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# Community Attitudes to Poker Machines and Gambling Reform

## Analysis Report nr. 5

July 2025

# Contents



# 1. Executive Summary

Wesley Mission, in partnership with Compass Polling, routinely surveys adults in NSW to evaluate their views on reducing gambling harm. This is the fifth survey undertaken, carried out in May 2025, after the federal election.

**Key Insights**

1. **Strong support for midnight – 10am poker machine shutdown:** While general support for this reform remains close to 80% (an extremely high level of support which is consistent across all our surveys), when specifically asked about the impact on the way people go out at night, support remained strong across age groups. Support was noticeably high among people who regularly (at least once a month) use poker machines, with a majority (68%) considering either there would be no impact, or the impact would be positive. Only 5% of respondents felt there would be negative impact on their social life. Decision makers should consider these responses against the industry claims that patrons want to keep losing money after midnight.
2. **Strong support for mandatory cashless gambling and strong support for fixed upper limits:** Although support, in the context of sustained anti-cashless rhetoric from the gambling industry, has softened slightly, over two thirds of respondents support the introduction of a mandatory cashless payment system with harm minimisation features. The key features proposed are time and loss limits, with discussion around whether these should be fixed, variable

or voluntary. Over 60% of regular gamblers support limits which are fixed, and which cannot be changed.

3. **Majority still want a full ban on sportsgambling ads:** Support has slightly softened in the two years Australia has waited for a response from the government to the *You Win Some, You Lose More* cross-party committee report, calling for 31 changes, including a full ad ban. The majority of people still want a full ban, rather than a partial ban or none at all.
4. **More people are gambling more frequently:** confirming a trend that we first saw in the October 2024 Community Attitude Survey, there are significantly more people reporting gambling more than once a month and more than once a year. At the same time, more people have dropped their frequency to less than once a year – so the cohort of people who are likely to be engaged in risky gambling are providing the majority of profits to hotel owners or club managers, and those gambling for entertainment are falling in number.
5. **Reforms introduced by the current government are not curbing gambling behaviour:** in particular, gambling intensity, or the number of people gambling on poker machines at least once a month, which is defined as risky gambling, is increasing. This suggests also that clubs and pubs are increasingly working on attracting patrons to gamble more, or more frequently. If it were an overall gambling increase, we would see an uptick in online gambling frequency which is not apparent in our survey. Nearly half the respondents to the survey also felt the government should have done more on gambling reform, while only 4% thought there had been too much, and 20% thought it was enough.

# 2. Survey findings

We conduct cross-sectional surveys six-monthly, each involving approximately 1,000 adults from NSW. The surveys are administered by Compass Polling.

## PART 1: Demographic Insights

### Sample characteristics

The samples across the waves are comparable with minor demographic shifts, as shown in the **Table 1** below:

| Characteristics | Apr-23 (%) | Oct-23 (%) | Apr-24 (%) | Oct-24 (%) | May-25 (%) |
|---|---|---|---|---|---|
| | | | | | |
| **Totals (n)** | 1007 | 1000 | 1007 | 1016 | 1020 |
| ***Gender*** | | | | | |
| ***Male*** | 49.3 | 48.8 | 46.8 | 47.8 | 48 |
| ***Female*** | 50.5 | 51.2 | 53 | 51.8 | 51.8 |
| ***Other*** | | | | 0.2 | |
| ***Unspecified*** | | | | 0.2 | 0.2 |
| | | | | | |
| ***Age distribution*** | | | | | |
| ***18-24*** | 12 | 11.1 | 10 | 6.9 | 10.5 |
| ***25-34*** | 19.1 | 18 | 19.5 | 21.7 | 18.4 |
| ***35-44*** | 17.1 | 17.6 | 16.2 | 18.9 | 17.5 |

| Characteristics | Apr-23 (%) | Oct-23 (%) | Apr-24 (%) | Oct-24 (%) | May-25 (%) |
|---|---|---|---|---|---|
| *45-54* | 16.5 | 16.3 | 18.1 | 17.6 | 15.8 |
| *55-64* | 14.9 | 15.1 | 15.1 | 15.4 | 15.4 |
| *65+* | 20.5 | 21.9 | 21 | 19.6 | 22.4 |
| *Education* | | | | | |
| *School* | 24 | 23.2 | 23.4 | 20.1 | 25.2 |
| *Trade/TAFE* | 27.3 | 28.5 | 28.8 | 25.5 | 27.5 |
| *University* | 48.7 | 48.3 | 47.8 | 54.4 | 47.2 |
| *Income* | | | | | |
| *Less than $70,000* | 36.7 | 36.2 | 35.7 | 29 | 35.1 |
| *$70,000K to $160,000* | 45.4 | 46.1 | 45 | 47 | 44.2 |
| *$160,000 or more* | 17.9 | 17.7 | 19.3 | 23.9 | 20.7 |
| *Voting preferences* | | | | | |
| *Labor Party* | 41.3 | 40.1 | 34.5 | 33.3 | 40.3 |
| *Liberal Party* | 28 | 28.6 | 29.7 | 32.5 | 25.4 |
| *Greens* | 10.5 | 10.3 | 10.4 | 11.6 | 10.2 |
| *Independent* | 5.9 | 6.2 | 6.3 | 6.5 | 6.7 |
| *One Nation* | 4.1 | 4 | 5.9 | 5.6 | 6.3 |
| *Nationals* | 3.3 | 3.7 | 3.8 | 3.1 | 3.3 |
| *Other* | 1.2 | 1.5 | 3.1 | 0.7 | 2.2 |
| *Ineligible* | | | | 1.4 | |
| *Prefer not to say* | 5.8 | 5.6 | 6.3 | 5.4 | 5.6 |
| *Region** | | | | | |
| *Inner city of Sydney* | 37.5 | 37.4 | 35.3 | 35.8 | 34.1 |
| *Outer suburbs of Sydney* | 28.2 | 29.5 | 21.6 | 30.8 | 30.4 |
| *Other major city (e.g. Newcastle)* | 11.5 | 11.9 | - | 10.9 | 12.3 |
| *Regional* | 19.1 | 17.5 | 23 | 19 | 20.7 |
| *Rural* | 3.7 | 3.7 | 20.1 | 3.4 | 2.5 |

*Note: *In the 2024 dataset, the 'region' variable options were updated to: inner metropolitan, outer metropolitan, regional and rural areas.*

## Key insights

### *Voting, education and age:*

Education and age significantly influence voting preferences, as shown in Table 2. The data reveals distinct patterns across demographic segments, highlighting the need for campaigns to craft targeted strategies that resonate with specific voter groups.

**Table 2:** Voter preferences by age and education level, May 2025

| May-2025 D_Education | D_Vote D_Age | Greens | Independent | Labor Party | Liberal Party | Nationals | One Nation | Prefer not to say |
|---|---|---|---|---|---|---|---|---|
| School | 18-24 | 12.30% | 5.90% | 2.80% | 3.40% | 2.70% | 3.60% | 14.20% |
| | 25-34 | 3.80% | 4.20% | 2.70% | 1.10% | | 3.10% | 3.10% |
| | 35-44 | 2.50% | 2.50% | 1.90% | 0.70% | | | 7.40% |
| | 45-54 | 1.90% | 1.30% | 2.50% | 3.30% | 5.30% | 8.50% | 3.40% |
| | 55-64 | 2.80% | 4.30% | 5.00% | 4.60% | 11.60% | 7.60% | |
| | 65+ | 1.10% | 6.50% | 6.70% | 15.90% | 10.10% | 7.00% | 4.00% |
| Trade/TAFE | 18-24 | 5.20% | 4.60% | 0.40% | 3.20% | | | 5.60% |
| | 25-34 | 5.20% | 1.30% | 1.80% | 1.80% | | 4.50% | 9.40% |
| | 35-44 | 4.20% | 7.40% | 6.00% | 4.20% | | 8.00% | 2.80% |
| | 45-54 | 5.40% | 5.20% | 4.20% | 5.10% | 10.80% | 4.50% | 3.40% |
| | 55-64 | 4.70% | 5.70% | 7.20% | 3.40% | 8.70% | 7.60% | 1.70% |
| | 65+ | | 8.20% | 5.90% | 10.60% | 16.40% | 1.70% | 8.00% |
| University | 18-24 | 9.60% | 2.60% | 3.80% | 2.80% | | 1.40% | 1.60% |
| | 25-34 | 16.40% | 7.50% | 17.40% | 12.10% | 8.40% | 6.10% | 5.30% |
| | 35-44 | 14.10% | 8.60% | 12.80% | 6.70% | 5.30% | 6.70% | 15.00% |
| | 45-54 | 3.60% | 7.10% | 8.30% | 8.00% | 5.30% | 11.50% | 9.80% |
| | 55-64 | 2.80% | 5.70% | 4.80% | 6.10% | 2.90% | 6.10% | 3.40% |
| | 65+ | 4.30% | 11.30% | 6.00% | 7.10% | 12.50% | 12.20% | 1.90% |

