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Towards responsible provision of gaming in New South Wales registered clubs: a quantitative study of current priorities and practices from a club management perspective

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Towards Responsible Provision of Gaming in New South Wales Registered Clubs

A Quantitative Study of Current Priorities and Practices from a Club Management Perspective

A report prepared for the Club Managers' Association Australia

August 1998

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A Quantitative Study of Current Priorities and Practices from a Club Management Perspective

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EXECUTIVE SUMMARY

This study is the second initiated by the Club Managers' Association Australia to seek opinions of NSW club managers on implementing responsible provision of gambling strategies and to identify related current practices in club poker machine operations. The first study (*Towards Responsible Provision of Gaming in New South Wales Registered Clubs*) was completed in September 1997 and provided an exploratory qualitative analysis. This second study, using quantitative methods, was designed to seek a broader opinion base.

The specific objective was to evaluate current practices in, and likely future implementation of, responsible provision of gambling strategies in NSW registered clubs in their machine gaming operations. Data collection was by a mail questionnaire survey of managers of all NSW clubs with poker machines. Although the low response rate to the survey does not allow results to be interpreted as representative of the industry, the two studies in combination provide useful insights into current practices and likely future implementation of responsible provision of gambling strategies in clubs in NSW. This is particularly pertinent, given the recent *Liquor and Registered Clubs Legislation Amendment (Community Partnership) Act 1998 NSW*, which established a legislative framework for social responsibility in gambling by the clubs, and the subsequent development by the Registered Clubs Association of NSW of its *Problem Gambling Policy* and *Responsible Management of Gambling Strategies* (Australian Institute for Gambling Research, 1998).

Because data collection for this study was conducted prior to this legislation, it provides baseline information on current practices in responsible provision of machine gambling in NSW clubs and assesses their willingness to implement related strategies. Thus, an evaluation can be made of the likely industry support to be expected in the future. This should help to facilitate the future implementation of such strategies by identifying areas of greatest opportunity and resistance so that the industry can better meet the accompanying challenges. In this way, this study hopes to make a valuable contribution to the effectiveness of these recent developments in responsible management of gambling in NSW clubs.

Key conclusions of the study are as follows.

- The club managers clearly feel that responsible provision of gambling should be shared amongst numerous stakeholders. Thus, the possibilities of a consistent and cooperative approach across all NSW gambling industries should continue to be pursued. Unless similar legal obligations are applied to other gambling sectors, it appears there will be a degree of resistance by NSW clubs to implementing the types of strategies examined in this study. Many club managers also considered that individual gamblers and the NSW Government have a role to play. A community education program and a more responsible approach by government would assist in sharing the responsibility for addressing gambling-related problems in the community.

- Nevertheless, it appears that key club industry associations would currently find wide support from the clubs for a more proactive approach to social responsibility in gambling. Given appropriate direction from these associations at a time of heightened government and community concern for the social impacts of gambling, NSW clubs appear receptive to implementing many of the strategies examined in this study.

However, current practices in responsible provision of gambling are minimal within the club industry at present.

- To capitalise on these good intentions, club industry associations have an opportunity to develop a range of industry level strategies which would be likely to receive wide support from the clubs. These include venue guidelines, a code of practice, and management and staff training programs in responsible provision of gambling.

- At the venue level, implementation of a variety of responsible provision of gambling strategies would be facilitated with the development and dissemination of: 1) a player guide to responsible gambling; 2) guidelines for clubs in providing a self-exclusion program; and 3) appropriate signage, brochures and publications for use by clubs. If these were developed and disseminated by the industry associations, it appears that many clubs would utilise them.

- Many clubs appear resistant to implementing strategies that would limit access to cash for gambling purposes. The challenge is to develop clear industry policies in this area and find mechanisms which would encourage the clubs to comply.

- A comprehensive code of practice on the advertising and promotion of gambling by NSW clubs would assist by providing clear directions for what is considered socially responsible and within current legislation.

- Given a certain reluctance to assist welfare and community organisations who service problem gamblers and their families, it seems appropriate that a proportion of the 1.5% levy imposed on larger NSW clubs by the *Liquor and Registered Clubs Legislation Amendment (Community Partnership) Act 1998 NSW* be allocated for this purpose and for research into problem gambling and its treatment. Additional avenues for building closer links with the welfare sector warrant further investigation.

- Policy direction from the NSW Government in responsible provision of gambling appears marginal in the club industry, at least from the perspective of the club managers at the time of the survey. Both the responsible gaming policy developed by the NSW Department of Gaming and Racing and legal obligations pertaining to responsible provision of gambling need wider publicity within the club community.

- With the self-regulatory approach to responsible provision of gambling in the clubs, implementation of related strategies is voluntary. To maximise strategy implementation, an education and marketing program is needed to emphasise the benefits of responsible gambling initiatives to the industry. Ongoing research into the implementation of responsible provision of gambling strategies in NSW clubs will then be necessary to monitor and improve effectiveness.

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SECTION ONE
INTRODUCTION TO THE STUDY

1.1 Background to the Study

Collectively, the registered clubs industry is the largest provider of machine gaming in New South Wales (NSW). Currently, over 66,000 gaming machines in 1,500 NSW registered clubs generate about $22 billion in turnover, $480 million in state taxes and $2.3 billion in gross profits per year (NSW Department of Gaming and Racing, 1998). Along with the economic impacts of machine gaming, its social impacts, both positive and negative, are well recognised. For example, machine gaming revenues help provide affordable leisure facilities and support charity and community projects, but this type of gambling has also been shown to contribute to problem gambling, with its attendant pressures on individuals, families, the community, and welfare and other services (Fisher and Griffiths, 1995; Keys Young, 1995; Dickerson, 1996; Delfabbro and Winefield, 1996). Recently, public concern for the negative social impacts of machine gaming has increased with the expansion of poker machine gaming into NSW hotels, legalisation of gaming machines in other Australian jurisdictions and the establishment of large casinos with gaming machines in major Australian cities.

In recognition of heightened community concern for the social impacts of gambling, the Club Managers' Association Australia initiated two studies designed to seek opinions of NSW club managers on implementing responsible provision of gambling strategies and to identify related current practices in club poker machine operations. The first study (*Towards Responsible Provision of Gaming in New South Wales Registered Clubs*) was completed in September 1997 and provided an exploratory qualitative analysis. This second study, using quantitative methods, commenced in February 1998 and was designed to seek a broader opinion base.

In May 1998, the *Liquor and Registered Clubs Legislation Amendment (Community Partnership) Act 1998 NSW* was passed, with the result that, for the first time, social responsibility in the conduct of gambling within NSW registered clubs has been established in a legislative framework. Section 87AA of the Act called upon the Registered Clubs Association of NSW to publish 'an appropriately funded policy that is capable of enforcement for minimising harm caused to the public interest and to individuals and families by gambling in registered clubs.' The Registered Clubs Association has now published this policy (*Problem Gambling Policy*) and developed a related package of responsible provision of gambling strategies (*Responsible Management of Gambling Strategies*) which are currently being trialed in a small number of clubs around the state. The intention is for eventual

statewide implementation. However, implementation of these strategies is optional for the clubs, with the NSW Government opting for a self-regulatory approach by the industry.

The present study was designed, and all data collected prior to the passing of this legislation. Thus, because it provides baseline data on current practices in responsible provision of machine gambling in NSW clubs and assesses their willingness to implement related strategies, it can evaluate the likely industry support to be expected in the near future. This should help to facilitate the future implementation of responsible provision of gambling strategies in NSW clubs by identifying areas of greatest opportunity and resistance so that the industry can better meet the accompanying challenges. In this way, this study hopes to make a valuable contribution to the effectiveness of these recent developments in responsible management of gambling in NSW clubs.

1.2 Research Design

The qualitative study, referred to earlier and conducted by the author on behalf of the Club Managers' Association Australia, explored the perceptions, attitudes and opinions of a small number of NSW club managers relating to the issue of responsible provision of gambling. Drawing on in-depth interviews with nineteen managers from clubs which ranged in type, membership size, location, number of poker machines and reliance on poker machine revenue, it illuminated a range of opportunities and concerns with implementing responsible gambling strategies. At the time of this first study, South Australia and Victoria were the two Australian jurisdictions most proactive in responsible provision of machine gaming. Their related strategies were used to guide the interviews with the nineteen NSW club managers.

Given the small sample size of the first study, the present study was designed to provide the opportunity for all NSW club managers to express their opinions on this issue. The specific objective was to evaluate current practices in, and likely future implementation of, responsible provision of gambling strategies in NSW registered clubs in their machine gaming operations. The responsible provision of gambling strategies used in South Australia and Victoria were distilled into a questionnaire (see Appendix A) and mailed to managers of all NSW registered clubs with poker machines (1,433) in March-April 1998. Despite two mail-outs, both containing a cover letter from the Club Managers' Association Australia and the questionnaire, only 247 responses were received, representing a response rate of 17.2% (see Appendix B for a summary of the main characteristics of responding clubs).

While this response is disappointing and does not allow the results to be interpreted as representative of the industry, the two studies in combination provide useful insights into current practices and likely future implementation of responsible provision of gambling strategies in clubs in NSW. This is particularly pertinent, given the recent passing of the

Liquor and Registered Clubs Legislation Amendment (Community Partnership) Act 1998 NSW and the development by the Registered Clubs Association of NSW of its *Problem Gambling Policy* and *Responsible Management of Gambling Strategies* (Australian Institute for Gambling Research, 1998).

1.3 Structure of the Report

The results of the survey are presented and discussed in seven sections. For background information, Section Two provides an update of recent developments in responsible provision of gambling by the NSW State Government and the NSW registered clubs industry. Section Three then summarises responses to survey questions about the club managers' perceptions of the existence of gambling-related problems, the types of gambling most likely to be associated with these, and responsibility for minimising gambling-related problems. Sections Four and Five then summarise responses relating to current practices in, and future willingness to implement, responsible provision of gambling strategies at both industry and venue levels, respectively. An analysis and discussion of the results are contained in Section Six, while Section Seven formulates recommendations aimed at improving the likely implementation of socially responsible initiatives in machine gaming in NSW clubs.

SECTION TWO
RECENT DEVELOPMENTS AFFECTING RESPONSIBLE PROVISION OF GAMBLING BY THE NSW CLUB INDUSTRY

To put this study into perspective, this section provides an update of recent developments in responsible provision of gambling by the NSW State Government and the NSW registered clubs industry. (It should be noted that a review of literature pertaining to social responsibility in machine gaming is contained in *Towards Responsible Provision of Gaming in New South Registered Clubs* [Hing, 1997].)

2.1 Recent Public Policy Developments in Responsible Provision of Gambling

Apart from various consumer protection measures contained in the relevant legislation, there has been no legal requirement for the NSW club industry to embrace socially responsible initiatives in its conduct of machine gaming until recently. For the first time, the *Liquor and Registered Clubs Legislation Amendment (Community Partnership) Act 1998 NSW*, passed in May 1998, has established this responsibility in a legislative framework.

However, publicly stated concern by the incumbent Labor Government in NSW to the social impacts of gambling can be traced to 1995, with the Party's release of its *Social Conscience Stand on Gaming Policy* (1995). As stated in the policy, attention to the issue arose from the licensing of the Sydney Harbour Casino. The document notes that, because NSW has higher levels of gambling than any other Australian jurisdiction, and because the 'Gaming public may expand their spending in line with the expansion of the Gaming market', 'any problems associated with gambling require thorough investigation'. Thus, the NSW Labor Party 'has a responsibility in monitoring these problems and attempting to redress any inefficiencies within the Gaming Industry, and community, which may contribute to the problems of gambling addiction.'

Key principles underpinning this policy were identified as:

- the importance of protecting the public 'from the pitfalls of gambling addiction';
- the urgency of addressing the issue of problem gambling;
- recognition that gambling will always exist and is 'preferable in an open and controlled environment' that respects 'freedom of choice for people' and 'the wealth that it can create by revenue-raising';
- the unknown effects of the casino on gaming expenditure, problem gambling and its attendant effects on families, friends and community facilities.

Thus, the key challenge was identified as 'find(ing) a situation whereby the government continues to raise revenue and allow freedom of choice whilst maintaining community support and preventing gambling dependency.' To this end, the NSW Labor Party considered the Casino Community Benefit Fund as the central way of implementing 'a number of measures to counter the problems of addictive gambling', with the primary aim being to allocate funds for research into the causes of problem gambling in NSW 'so that problem gambling may be dealt with in the long term'.

