion of Proposed Location - Willsmere Site

strongly disapprove	17	34%
disapprove	7	14%
indifferent	9	18%
approve	4	8%
strongly approve	8	16%
don't know	5	10%
TOTAL - KEW	50	100%

As to whether the former Willsmere Hospital was considered appropriate for a casino development, the opinion of the Kew residents was generally unfavourable.

This was the case for 48% of the sample, of which 34% indicated a strong strong negative reaction. In broad terms, it was the feeling of this group, that the premises would better serve the community, if it were dedicated to a housing or a hotel-only development, or used as it was originally intended, as a hospital. It was also perceived that a casino would compromise the respectability of the area.

In contrast, a total of 24% indicated a more positive attitude, with 16% strongly approving the use of the historical site to this end. In support, the casino development was regarded as a means of preserving the architectural and historical significance of the Willsmere building. It was considered a wasted asset in its present state.

18% of the respondents were indifferent toward the possibility, whilst a further 10% did not state their opinion.

[4] Location - KEW

In response to an open-ended question seeking their opinion of the proposed Willsmere site for casino development, the following comments were collected from the Kew sample.

Table 35 .. Location - Listing of Comments [KEW]

APPROVE

* should provide good atmosphere
* good way of retaining integrity and keep intact historical features
* magnificent site for casino - aesthetic qualities
* OK only if heritage protected
* accessible to locals
* approve only if architecture/historical value preserved
* is presently a wasted asset - could be used for entertainment facilities
* ideal site for development
* disapprove if foreign ownership, OK if Australian
* building needs some sort of development - wasted otherwise
* might attract people to stay in the area
* convenient to visit

DISAPPROVE

* too close to residential area
* would prefer housing to a casino
* should be preserved as a hospital
* would prefer development other than a casino
* are their sufficient funds to provide proper facilities
* not a sensible place for casino - not suitable for area
* no casino - just a hotel development
* better served as a housing development

Table 36 .. Opinion of Proposed Location - Farrow Building

strongly disapprove	11	22%
disapprove	0	0%
indifferent	7	14%
approve	2	4%
strongly approve	24	48%
don't know	6	12%
TOTAL - GEELONG	50	100%

Of the Geelong sample, 22% did not regard the Farrow Building as suitable for a casino development. Proximity to residential areas and better alternatives for its use within the community, were the two main concerns which contributed to this level of disapproval.

52% indicated to the contrary, with 48% expressing their strong approval of the former office block situated on the Geelong foreshore. It was considered a prime property, with tourism potential.

14% of the Geelong sample were indifferent toward the nominated site, whilst 12% did not respond.

[5] Location - GEELONG

In response to an open-ended question seeking their views on the suitability of the Farrow Building for a local casino, the following comments were collected from the Geelong sample.

Table 37 .. Location - Listing of Comments [GEELONG]

APPROVE

* central location - ample parking
* location close to home - accessible
* ideal for casino development
* well-situated for a good tourist attraction

DISAPPROVE

* too close to residential area
* building could be put to more productive use

[6] Location - TOTAL SAMPLE

Table 38 .. Location - Summary of Comments - TOTAL SAMPLE

REFERENCE	Keilor	Kew	Geelong	Total	
no comment	36	26	36	98	65%
economy/business - positive	1	2	3	6	4%
legal/moral issues/crime	0	1	0	1	1%
community/individual crime	1	1	1	3	2%
infrastructure	7	16	5	28	19%
quality of life	5	4	5	14	9%
TOTAL SAMPLE	50	50	50	150	100%

With reference to the proposed casino site for each area, Table 38 is provided to highlight the matters of interest.

As alluded to in earlier discussion, the comments were primarily concerned with the appropriate use of infrastructure, and the consequential effect upon the quality of community life.

6.3.8. Opinion on the Operation of a Local Casino

With regard to the operation of a local casino, 40% of the total sample indicated their approval. Of this figure, 25% strongly approved of the development. To the contrary, 34% of the total sample disapproved, with 23% voicing a strong disapproval of the same.

Those who remained indifferent to the situation accounted for 27% of the total sample.

Table 39 .. Opinion of Operation of Local Casino - TOTAL SAMPLE

	TOTAL	PERCENTAGE
disapprove strongly	34	23%
disapprove	16	11%
indifferent	40	27%
approve	22	15%
approve strongly	38	25%
TOTAL SAMPLE	150	100%

Table 40 .. Opinion of Operation of Local Casino - BY AREA

	Keilor	Kew	Geelong	TOTAL
disapprove strongly	7	18	9	34
disapprove	4	9	3	16
indifferent	18	10	12	40
approve	8	8	6	22
approve strongly	13	5	20	38
TOTAL SAMPLE	50	50	50	150

To facilitate the interpretation of the above results, Figure 10 provides an overview of the opinion of the total sample, whilst Figure 11 highlights the differences between the three areas.