**Table 3:** Annual income and residential location of participants May 2025

| D_Income | D_Region | Inner Metro Capital | Non-Capital City | Outer Metro Capital | Regional | Rural | Totals |
|---|---|---|---|---|---|---|---|
| less than $70K | | 25.50% | 31.80% | 34.10% | 51.00% | 63.40% | **35.10%** |
| $70K to $160K | | 44.70% | 44.70% | 50.00% | 36.70% | 25.80% | **44.20%** |
| $160K or more | | 29.80% | 23.50% | 15.90% | 12.30% | 10.80% | **20.70%** |
| | **Totals** | **100.00%** | **100.00%** | **100.00%** | **100.00%** | **100.00%** | **100.00%** |

# PART 2: Attitudes to gambling harm and reforms

## Support for gambling reforms

Our questions related to attitudes and preferences for gambling reform have changed during the course of the Community Attitudes to Gambling project, depending on external events. We have also reassessed some questions where, clearly, more detailed background information was needed for participants to confidently answer.

### Q9: Mandatory cashless payment with limits

A key question, following from our October 2024 survey, tracked reservations around the introduction of a mandatory cashless system with harm minimisation features. Support for this remains high, with over two thirds still supporting it, even though information around the mechanism is limited. Support is lowest, but still over 60% in the inner metro and non-capital cities, and very strong in the outer metropolitan areas of Sydney (75%).

| **Table 4, Q9:** Reservations (Do you have any reservations about the introduction of a mandatory cashless payment system, with harm minimisation measures, for poker machines) | October 2024 (%) | May 2025 (%) |
|---|---|---|
| **Yes** | 28.3 | 33.6 |
| **No** | 71.7 | 66.4 |

**Analysis**: The proportion of respondents with reservations is higher in this survey, but textual analysis of their answers shows that many of the answers reflect a misunderstanding of the purpose of the system. This might be attributed to messaging by the gambling industry, which benefits from confusion around the system. It reinforces statements from the Minister for Gaming and Racing that there will need to be a strong education process in the lead up to any changes.

Among the responses from people with reservations (n = 342) were several strong themes which were not directly linked to the mechanism of a mandatory card with limit setting. These include 23 people with a marked desire to continue to be allowed to use cash ("sovereign cash"). 31 objected to the government either telling them how to spend their money, which seems to be a misunderstanding of the term "mandatory", or "tracking" how they spend their money. Notably only two respondents also, and mistakenly, thought that clubs and pubs would then know how much they were spending, when venues already have this information in great detail. Several people (15) had concerns that the card would in some way infringe on their freedom to spend their money as they liked or reduce their choices in spending or entertainment. Security and/or privacy concerns (of data? of spending? of behaviour?) from 17 people might be related to the "nanny state" issue. Of the 81 (24%) of people worried that the card would encourage extra spending, opinions were divided between genuine concerns around frictionless payment systems, which limit setting is designed to address, or that in some way a "mandatory" card would make it "mandatory" to use poker machines.

### Q 11: Support for limit setting design within a mandatory cashless system

For the first time, we tested support for a variety of ways time and loss limits could operate, assuming a mandatory cashless system was introduced. We know from the comments made by respondents in previous surveys that some of the reservations people have are around how the limit setting will work – either they are worried that there will be no limits (frictionless payment) or the government will impose limits and remove their freedom of choice.

We gave some background information in the survey and then asked for support for four different mechanisms:

There are multiple ways harm minimisation features can be included in cashless payment systems for gambling. Some allow the customer (you) to vary the limits. If a mandatory cashless system, with money and time limits, was introduced into NSW (similar to the new system in the casino) what system would you prefer:

a. Money loss and time limits set by default, equal to the average reported losses in NSW, no increases allowed
b. Money loss and time limits set by the account holder (you), but with a fixed upper ANNUAL limit equal to the average reported ANNUAL losses in NSW
c. Money loss and time limits set by the account holder, with a variable upper limit (if a person can prove they are gambling with their own money, not stolen money)
d. Money loss and time limits set by the account holder, no upper limit (allows a person to set $1million a day for losses)

| Table 5: Q11 – preference for limit setting | Totals |
|---|---|
| Loss and time limits set by default - average NSW losses. No increases | **43.0%** |
| Loss and time limits set by account holder - Fixed upper limit: average NSW losses | **26.2%** |
| Loss and time limits set by account holder - Variable upper limit | **20.3%** |
| Loss and time limits set by account holder - No upper limit | **10.5%** |
| Totals | **100.0%** |

Table 6 tests support for limit setting mechanisms against frequency of gambling on EGMs.

| **Table 6** Limit setting preference ↓ / Frequency of use → | Never | Less than once per year | Several times per year | More than once a month | More than once a week | Totals |
|---|---|---|---|---|---|---|
| **Loss and time limits set by default - average NSW losses. No increases** | 51 | 46 | 38 | 24 | 31 | **43** |
| **Loss and time limits set by account holder - Fixed upper limit: average NSW losses** | 22 | 21 | 30 | 42 | 37 | **26** |
| **Loss and time limits set by account holder - Variable upper limit** | 17 | 23 | 23 | 21 | 16 | **20** |
| **Loss and time limits set by account holder - No upper limit** | 10 | 10 | 10 | 13 | 16 | **11** |
| **Totals** | **100** | **100** | **100** | **100** | **100** | **100** |

**Analysis**: There is strong support for loss and time limits in any mandatory cashless payment setting, with only 10.5% of people supporting "no upper limits". It is not fanciful to propose a system where voluntary limit settings allow $1million a day – this is the system Crown Melbourne was using which was exposed during the Royal Commission into the Casino.
Two-thirds of respondents support fixed upper limits related to average NSW losses. An additional one in five would support allowing upper limits to be varied as long as the account holder could prove that they were gambling with their own money.

This is a different approach to the former Tasmanian model, and the UK attitude, which requires people to prove that they can "afford" to gamble. Wesley Mission considers this latter approach more difficult to judge, opens the door for moralistic public service decision making which is inappropriate, and will lead more people to oppose the whole system on the grounds of opposing a "nanny state".