In a paper entitled 'Current Trends in Gaming Regulation' at the *Directions in Australasian Gaming Conference* in Sydney in March 1997, Ken Brown, Director-General, NSW Department of Gaming and Racing, further articulated the principles driving the government's policy on gambling. He noted that 'a policy framework is an essential part of the infrastructure required to support the continued growth of the gaming and wagering industry, and the introduction of new products'. While emphasising the importance of economic benefits in shaping the future regulation of gambling, he drew attention to the importance of legal compliance and consumer protection. 'A modern government approach to gaming', he stated, fosters increased privatisation of gambling, with control and regulation 'as the optimal way of safeguarding the public interest'. He noted that governments are facing increasing pressure to deliver gaming and wagering services in 'a public policy context' and cited the *Casino Control Act 1992 NSW* as setting a 'benchmark' for consumer protection measures. These measures included prohibition of ATMs within casino boundaries, signage to inform people with gambling problems of sources of help, a self-exclusion program, regulation of casino advertising, guidelines on inducements provided by the casino to gamblers, and the conduct of training courses for casino staff to help them identify problem gamblers. He noted that:

> *...in these times of community sensitivity about many aspects of commercial gaming, gaming operators should also consider their broader social responsibilities to conduct gaming activities in a manner which respects that rising level of concern. In the same way that the liquor industry is showing its responsiveness to the message of responsible service of liquor, so might the gaming and wagering industry reflect on the desirability of being responsible providers of gaming services.*

In December 1997, the NSW Department of Gaming and Racing articulated its three-pronged approach to harm minimisation in gambling in its quarterly publication, *Liquor and Gaming*. This comprises:

- dedicated funding through the Casino Community Benefit Fund;
- development of legislative and other regulatory controls which give effect to essential public interest issues; and
- encouragement and fostering of industry based 'patron care' initiatives.

(*Liquor and Gaming*, December 1997, p. 14.)

Casino Community Benefit Fund

The Department noted that the Casino Community Benefit Fund is 'the central initiative which provides financial assistance for projects which aim to reduce the harm associated with gambling' (*Liquor and Gaming*, December 1997, pp. 14). A press release by the NSW Treasury on 20 February 1998 noted that the Casino Community Benefit Fund had spent more than $15 million, of which more than $10 million has gone to research, education, treatment and rehabilitation of problem gamblers.

A recent initiative funded by the Casino Community Benefit Fund is G-Line, a 24 hour, toll-free, telephone counselling service that operates seven days a week. The Department states that the service is accessible to all residents in NSW, including those from a non-English speaking background; provides immediate crisis counselling, provides information and contact details of financial, legal and face-to-face counselling agencies throughout NSW; and ensures confidentiality and anonymity for callers (*Liquor and Gaming*, December 1997, pp. 14).[1] An evaluation of this service is presently being conducted.

Legislative and Regulatory Controls

The Department summarised the statutory prohibitions on gambling operators designed to minimise harm in gambling as follows:

- ensuring that credit is not provided to patrons for gambling purposes;
- ensuring that minors cannot access a venue's gambling facilities;
- controls on hotel and club gaming advertising;
- controls on advertising that misleads patrons about the nature of the venue's gambling facilities.

(*Liquor and Gaming*, December 1997, pp. 14-15.)

Industry Based Patron Care Strategies

The Department noted that, because there are 'particular public interest sensitivities' inherent in the activities of gambling operators and a 'real and growing interest' in minimising gambling-related harm, 'gambling service providers...are in a unique position to take action to prevent or minimise gambling related harm and to demonstrate their broader commitment to the community' (*Liquor and Gaming*, December 1997, pp. 14). They identified the following 'best practice strategies' for gambling providers which can supplement adherence to statutory requirements:

- displaying sensitivity and advising patrons that it is in their interests to seek confidential, professional advice if they approach the venue for assistance or advice

[1] However, it appears that the service is not accessible in the Tweed region by residents with Queensland area codes.

about a gambling problem, ask for credit for gambling purposes, or if a patron or 'a person close to the patron' asks to exclude that patron from the gaming area;

- not promoting or engaging in advertising or promotional activities designed to encourage patrons to gamble irresponsibly;
- not offering inducements which may encourage patrons to gamble irresponsibly;
- developing a problem gambling house policy covering placement of the 1 800 help line number in conspicuous areas; signage near gambling areas with messages such as 'your best bet is the one you can afford', 'bet with your head not over it', 'never gamble with borrowed money', 'don't chase your losses' and 'whose money are you gambling with?'; and ensuring staff do not gamble on the premises at any time.

(*Liquor and Gaming*, December 1997, pp. 15.)

The Department's *Responsible Gaming Guidelines* (*Liquor and Gaming*, December 1997, pp. 15), reproduced below, encapsulate their recommended harm minimisation strategies for gambling providers:

- *Do care for your patrons and their families*
- *Do develop a House Policy to encourage responsible gaming*
- *Do provide problem gambling and counselling information to your patrons*
- *Don't promote irresponsible gambling practices*
- *Don't provide credit to your patrons for gambling purposes*
- *Don't allow minors into restricted areas*

In March 1998, the Department further articulated its stance on responsible provision of gambling in *Liquor and Gaming*. It drew attention to the legal obligations of gambling providers in preventing gambling by minors, and published guidelines to help venues meet these responsibilities. It also noted that G-Line had been promoted in metropolitan and regional newspapers, through radio interviews with G-Line representatives, and through a pilot advertising campaign involving about 100 NSW clubs which display signs promoting the service.

The Department advised venues that, if approached by a family member, employer or friend concerned about problems caused by a patron's gambling, they should be sympathetic; acknowledge a problem may exist; inform the person of the venue's harm minimisation policies, such as self-exclusion or cheque-cashing limitations; provide the person with some G-Line material and suggest they ring the toll free number; and review the venue's responsible gambling practices, asking 'is there something I could have done to avoid the problem arising in the first place?' (*Liquor and Gaming*, March 1998, p. 15). The Department also added to its former list of 'best practice initiatives' that venues should 'ensure ATMs are

not placed within gaming areas'. This was in response to a recent comment by Judge David Morrow, sitting in the Victorian County Court on a case where a woman was gaoled for criminal offences committed to support her gambling, that 'it seems...dangerous to allow automatic teller machines on the same premises as gambling machines'. He questioned whether the woman would have gambled as much of her family's savings if the ATM in the club was not so easily accessible (cited in *Liquor and Gaming*, March 1998, p. 15).

In December 1997, the Department announced that the NSW government was reviewing gambling laws to establish a legislative framework for responsible provision of gambling (*Liquor and Gaming*, December 1997, p. 15). During negotiations with the Registered Clubs Association and the government on the taxation rates announced in the May 1997 State Budget, it was agreed that, as part of the overall outcome, the Association would publish a policy on problem gambling (*RCA Circular* No. 98.044). A press release from the NSW Treasury on 20 February 1998 subsequently announced the launch of 'a community partnership between the Government and the club industry' which 'return(s) the same annual revenues and contain(s) measures to deal with problem gamblers'. These measures aim 'to achieve 'harm minimisation' in gaming, which will co-ordinate industry and community policy and research, and promote education and treatment of problem gamblers' (NSW Treasury, 20 February, 1998). The ensuing *Liquor and Registered Clubs Legislation Amendment (Community Partnership) Act 1998 NSW*, passed in May 1998, amended the *Registered Clubs Act 1976 NSW* and the *Liquor Act 1982 NSW*.

The main provisions of the Act relevant to responsible provision of gambling in NSW clubs are contained in Section 87AA, Problem Gambling Policy, which states:

> *(1) The Registered Clubs Association of New South Wales is to develop and publish, by 31 May 1998, an appropriately funded policy that is capable of enforcement for minimising harm caused to the public interest and to individuals and families by gambling in registered clubs.*
>
> *(2) If the Association does not meet its obligations under this section by the due date, the dates mentioned in Section 87 (7) and (8) are to be brought forward by two months for every calendar month after the due date during which the Association fails to meet those obligations.*[2]

[2] The *Liquor and Registered Clubs Legislation Amendment (Community Partnership) Act 1998 NSW* adjusted duty rates for club gaming machines and guaranteed them until at least 1 February 2001, with a report on club gaming machine duty rates to be prepared and finalised by 31 January 2001. This fixed timeframe is conditional upon the publication of a responsible gambling policy by the RCA.

Amongst other amendments, the Act also:

- reduced club taxation on poker machine revenue above $1 million from 30% to 26.25%, and for revenue between $200,000 and $1 million from 22.5% to 20%, guaranteed for three years, subject to Section 87AA;
- provided for an additional allowance of up to 1.5% of club poker machine profits which exceed $1 million for amounts spent on approved community support measures;
- established an independent review of gaming in NSW.

The decision to hold the NSW Gaming Inquiry arose as part of the parliamentary debate about the *Liquor and Registered Clubs Legislation Amendment (Community Partnership) Bill 1998 NSW*. The holding of an inquiry was proposed by the NSW Opposition in May 1998, and agreed to by the NSW Government. As indicated in the legislation, the inquiry is to report to Parliament by 26 November 1998. It has been referred to the Independent Pricing and Regulatory Tribunal (IPART) and 'will cover the Sydney Casino, machine gaming in hotels and registered clubs, Club Keno, Lotto, Lotto Strike, OZ Lotto, Powerball, Soccer Pools, Draw Lottery games and Instant Lotteries' (IPART, 1998). The Terms of Reference for the Inquiry state that, in conducting the review, the Tribunal will investigate the:

- need for and form of a gaming commission or similar authority to oversight gaming in NSW;
- relationship that should exist between the Casino Control Authority (and other existing licensing or regulatory bodies) and any such gaming commission or similar authority;
- measures (both existing and potential) to foster a responsible gaming environment;
- c-ordination of the problem gaming policies of hotels, registered clubs and the casino and other providers of gaming; and
- co-ordination of problem gaming support services and research centres to address problem gaming.

2.2 Recent Developments in Responsible Provision of Gambling by the NSW Club Industry

Following the passage of the *Liquor and Registered Clubs Legislation Amendment (Community Partnership Act) 1998 NSW*, the Registered Clubs Association committed about $100,000 and commissioned the Australian Institute for Gambling Research to assist in developing the required policy and a program to implement it. A four-stage process was planned, consisting of:

- Stage One: Policy Development, involving a literature review of related research, policies and practices and extensive consultation with key stakeholders. This consultation involved a workshop attended by representatives of industry, government and problem gambling agencies; preliminary consultations with other club managers and community groups; and the establishment of an Industry Reference Group comprised of representatives from the Registered Clubs Association of NSW, the Club Managers' Association Australia, the Australian Hotels Association, the Totalisator Agency Board, Star City Casino, NSW Council of Social Service, the Department of Gaming and Racing, Premier's Department and the NSW Cabinet Office.

- Stage Two: Trial Program, involving preparation and revision of a responsible provision of gambling program in consultation with the Registered Clubs Association, Industry Reference Group and other key stakeholders; incorporation of an evaluation process into the program; and trial of the program in about 20 NSW clubs for four months.

- Stage Three: Evaluation of the Trial Program, involving the preparation of an evaluation report distributed within the Registered Clubs Association and to government and other interested parties for review and feedback; and publication and distribution of a final report.

- Stage Four: Post-Evaluation, involving refinement of the policy and program by the Registered Clubs Association in light of the evaluation report for statewide implementation of responsible provision of gambling; regular reviews of the program; and reviews of input that may arise from the forthcoming NSW and Federal Inquiries into gambling.

At the time of writing, Stage One was complete. Stage Two was in progress, with the *Responsible Management of Gambling Strategies* developed and being trialed. These strategies embrace the key policy areas of harm minimisation, compliance and enforcement, and consumer and employee protection. Seven key strategy areas are identified as signage, brochures and publications, self-exclusion, responsible marketing, community liaison, financial transactions and credit, the gambling environment, and venue interventions. The evaluation report is due by November 1998.