6.3.8. Opinion on the Operation of a Local Casino

Figure 10 .. Opinion on Operation of a Local Casino - TOTAL SAMPLE

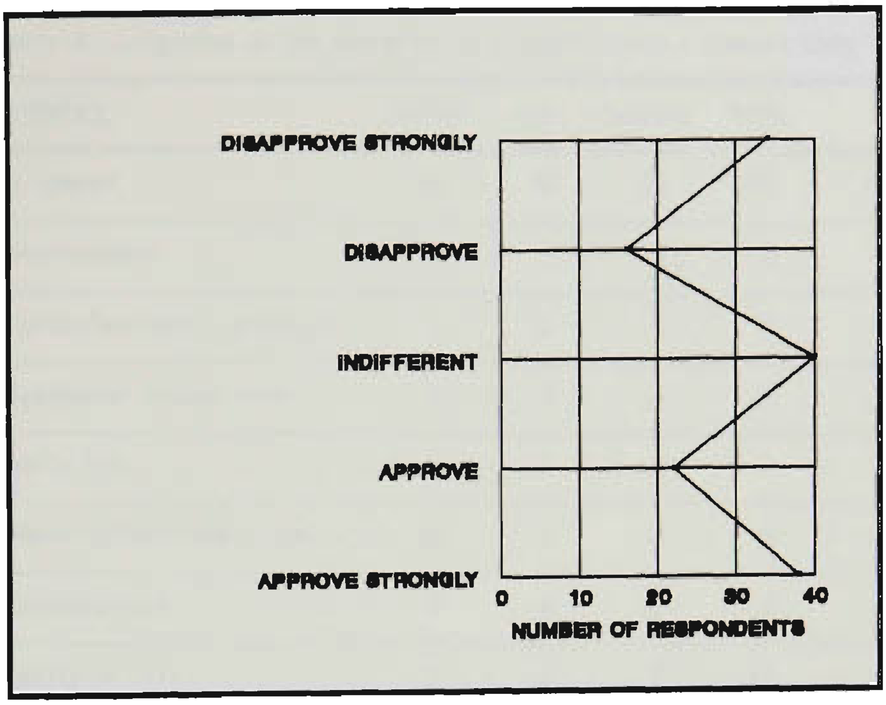
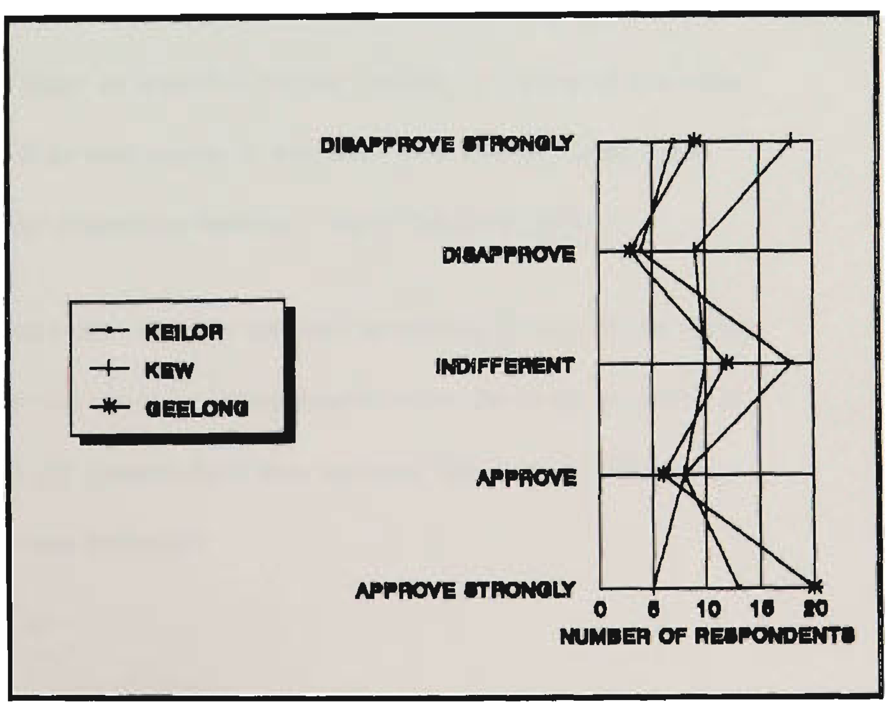


Figure 11 .. Opinion on Operation of a Local Casino - BY AREA



6.3.8. Opinion on the Operation of a Local Casino

Additional comments relating to the above, were assigned a "comment code" to facilitate the overview of the pertinent issues provided below.

Table 41 .. Opinion on the Operation of a Local Casino - Comment Code

REFERENCE	Keilor	Kew	Geelong	TOTAL	
no comment	41	32	30	103	69%
entertainment	0	3	3	6	4%
economy/business - positive	1	2	5	8	5%
legal/moral issues/crime	4	4	3	11	7%
family life	0	0	2	2	1%
community/individual crime	0	3	2	5	3%
infrastructure	1	4	0	5	3%
quality of life	3	2	5	10	7%
TOTAL SAMPLE	50	50	50	150	100%

To ensure consistency, the aforementioned categories were applied to summarise all data of a narrative nature.

In order to provide a further insight, a listing of the views held by each region is presented in a tabular format under their respective headings. Refer Tables 42 to 47.

Please note that the comments pertaining to each of the regions are considered to be representative of the responses gathered. Not all comments have been included, due to the similarity of some responses.

6.3.8. Opinion of Operation of Local Casino [KEILOR]

Table 42 .. Opinion of Operation of Local Casino [KEILOR]

disapprove strongly	7	14%
disapprove	4	8%
indifferent	18	36%
approve	8	16%
approve strongly	13	26%
TOTAL - KEILOR	50	100%

From the Keilor sample, the outlook appeared more positive, 22% of respondents indicated their disapproval, with 14% showing a strong anti-casino sentiment.

A more welcome response to the possibility of a local casino was expressed by 42% of the Keilor sample, with the greater number of respondents, 26% approving strongly.

It was noted that the 36% of the Keilor sample were indifferent toward the casino development, as opposed to the 20% and 24% recorded for Kew and Geelong, respectively.

This may be attributed to the proximity of the proposed site in relation to the residential areas surveyed. Sydenham Park is sufficiently remote from the majority of the randomly selected "target zones".

The Willsmere site in Kew, and the Farrow Building in Geelong are situated closer to the residential area. This may have evoked a more decisive response.

6.3.8. Opinion of Operation of Local Casino [KEILOR]

In response to an open-ended question seeking an opinion on the operation of a casino in the community, the views of the Keilor sample are presented below.

Table 43 .. Opinion of Local Casino Operation - Comments [KEILOR] :-

POSITIVE

* encourage Victorians to spend within the state
* the sooner the better - good entertainment value
* good for revenue

NEGATIVE

* thugs, mugs, drugs, crime, traffic and prostitution
* influential gambling friends - increases temptation
* the less gambling, the better
* casino not required... who needs it...
* need awareness of social impacts

6.3.8. Opinion of Operation of Local Casino [KEW]

Table 44 .. Opinion of Operation of Local Casino [KEW]

disapprove strongly	18	36%
disapprove	9	18%
indifferent	10	20%
approve	8	16%
approve strongly	5	10%
TOTAL - KEW	50	100%

The disapproval of its operation is most evident from the Kew sample, in which 36% of the respondents expressed strongly, their anti-casino stance.

A further 18% of respondents indicated their negative attitude to a lesser extent, and 20 % were indifferent toward its operation.

A total of 26% of respondents were in favour of the local casino, of which 10% registered their strong approval.

It is apparent from the above, that the majority of the Kew sample, 54% were not in favour of the casino development in their community.

6.3.8. Opinion of Operation of Local Casino [KEW]

In response to an open-ended question seeking an opinion on the operation of a local casino, the following comments were noted for the Kew sample.

Table 45 .. Opinion of Local Casino Operation - Comments [KEW] :-

POSITIVE

* a place for entertainment and reasonable meals
* remedy the lack of entertainment in Kew
* approve so long as it is well run
* would like the development of site to go ahead
* country-club style like Launceston would be good
* development should be in consultation with the Kew council

NEGATIVE

* entices those who can't afford to play - the elderly
* sufficient gambling outlets - casinos linked with organised crime
* don't need a casino - need pokies in all clubs
* would be better placed in South Yarra or St. Kilda
* not sure about the effects of more people in the area
* traffic - potential problem - particularly if allowed in local residential areas
* little benefit to the community - cost more to police it
* concerned where money will actually go

6.3.8. Opinion of Operation of Local Casino [GEELONG]

Table 46 .. Opinion of Operation of Local Casino [GEELONG]

disapprove strongly	9	18%
disapprove	3	6%
indifferent	12	24%
approve	6	12%
approve strongly	20	40%
TOTAL - GEELONG	50	100%

The City of Geelong showed the greatest level of acceptance, with 52% of the respondents voting in favour of a local casino, of which 40% supported its development strongly.