### Q8: Operational hours for poker machines

Support for closing poker machine venues from midnight to 10am remains very high, even among younger people who might be influenced by industry messaging that after-midnight poker machines are essential to keep venues open.

| Table 7, Q8: Opinion (Should poker machines be switched off between midnight and 10am?) | October 2023 (%) | April 2024 (%) | October 2024 (%) | May 2025 (%) |
|---|---|---|---|---|
| **No** | 18 | 17 | 18 | 22 |
| **Yes** | 82 | 83 | 82 | 78 |

| Table 8, Q8: Opinion (Should poker machines be switched off between midnight and 10am?) May 2025 only (%) Age | 18-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65+ | Totals |
|---|---|---|---|---|---|---|---|
| **No** | 27 | 29 | 24 | 23 | 19 | 16 | **22** |
| **Yes** | 73 | 71 | 76 | 77 | 81 | 84 | **78** |
| **Totals** | **100** | **100** | **100** | **100** | **100** | **100** | **100** |

### Q12: Would a midnight shutdown affect the way you go out at night

This survey, we explored more deeply into the impact of midnight closure on people's social lives. We asked people "If poker machines were shutdown from midnight to 10am, would this affect the things you like to do when you go out in the evenings?"

**Analysis**: Decision makers should take note of these results: regardless of age group, the majority of people were clear that midnight close-downs of poker machines would either make no difference to a night out (56%), or in fact enhance it (13%). Only 5% of respondents felt it would be detrimental to their evening out. When plotted against frequency of poker machine use, it is also striking that even those who frequently gamble (at least once a month) either think it would be a good impact or make no difference (47%). We can speculate that those people who are already experiencing risky gambling might recognise that a system-wide change would help them control their gambling.

| Table 9: affect on social life<br>Q12 – If poker machines were shutdown from midnight to 10am, would this affect the things you like to do when you go out in the evenings? 🡻 | D_Age 🡺 | 18-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65+ | Totals |
|---|---|---|---|---|---|---|---|---|
| **Don't know** | | 10 | 8 | 9 | 2 | 4 | 1 | **5** |
| **I don't go out very much that late at night** | | 10 | 14 | 16 | 24 | 23 | 36 | **22** |
| **No** | | 44 | 48 | 57 | 60 | 68 | 55 | **56** |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| **Yes, but in a bad way** | 10 | 10 | 2 | 5 | 1 | 2 | **4** |
| **Yes, but in a good way** | 26 | 20 | 16 | 9 | 4 | 6 | **13** |
| **Totals** | **100** | **100** | **100** | **100** | **100** | **100** | **100** |

| **Table 10: testing by frequency**<br><br>**Q12 – How would a midnight shutdown affect your night out (%) 🡻** **Q3 How frequently do you use poker machines 🡺** | **Never** | **< once per year** | **Several times per year** | **More than once a month** | **More than once a week** | **totals** |
|---|---|---|---|---|---|---|
| Don’t know | 6 | 4 | 5 | 5 | 8 | **5** |
| I don't go out very much that late at night | 34 | 23 | 11 | 8 | 7 | **22** |
| No | 52 | 63 | 61 | 44 | 40 | **56** |
| Yes, but in a bad way | 1 | 2 | 6 | 20 | 8 | **5** |
| Yes, but in a good way | 7 | 8 | 17 | 23 | 37 | **13** |
| **Totals** | **100** | **100** | **100** | **100** | **100** | **100** |

## Q21: Full, partial or no ban on sports gambling ads

In June 2023 the Federal House of Representatives’ Standing Committee on Social Policy and Legal Affairs, chaired by Peta Murphy, tabled its report into online gambling entitled “You Win Some, You Lose More”. That report included 31 recommendations to reduce the harm of online gambling. One of those recommendations was for a phased in complete ban on all forms of online gambling advertising, including on digital, print and broadcast media.

**Analysis**: Although support has softened in the two years the report was delivered to the government, the highest support is still for a full ad ban, similar to that which currently exists for tobacco. Support for a full ad ban is particularly strong in outer Sydney and regional NSW.

In this Wave 5 survey, we added the option of “No Ban”. This appears to have mostly effected support for a partial ban.

*Introductory text: The government is considering extending existing bans on sports gambling advertising, to possibly include broadcast TV, digital platforms, print, sponsorship and stadium advertising. A partial ban is also considered, which might allow 2 ads per hour on broadcast TV, outside children’s programs, but including family viewing programs*

| **Table 11: Q21 Full, partial ban or no ban** | **Oct 24 Full %** | **Oct 24 Partial %** | **May 25 Full %** | **May 25 Partial %** | **May 25 No ban** |
|---|---|---|---|---|---|
| **All ages, all genders** | 54 | 46 | 50 | 34 | 16 |
| | | | | | |

| Table 11: Q21 Full, partial ban or no ban | Oct 24 Full % | Oct 24 Partial % | May 25 Full % | May 25 Partial % | May 25 No ban |
|---|---|---|---|---|---|
| **By gender** | | | | | |
| **Female** | 60 | 40 | 55 | 33 | 12 |
| **Male** | 48 | 52 | 44 | 35 | 21 |
| | | | | | |
| **By income** | | | | | |
| **<$70k** | 58 | 42 | 54 | 30 | 16 |
| **$70-$160k** | 51 | 49 | 48 | 36 | 16 |
| **>$160k** | 56 | 44 | 46 | 38 | 16 |

We tested support for ban positions by age groups, and residence in tables 12 and 13.

| Table 12 Would you prefer | Age | 18-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65+ | Totals |
|---|---|---|---|---|---|---|---|---|
| **A full ban** | | 31 | 41 | 43 | 46 | 59 | 67 | **50** |
| **A partial ban** | | 39 | 40 | 39 | 38 | 31 | 23 | **34** |
| **No ban** | | 30 | 19 | 18 | 16 | 10 | 10 | **16** |
| **Totals** | | **100** | **100** | **100** | **100** | **100** | **100** | **100** |

| Table 13: Would you prefer | Region | Inner Metro Capital | Non-Capital City | Outer Metro Capital | Regional | Rural | Totals |
|---|---|---|---|---|---|---|---|
| **A full ban** | | 40 | 48 | 54 | 61 | 47 | **50** |
| **A partial ban** | | 40 | 37 | 34 | 23 | 28 | **34** |
| **No ban** | | 20 | 15 | 12 | 16 | 25 | **16** |
| **Totals** | | **100** | **100** | **100** | **100** | **100** | **100** |

## Awareness of harm from gambling

The NSW Gambling Survey shows that 21% of people currently experience gambling harm. The responses to our questions around identifying if people recognise that among their family and friends shows that both that more education is needed to help people understand how gambling harm is manifested, and that the stigma and shame around gambling harm (whether from one's own or another's gambling) has the effect of hiding the impact, even within a family.

| **Table 14, Q6:** Awareness of harm (Do you have a colleague, family member or friend who has been harmed by gambling on poker machines?) | April 2023 (%) | October 2023 (%) | April 2024 (%) | October 2024 (%) | May 2025 (%) |
|---|---|---|---|---|---|
| **Yes** | 31 | 32 | 30 | 26 | 29 |
| **No** | 69 | 54 | 38 | 64 | 63 |
| **Don't know** | - | 14 | 32 | 9 | 8 |

| **Table 15, Q7:** Awareness of harm (Do you have a colleague, family member or friend who has been harmed by online gambling?) | **October 2024 (%)** | **May 2025 (%)** |
|---|---|---|
| **Yes** | 17 | 19 |
| **No** | 66 | 69 |
| **Don't know** | 16 | 12 |

# PART 3: Gambling participation rates

We have begun surveying types of gambling and the approximate age at which participants, if they gambled, made their first bets. We also investigated preferences for poker machine free venues, and whether the 2023 ban on external signage was still influencing behaviour.