2.3 Summary

While the social impacts of gambling have received increased government attention in recent years, the *Liquor and Registered Clubs Legislation Amendment (Community Partnership Act) 1998 NSW* provided, for the first time, a legal obligation for the Registered Clubs Association to publish a problem gambling policy. The legislation does not specify how that policy should be implemented in NSW clubs, with the State Government opting for a self-regulatory approach to the issue. To this end, the Association has commissioned the Australian Institute for Gambling Research to develop a set of related strategies and to trial these in a small number of clubs to allow evaluation, refinement and subsequent statewide implementation after November 1998. The self-regulatory approach necessarily relies on clubs to voluntarily implement these strategies. Given the challenges identified in the first study, *Towards Responsible Provision of Gaming in New South Registered Clubs* (1997), it is pertinent to assess current practices in responsible provision of gambling in NSW clubs and their likely future implementation of responsible provision of gambling strategies. The remainder of this report focuses on the survey findings which address these objectives.

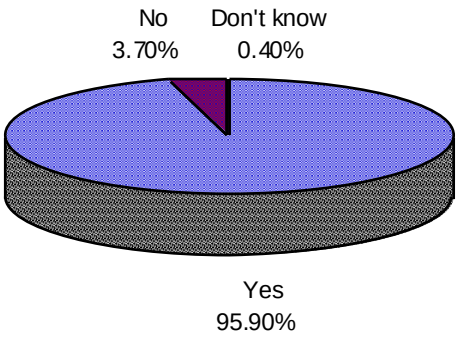
SECTION THREE
RESPONSIBILITY FOR ADDRESSING GAMBLING-RELATED PROBLEMS

This section summarises and discusses responses to questions about the club managers' perceptions of gambling-related problems and responsibility for minimising these. Two questions were asked about perceptions of gambling-related problems - whether gambling results in serious problems for some gamblers and which types of gambling are most likely to be associated with problem gambling. A range of questions were then asked about responsibility for minimising gambling-related problems, whether the NSW club industry does or should take more responsibility, the NSW Department of Gaming and Racing's responsible gaming policy, and legal obligations in responsible provision of gambling.

3.1 Perceptions of Gambling-Related Problems

As shown in Figure 1, 95.9% of respondents agreed that gambling does cause serious problems for some gamblers.

Figure 1
Frequency Distribution: Does Gambling Cause Serious Problems for Some Gamblers?



When asked which types of gambling they thought most likely associated with problem gambling, respondents nominated casino table games, TAB betting and gaming machines as the most likely types, respectively, followed by on-course betting, lotto/lottery and sportsbetting. Very few respondents nominated keno or bingo as associated with problem gambling. These results are shown in Table 1.

Table 1
Frequency Distribution: Which Types of Gambling Are Most Likely Associated with Problem Gambling?

	Most Likely %	2nd Most Likely %	3rd Most Likely %	Weighted %[a]
Casino table games	34.8	21.1	21.1	167.7
TAB betting	26.7	29.1	22.7	161.0
Gaming machines	23.1	25.5	25.5	145.8
On-course betting	4.9	12.1	12.6	51.5
Lotto/lottery	1.2	2.8	5.3	14.5
Sports betting	0.4	1.2	2.4	6.0
Keno	0.0	0.4	0.8	1.6
Bingo	0.0	0.4	0.4	1.2
Other[b]	7.6	5.2	2.0	35.2

a Weighted % were calculated by allocating 3 points to most likely, 2 points to 2nd most likely and 1 point to 3rd most likely. While somewhat crude, this method allows an overall comparison of the perceived association of each type of gambling with problem gambling.

b 'Other' consisted mainly of combinations of types of gambling.

3.2 Responsibility for Minimising Gambling-Related Problems

When asked whose responsibility they thought it is to minimise gambling-related problems, the club managers nominated individual gamblers, the state government and gambling venues as having most responsibility, respectively, followed by counselling/welfare bodies. Very few respondents nominated 'no one' or poker machine manufacturers. These results are shown in Table 2.

Table 2
Frequency Distribution: Responsibility for Minimising Gambling-Related Problems

	Most Responsibility %	2nd Most Responsibility %	3rd Most Responsibility %	Weighted %[a]
Individual gamblers	49.0	16.6	19.4	199.6
State government	31.2	28.7	17.4	168.4
Gambling venues	13.8	32.4	28.3	134.5
Counselling/welfare bodies	1.2	13.8	17.8	49.0
No one	0.4	2.0	5.7	10.9
Poker machine manufacturers	0.0	1.6	4.5	7.7
Other[b]	3.6	2.8	2.8	18.6

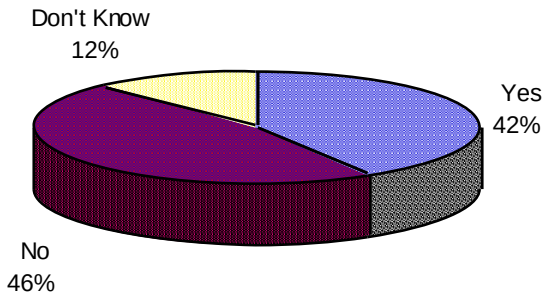
a Weighted % were calculated by allocating 3 points to most responsibility, 2 points to 2nd most responsibility and 1 point to 3rd most responsibility. While somewhat crude, this method allows an overall comparison of the perceived responsibility for minimising gambling-related problems.

b 'Other' consisted mainly of combinations of stakeholders.

3.3 Responsibility of the NSW Club Industry in Minimising Gambling-Related Problems

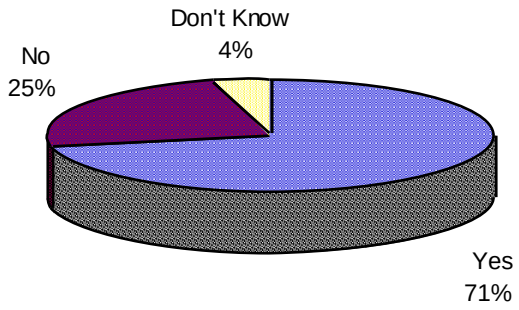
As shown in Figure 2, 41.6% of managers considered that the NSW club industry is currently taking sufficient responsibility in minimising gambling-related problems, outnumbered by the 46.5% who consider it is not. 11.9% were uncommitted.

Figure 2
Frequency Distribution: Is the NSW Club Industry Currently Taking Sufficient Responsibility for Minimising Gambling-Related Problems?



Despite the large proportion of respondents who thought the NSW club industry is currently taking sufficient responsibility in minimising gambling-related problems, most (71.3%) thought it also in the best interests of the industry to take more responsibility, as shown in Figure 3.

Figure 3
Frequency Distribution: Is it in the Best Interests of the NSW Club Industry to Take More Responsibility for Minimising Gambling-Related Problems?

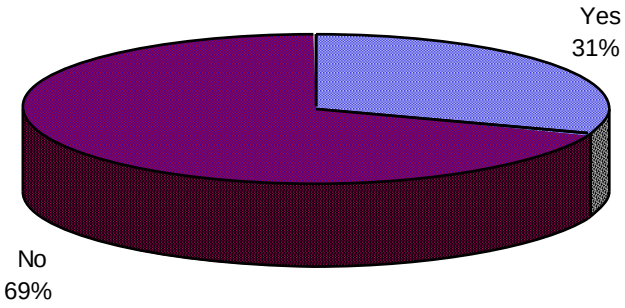


3.4 NSW Department of Gaming and Racing's Responsible Gaming Policy

When asked whether they had seen the responsible gaming policy developed by the NSW Department of Gaming and Racing, publicised in their *Liquor and Gaming* bulletins in December 1997 and March 1998 and also displayed at various trade shows, only 30.7% of

respondents answered in the affirmative, as shown in Figure 4. Of those that had seen the policy, about one-third thought it adequate to ensure responsible provision of gambling in NSW clubs, about one-third thought it inadequate, and about one-third stated they did not know.

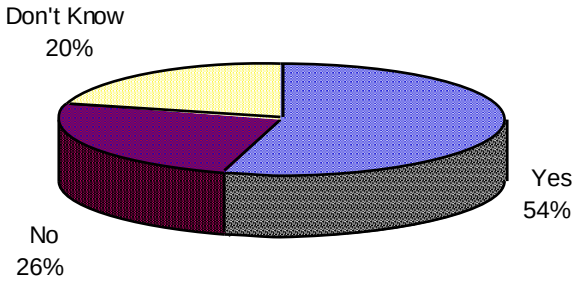
Figure 4
Frequency Distribution: Have You Seen the NSW Department of Gaming and Racing's Responsible Gaming Policy?



3.5 Legal Obligations in Responsible Provision of Gambling

Most respondents thought that legislation applying to NSW clubs in machine gaming was adequate to ensure responsible provision of gambling. Most (54%) thought it adequate, about a quarter (26%) thought it inadequate, while 20% stated they did not know, as shown in Figure 5.

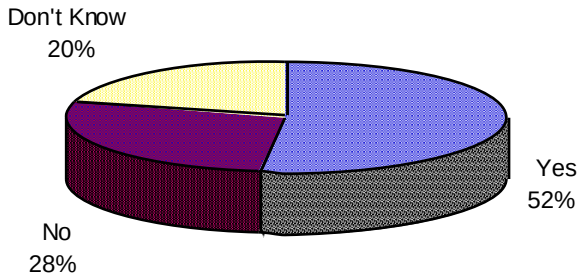
Figure 5
Frequency Distribution: Is Legislation Applying to NSW Clubs in Machine Gaming Adequate to Ensure Responsible Provision of Gaming in Clubs?



Perhaps some respondents who that thought legislation inadequate to ensure responsible provision of gambling in NSW clubs felt this way because of lack of compliance. 27.5% of

respondents felt that the legislation is not adhered to sufficiently to ensure responsible provision of gambling in NSW clubs, as shown in Figure 6.

Figure 6
Frequency Distribution: Is Legislation Applying to NSW Clubs in Machine Gaming Adhered to Sufficiently to Ensure Responsible Provision of Gaming in Clubs?



SECTION FOUR
SUPPORT FOR INDUSTRY LEVEL STRATEGIES IN RESPONSIBLE PROVISION OF GAMBLING

This section summarises and discusses the club managers' responses to questions about possible industry level strategies in responsible provision of gambling. These questions were based on industry initiatives in responsible gambling adopted by some gambling operators in South Australia and Victoria. These include industry guidelines in responsible gambling, a self-regulating code of practice, training for gambling venue staff, a cooperative approach to responsible gambling amongst gambling industries, and an industry accord to develop and periodically review responsible gambling strategies and liaise with key community groups.

4.1 Venue Guidelines

As shown in Figures 7 and 8, the vast majority of club managers (88.0%) supported the development and implementation of venue guidelines in responsible provision of gambling, with 86.1% saying their club would be likely to adopt them if developed for the NSW club industry. 75.3% considered such guidelines should be developed cooperatively amongst all gambling sectors, rather than individually. According to the responses, over half the managers thought this development should involve the Registered Clubs Association of NSW (90.0%), the Club Managers' Association Australia (80.5%) and the NSW Department of Gaming and Racing (78.0%). Less than half thought counselling/welfare bodies (49.4%), the Poker Machine Council of Australia (41.9%), other gambling sectors (27.8%), concerned community groups (23.6%) and poker machine manufacturers (23.2%) should be involved. Over half the respondents thought that such guidelines should be funded by the NSW Department of Gaming and Racing (84.2%) and/or the Registered Clubs Association of NSW (57.7%). However, less than half thought poker machine manufacturers (32.0%), the Club Managers' Association Australia (29.0%), other gambling sectors (17.0%) counselling/welfare bodies (11.6%) and concerned community groups (0.1%) should contribute.

Figure 7
Frequency Distribution: Should the NSW Club Industry Develop Guidelines to Help Clubs Adopt More Responsible Gaming Practices?

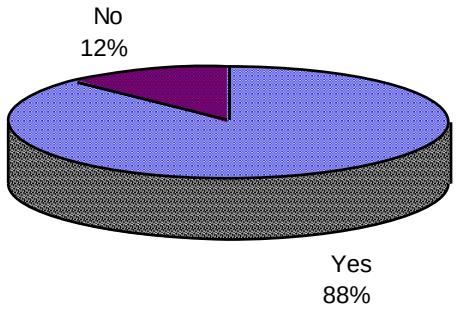
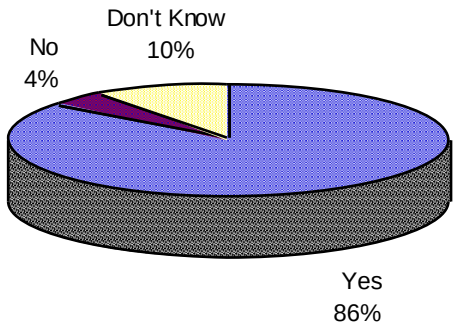


Figure 8
Frequency Distribution: Would Your Club be Likely to Adopt Responsible Provision of Gambling Guidelines?