Of the 24% opposing its establishment, 18% of the respondents expressed a strong disapproval of the same.

The comments collated are reflective of the optimism attached to the casino as an opportunity to boost Geelong's current economic status.

6.3.8. Opinion of Operation of Local Casino [GEELONG]

In response to an open-ended question seeking an opinion on the operation of a casino in the community, the views expressed by Geelong sample follow.

Table 47 .. Opinion of Local Casino Operation - Comments [GEELONG] :-

POSITIVE

* good for Geelong's economic recovery - new jobs
* good for employment - would go for entertainment only
* increase interest for tourists - good for Geelong
* create more jobs for Geelong - help locals
* leisure outlet for younger age group
* the sooner they build it, the better for Geelong
* good entertainment
* free enterprise - choices available
* Geelong needs a shot in the arm
* bring more people into Geelong rather than interstate

NEGATIVE

* encourages people to gamble - wrong way of life
* the way that things are, do not need a casino
* need an education programme which is both preventative and reactive
* bad influence on the kids
* excessive gambling - should have minimum age limit of 21
* enough financial trouble without casino influence
* gambling causes family break-ups
* not good for the people
* strongly oppose gambling of any kind
* people in Geelong do not have the money to spend at a casino

6.4 Attitudinal Profile

The following attitudinal profile aims to provide an overview of the community's reaction to the operation of a local casino, as well as an insight into the perceived impacts from the respondent's view-point.

6.4.1. Rating Scale

As this section was designed to measure the extent to which respondents perceived particular factors as "negative" or "positive", a seven-point scale was considered sufficient to record the variances in response.

The anchor-point was designated "0", which represents "NO EFFECT" whilst the extremities of "NEGATIVE" and "POSITIVE" were assigned values of "-3" and "+3" accordingly.

To facilitate the calculation of mean scores, these values were coded in the following manner :-

initial code	-3	-2	-1	0	+1	+2	+3
value	1	2	3	4	5	6	7
interpretation	NEGATIVE			NEUTRAL	POSITIVE		

In effect, the mean scores provide a form of "attitude index", by which the community perception may be measured and compared.

6.4.2 Mean Scores

With regard to the order in which the factors are listed, the most favourable perceptions appear foremost, and continue in descending order to the least favourable perceptions.

Out of a possible score of 7, the mean scores for the total sample, as well as a regional break-down, were calculated and ranked as follows :-

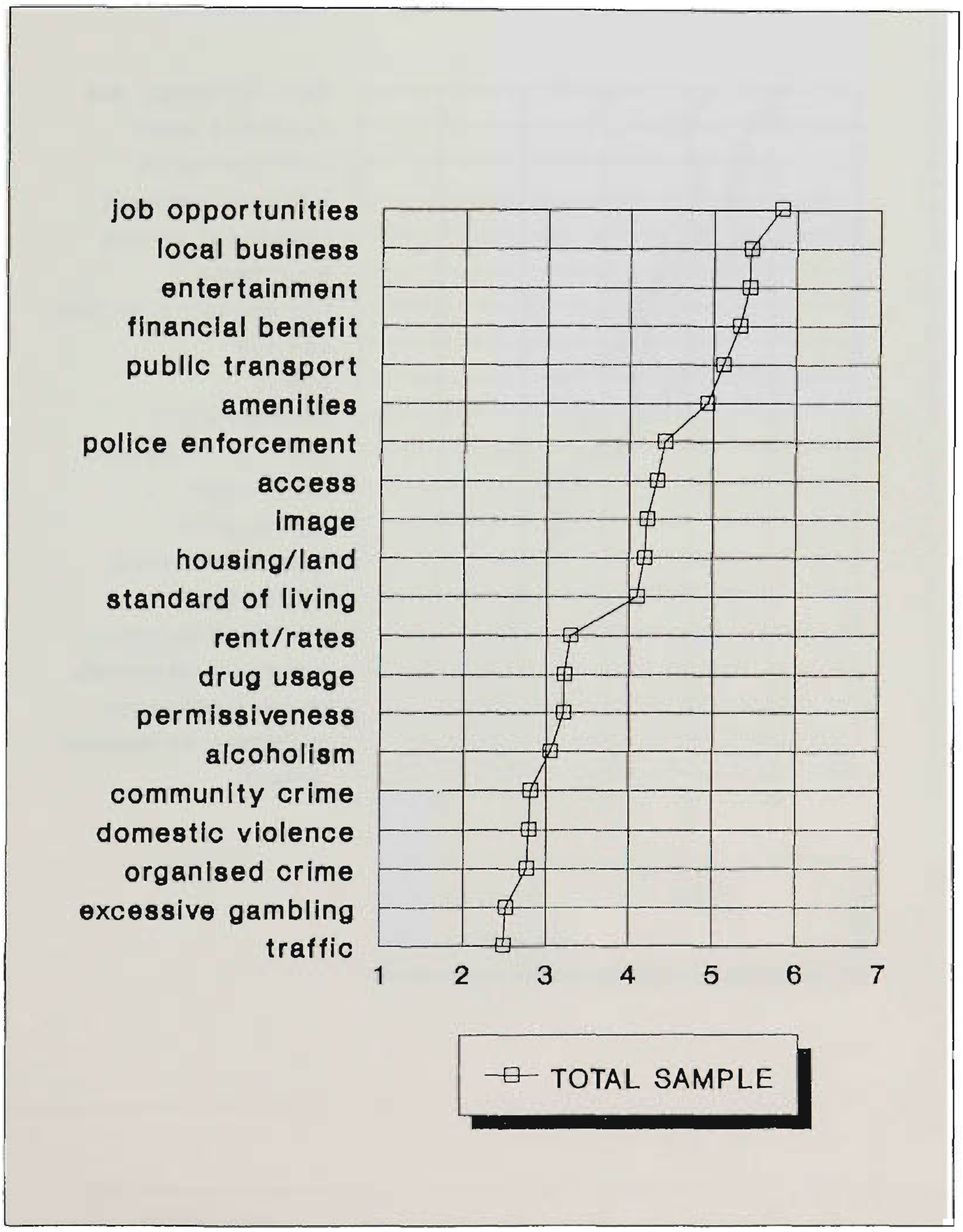
Table 48 .. Attitudinal Profile - Summary of Mean Scores