## Types of gambling

| **Table 16: Have you ever gambled with:** | **Lotteries or Lotto** | | **Scratchies** | | **Poker machines** | | **Horse/dog racing** | | **Casino** | | **Online sports gambling** | | **None of these** | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Oct 24 | May 25 | Oct 24 | May 25 | Oct 24 | May 25 | Oct 24 | May 25 | Oct 24 | May 25 | Oct 24 | May 25 | Oct 24 | May 25 |
| All | 72 | 72 | 60 | 64 | 53 | 55 | 42 | 39 | 35 | 35 | 33 | 31 | 13 | 13 |
| | | | | | | | | | | | | | | |
| 18-24 | 50 | 39 | 51 | 40 | 33 | 46 | 21 | 25 | 23 | 29 | 34 | 43 | 27 | 24 |
| 25-34 | 66 | 67 | 55 | 54 | 50 | 52 | 40 | 38 | 40 | 41 | 46 | 46 | 12 | 12 |
| 35-44 | 73 | 72 | 63 | 67 | 58 | 57 | 50 | 40 | 44 | 42 | 52 | 43 | 9 | 12 |
| 45-54 | 78 | 78 | 65 | 67 | 54 | 59 | 45 | 45 | 35 | 36 | 28 | 29 | 12 | 14 |
| 55-64 | 76 | 84 | 62 | 77 | 58 | 57 | 52 | 48 | 38 | 36 | 25 | 18 | 12 | 6 |
| 65+ | 75 | 75 | 60 | 66 | 54 | 55 | 36 | 36 | 21 | 23 | 12 | 14 | 16 | 14 |
| | | | | | | | | | | | | | | |
| NSW 2024 Gambling Survey ("gambled in the last 12 months") | | 41 | | 11 | | 14 | | 10 | | 4 | | 8 | | |
| NSW 2019 Gambling Survey | | 41 | | 13 | | 16 | | 13 | | 5 | | 6 | | |

The data, as would be expected in surveys conducted only around 6 months apart, are roughly the same, with some changes indicated. In Table 16, green cells have results which are better (less gambling), while orange cells have responses indicating more gambling, although none of the variance appears to be statistically significant. It may be a factor due to slight differences in the numbers of people in each age group, between the two waves – and there are more 18-24s in this wave of data. However, overall, the picture is consistent.

**Analysis**: This data shows clearly that younger people are overall participating less in gambling, although that might be a function of opportunity. However, the response to "none of the above" is much higher in this age group and might reflect the impact of gambling harm awareness education through schools. This should be further explored.

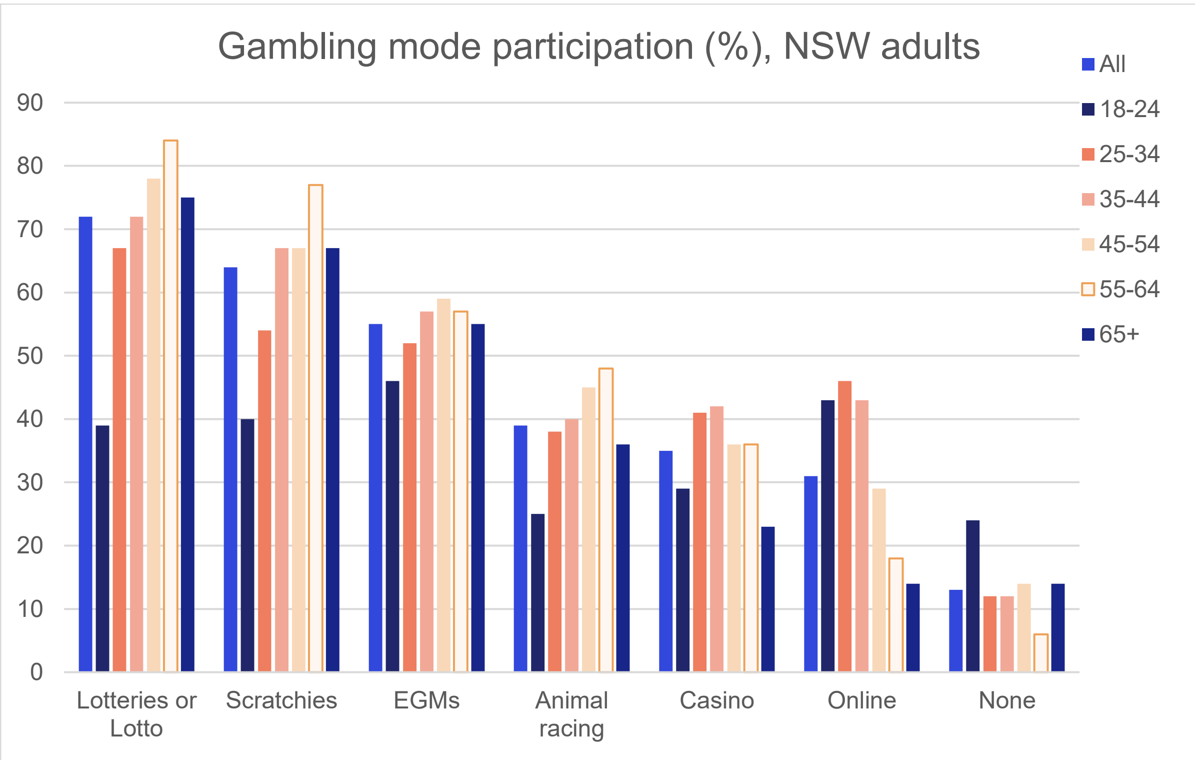
As expected, online gambling participation is higher in younger age groups.

We have included the results from the 2024 RGF NSW Gambling Survey as a comparison with our results. We did not include some of the gambling options covered in the Survey, such as bingo, keno or informal private betting, and we did not include their variety of online gambling options – overseas lotteries, non-sports betting, online casino, eSports, online poker or fantasy sports (total participation 4.4%) – because we were more interested in the major gambling categories.

We asked about "ever gambled", in contrast to most prevalence studies which ask if participants have gambled in the last 12 months. The responses reflect this difference; however it should be noted that in all prevalence studies, including ours, lottery, lotto or scratchie tickets are the most common form of gambling.

We are also unsure the extent to which younger people distinguish between horse/dog racing betting (formerly landbased, at the TAB or at the course) and online sports gambling, given that most online wagering services offer both products. This too should be further explored by researchers. This difference is not always clear in state-based prevalence studies, which may become important as the mode of gambling should probably be distinguished from the product.

**Figure 1: Participation by age group**



## Age at first bet

We asked participants, if they had gambled on any of these modes, to tell us their approximate age when they first made a bet or bought a lottery or scratchie ticket.

**Analysis**: As in the October 2024 survey, when we first asked this, obviously some respondents are not answering honestly, as it is very unlikely that someone gambled in a casino aged 10, or even put their first bet online at age 2. However, it is believable that someone used their first scratchie aged 5, or went to the horse or dog races from a very early age.

There may also be some misunderstanding of the question: when looking at age of first gambling at a casino, it may be that some people are answering with their age when first visiting a casino, where they may have accompanied parents. Only people living in Sydney, where the only casinos are, reported gambling before the age of 18 at a casino (1.8%). Similarly, only rural residents reported not starting gambling on horse or dog racing until 18, while all the other residents, who live in areas where animal racing is accessible, particularly those in regional NSW, where this is a prominent social activity, claimed to have started before 18. Again, rural respondents were the only ones reporting starting poker machine gambling at 18, reflecting the much reduced opportunities to sneak into a hotel VIP lounge in remote communities.

In fact, the age at first bet profile of rural respondents, although only 2.5% of our sample, clearly demonstrates the impact of accessibility of gambling forms. Without easy access to EGMs and animal racing, people simply don’t participate. This is a key argument towards reducing the ubiquity and accessibility of EGMs in NSW, to assist people in managing their gambling.

Taking that into account, we believe that the majority of respondents appear to be honest with their answers, as overall the results match our anticipated outcomes. The 2020 NSW Youth Gambling Study, investigating gambling among 12-17 year olds, reported that around 75% of participants were not stopped from gambling. Online gambling using another person’s account with permission was the most common method of under-age gambling. The average age when respondents had first gambled was 11-12 years old. Wesley Mission has spoken with people who made bets in the TAB while in school uniform, or gambled on poker machines where their age was not checked as long as they did not order alcohol. We are therefore not surprised that the age of first bet in our survey shows noticeable numbers of people gambling under-age.