4.2 Self-Regulating Code of Practice

As shown in Figures 9 and 10 and , the vast majority of club managers (88.0%) also supported the development and implementation of a self-regulating code of practice in responsible provision of gambling, with 84.0% saying their club would be likely to adopt one if developed for the NSW club industry. 72.0% considered such a code should be developed cooperatively amongst all gambling sectors, rather than individually. According to the responses, over half the managers thought this development should involve the Registered Clubs Association of NSW (90.4%), the Club Managers' Association Australia (83.0%) and the NSW Department of Gaming and Racing (70.5%). However, less than half the respondents thought that the Poker Machine Council of Australia (39.0%), counselling/welfare bodies (32.0%), other gambling sectors (23.7%), concerned community groups (19.1%) and poker machine manufacturers (17.0%) should be involved. Over half the

respondents thought that such a code of conduct should be funded by the NSW Department of Gaming and Racing (76.8%) and/or the Registered Clubs Association of NSW (62.9%). Less than half thought the Club Managers' Association Australia (32.9%), poker machine manufacturers (24.9%), the Poker Machine Council of Australia (14.8%), counselling/welfare bodies (0.1%) and concerned community groups (0.1%) should contribute.

Figure 9
Frequency Distribution: Should the NSW Club Industry Implement a Self-Regulating Code of Practice in Responsible Gaming?

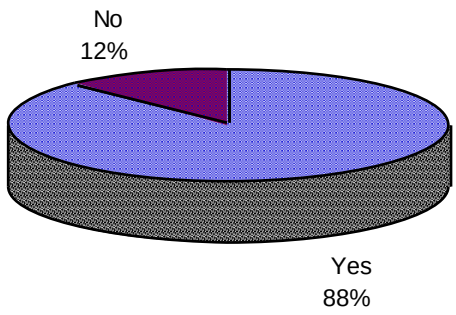
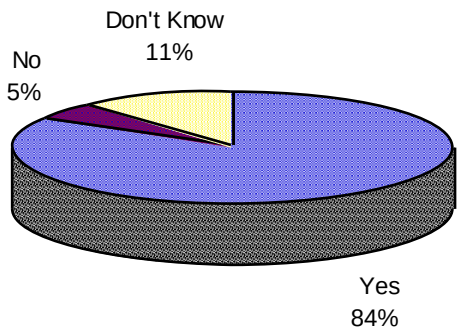


Figure 10
Frequency Distribution: Would Your Club be Likely to Adopt a Self-Regulating Code of Practice in Responsible Provision of Gaming?



4.3 Management and Staff Training

As shown in Figures 11 and 12, the vast majority of club managers (88.0%) also supported the development and implementation of training programs for club managers and staff in responsible gambling, with 80.3% saying their club would be likely to adopt them if developed for the NSW club industry. 61.9% considered such training programs should be developed cooperatively amongst all gambling sectors, rather than individually. According to the responses, over half the managers thought that this development should involve the

Registered Clubs Association of NSW (89.6%), the Club Managers' Association Australia (5.5.0%) and the NSW Department of Gaming and Racing (58.5%). However, less than half the respondents thought that the Poker Machine Council of Australia (28.2%), counselling/welfare bodies (28.2%), other gambling sectors (17.4%), poker machine manufacturers (15.4%) and concerned community groups (11.2%) should be involved. Over half the respondents thought such training programs should be funded by the NSW Department of Gaming and Racing (76.3%) and/or by the Registered Clubs Association of NSW (62.9%). However, less than half felt that the Club Managers' Association Australia (40.8%), poker machine manufacturers (29.2%), the Poker Machine Council of Australia (14.6%), other gambling sectors (0.2%), counselling/welfare bodies (0.1%) and concerned community groups (0.1%) should contribute.

Figure 11
Frequency Distribution: Should the NSW Club Industry Implement Training Programs for Club Managers and Staff in Responsible Gaming?

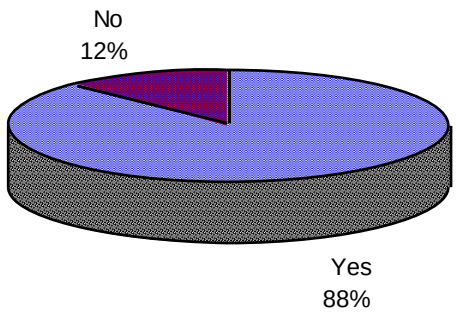
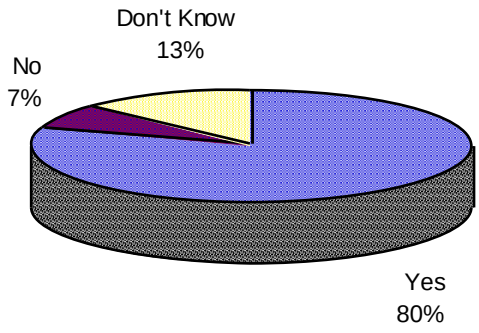


Figure 12
Frequency Distribution: Would Your Club be Likely to Adopt a Training Program in Responsible Provision of Gaming?



4.4 Industry Accord and Disputes Resolution Body

A slightly lower majority of respondents supported the development of an industry accord amongst various gambling sectors to develop and review responsible gambling initiatives and to liaise with community groups (79.8%), and the development of an independent disputed resolution body to deal with disputes and unethical practices (64.8%), as shown in Figures 13 and 14.

Figure 13
Frequency Distribution: Should the NSW Club Industry Encourage an Industry Accord?

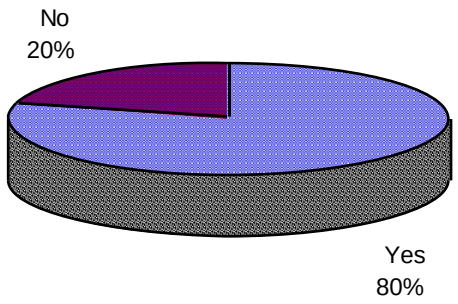
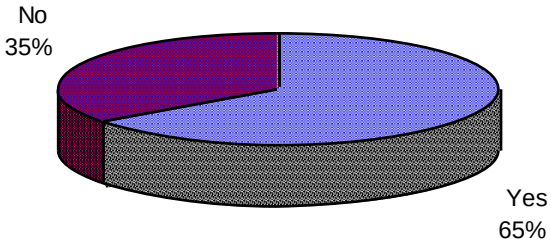


Figure 14
Frequency Distribution: Should the NSW Club Industry Encourage an Independent Disputes Resolution Body?



SECTION FIVE
SUPPORT FOR VENUE LEVEL STRATEGIES IN RESPONSIBLE PROVISION OF GAMBLING

This section summarises and discusses the club managers' responses to questions about possible venue level strategies in responsible provision of gambling. While these questions were based on venue level strategies adopted by gambling operators in South Australia and Victoria, they will be grouped here according to six of the strategy areas in the Registered Clubs Association's *Responsible Management of Gambling Strategies* (Australian Institute for Gambling Research, 1998). These areas are signage, brochures and publications, self-exclusion, financial transactions and credit, responsible marketing, venue interventions, and community liaison.

5.1 Signage, Brochures and Publications

One goal of the Registered Clubs Association's *Responsible Management of Gambling Strategies* (Australian Institute for Gambling Research, 1998) is 'to inform patrons and staff of the venue's responsible gambling policy, gambling facilities and the availability of support services for problem gamblers' through the use of signage, brochures and publications. Twelve related questions were asked of the club managers surveyed.

As shown in Figure 15, the vast majority of respondents were agreeable to implementing a house policy on responsible provision of gambling, with 23.4% already having one in place and 73.3% willing to do so. Only 3.3% stated they would not implement one.

Figure 15
Frequency Distribution: Would Your Club Implement a House Policy on Responsible Provision of Gaming?

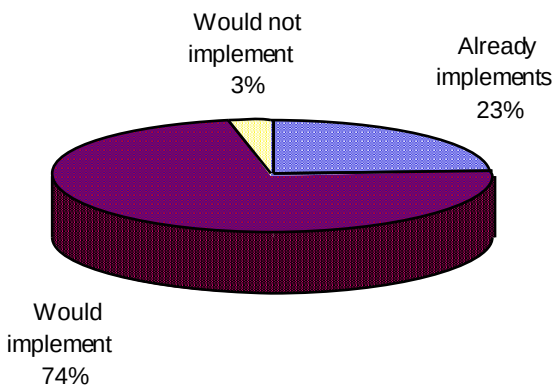
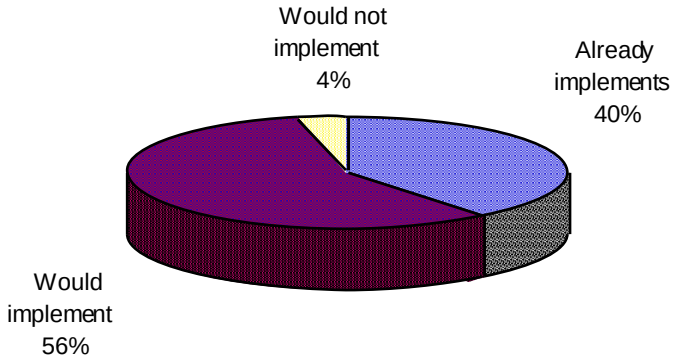


Figure 16 shows that nearly two-fifths (39.5%) of clubs whose managers responded already provided signage for patrons on responsible provision of gambling, with a further 56.8% willing to do so. Only 3.7% would not implement this.

Figure 16
Frequency Distribution: Would Your Club Provide Signage for Patrons About Responsible Provision of Gaming?



Three questions were asked about providing information for poker machine players on how machines work. As shown in Figures 17 to 19, the majority of club managers already, or would be willing to provide such information if endorsed by the NSW club industry, although sizeable minorities would resist this.

Figure 17
Frequency Distribution: Would Your Club Provide Player Information on How Poker Machines Work?

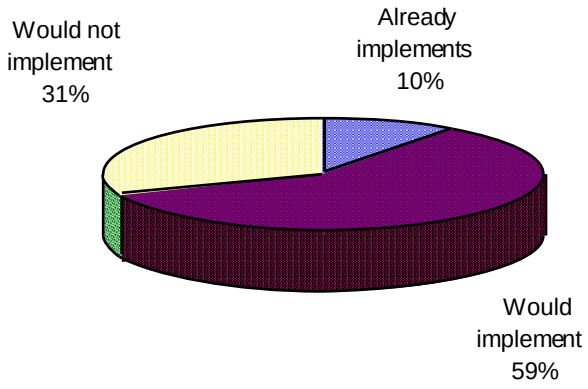


Figure 18
Frequency Distribution: Would Your Club Provide Player Information on How Different Features of Poker Machines Influence Bet Size?

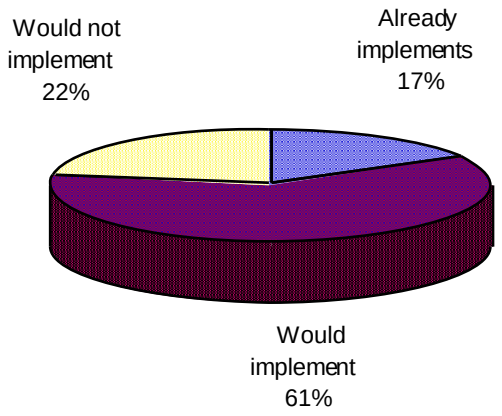
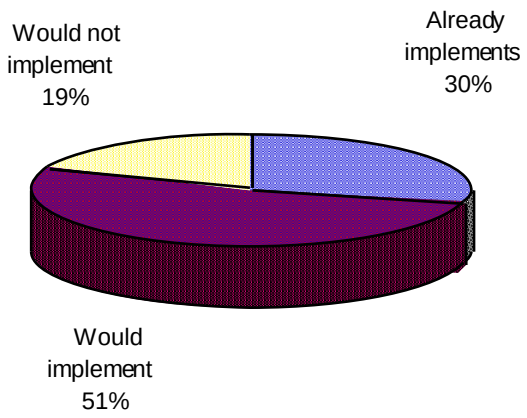
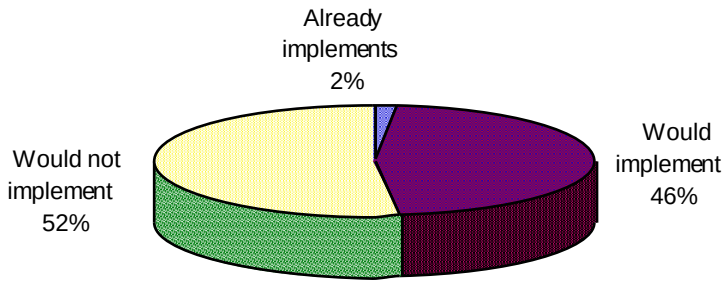


Figure 19
Frequency Distribution: Would Your Club Provide Player Information on How Payouts Occur on Poker Machines?