	Keilor	Kew	Geelong	TOTAL
job opportunities	6.12	5.29	6.06	5.81
volume of local business	5.70	4.92	5.78	5.44
entertainment/recreation	5.72	5.12	5.52	5.43
financial benefit	5.46	5.06	5.50	5.31
public transport	5.58	4.69	5.12	5.12
amenities	5.44	4.65	4.78	4.93
police enforcement	4.44	4.41	4.46	4.42
access	4.52	4.20	4.28	4.33
image	4.32	3.49	4.86	4.21
value of housing and land	4.42	3.69	4.48	4.18
standard of living	4.26	3.92	4.16	4.09
rent and rates	2.94	3.63	3.34	3.29
drug usage	3.00	3.27	3.42	3.22
sexual permissiveness	3.04	3.31	3.34	3.21
alcoholism	2.92	3.29	2.98	3.05
community/individual crime	2.84	2.86	2.78	2.81
domestic violence	2.78	3.04	2.58	2.79
organised crime	2.76	2.86	2.72	2.77
excessive gambling	2.26	2.63	2.70	2.52
local traffic conditions	2.62	2.06	2.80	2.49

6.4.2 Mean Scores

A graphical interpretation of the mean scores is shown in Figure 12 for the total sample, and Figure 13 for the regional details.

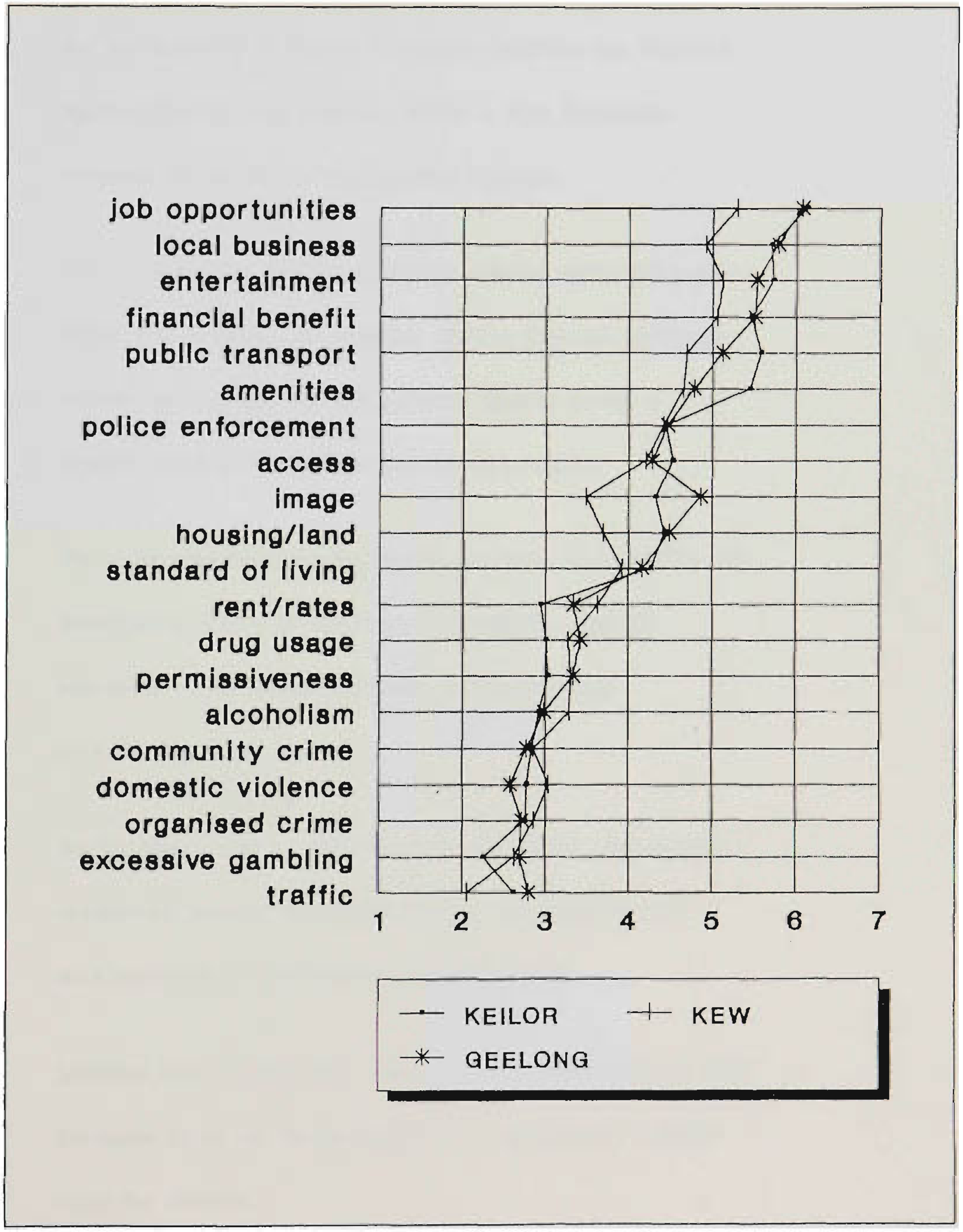
Figure 12 .. Attitudinal Profile - Mean Scores - TOTAL SAMPLE



initial code	-3	-2	-1	0	+1	+2	+3
value	1	2	3	4	5	6	7
interpretation	NEGATIVE			NEUTRAL	POSITIVE		

6.4.2 Mean Scores

Figure 13 .. Attitudinal Profile - Mean Scores BY AREA



initial code	-3	-2	-1	0	+1	+2	+3
value	1	2	3	4	5	6	7
interpretation	NEGATIVE			NEUTRAL	POSITIVE		

6.4.3 Overview of Mean Scores

A slight variation in attitude may be detected across the three communities, with some interesting trends emerging.

The Kew sample appeared to be the most conservative in their expectations, as a negative bias was evident in the results. For the majority of cases, a stronger reaction was recorded against the negative aspects, whilst a less favourable response was noted for the positive impacts.

In contrast, the Geelong and Keilor samples reflected a more optimistic outlook. The negative impacts were not perceived to the same extent, but the positive impacts evoked a greater level of enthusiasm than the Kew sample.

The difference in attitudes may be partially explained by the demographic status of the respective samples, and the proximity of the residential area to the proposed site for the local casino.

The Willsmere site is located within the older, established residential area of Kew. Consequently, residents may be more sensitive to developments of this nature.

Sydenham Park, on the other hand, is sufficiently remote from the majority of the Keilor population, and perhaps a lesser cause for concern.

6.4.3 Overview of Mean Scores

The Farrow Building in Geelong is located on the city fringe, adjoining several residential zones. As such, it may have been reasonable to expect a response similar to that of the Kew sample, however, a marked difference was noted. Some degree of compensation, due to the depressed state of its local economy, may have been influential in this respect.

The subsequent commentary is in reference to the total sample mean scores presented in Table 48.