We would also have expected, as these results show, that the median age of first gambling on a poker machine is the closest to 18 of all forms. Anecdotal evidence known to Wesley Mission is that gambling on a poker machine is a rite of passage for young people reaching the age of 18.

Given the relatively recent introduction of online gambling, the higher median age for first betting is not surprising.

Consistent with research on the differing gambling behaviours of men and women (0.2% of our sample did not specify gender), age at first bet when plotted by gender shows a clear difference for casino and poker machine gambling.

**Figure 2: approximate age at first bet, all age groups, all genders**

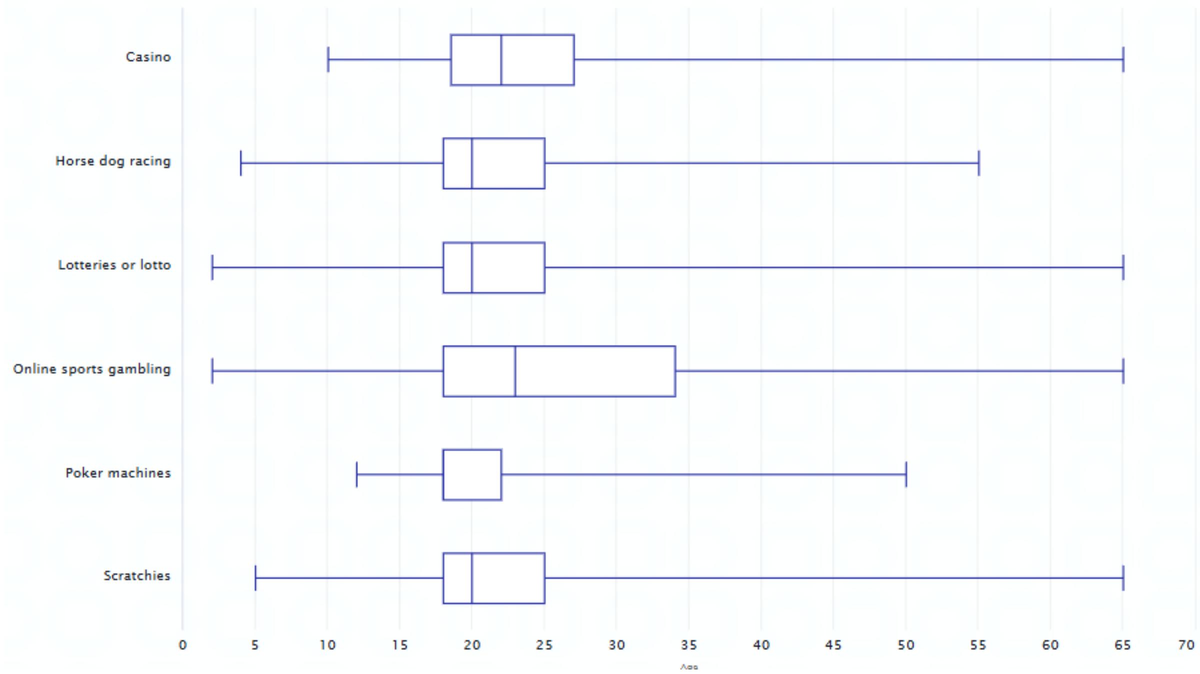



**Figure 3: Age at first bet, male, all ages**

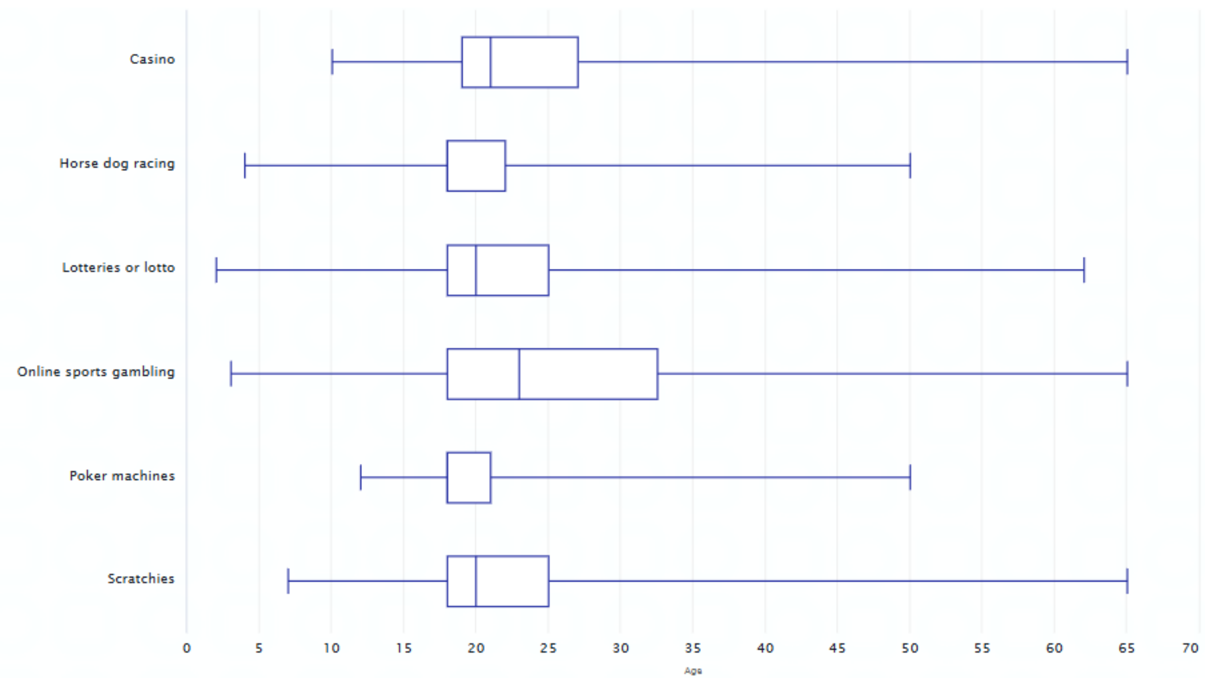



**Figure 4: Age at first bet, female, all ages**

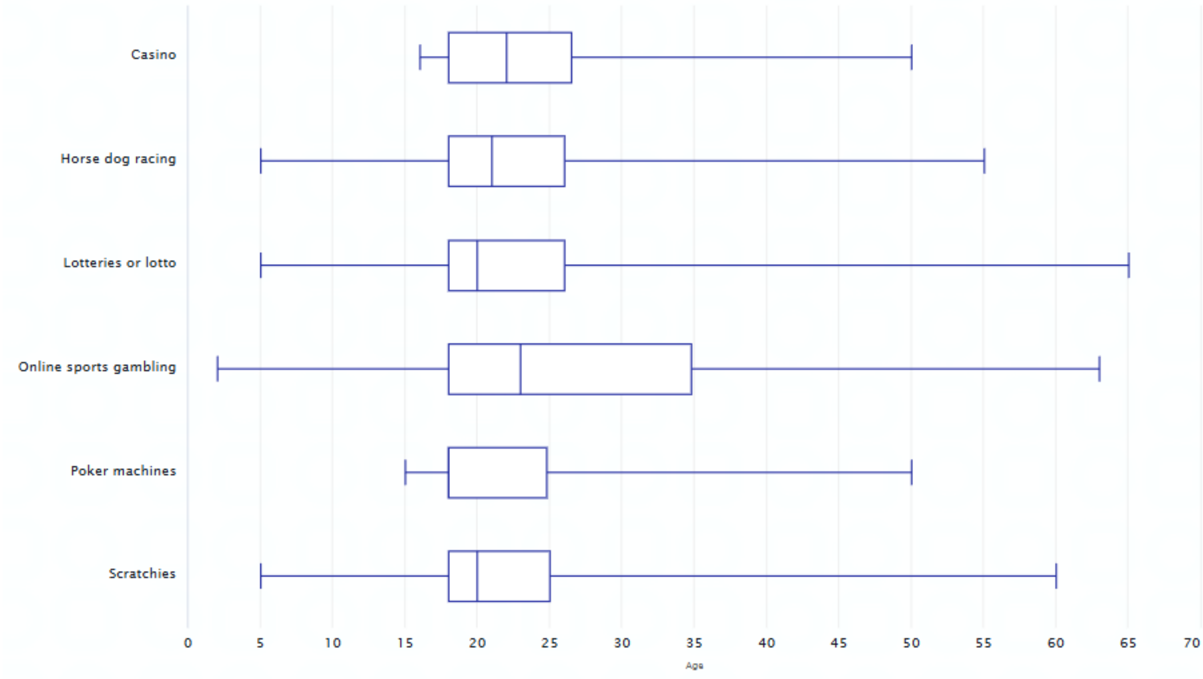
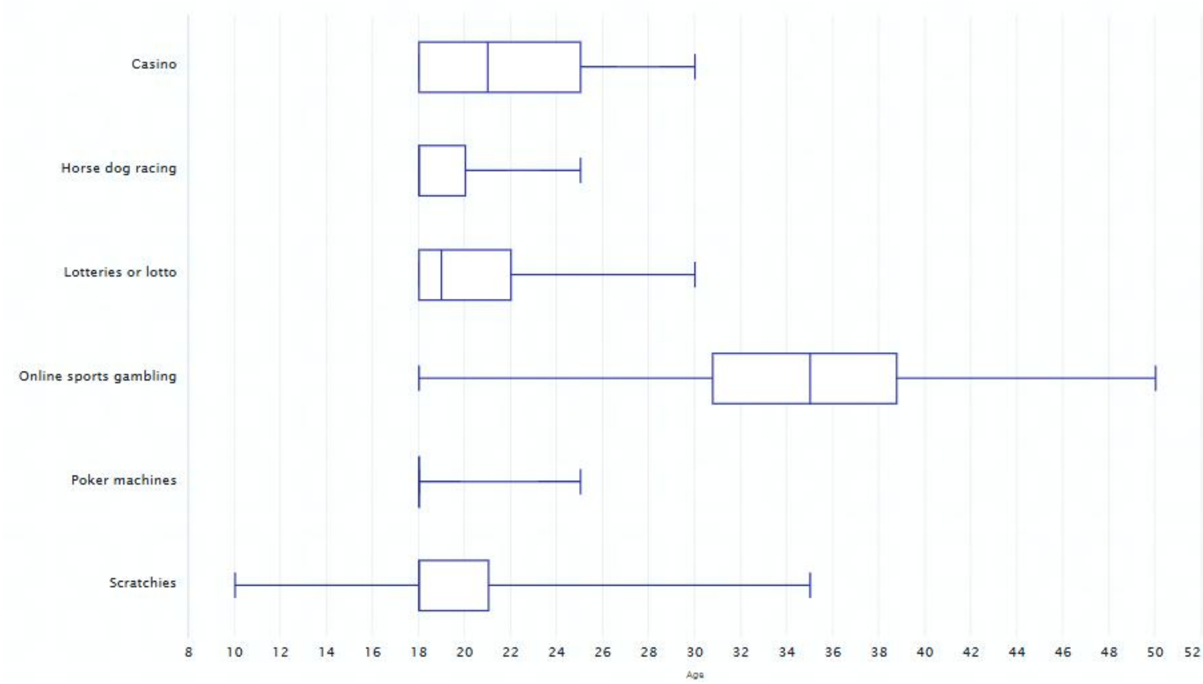



**Figure 5: Age at first bet, living in a rural location**




# Frequency of gambling

## Frequency of gambling with poker machines.

Respondents were asked about their frequency of gambling on poker machines. The results were:

| **Table 17:** Frequency (How often do you gamble on poker machines?) | **April 2023 (%)** | **October 2023 (%)** | **April 2024 (%)** | **October 2024 (%)** | **May 2025 (%)** |
|---|---|---|---|---|---|
| **Never** | 47 | 49 | 47 | 36 | 35 |
| **Less than once per year** | 21 | 21 | 20 | 29 | 29 |
| **Several times per year** | 20 | 18 | 19 | 20 | 20 |
| **More than once a month** | 9 | 8 | 11 | 10 | 11 |
| **More than once a week** | 3 | 4 | 3 | 5 | 5 |

The response to "Less than once a year" has increased in this and the previous survey, while the figures for those gambling more than once a month and more than once a week, have increased. This is consistent with the results from the NSW Gambling Survey, suggesting that while overall gambling rates are falling, those who are gambling are doing so more intensively.

This shows that reforms introduced by the current government are not curbing gambling behaviour and particularly, are not reducing intensity of gambling.

## Frequency and intensity of online gambling

| **Table 18:** How frequently do you gamble online | **October 2024 (%)** | **May 2025 (%)** |