However, providing player information on budgeting money for playing poker machines would be resisted by most clubs (52.1%), as shown in Figure 20. Only 1.7% already followed this practice, with a further 46.3% willing to do so.

Figure 20
Frequency Distribution: Would Your Club Provide Player Information on Budgeting Money for Playing Poker Machines?



Three questions were asked about providing player information about recognising and acting on a gambling problem. Figures 21 to 23 indicate high acceptance of these practices, with an encouraging proportion of clubs already providing information about a telephone hotline service for problem gamblers.

Figure 21
Frequency Distribution: Would Your Club Provide Player Information on Recognising if They Have a Gambling Problem?

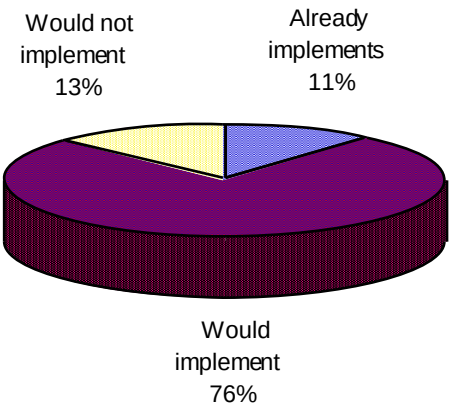


Figure 22
Frequency Distribution: Would Your Club Provide Player Information on What to do if They Think They Have a Gambling Problem?

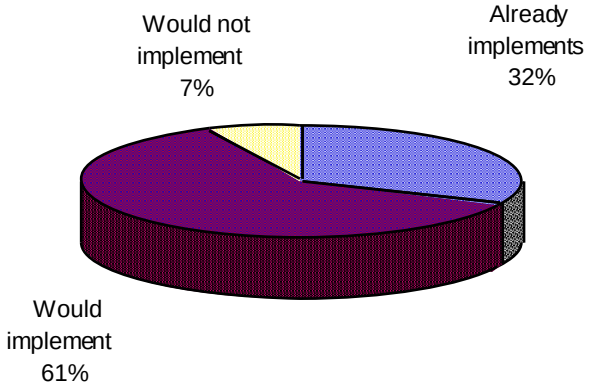
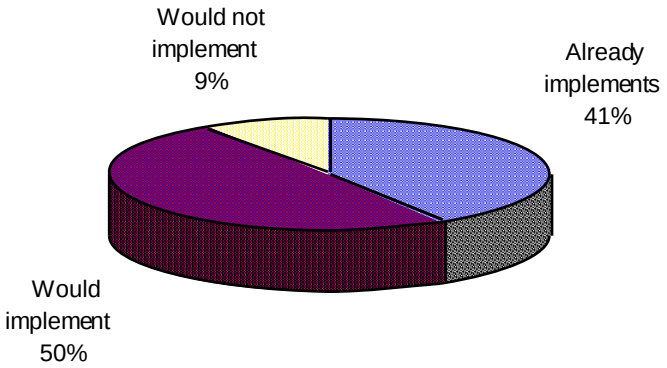


Figure 23
Frequency Distribution: Would Your Club Provide Player Information on a Telephone Hotline Service for Problem Gamblers?



Two questions were asked about informing patrons about machine malfunctions and actions to take if they have a machine related complaint or dispute. Figures 23 and 24 indicate reasonably high levels of current compliance with both these practices and a high degree of willingness to implement them.

Figure 24
Frequency Distribution: Would Your Club Provide Player Information on Recognising if a Machine Has Malfunctioned of Short Paid Them?

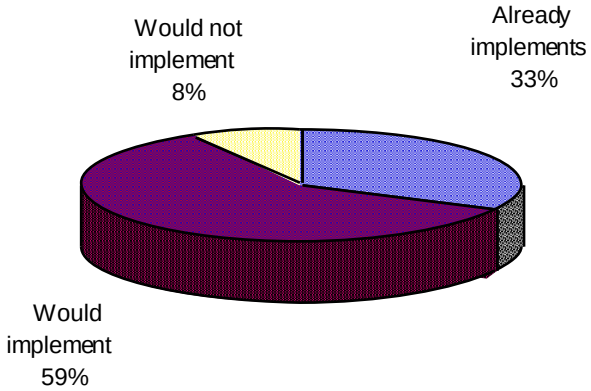
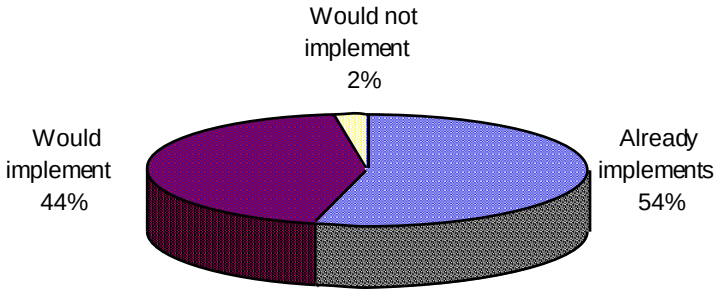
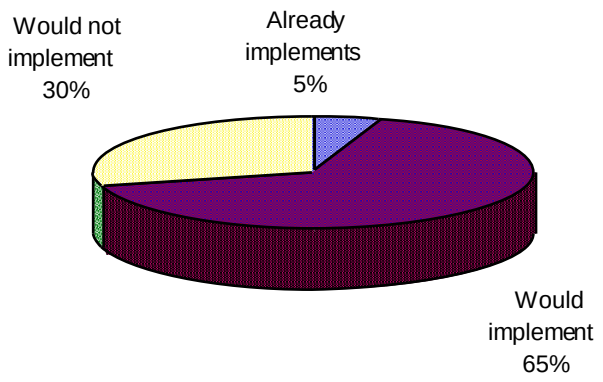


Figure 25
Frequency Distribution: Would Your Club Provide Player Information on What to do if They Have a Machine Related Complaint or Dispute?



However, there was greater resistance to providing multi-lingual information for poker machine players from non-English speaking backgrounds. Only 5.0% of clubs already provide this, 64.7% would be willing to do so, while 29.9% would be unwilling, as shown in Figure 26.

Figure 26
Frequency Distribution: Would Your Club Provide Multi-Lingual Information for Poker Machine Players?

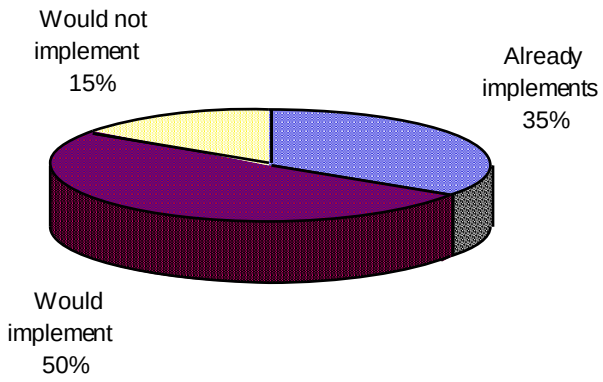


5.2 Self-Exclusion

A second goal of the Registered Clubs Association's *Responsible Management of Gambling Strategies* (Australian Institute for Gambling Research, 1998) is 'to encourage patrons at risk of gambling problems to take responsibility for their behaviour through an effective self-exclusion mechanism'.

Figure 27 indicates that this strategy is already implemented in 34.6% of clubs, with another 50.0% willing to implement it if endorsed by the industry. However, 15.0% of respondents were opposed to a self-exclusion program.

Figure 27
Frequency Distribution: Would Your Club Encourage Problem Gamblers to Self-Bar Themselves from Playing Poker Machines?

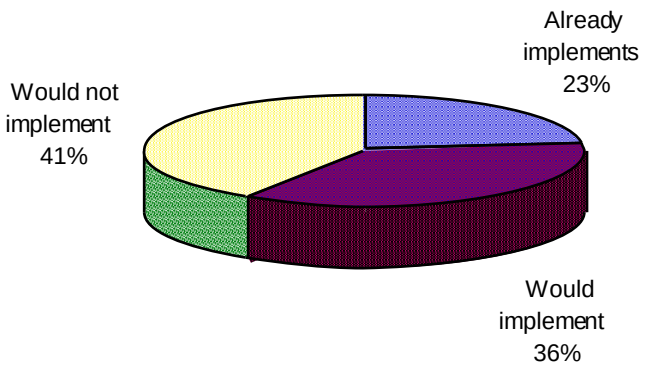


5.3 Financial Transactions and Credit

Through strategies relating to financial transactions and credit, the Registered Clubs Association's *Responsible Management of Gambling Strategies* (Australian Institute for Gambling Research, 1998) aim 'to encourage patrons to develop responsible practices in the use of finances for gambling purposes through limiting the availability of cash and credit. Seven related questions were asked of the club managers surveyed.

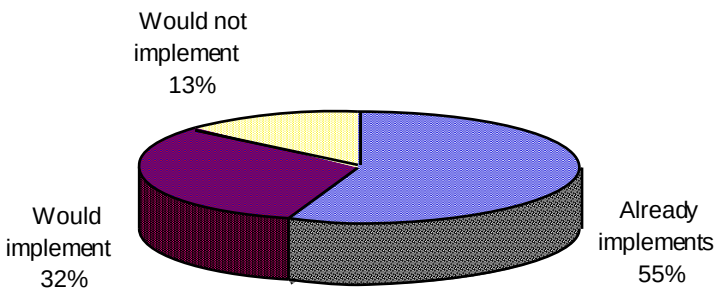
A degree of resistance was shown towards encouraging a cooling-off period before poker machine players collect big wins, with 40.9% of respondents stating that their club would not implement this. However, 22.7% of clubs already do this, and a further 36.0% would be willing to do so, as shown in Figure 28.

Figure 28
Frequency Distribution: Would Your Club Encourage a Cooling-Off Period Before Players Collect Big Wins?



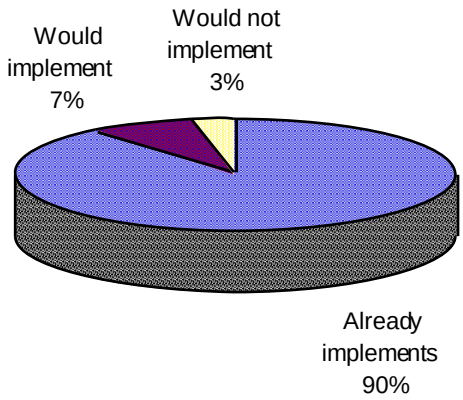
However, most clubs already encourage big winners to take payment by cheque instead of cash. As Figure 29 indicates, over half the clubs (55.0%) already do this, a further 31.4% would be willing to do so, with this strategy resisted by only 13.2% of club managers.

Figure 29
Frequency Distribution: Would Your Club Encourage Big Winners to Take Payment by Cheque?



Credit betting is illegal, and the respondents showed a high degree of compliance with this. 83.9% of respondents stated that their club already prevents credit betting. However, while 7.4% would be willing to do so if endorsed by the industry, 3.3% stated their club would not implement such a strategy. These results are shown in Figure 30.

Figure 30
Frequency Distribution: Would Your Club Prevent Credit Betting?



Four questions were asked about access to cash for playing poker machines from cheques, EFTPOS machines and ATMs. However, the club managers' responses indicate a high level of resistance to limiting access to gambling money through these means. Nearly half the clubs would not prohibit cheque cashing for playing machines (48.7%) and ATMs in poker machine areas (44.4%). Even higher proportions of managers were opposed to prohibiting cash withdrawals to play poker machines from EFTPOS machines (87.0%) and to prohibiting ATMs in the club (93%.0). Figures 31 to 34 show these results.