6.4.4. Commentary on individual community factors :-

For a clearer presentation of results, the factors appearing in Table 48, have been re-classified into "positive" and "negative" impacts.

With regard to the "positive" impacts, the "most positive" factors will appear foremost, and the list will continue in descending order.

The aforementioned rationale will also apply to the "negative" impacts, with the "most negative" factors ranked foremost.

PERCEIVED POSITIVE IMPACTS

* job opportunities

It was the opinion of the majority of respondents, that the creation of job opportunities in the immediate vicinity, was clearly the most favourable consequence of establishing a local casino.

* volume of local business

As a spin-off effect of the influx of visitors from local and external sources, a greater volume of business within the community was expected to be generated.

It was expressed that the benefit would result from the provision of direct and ancillary services to the casino.

It was also anticipated that local traders would have the opportunity to capitalise on the increasing level of visitors passing through.

6.4.4. Commentary on individual community factors :-

PERCEIVED POSITIVE IMPACTS

* entertainment and recreation

It was expressed that the needs of the younger residents particularly, were often overlooked, and a local casino complex could fulfill these demands to some extent, if a night-club, restaurant and bar facilities, as well as live entertainment were incorporated to broaden the range of recreational facilities presently available.

* financial benefit

Whilst there was little doubt over the revenue raising potential of a local casino, there was some scepticism regarding the real financial benefit flowing back to the community.

Irrespective of this, it was generally conceded that a casino would be a valuable source of community funds to improve and expand local facilities.

* public transport

The quality and the availablity of public transport was considered relatively important, to facilitate access to and within their respective communities.

The need to upgrade present facilities was particularly evident in Keilor, as Sydenham Park is not yet serviced by any form of public transport.

It was perceived that the local population would benefit from the operation of a more streamlined means of transport.

6.4.4. Commentary on individual community factors :-

PERCEIVED POSITIVE IMPACTS

* **amenities**

It was appreciated that in order to maximise tourism potential, it may be necessary to attach some priority to improving the character and appeal of the area.

Whether this be in the form of improved community facilities and amenities, or merely cosmetic in nature, this was perceived to be one of the more favourable outcomes.

* **police enforcement**

In an effort to minimise the incidence of criminal activities, a greater police presence was expected to monitor the operations of the casino and patrol the immediate vicinity.

This was perceived a positive factor, as residents were generally of the opinion that a sense of safety and security would be instilled as a result of this.

* **image**

In response to whether a casino would be a source of civic pride, a differentiation between responses was observed.

In general terms, the Kew sample felt that the area was "too respectable" for a casino, and considered this to be detrimental to its image. In contrast, both the Keilor and Geelong sample indicated that its presence would be an enhancement to the image of their respective community.

6.4.4. Commentary on individual community factors :-

PERCEIVED POSITIVE IMPACTS

* land and housing

It would be reasonable to assume a strong correlation between community image and the value of land and housing within.

With regard to the Kew sample, the unfavourable movement in land value is consistent with its perception of image. Similarly, with the Keilor and Geelong sample, an escalation of land values is in line with the more positive outlook expressed.

standard of living

Whilst respondents recognised the economic importance of a local casino, it was interesting to note that its effect on the community standard of living was perceived to be minimal, but positive.

6.4.4. Commentary on individual community factors :-

PERCEIVED NEGATIVE IMPACTS

* traffic

Matters relating to increased traffic into the area were considered the most negative of impacts, consequential to the operation of a local casino.

Congestion, insufficient parking, noise and air pollution, were cited amongst these primary concerns.

* excessive gambling

The issue of whether a local casino is conducive to excessive gambling within the community, also proved to be sensitive. This was considered one of the more predominant social costs attributed to casinos.

* organised crime

Whilst the respondents showed an awareness of the association between casino gambling and organised crime, it was not regarded a substantial risk to the local community.

It was felt that whilst regulatory controls and police enforcement would assist in minimising this form of criminal activity, it would not be eradicated completely.

* domestic violence

Although the mean score indicates only a mild level of concern, it was recognised by the respondents that the frustration of continued losses may adversely effect the quality of family life, particularly the incidence of domestic violence and family disruption.

6.4.4. Commentary on individual community factors :-

PERCEIVED NEGATIVE IMPACTS

* community / individual crime

The introduction of casinos have also been linked with a greater frequency of vandalism, car-stealing, petty theft and other crimes similar in nature.

It was the generally agreed that the presence of a local casino would attract some undesirable elements into the area.

* alcoholism

In response to whether a local casino would contribute to an increase in the social problem of alcoholism, it was acknowledged as a potential cause, but not considered a significant impact.

* sexual permissiveness

Sexual permissiveness is often associated with the "good time" philosophy attached to the casino image.

Questioned about the anticipated effect upon promiscuity in the community, respondents believed that to a limited extent, such behaviour would be encouraged.

* drug usage

Whilst the prevalence of drug usage and trafficking was acknowledged, it was perceived that the presence of a local casino would not have a dramatic effect on existing practices.

6.4.4. Commentary on individual community factors :-

PERCEIVED NEGATIVE IMPACTS

* access

Assuming the success of the local casino in drawing non-residents into the community, its impact on the access to present facilities and amenities was sought.

The results indicate that the respondents were of the opinion that access to the aforementioned and the proposed casino, would be hindered as a result of the growing interest in the area, however, this appeared to be a minor concern.

* rent and rates

It was felt that the cost of rent and rates would rise slightly as a result of a casino operating in the immediate area.

This is consistent with the earlier reference to anticipated increases in land values, and the perceived improvement of community image.

SECTION 7 - CONCLUSION

It was stated as the primary objective of this research, to identify the community's gambling patterns prior to the establishment of a local casino, and to then assess the perceived consequential effects.

Accordingly, in Table 14 it was found that a significant portion, 69% of the total sample, engaged in at least one form of gambling on a weekly basis. The remaining 31% of the sample were classified as "non-gamblers" as they were neither active nor interested in any form of gambling activity.

However, given the availability of local casino games, some interesting trends emerged. From the survey results, there was evidence to suggest that the aforementioned participation rate would increase, due to the greater accessibility of gambling alternatives. This may be inferred from the information recorded in Figure 9, in which the proportion of the total sample who would not visit a local casino amounted to 21%. This represents a 10% decline in the proportion of "non-gamblers" previously referred to in Table 14. The shift in "gambling status" seems to suggest that a local casino may attract a number of "new" players from the community, however, the regularity of patronage of this transient group is difficult to ascertain.

With reference to the total sample, the results in Table 24 indicate that it may be possible to draw a substantial clientele base from the resident population to support a local casino operation. The level of repeat patronage anticipated from community sources amounted to 55%.