|---|---|---|
| **Never** | 53 | 52 |
| **Less than once a year** | 10 | 11 |
| **Several times a year** | 16 | 15 |
| **More than once a month** | 13 | 13 |
| **More than once a week** | 8 | 9 |

| **Table 19:** Q20: if you bet online, what do you bet on? | **Totals** |
|---|---|
| Don't bet online | 52 |
| About the same for sport and racing | 8 |
| Mainly horse or dog racing | 15 |
| Mainly sports | 25 |
| Totals | 100 |

| **Table 20: Number of online accounts** | **October 2024 (%)** | **May 2025 (%)** | **2nd Study Interactive Gambling[1]** |
|---|---|---|---|
| **0** | 52.6 | 51.7 | |
| **1** | 30.2 | 32.6 | 53.9 |
| **2** | 11.5 | 10.0 | 22.4 |

[1] Hing, N. et al 2021 *The Second National Study of Interactive Gambling in Australia (2019-2020),* Gambling Research Australia, p.172

| | | | |
|---|---|---|---|
| **3** | 3.6 | 3.1 | 10.3 |
| **4** | 0.8 | 1.3 | 4.6 |
| **5** | 1.3 | 1.3 | 4.1 |
| **>5** | | | 4.7 |

**Table 21: Mapping frequency of gambling online against number of accounts**

| Frequency of gambling online ➔<br><br>Number of Accounts 🡻 | Never | < once a year | Several times a year | More than once a month | More than once a week | total |
|---|---|---|---|---|---|---|
| **0** | 100 | | | | | 51.7 |
| **1** | | 88.3 | 79.5 | 52.1 | 45.4 | 32.6 |
| **2** | | 8.5 | 14.4 | 33.5 | 27.5 | 10.0 |
| **3** | | 2.3 | 3.9 | 11.5 | 7.9 | 3.1 |
| **4** | | | 0.7 | 2.3 | 9.5 | 1.3 |
| **5** | | 1.0 | 1.5 | 0.7 | 9.7 | 1.3 |
| **Totals** | 100% | 100% | 100% | 100% | 100% | |

With only two waves of responses, our analysis is limited. However, we note that the response to frequency is much higher than in the 2021 2nd National Study of Interactive Gambling[2] where in 2019 it was estimated that 17.5% of Australian adults gambled online. It is also higher than the AIFS 2023 Gambling in Australia[3] snapshot of 44% of adults betting on sports and/or racing in the last year (the majority online). Of those who gambled online in the snapshot sample, more reported having two accounts and more reported having three or more accounts than our sample.

As might be expected, those who gamble infrequently tend to have only one account. Monthly gamblers have 2 or 3 accounts, while those gambling at least once a week are the gamblers with 4 or more accounts.