Figure 31
Frequency Distribution: Would Your Club Prohibit Cashing of Patrons' Cheques for Playing Poker Machines?

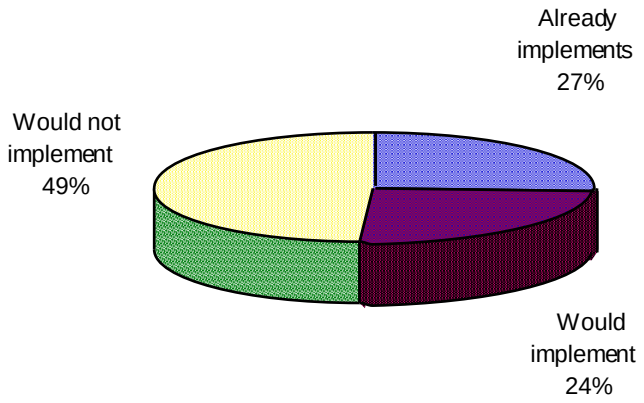


Figure 32
Frequency Distribution: Would Your Club Prohibit ATMs in Poker Machine Areas?

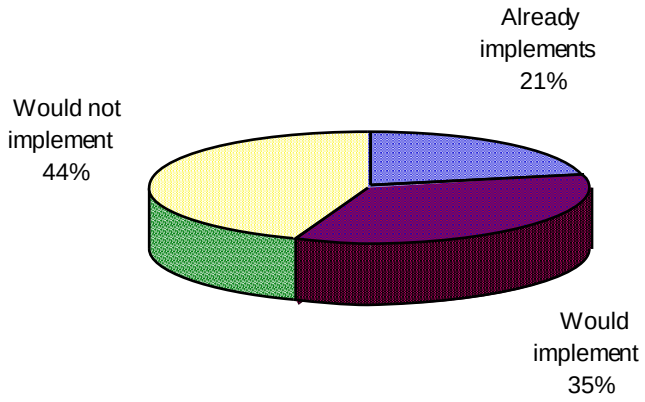


Figure 33
Frequency Distribution: Would Your Club Prohibit Cash Withdrawals from EFTPOS Machines for Playing Poker Machines?

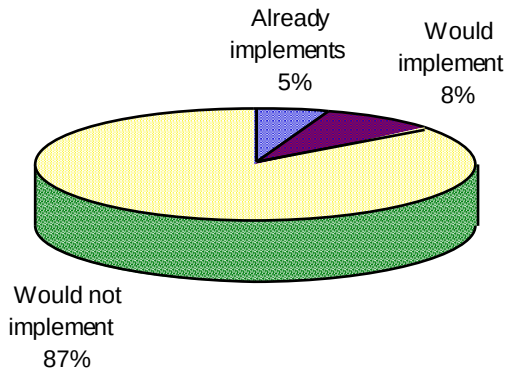
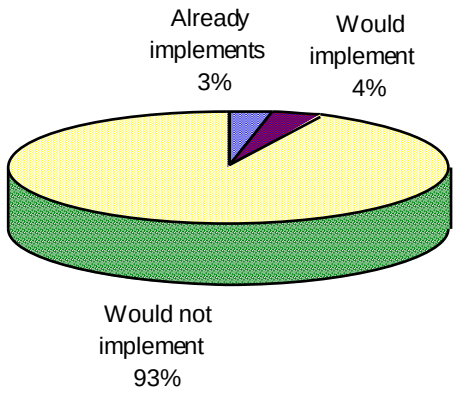


Figure 34
Frequency Distribution: Would Your Club Prohibit ATMs in the Club?

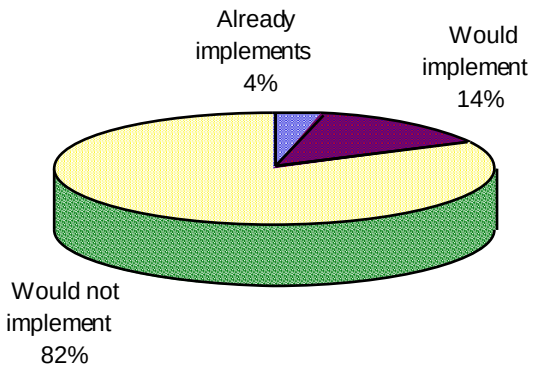


5.4 Responsible Marketing

In the area of responsible marketing, the Registered Clubs Association's *Responsible Management of Gambling Strategies* (Australian Institute for Gambling Research, 1998) aim 'to promote responsible advertising of gambling products and to conform with community standards'. The surveyed club managers were asked three related questions.

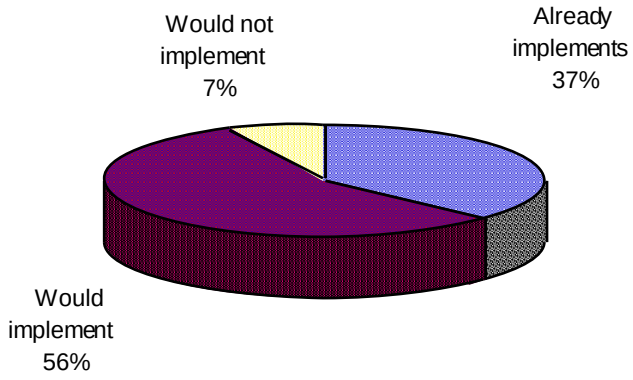
High levels of opposition were shown towards preventing any advertising or promotion of poker machine gaming. While 3.7% of clubs currently refrain from this, only 13.6% would implement this strategy if endorsed by the industry. 82.6% were opposed to this, as shown in Figure 35.

Figure 35
Frequency Distribution: Would Your Club Prevent Advertising or Promotion of Poker Machine Gaming?



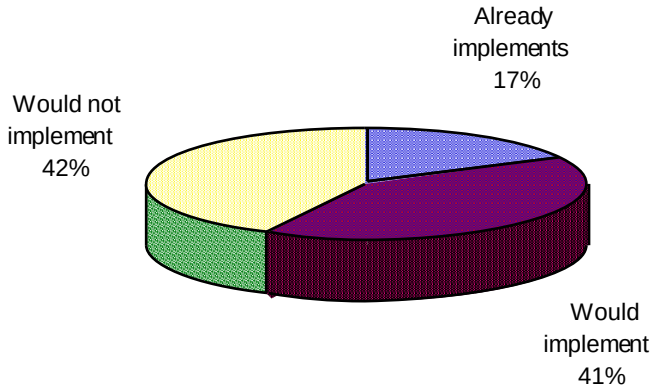
Encouragingly, the club managers were far more supportive of ensuring that advertising and promotion of poker machine gaming is socially responsible. 36.4% of respondents stated that this already occurs in their club, while 54.5% would be willing to do so if endorsed by the industry. However, 7.0% of respondents were opposed to this, as Figure 36 indicates.

Figure 36
Frequency Distribution: Would Your Club Ensure that Advertising or Promotion of Poker Machine Gaming is Socially Responsible?



However, many respondents did not extend this support when asked if their club would restrict poker machine advertising to certain media, publications, or times of day to prevent minors seeing it, with 42.4% of club managers opposed to such a restriction. Figure 37 shows the breakdown of these results.

Figure 37
Frequency Distribution: Would Your Club Restrict Poker Machine Advertising to Prevent Minors Seeing It?

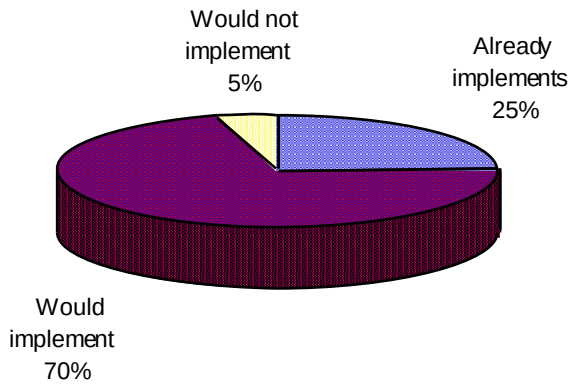


5.5 Venue Interventions in Responsible Gaming

Through venue interventions, the Registered Clubs Association's *Responsible Management of Gambling Strategies* (Australian Institute for Gambling Research, 1998) aim 'to promote the concept of patron and employee care through informing and training venue staff on problem gambling and appropriate interventions'. Six related questions were asked in the present survey.

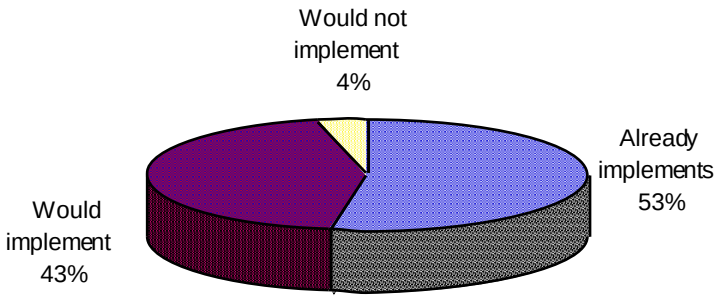
As shown in Figure 38, the vast majority of club managers felt that their club already (25.0%), or would (69.7%), ensure that staff can recognise signs of problem gambling.

Figure 38
Frequency Distribution: Would Your Club Ensure Staff Can Recognise Signs of Problem Gambling?



Encouragingly, most club managers (52.5%) stated that their club already knew where to refer problem gamblers to for help, with a further 43.0% willing to embrace this if endorsed by the industry. Only 3.7% were opposed to this idea, as Figure 39 shows.

Figure 39
Frequency Distribution: Does Your Club Know Where to Refer Problem Gamblers to for Help?



Three questions were asked relating to restrictions on poker machine playing in the club by staff. Nearly all clubs (94.3%) already prohibited staff playing poker machines while on duty and 80.4% prohibited this when staff are in uniform. However, only 24.4% prohibited poker machine playing by staff in the club at any time, with over half (51.0%) opposed to this restriction. These results are shown in Figures 40 to 42.

Figure 40
Frequency Distribution: Would Your Club Prohibit Club Employees Playing Poker Machines While on Duty?

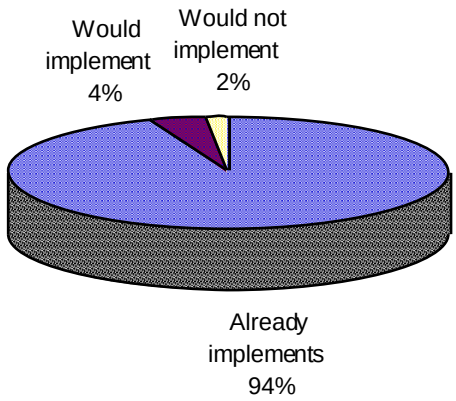


Figure 41
Frequency Distribution: Would Your Club Prohibit Club Employees Playing Poker Machines While in Uniform?

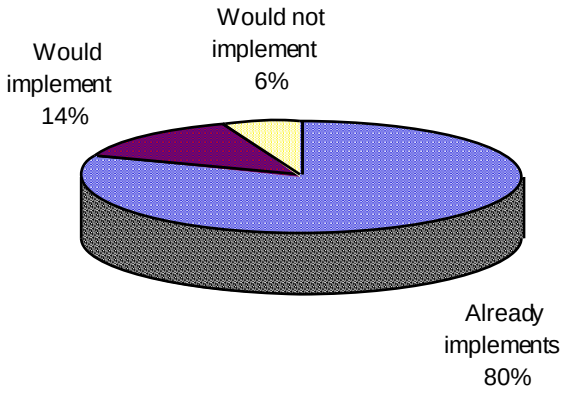
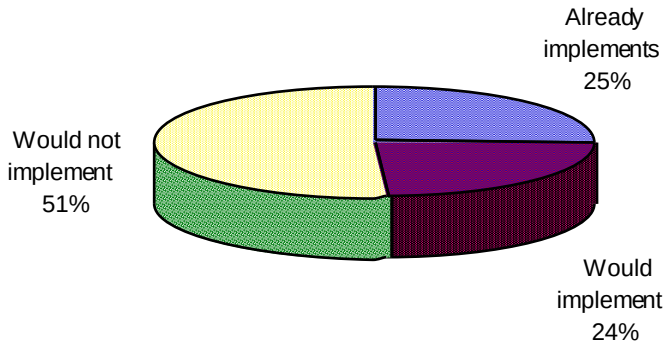


Figure 42
Frequency Distribution: Would Your Club Prohibit Club Employees Playing Poker Machines At All?