SECTION 7 - CONCLUSION

In determining the effect of a local casino upon personal expenditure on gambling activities, it was revealed in Table 21 that its operation would encourage 39% of the total sample to spend beyond their present gambling budget. Whether this attributed to the risk of excessive gambling, it was noted in Table 25 that 8% of the total sample would play beyond their gambling allowance, of which 3% would borrow money to continue play in an effort to recover losses.

The effectiveness of a local operation in confining casino gambling within the state was measured in Table 22. Approximately 19% of the total sample indicated that their level of spending "across the border" would decrease in preference to a closer alternative.

The attitudinal profile presented in Table 48 identified traffic-related problems and the increased incidence of excessive gambling as the negative factors which attracted the highest levels of concern. However, these less desirable consequences of a local casino appeared to be compensated by the considerable optimism attached to the creation of employment opportunities and the catalystic effect on further development in the community.

This was reflected in the overall approval rating appearing in Table 39. Whilst 40% of the total sample were in favour of a local casino operation, 34% expressed an opinion to the contrary. The remainder were indifferent to the proposal.

SECTION 7 - CONCLUSION

A more specific analysis in Table 40, highlighted varying levels of acceptance across the three communities surveyed. The proposal was considered most favourable by the Geelong sample, with its anticipation of a "casino-led recovery". A similar response was recorded for the Keilor sample, as it was seen to be an opportunity for further development in the local community. Support for the project by the Kew sample did not seem to generate a high level of enthusiasm. It was generally felt that the status and life-style of the area would be compromised by a development of this kind.

SECTION 8 - RECOMMENDATIONS

In an endeavour to harmonise the economic and social consequences of a local casino operation, based on the main findings of this research paper, the following recommendations are offered :-

CONSULTATION AND PLANNING

* Due to the controversial nature of a casino development, consultation with local government and residents during the initial stages of implementation is imperative. Acknowledging the concerns of the local community and promoting some of the benefits to be derived from the project may assist in gaining a greater level of acceptance.

* According to the attitudinal profile in Table 48, traffic-related problems and excessive gambling were identified as the primary issues which should be addressed. Control mechanisms to minimise these effects upon the community should be incorporated, where possible, into the overall planning strategy.

SOCIAL RESPONSIBILITIES

* It is also considered important to raise the awareness of the less desirable impacts associated with the project. Whilst this may potentially impede progress, it may also minimise the opportunity for objection at a later time.

* It was found in Table 25, that a small proportion of the community may be prone to the risk of excessive gambling. As an indication of social responsiblity, a specified percentage of casino revenue should be designated to rehabilitation and welfare programmes which provide assistance to this group.

* A proportion of the revenue derived from its operation should be directed toward a community benefit fund to up-grade civic facilities and amenities. With reference to Table 48, the acceptance of a local casino was influenced by the anticipated improvement to community infrastructure.

OPERATIONAL CONSIDERATIONS

* The casino should be supplemented by a variety of non-gaming attractions to provide an atmosphere conducive to relaxation and enjoyment. By emphasising a social focus, it is more likely to attract a wider cross-section of patrons, not only those with the sole intention of gambling.

  With reference to the comments in Table 43, Table 45 and Table 47, a multi-purpose entertainment complex, comprising restaurants and night-life was considered a welcome addition to the community.

  It may also be possible to incorporate child-minding facilities to enhance its appeal across a broader range of age groups in various stages of their life cycle.

* As to the types of games preferred in the proposed establishment, across all three communities it was noted in Table 7 that casino games were considered the most popular choice. This was closely followed by poker machines, whilst electronic games appeared to be the least favoured option.

  Subsequently, the greater availability of lower denomination table games and machines, may to some extent, maximise enjoyment and minimise risk.

OPERATIONAL CONSIDERATIONS

* In an effort to control excessive gambling amongst its regular patrons, it may be possible to introduce a form of "cashless" betting, similar to the system presently used at the Tabaret. With an electronic account, limits of spending may be imposed such that once funds are exhausted, access to further gambling is denied. Whilst this may be regarded as restrictive, this could be provided as an optional service.

SECTION 9 - APPENDICES

9.1 Letters

Victoria University of Technology
Ballarat Road
Footscray
PO Box 64
Footscray
Victoria 3011
Australia

Telephone
(03) 688 4200
Facsimile
(03) 689 4069

Footscray Campus

VICTORIA UNIVERSITY OF TECHNOLOGY

Mr. P. Black
Municipal Offices
Macedon Street
Keilor Vic 3036

15th September 1991

Dear Sir,

As a student enrolled in the Master of Business - Tourism Development - Victoria University of Technology, I am in the process of collecting information which is integral to the completion of my thesis topic.

In brief, I would like to inform you of my project, which aims to survey the community's attitude toward the establishment and operation of a local casino.

I have spoken to Anne Varney with regard to this matter, and she has been most resourceful in advising me on the pertinent issues which could be addressed.

In order to gather the required information, it will be necessary to interview personally, a sample population of residents within the City of Keilor.

A random sample of 50 house-holds will be selected to participate in the survey, and a structured, multiple choice questionnaire will be used to facilitate the interview process. This will be administered either by myself, or a member of the research team, and should take approximately 10 minutes to complete. Each member of the research team will carry V.U.T. identification, and please be assured that the process will be conducted in a professional manner.

It is stressed that data collected will be treated as strictly confidential, and will be used only for aggregation purposes.

The anticipated time-frame for the survey is between the 21st through to the 30th of September 1991.

I seek your permission to conduct the survey as described.

Should you have any concerns, please do not hesitate to contact me on 688 4617.

Yours faithfully,

[redacted]

Lily Wong

Lecturer - Faculty of Business

9.1 Letters

CITY OF KEILOR
Municipal Offices
Macedon Street
Keilor Victoria 3036

DX 32309 St. Albans
Telephone: (03) 336 7211
Facsimile: (03) 336 3941

Your Reference

Our Reference 200.000: 1\12309bn.74p

Enquiries to: Bill Nicol

Telephone: 334 0145

September 23, 1991

Ms Lily Wong
Victoria University of Technology
P O Box 64
Footscray 3011

Dear Madam

Your letter dated 15 September, 1991 is acknowledged.

Council does not have any objections with you conducting the survey on the community's attitude towards the establishment and operation of a local casino.

It would, however, be appreciated if you could provide Council with a copy of your survey.

Yours faithfully

[redacted]

W E Nicol, CPEng
Director, Technical Services and City Engineer

9.1 Letters

Victoria University of Technology
Ballarat Road Footscray
PO Box 64 Footscray Victoria 3011 Australia
Telephone (03) 688 4200
Facsimile (03) 689 4069

Footscray Campus

Mr. A. Chung
Chief Executive Officer
Municipal Offices
Charles Street
Kew Vic 3101

VICTORIA UNIVERSITY OF TECHNOLOGY

20th September 1991

Dear Sir,

As a student enrolled in the Master of Business - Tourism Development - Victoria University of Technology, I am in the process of collecting information which is integral to the completion of my thesis topic.