## Venue characteristics

Our survey investigates attitudes to venues with, and without, poker machines. We are also exploring the extent to which the signage ban, introduced in September 2023, has changed behaviour. The signage ban appears to have been based on an assumption that visual cues would trigger some people into entering a venue in order to use EGMs. Although we know that visual and auditory triggers do exist, Wesley Mission is not aware of specific research around signage. We did however, strongly support the ban as a public health action. Like most public health measures aimed at behaviour change, we would expect an initial strong impact, then a lengthy taper as people adjust to the new circumstances, requiring after some time a new action. The history of reduction of road deaths shows that every few years a new initiative is needed[4].

| **Table 22:** Venue preference (Are you more likely to visit venues with or without poker machines?) | **April 2023 (%)** | **October 2023 (%)** | **April 2024 (%)** | **October 2024 (%)** | **May 2025 (%)** |
|---|---|---|---|---|---|

[2] N. Hing et al, The Second National Study of Interactive Gambling in Australia (2019-2020), prepared for Gambling Research Australia, 2021
[3] Gambling Participation and experience of harm in Australia: Research snapshot, Australian Gambling Research Centre 2023 (accessed November 2024: AGRC Snapshot: Gambling participation, experience of harm and community views - overview)
[4] M. Stevenson & J. Thompson 2014 "On the road to prevention: road injury and health promotion" Health Promotion Journal of Australia 25 (1), 4-7

| | | | | | |
|---|---|---|---|---|---|
| **Without poker machines** | 67 | 69 | 60 | 64 | 57 |
| **With poker machines** | 33 | 31 | 40 | 36 | 43 |

| Table 23: Given the absence of external signage, are you: | October 2023 (%) | April 2024 (%) | October 2024 (%) | May 2025 (%) |
|---|---|---|---|---|
| **Less likely to enter a venue to gamble on poker machines** | 13 | 9 | 13 | 9 |
| **More likely to enter a venue to gamble on poker machines** | 6 | 5 | 6 | 9 |
| **The signage does not influence my decisions** | 44 | 35 | 47 | 49 |
| **I do not gamble on poker machines** | 37 | 52 | 35 | 33 |

| Table 24: Frequency of poker machine use % ➔ Impact of external signage ban ⬇ | Never | < once a year | Several times a year | > once a month | >once a week | totals |
|---|---|---|---|---|---|---|
| **Do not use poker machines** | 77 | 17 | 5 | 1 | 5 | 33% |
| **No effect** | 20 | 72 | 71 | 41 | 39 | 49% |
| **Less likely to enter** | 2 | 8 | 13 | 27 | 19 | 9% |
| **More likely to enter** | 1 | 3 | 11 | 31 | 37 | 8% |
| | 100% | 100% | 100% | 100% | 100% | |

**Note on data integrity:** clearly there is an inconsistency in some respondents' answers. This came to 6% of the data set, and if those who answered "Never" to the original frequency question genuinely thought "less than once a year" was a similar answer, this falls to 1%.

| Table 25: Frequency response to signage question | Frequency of use in Q 3 |
|---|---|
| **Do not use** | 278 |
| **< once a year** | 49 |
| **Several times a year** | 9 |
| **> once a month** | 1 |
| **> once a week** | 3 |

**Analysis**: It is now nearly two years since the signage ban was enforced in NSW. The target demographic for change are the people who gamble on poker machines at least once a month. Although responses fluctuate in our survey, particularly in Wave 3 (April 2024), we can see that in the immediate period after the ban was introduced, more regular gamblers reported being less likely to enter a venue than more likely. That ratio is changing two years later. However, there is still an impact from the action – between around 20 and 30% of regular gamblers are still less likely to enter a venue now there are no external visual triggers.

**Table 26: mapping likelihood of entering a venue for regular gamblers only.**

| Table 26 | Oct 2023 % | | April 2024 % | | October 2024 % | | May 2025 % | |
|---|---|---|---|---|---|---|---|---|
| Liklihood | Month | Week | Month | Week | Month | Week | Month | Week |
| Less likely | 25 | 28 | 26 | 10 | 35 | 27 | 27 | 19 |
| More likely | 18 | 18 | 16 | 31 | 22 | 27 | 31 | 37 |

## PART 4: Public trust in government independence

Respondents were asked a number of questions related to influence over public policy and the degree to which they felt the government would act.

| **Table 27 Q16:** Trust in government (Do you trust the government to stand up to the gambling industry?) | **April 2023 (%)** | **October 2023 (%)** | **April 2024 (%)** | **October 2024 (%)** | **May 2025 (%)** |
|---|---|---|---|---|---|
| **Yes** | 35 | 31 | 28 | 38 | 35 |
| **No** | 65 | 70 | 72 | 62 | 65 |

| **Table 28 Q13:** Doing enough (Do you think the NSW Government is doing enough for poker machine and gambling reform?) | **April 2023 (%)** | **October 2023 (%)** | **April 2024 (%)** | **October 2024 (%)** | **May 2025 (%)** |
|---|---|---|---|---|---|
| **Yes** | 30 | 28 | 32 | 39 | 36 |
| **No** | 70 | 72 | 68 | 61 | 64 |

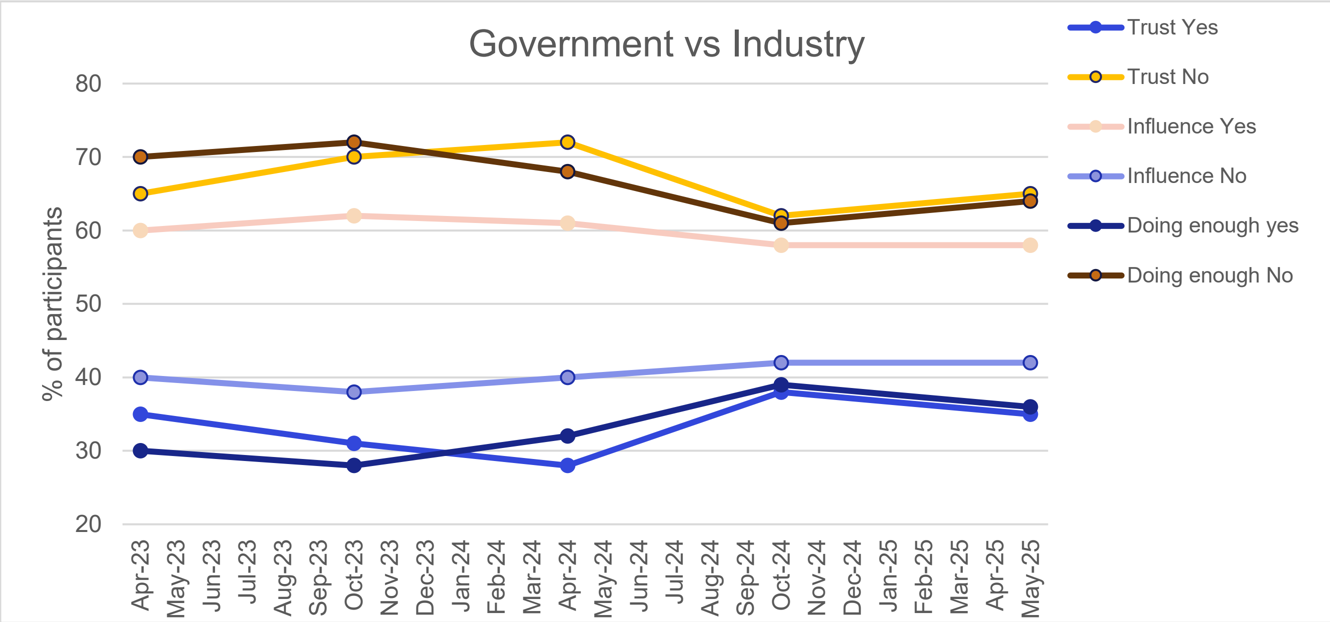
| **Table 29 Q15:** Influence on NSW Labor Party (Does the gambling lobby have too much influence on NSW Labor?) | **April 2023 (%)** | **October 2023 (%)** | **April 2024 (%)** | **October 2024 (%)** | **May 2025 (%)** |
|---|---|---|---|---|---|
| **Yes** | 60 | 62 | 61 | 58 | 58 |
| **No** | 40 | 38 | 40 | 42 | 42 |

We also tested sentiment at the half-way mark of the term of government.

| Q30: after 2 years in government, has the ALP | Totals % |
|---:|---:|
| Done enough on gambling reform | 20 |
| Done too much on gambling reform | 4 |
| I don't know enough to decide | 31 |
| Should have done more on gambling reform | 45 |
| Totals | 100 |

Collectively, the answers to these questions show that participants feel that the government is not trusted to act on gambling harm, nor has done enough, because the industry has too much influence on public policy, and specifically, over the ALP. This trend was improving, that is, more people were inclined to think the government was standing up to the industry, but that has significantly worsened since the last survey. The brown lines indicate lack of trust, belief that the government is not doing enough on gambling reform, and belief that the gambling industry has too much influence over NSW Labor. The blue lines are the opposite positions, and clearly show that less than 50% have faith in the government to act against the gambling industry's interests.