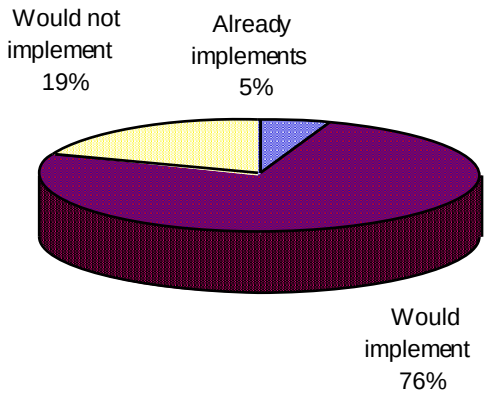


5.6 Community Liaison

The community liaison area in the Registered Clubs Association's *Responsible Management of Gambling Strategies* (Australian Institute for Gambling Research, 1998) aims 'to develop links between the venue and relevant community organisations that will provide support and advice for problem gamblers and their families and to promote community standards and expectations'. Five related questions were asked in the present survey.

As Figure 43 illustrates, while about one-fifth (19.0%) of club managers felt that their club would not liaise closely with the welfare sector to minimise harm in gambling, the majority (75.2%) were willing to do so, and 5.4% felt their club already did.

Figure 43
Frequency Distribution: Would Your Club Liaise Closely with the Welfare Sector to Minimise Harm in Gambling?



It is also apparent that most clubs would be willing to extend financial (57.2%) and in-kind support (72.3%) for gambling-related welfare/counselling services. However, low proportions of clubs already did this, with substantial minorities opposed to provision of financial donations. The breakdown of these results is shown in Figures 44 and 45.

Figure 44
Frequency Distribution: Would Your Club Donate Funds to Gambling-Related Welfare/Counselling Services?

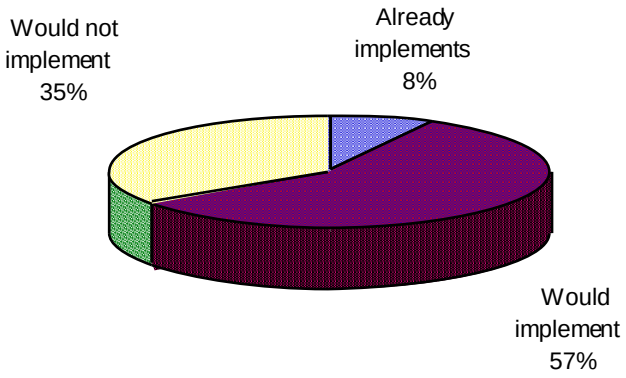
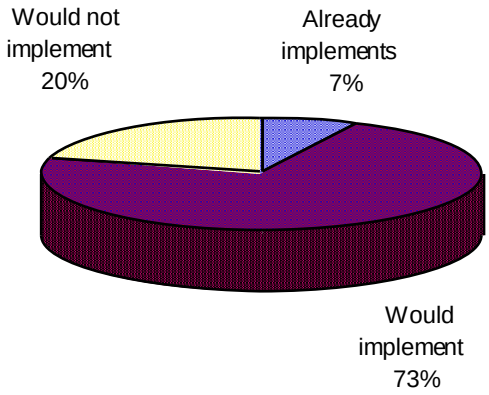


Figure 45
Frequency Distribution: Would Your Club Donate In-Kind to Gambling-Related Welfare/Counselling Services?



A similar degree of willingness was apparent when respondents were asked about donating financial and in-kind support for research into problem gambling and its treatment. As shown in Figures 46 and 47, 56.8% and 71.7% would donate financial and in-kind support, respectively, although there was a substantial minority again opposed to the provision of financial donations.

Figure 46
Frequency Distribution: Would Your Club Donate Funds for Research into Problem Gambling and its Treatment?

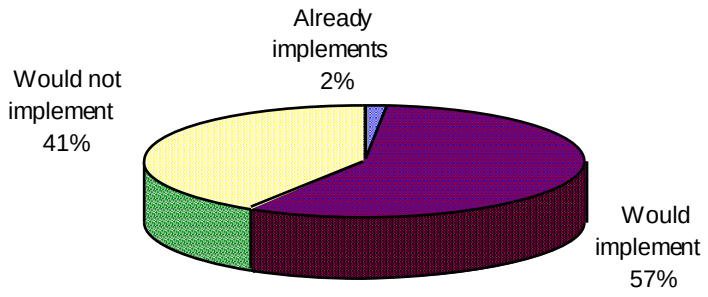
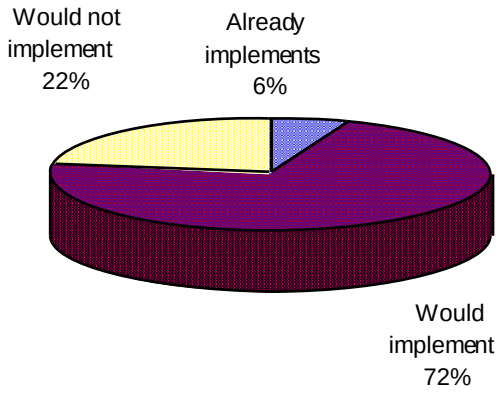


Figure 47
Frequency Distribution: Would Your Club Donate In-Kind for Research into Problem Gambling and its Treatment?



SECTION SIX
SUMMARY AND DISCUSSION

This section summarises and discusses the findings presented in previous sections in terms of responsibility for addressing gambling-related problems, support for industry level strategies and support for venue level strategies in responsible provision of gambling in NSW clubs.

6.1 Responsibility for Addressing Gambling-Related Problems

While the vast majority of responding club managers agreed that gambling causes serious problems for some gamblers, most felt that casino table games and TAB betting were more likely than machine gaming to be associated with problem gambling. However, about three-quarters of respondents felt that machine gaming was one of the top three types of gambling most likely to result in gambling problems. About half the managers felt that minimising gambling-related problems was primarily the responsibility of individual gamblers, followed by the state government. However, about three-quarters felt that gambling venues were amongst the top three main stakeholders with some responsibility. Fewer than half the respondents felt that the NSW registered clubs industry was not currently taking sufficient responsibility in this area, although nearly three-quarters thought it in the best interests of the industry to take more responsibility. There were low levels of familiarity with the NSW Department of Gaming and Racing's responsible gaming policy, and some acknowledgement that legal provisions are insufficient or not complied with adequately to ensure responsible provision of gambling in the clubs.

These findings suggest that, at least at the general level, most club managers are receptive to a more proactive approach by the industry to enhance social responsibility in machine gaming, although it is clear that this is considered a shared responsibility. Perhaps this is one of the reasons why a quarter of respondents felt that it was not in the best interests of the NSW club industry to take more responsibility for minimising gambling-related problems. If this is the case, then it appears that receptivity to responsible provision of gambling in the clubs could be enhanced by obligations for other gambling codes similar to those contained in the *Liquor and Registered Clubs Legislation Amendment (Community Partnership) Act 1998 NSW*, education of individual gamblers in responsible gambling, a less expansionist approach by the NSW State Government, and greater policy direction from the NSW Department of Gaming and Racing.

6.2 Support for Industry Level Strategies in Responsible Provision of Gambling

It appears that the industry level strategies in responsible provision of gambling which have been examined would receive support from most NSW clubs. Over four-fifths of respondents stated that their club would adopt responsible provision of gambling guidelines, a self-regulating code of practice and related training programs for management and staff. Most thought that the Registered Clubs Association, the Club Managers' Association Australia and the NSW Department of Gaming and Racing should be critically involved in the development of these, with funding provided by the Registered Clubs Association and the NSW Department of Gaming and Racing. There was also little opposition to an industry accord, although less support for an independent disputes resolution body.

However, most club managers felt that such industry initiatives should be developed cooperatively by all gambling sectors. This is consistent with majority opinions that minimising gambling-related problems is a shared responsibility. Again, it appears that support for these strategies within the club industry could be enhanced with similar initiatives in other gambling sectors. Nevertheless, given appropriate leadership and resource allocation from the key industry associations, in cooperation with the NSW Department of Gaming and Racing, it appears that the implementation of industry level strategies in responsible provision of gambling would be widely implemented in NSW clubs.

6.3 Support for Venue Level Strategies in Responsible Provision of Gambling

Amongst the respondents, there was very little resistance to many types of signage, brochures and publications on responsible provision of gambling. Support was shown by over 90% of respondents for a house policy, signage for patrons about responsible provision of gambling, what patrons should do if they think they have a gambling problem, information on a telephone hotline service for problem gamblers, providing player information on recognising machine malfunctions and what to do if they have a machine-related compliant. However, resistance was shown by a sizeable minority of respondents for providing player information on how machines work, how different machine features affect bet size, how payouts occur on machines, budgeting money for playing machines and recognising if they have a gambling problem, and for providing multi-lingual information.

However, while support for these types of venue strategies was reasonably positive, the majority of clubs do not currently provide the types of signage, brochures and publications examined. The most common strategies currently implemented were player information on actions to take in the event of a machine-related complaint or dispute, how to access a telephone hotline service for problem gamblers, signage for patrons about responsible provision of gambling, how to recognise machine malfunctions, what to do if they think they

have a gambling problem, and how payouts occur on machines, respectively. However, less than a quarter of respondents already implemented the other strategies examined in this area.

Self-exclusion programs are already provided by over one-third of the responding clubs, with another half willing to provide one. Of concern however, is the 15% who are opposed to this idea. Naturally, the reasons for this resistance are not apparent from the survey, but qualitative data analysed previously (Hing, 1997) revealed some scepticism over the effectiveness of self-exclusion programs, difficulties in monitoring entry of patrons, and concern for loss of revenue.

Greater resistance was shown to the strategies examined in the area of financial transactions and credit. While most clubs already prevent credit betting and encourage big winners to take payment by cheque rather than cash, current practices in the remaining areas was low. Further, the vast majority of clubs would not prohibit ATMs in the club, nor withdrawals from EFTPOS machines for playing poker machines, and over two-fifths would not encourage a cooling-off periods for big winners, prohibit cheque cashing for gambling purposes and removal of ATMs in poker machine areas.

In the area of responsible marketing of poker machines, current practices were low but stated intentions reasonably positive, at least overall. While most clubs were willing to ensure that their advertising and promotion of poker machine gaming is socially responsible, over two-fifths would not ensure that such advertising was inaccessible to minors, and four-fifths would not abstain from any advertising or promotion of machine gaming.

In terms of venue interventions in responsible gambling, only a little over half the clubs already know where to refer problem gamblers to for help and only one-quarter already ensure that their staff can recognise signs of problem gambling. However, there was very little resistance to implementing both these strategies in the future. The vast majority of clubs also already prevent their staff from playing poker machines while on duty and in uniform, but most clubs would resist preventing staff usage of poker machines at other times.

There was very low current implementation by the responding clubs of strategies examined in the area of community liaison. While about three-quarters of the clubs would be willing to improve these links by liaising more closely with the welfare sector and by providing in-kind support for the welfare sector and research into problem gambling and its treatment, about two-fifths of clubs would not extend this support to financial donations.

Clearly, there is a great degree of variation in both current practices in and willingness to implement the venue strategies examined, as shown in Tables 3 and 4, respectively.