In brief, I would like to inform you of my project, which aims to survey the community's attitude toward the establishment and operation of a local casino.

In order to gather the required information, it will be necessary to interview personally, a sample population of residents within the City of Kew.

A random sample of 50 house-holds will be selected to participate in the survey, and a structured, multiple choice questionnaire will be used to facilitate the interview process. This will be administered either by myself, or a member of the research team, and should take approximately 10 minutes to complete. Each member of the research team will carry V.U.T. identification, and please be assured that the process will be conducted in a professional manner.

It is stressed that data collected will be treated as strictly confidential, and will be used only for aggregation purposes.

The anticipated time-frame for the survey is between the 21st through to the 30th of September 1991.

I seek your permission to conduct the survey as described.

Should you have any concerns, please do not hesitate to contact me on 688 4617.

Yours faithfully,

[redacted]

Lily Wong

Lecturer - Faculty of Business

CITY OF KEW

MUNICIPAL OFFICES
CHARLES STREET
KEW, 3101
TELEPHONE: (03) 862 2466
FAX: (03) 862 3797

In reply please quote:

Ref. 01-20-01

Enquiries to Ext. 202 *ask for* Alan Chung

Ms Lily Wong
Faculty of Business
Victoria University of Technology
Ballarat Road
FOOTSCRAY. V. 3011.

Dear Ms Wong

I refer to your request for permission to conduct a survey of residents in Kew by students of the University, over the period Saturday 21 to Sunday 29 September, 1991, in conjunction with your thesis project.

I advise that Kew Council has no objection to the conduct of the survey provided:

. all students produce identification on their approach to residents

. residents are approached professionally and sensitively

A copy of the results of your survey, which I understand relates to attitudes to a casino in Kew, would be appreciated.

Yours faithfully

[redacted]
Executive Officer

9.1 Letters

Victoria University of Technology
Ballarat Road
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PO Box 64
Footscray
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Australia

Telephone
(03) 688 4200
Facsimile
(03) 689 4069

Footscray Campus

VICTORIA UNIVERSITY OF TECHNOLOGY

Mr. T. Neal
Town Clerk
Municipal Offices
P.O. Box 104
Geelong Vic 3220

24th September 1991

Dear Sir,

As a student enrolled in the Master of Business - Tourism Development - Victoria University of Technology, I am in the process of collecting information which is integral to the completion of my thesis topic.

In brief, I would like to inform you of my project, which aims to survey the community's attitude toward the establishment and operation of a local casino.

In order to gather the required information, it will be necessary to interview personally, a sample population of residents within the City of Geelong.

A random sample of 50 house-holds will be selected to participate in the survey, and a structured, multiple choice questionnaire will be used to facilitate the interview process. This will be administered either by myself, or a member of the research team, and should take approximately 10 minutes to complete. Each member of the research team will carry V.U.T. identification, and please be assured that the process will be conducted in a professional manner.

It is stressed that data collected will be treated as strictly confidential, and will be used only for aggregation purposes.

The anticipated time-frame for the survey is between the 28th through to the 30th of September 1991.

I seek your permission to conduct the survey as described.

Should you have any concerns, please do not hesitate to contact me on 688 4617.

Yours faithfully,

[redacted]

Lily Wong

Lecturer - Faculty of Business

9.2 Survey Instrument

20/09/91

ZONE	L	M	H
SEX	Female	Male	

INSTRUCTIONS :-

Please CIRCLE your answer to the following questions or where appropriate, WRITE in the response.

1. How long have you been living in the

1	City of Keilor
2	City of Kew
3	City of Geelong

1	less than 6 months
2	6 months - 1 year
3	1 - 5 years
4	more than 5 years

2. In which age group do you belong ?

1	under 18
2	18 - 24
3	25 - 39
4	40 - 49
5	50 - 59
6	over 60

3. What is your Marital Status ?

1	single
2	married / de facto
3	been married but single now
4	other .... ?

4. Status of Home Ownership ?

1	Rent	-->
2	Paying-off	-->
3	Own	
4	Other........... ?	-->

5. Financial Committment PER WEEK ?

rental	
mortgage	

please answer "5" with appropriate range --->

1	under $100
2	$100 - $150
3	$151 - $200
4	$201 - 250
5	above $250

PLEASE NOTE :- DATA PROVIDED IS STRICTLY CONFIDENTIAL AND WILL BE USED FOR AGGREGATION ONLY.

QUESTIONNAIRE PAGE 1

6. Household Size

	number of people in household, including yourself
	number of people who are 17 years old or younger

7. What is your Employment Status :-

1	full-time
2	part-time
3	unemployed
4	retired
5	home-duties
6	student
7	other........... ?

8. What is your MAIN SOURCE of INCOME ?

1	wage
2	salary
3	pension
4	unemployment benefits
5	government allowance
6	other .... ?

9. In which range, is your ANNUAL TOTAL INCOME ?

1	below $15,000
2	$15,000 - $25,000
3	$25,001 - $35,000
4	$35,001 - $45,000
5	$45,001 - $55,000
6	$55,001 - $65,000
7	above $65,000

10. What is the HIGHEST level of EDUCATION you have COMPLETED ?

1	secondary
2	technical/vocational
3	tertiary
4	other ---> ________

11. Approximately how OFTEN do you spend money having a BET on EACH of the following ? — please specify

	ACTIVITY	number of times - PER WEEK					more ?
A)	horse-racing	0	1	2	3	4	5 ....
B)	trotting	0	1	2	3	4	5 ....
C)	greyhound racing	0	1	2	3	4	5 ....
D)	tattslotto/lotteries/ instant lotteries	0	1	2	3	4	5 ....
E)	pools	0	1	2	3	4	5 ....
F)	bingo	0	1	2	3	4	5 ....
G)	cards	0	1	2	3	4	5 ....
H)	other .... ?	0	1	2	3	4	5 ....

---> IF "0" TO ALL CATEGORIES...GO TO 13...

12. Approximately how much would you SPEND in a TYPICAL WEEK ?

	ACTIVITY		$	OR state RANGE
A)	horse-racing	na		
B)	trotting	na		
C)	greyhound racing	na		
D)	tattslotto/lotteries/ instant lotteries	na		
E)	pools	na		
F)	bingo	na		
G)	cards	na		
H)	other .... ?	na		

13. Approximately how OFTEN do you spend money having a BET on EACH of the following ? — please specify

	ACTIVITY	number of times - PER ANNUM					more ?
A)	Tabaret	0	1	2	3	4	5 ....
B)	Poker Machines	0	1	2	3	4	5 ....
C)	Casino Gaming	0	1	2	3	4	5 ....
D)	other .... ?	0	1	2	3	4	5 ....