**Figure 6: confidence in the government acting for reform**



# 3. Appendix

### *Study questionnaire*

### Standard demographic questions

1. Gender (standard)
2. Age (standard)
3. State (Screen out all other than NSW)
4. Region
    a. Inner city of Capital city (e.g., Sydney, Melbourne, Brisbane)
    b. Outer suburbs of Capital city (e.g., Sydney, Melbourne, Brisbane)
    c. Other major city (e.g., Newcastle, Geelong, Gold Coast)
    d. Regional
    e. Rural
5. Please enter your postcode (number entry)
6. Please select which political party you identify with most?
    a. Greens
    b. Labor Party
    c. Liberal Party
    d. Nationals
    e. One Nation
    f. Independent
    g. Other (Please specify)
    h. Prefer not to say
7. What is your highest level of education?
    a. School
    b. Trade/TAFE
    c. University
8. What is your annual household income?
    a. less than $70,000
    b. $70,000k to $160,000
    c. $160,000 or more

### Gambling attitudes questions

| Short code question | Questions |
|---|---|
| **Q1.1_Gambled.Following_Online.sports.gambling** | Have you ever gambled using any of the following? (random rotation)<br>a. Online sports gambling<br>b. Poker machines<br>c. Horse/dog racing<br>d. Casino<br>e. Lotteries or lotto<br>f. Scratchies<br>g. None of the above |
| **Q2.1_Approx.Age_** | If answering yes to any of the above, what was your approximate age when you made your first bet on/with:<br>a. Online sports gambling<br>b. Poker machines<br>c. Horse/dog racing<br>d. Casino<br>e. Lotteries or lotto<br>f. Scratchies |

| Short code question | Questions |
|---|---|
| **Q3_Often.PokerMachine** | How often do you gamble on poker machines?<br>a. More than once a week<br>b. More than once a month<br>c. Several times per year<br>d. Less than once per year<br>e. Never |
| **Q4_More.Likely.Venue** | Are you more likely to visit venues with or without poker machines? |
| **Q5_External.Signage.Ban** | Since the external signage (for example VIP LOUNGE) was banned in September 2023, are you:<br>a. More likely to enter a venue to gamble on poker machines?<br>b. Less likely to enter a venue to gamble on poker machines?<br>c. The signage does not influence my decision.<br>d. I do not gamble on poker machines. |
| **Q6_Harm.Poker.Machine** | Do you have a colleague, family member or friend who has been harmed by gambling on poker machines? |
| **Q7_Harm.Online.Gambling** | Do you have a colleague, family member or friend who has been harmed by sports gambling or online gambling? |
| **Q8_After.Midnight.Switchoff** | Research suggests that gambling after midnight is associated with a higher risk of harm. Do you support a proposal for all poker machine to be switched off from midnight until 10am? |
| Introductory statement to next set of questions: The NSW government ran a trial of different technical solutions for cashless gambling for poker machines, including some harm minimisation features such as setting limits for total losses or time spent gambling. Valuable information was supplied by the trial, even though since it was voluntary, participation was low | |
| **Q9_Cashless.Reservation** | Do you have any reservations about the introduction of a mandatory cashless payment system, with harm minimisation measures, for poker machines. |
| **Q10_Main.Concern.Cashless** | What is your main concern? |
| **Q11_Harm.Minimisation.options** | There are multiple ways harm minimisation features can be included in cashless payment systems for gambling. Some allow the customer (you) to vary the limits. If a mandatory cashless system, with money and time limits, was introduced into NSW (similar to the new system in the casino) what system would you prefer:<br>e. Money loss and time limits set by default, equal to the average reported losses in NSW, no increases allowed<br>f. Money loss and time limits set by the account holder (you), but with a fixed upper ANNUAL limit equal to the average reported ANNUAL losses in NSW<br>g. Money loss and time limits set by the account holder, with a variable upper limit (if a person can prove they are gambling with their own money, not stolen money)<br>h. Money loss and time limits set by the account holder, no upper limit (allows a person to set $1million a day for losses) |
| **Q12_10pm.Shutdown** | If poker machines were shutdown from midnight to 10am, would this affect the things you like to do when you go out in the evenings?<br>a. Yes, but in a good way<br>b. Yes, but in a bad way<br>c. No<br>d. Don't know<br>e. I don't go out very much that late at night |
| **Q13_Govt.Doing.Enough** | Do you think the NSW government is doing enough for poker machine and gambling reform? |

| Short code question | Questions |
| --- | --- |
| **Q14_Gambling.Influence.NSW** | Do you believe the gambling lobby has too much influence on the NSW politics? |
| **Q15_Gambling.Influence.Labor** | Do you believe the gambling lobby has too much influence on the NSW Labor Party? |
| **Q16_Trust.Govt** | Do you trust the government to stand up to the gambling industry? |
| **Q17_ALP.Two.Years** | After two years in government, do you think the ALP should<br>a. Done more on gambling reform<br>b. Have done enough on gambling reform<br>c. Have done too much gambling reform<br>d. I don't know enough to decide |
| **Q18_Gamble.Often** | How often do you gamble using an online gambling account?<br>a. More than once a week<br>b. More than once a month<br>c. Several times per year<br>d. Less than once per year<br>e. Never |
| **Q19_Number.of.Accounts** | How many accounts do you have for online gambling? |
| **Q20_Bet.online** | When you gamble online, what do you mainly bet on?<br>a. Mainly sports<br>b. Mainly horse or dog racing<br>c. About the same for sport and racing |
| **Q21_Would.you.prefer** | The government is considering extending existing bans on sports gambling advertising, to possibly include broadcast TV, digital platforms, print, sponsorship and stadium advertising. A partial ban is also considered, which might allow 2 ads per hour on broadcast TV, outside children's programs, but including family viewing programs<br><br>Would you prefer (randomised)<br>a. A full ban<br>b. A partial ban<br>c. No ban |

Parking this here in case needed

| Table 17: Impact of external signage ban Q5 ➔ Frequency of poker machine use Q3 % 🡻 | Do not use poker machines | Less likely to enter | More likely to enter | No effect | totals |
| --- | --- | --- | --- | --- | --- |
| **Never** | 81 | 6 | 3 | 15 | 35% |
| **Less than once a year** | 15 | 25 | 9 | 43 | 29% |
| **Several times a year** | 3 | 29 | 27 | 30 | 20% |
| **More than once a month** | 0.3 | 30 | 38 | 9 | 10% |

| | | | | | |
|---|---|---|---|---|---|
| **More than once a week** | 0.8 | 10 | 22 | 4 | 5% |
| | 100% | 100% | 100% | 100% | |

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# Community Attitudes to Poker Machines and Gambling Reform

## Analysis Report nr. 5

July 2025