Table 3
% of Clubs Already Implementing Various Venue Strategies in Responsible Provision of Gambling

Venue Strategy	%
Prohibit club employees from playing PMs while on duty	94.3
Prevent credit betting on PMs	89.3
Prohibit club employees from playing PMs while in uniform	80.7
Encourage big winners to take payment by cheque instead of cash	55.0
Provide player information about what to do if they have a PM related complaint/ dispute	53.9
Know where to refer patrons with gambling problems for help	52.5
Provide information on a telephone hotline service for problem gamblers	41.4
Provide signage for players about responsible practice of gaming	39.5
Ensure advertising & promotion of PM gaming is socially responsible	36.4
Encourage problem gamblers to self-bar themselves from PMs	34.6
Provide player information about how to recognise if a PM has malfunctioned or short-paid them	32.5
Provide player information about what to do if they think they have a gambling problem	32.0
Provide player information about how payouts occur on PMs	29.4
Prohibit cashing of patrons' cheques for cash to play PMs	26.5
Ensure gaming staff can recognise signs of problem gambling	25.0
Prohibit club employees from playing PMs in the club at all	24.5
Have a house policy on responsible provision of gaming	23.5
Encourage a cooling off period before PM players collect big wins	22.7
Prohibit ATMs in PM areas	21.0
Restrict PM advertising to certain media, publications, or times to prevent minors seeing it	16.8
Provide player information on how different features of PMs influence bet size	16.5
Provide player information about recognising if they have a gambling problem	11.1
Provide player information on how PMs work	9.5
Donate funds to gambling-related counselling/welfare services	7.6
Donate in-kind support for gambling-related counselling/welfare services	7.2
Donate in-kind support for research into problem gambling & its treatment	5.9
Prohibit obtaining cash to play PMs from club EFTPOS facilities	5.5
Liaise closely with the welfare sector to minimise harm in gambling	5.4
Provide multi-lingual information about PMs for NESB players	5.0
Prevent any advertising or promotion of PM gaming	3.7
Prohibit ATMs in the club	3.3
Donate funds for research into problem gambling & its treatment	1.7
Provide player information about budgeting money for playing PMs	1.7

Table 4
% of Clubs Unwilling to Implement Various Venue Strategies in Responsible Provision of Gambling

Venue Strategy	%
Prohibit ATMs in the club	93.0
Prohibit obtaining cash to play PMs from club EFTPOS facilities	86.1
Prevent any advertising or promotion of PM gaming	82.6
Provide player information about budgeting money for playing PMs	52.1
Prohibit club employees from playing PMs in the club at all	51.0
Prohibit cashing of patrons' cheques for cash to play PMs	48.7
Prohibit ATMs in PM areas	44.4
Restrict PM advertising to certain media, publications, or times to prevent minors seeing it	42.4
Donate funds for research into problem gambling & its treatment	41.5
Encourage a cooling off period before PM players collect big wins	40.9
Donate funds to gambling-related counselling/welfare services	34.7
Provide player information on how PMs work	31.1
Provide multi-lingual information about PMs for non-English speaking players	29.9
Donate in-kind support for research into problem gambling & its treatment	21.9
Provide player information on how different features of PMs influence bet size	21.9
Donate in-kind support for gambling-related counselling/welfare services	20.0
Liaise closely with the welfare sector to minimise harm in gambling	19.0
Provide player information about how payouts occur on PMs	18.5
Encourage problem gamblers to self-bar themselves from PMs	14.6
Encourage big winners to take payment by cheque instead of cash	13.2
Provide player information about recognising if they have a gambling problem	12.8
Provide information on a telephone hotline service for problem gamblers	9.4
Provide player information about how to recognise if a PM has malfunctioned or short-paid them	7.9
Ensure advertising & promotion of PM gaming is socially responsible	7.0
Provide player information about what to do if they think they have a gambling problem	7.0
Prohibit club employees from playing PMs while in uniform	5.7
Ensure gaming staff can recognise signs of problem gambling	4.5
Know where to refer patrons with gambling problems for help	3.7
Provide signage for players about responsible practice of gaming	3.7
Prevent credit betting on PMs	3.3
Have a house policy on responsible practice of gaming	3.3
Provide player information about what to do if they have a PM related complaint or dispute	2.5
Prohibit club employees from playing PMs while on duty	1.6

From the summary of the club managers' support for venue level strategies in responsible provision of gambling, it appears that the area of greatest resistance relates to limiting access to cash for poker machine gaming. While most clubs comply with legal restrictions on credit betting and encourage big winners to accept cheque rather than cash payment, there is substantial resistance to limiting access to cash from ATMs, cheques and EFTPOS machines and imposing a cooling-off period before large winnings are collected. Similarly, certain restrictions on the advertising and promotion of poker machines would not be widely received, with few clubs willing to forgo advertising and promotion of the machines at all, and a substantial minority unwilling to prevent the exposure of minors to such marketing. Many clubs would also resist financial donations to the welfare sector and to research into problem gambling and its treatment.

A lesser, but still substantial degree of resistance from the clubs would also be likely in providing more comprehensive information for players about how poker machines operate, their different features and pay-back mechanisms, in building closer links with the welfare sector, in providing a self-exclusion program and in providing information for players on recognising if they might have a gambling problem..

Conversely, more passive strategies in responsible provision of gambling would seem likely to receive widespread implementation. The vast majority of clubs would display a range of signage relating to the venue's house policy on responsible provision of gambling, what players should do if they think they have a gambling problem, and poker machine related malfunctions, complaints and disputes. They would also appear to be willing to ensure staff can recognise signs of problem gambling and know where to refer them to for help.

SECTION SEVEN
CONCLUSIONS

Based on the research findings, the following conclusions are drawn which may assist the effective implementation of responsible provision of gambling strategies by the NSW registered clubs industry.

- The club managers surveyed clearly feel that responsible provision of gambling is a shared responsibility amongst numerous stakeholders. Thus, the possibilities of a consistent and cooperative approach to responsible provision of gambling across all NSW gambling industries should continue to be pursued. Unless similar obligations to those contained in the *Liquor and Registered Clubs Legislation Amendment (Community Partnership) Act 1998 NSW* are applied to other gambling sectors, it appears that there will be a degree of resistance by NSW clubs to implementing the types of strategies examined in this study. Many club managers also considered that individual gamblers and the NSW Government have a role to play. A community education program and a more responsible approach by government would assist in sharing the responsibility for addressing gambling-related problems in the community.

- Nevertheless, it appears that key club industry associations would currently find widespread support from the clubs for a more proactive approach to social responsibility in gambling. Given appropriate direction from these associations at a time of heightened government and community concern for the social impacts of gambling, NSW clubs appear receptive to implementing many of the responsible provision of gambling strategies examined in this study. It should be noted, however, that current practices in responsible provision of gambling are minimal within the club industry at present.

- To capitalise on these good intentions, club industry associations have an opportunity to develop a range of industry level strategies in responsible provision of gambling which would be likely to receive widespread support from the clubs. These include venue guidelines, a code of practice, and management and staff training programs in responsible provision of gambling.

- At the venue level, implementation of a variety of responsible provision of gambling strategies would be facilitated with the development and dissemination of: 1) a player guide which explains how poker machines work and their various features and payback

mechanisms, how to recognise machine malfunctions, and how to resolve complaints; 2) guidelines for clubs in providing a self-exclusion program; and 3) appropriate signage, brochures and publications for clubs to raise patron awareness of the symptoms of problem gambling and who to contact for help. If these were developed and disseminated by the industry associations, it appears that many clubs would utilise them.

- Many clubs appear resistant to implementing strategies that would limit access to cash for gambling purposes. The challenge is to develop clear industry policies in this area and find mechanisms which would encourage the clubs to comply.

- A comprehensive code of practice on the advertising and promotion of gambling by NSW clubs would assist the clubs by providing clear directions for what is considered socially responsible and within current legislation. Again, club industry associations, with appropriate consultation, could play an important role in developing and publicising this code.

- Given a certain reluctance to assist welfare and community organisations who service problem gamblers and their families, it seems appropriate that a proportion of the 1.5% levy imposed on larger NSW clubs by the *Liquor and Registered Clubs Legislation Amendment (Community Partnership) Act 1998 NSW* be allocated for this purpose. Funding from this source could also be provided for research into problem gambling and its treatment. In addition, further avenues for building closer links between the NSW club industry and the welfare sector, particularly at the local level, warrant investigation.

- Policy direction from the NSW Government in responsible provision of gambling appears to be marginal in the club industry, at least from the perspective of the club managers at the time of the survey. Both the responsible gaming policy developed by the NSW Department of Gaming and Racing and legal obligations pertaining to responsible provision of gambling need wider publicity within the club community.

- With the self-regulatory approach to responsible provision of gambling in the clubs, implementation of related strategies is voluntary. To maximise strategy implementation, an education and marketing program developed by key club industry associations is needed to emphasise the benefits of responsible gambling initiatives to the industry. Ongoing research into the implementation of responsible provision of gambling strategies in NSW clubs will then be needed to monitor and improve effectiveness.

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APPENDIX A
SURVEY QUESTIONNAIRE

APPENDIX B
CHARACTERISTICS OF THE RESPONDING CLUBS

Location of Club	Frequency	%
Sydney	109	44.1
Regional city	40	16.2
Regional town or community	96	39.2
No response	2	0.8

Type of Club	Frequency	%
Bowls	31	12.6
Golf	17	6.9
Leagues	33	13.4
Other sporting	23	9.3
Returned services	92	37.2
Workers/professional	9	3.6
Ethnic/national/cultural	1	0.4
Religious	3	1.2
General/community/social/recreational	14	5.7
Other (mostly combinations of the above)	17	6.9
No response	7	2.8

No. of financial members	Frequency	%
Up to 1,000	19	7.7
1,001 - 3,000	50	20.2
3,001 - 5,000	49	19.8
5,001 - 10,000	52	21.1
10,001 - 20,000	40	16.2
20,001 - 30,000	13	5.3
30,000 - 40,000	9	3.6
More than 40,000	6	2.4
No response	9	3.6

No. of social members	Frequency	%
None	25	10.1
Up to 1,000	33	13.4
1,001 - 3,000	28	11.3
3,001 - 5,000	33	13.4
5,001 - 10,000	28	11.3
10,001 - 20,000	20	8.1
20,001 - 30,000	6	2.4
30,000 - 40,000	4	1.6
More than 40,000	1	0.4
No response	69	27.9

No. of full-time equivalent employees	Frequency	%
Less than 10	39	15/8
11 - 20	39	15.8
21 - 40	51	20.6
41 - 60	24	9.7
61 - 80	20	8.1
81 - 100	17	6.9
101 - 150	20	8.1
151 - 200	14	5.7
201 - 300	4	1.6
More than 300	5	2.0
No response	14	5.7

No. of poker machines	Frequency	%
1 - 20	17	6.9
21 - 40	26	10.5
41 - 60	33	13.4
61 - 80	20	8.1
81 - 100	30	12.1
101 - 120	9	3.6
121 - 140	19	7.7
141 - 160	10	4.0
161 - 180	11	4.5
181 - 200	25	10.1
201 - 250	13	5.3
251 - 300	7	2.8
301 - 350	10	4.0
351 - 400	4	1.6
401 - 500	3	1.2
More than 500	2	0.8
No response	8	3.2

Total club income	Frequency	%
Under $200,000	3	1.2
$200,000 - $500,000	6	2.4
$500,001 - $1,000,000	15	6.1
$1,000,001 - $2,000,000	36	14.6
$2,000,001 - $3,000,000	27	10.9
$3,000,001 - $4,000,000	9	3.6
$4,000,001 - $5,000,000	11	4.5
$5,000,001 - $6,000,000	16	6.5
$6,000,001 - $7,000,000	5	2.0
$7,000,001 - $8,000,000	5	2.0
$8,000,001 - $9,000,000	8	3.2
$9,000,001 - $10,000,000	6	2.4
$10,000,001 - $15,000,000	29	11.7
$15,000,001 - $20,000,000	13	5.3
$20,000,001 - $30,000,000	5	2.0
$30,000,001 - $40,000,000	2	0.8
More than $40,000,000	3	1.2
No response	48	19.4

Assessed poker machine profit	Frequency	%
Under $200,000	9	3.6
$200,001 - $500,000	18	7.3
$500,001 - $1,000,000	21	8.5
$1,000,001 - $1,500,000	24	9.7
$1,500,001 - $2,000,000	16	6.5
$2,000,001 - $2,500,000	16	6.5
$2,500,001 - $3,000,000	9	3.6
$3,000,001 - $4,000,000	15	6.1
$4,000,001 - $5,000,000	10	4.0
$5,000,001 - $6,000,000	9	3.6
$6,000,001 - $7,000,000	8	3.2
$7,000,001 - $8,000,000	7	2.8
$8,000,001 - $9,000,000	7	2.8
$9,000,001 - $10,000,000	6	2.4
$10,000,001 - $15,000,000	10	4.0
$15,000,001 - $20,000,000	7	2.8
$20,000,001 - $30,000,000	6	2.4
$30,000,001 - $40,000,000	1	0.8
$40,000,001 - $50,000,000	1	0.8
More than $50,000	1	0.8

No response	46	18.6

APPENDIX C
THE REGISTERED CLUBS ASSOCIATION'S PROBLEM GAMBLING POLICY