---> IF "0" TO ALL CATEGORIES...GO TO 15 (iii) ------------------------>>

QUESTIONNAIRE — PAGE 2

14. Approximately how much would you SPEND in a TYPICAL VISIT ?

	ACTIVITY		$	OR state RANGE
A)	Tabaret	na		
B)	Poker Machines	na		
C)	Casino Gaming	na		
D)	other .... ?	na		

15. i) Given the amount you now spend on each activity, approximately HOW MUCH of this amount, might you SPEND at a LOCAL CASINO ?

	ACTIVITY		PROPORTION SPENT AT LOCAL CASINO				
A)	horse-racing	na	ALL	> half	HALF	< half	NONE
B)	trotting	na	ALL	> half	HALF	< half	NONE
C)	greyhound racing	na	ALL	> half	HALF	< half	NONE
D)	tattslotto/lotteries/ instant lotteries	na	ALL	> half	HALF	< half	NONE
E)	pools	na	ALL	> half	HALF	< half	NONE
F)	bingo	na	ALL	> half	HALF	< half	NONE
G)	cards	na	ALL	> half	HALF	< half	NONE
H)	other .... ?		ALL	> half	HALF	< half	NONE

15. ii)

	ACTIVITY		PROPORTION SPENT AT LOCAL CASINO				
A)	Tabaret	na	ALL	> half	HALF	< half	NONE
B)	Poker Machines	na	ALL	> half	HALF	< half	NONE
C)	Casino Gaming	na	ALL	> half	HALF	< half	NONE
D)	other .... ?		ALL	> half	HALF	< half	NONE

15. iii) Would you consider any ADDITIONAL SPENDING at a LOCAL CASINO ?

YES --->	SIGNIFICANT INCREASE				INSIGNIFICANT INCREASE	NO
	5	4	3	2	1	0

16. How might the operation of a local casino affect your FUTURE SPENDING in casinos and clubs OUTSIDE VICTORIA ?

SIGNIFICANT INCREASE				SIGNIFICANT DECREASE	NO CHANGE
5	4	3	2	1	0

17. If there was a casino in the community, what type of games would you prefer to play ?

1	only POKER MACHINES
2	only ELECTRONIC GAMES
3	only CASINO GAMES ---> examples.. blackjack, two-up, roulette,
4	ALL THE ABOVE
5	only PM & ELEC. GAMES
6	only PM & CASINO GAMES
7	only EG & CASINO GAMES
8	NO PREFERENCE
9	NOT INTERESTED NOT APPLICABLE

18. If there was a local casino, approximately how many TIMES might you visit it A YEAR ?

0	1	2	3	4	5	6	
	7	8	9	10	11	12	more ...... ?

19. SCENARIO...

- Imagine yourself at the local casino...
- Seated at the roulette table, you decide to place a bet...
- First you lose a little, but then you win a large amount of cash.
- Your luck suddenly changes and then you lose it all...

What would you do next ?

1	give up
2	give up ONLY if you have EXCEEDED your gambling budget
3	play a different game to try to recover your losses
4	borrow money to continue
5	other.. ?

20. How concerned would you be about the PROXIMITY of a casino to your RESIDENCE ?

	if the casino was located :-	VERY CONCERNED				NOT CONCERNED	DON'T KNOW
A)	within 1 kilometre	5	4	3	2	1	0
B)	outside the community	5	4	3	2	1	0

Briefly, what are these concerns ?

____

____

____

21. The proposed location for the casino development is :-

Sydenham Park	Keilor
Willsmere Hospital	Kew
The Farrow Building	Geelong

What is your opinion of the use of this site for a casino development ?

STRONGLY APPROVE				STRONGLY DISAPPROVE	DON'T KNOW
5	4	3	2	1	0

Comments :-

____

____

____

22. Do you have any OTHER COMMENTS on the proposed casino development ?

____

____

____

____

ATTITUDINAL PROFILE

- This section of the questionnaire aims to assess the community's attitude toward the operation of a local casino.

INSTRUCTIONS

- In order to answer the question, please use the following RATING SCALE.
- Please CIRCLE your response.

RATING SCALE :-

NEGATIVE	-3 TO -1	means a BAD effect... the HIGHER the number the WORSE the effect
NO EFFECT	0	means NEITHER GOOD or BAD
POSITIVE	+1 TO +3	means a GOOD effect... the HIGHER the number the BETTER the effect

EXAMPLES

if you feel that the operation of a local casino will create many new jobs in the community...then you MIGHT rate the following...

FACTORS:-	Negative			no effect			Positive
creation of job opportunities	-3	-2	-1	0	+1	+2	+3

if you feel that the operation of a local casino may encourage excessive gambling...then you MIGHT rate the following...

FACTORS:-	Negative			no effect			Positive
excessive gambling	-3	-2	-1	0	+1	+2	+3

QUESTIONNAIRE *PAGE 4*

TO WHAT EXTENT, DO YOU THINK THE OPERATION OF A LOCAL CASINO WILL HAVE A POSITIVE / NEGATIVE EFFECT, ON THE FOLLOWING FACTORS ?

	FACTORS:-	Negative			no effect			Positive
1	creation of job opportunities	-3	-2	-1	0	+1	+2	+3
2	volume of local business	-3	-2	-1	0	+1	+2	+3
3	alcoholism in the community	-3	-2	-1	0	+1	+2	+3
4	value of the community's land and housing	-3	-2	-1	0	+1	+2	+3
5	community's image	-3	-2	-1	0	+1	+2	+3
6	drug usage in the community	-3	-2	-1	0	+1	+2	+3
7	community's standard of living	-3	-2	-1	0	+1	+2	+3
8	quality of police enforcement	-3	-2	-1	0	+1	+2	+3
9	sexual permissiveness	-3	-2	-1	0	+1	+2	+3
10	quality of entertainment and recreation	-3	-2	-1	0	+1	+2	+3
11	excessive gambling	-3	-2	-1	0	+1	+2	+3
12	quality of public transport	-3	-2	-1	0	+1	+2	+3
13	community/individual crime (example:- vandalism, theft)	-3	-2	-1	0	+1	+2	+3
14	organised crime	-3	-2	-1	0	+1	+2	+3
15	access to leisure facilities	-3	-2	-1	0	+1	+2	+3
16	quality of community amenities	-3	-2	-1	0	+1	+2	+3
17	financial benefit to the community	-3	-2	-1	0	+1	+2	+3
18	domestic violence	-3	-2	-1	0	+1	+2	+3
19	cost of rent and rates	-3	-2	-1	0	+1	+2	+3
20	local traffic conditions	-3	-2	-1	0	+1	+2	+3

21. Considering the above, what is your opinion on the operation a local casino ?

STRONGLY APPROVE				STRONGLY DISAPPROVE	DON'T KNOW
5	4	3	2	1	0

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