Community Attitudes to Poker Machines and Gambling Reform

Analysis Report

October 2023

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Doing all the good we can
because every life matters

In April 2023 Wesley Mission engaged <u>FastTracker</u>, an independent research agency, to study community attitudes towards poker machines and gambling reform. This report analyses the results of a second survey conducted in October 2023.

Summary of results

Wesley Mission intends to regularly survey NSW adults to track attitudes to poker machines, proposed interventions to reduce gambling harm, and opinions on whether the government is acting in accordance with community standards.

The results of our second survey in October 2023, include the following key findings:

- Support for legislated changes to the operation of poker machines to better prevent or reduce gambling harm remains consistently very high, across NSW
- Close analysis of responses to the recent changes to signage regulations, involving the simple enforcement of the law, reveals that 20-25% of regular poker machine gamblers are now less likely to enter a venue – showing that changes of this nature are important reforms to reduce gambling harm
- The NSW community continues to believe that the gambling industry, and not the government, is driving public policy regarding addressing gambling harm

Results

Surveys to date:

NSW adults, margin of error +/-2.5%

April 18-23 2023 (n=1007)

October 6-13 2023 (n=1000)

Demographic Information

Table 1: Demographics

Characteristics	April 2023 %	October 2023 %
Totals	*n=1,007*	*n=1,000*
Male	49.3	48.8
Female	50.5	51.2
Age distribution		
18-24	12.0	11.1
25-34	19.1	18.0
35-44	17.1	17.6
45-54	16.5	16.3
55-64	14.9	15.1
65+	20.5	21.9
Education		
School	24	23.2
Trade/TAFE	27.3	28.5
University	48.7	48.3
Voting preferences		
Labor Party	41.3	40.1
Liberal Party	28.0	28.6

The population surveyed demonstrates a consistent distribution across various categories from April to October 2023.

Greens	10.5	10.3
Independent	5.9	6.2
One Nation	4.1	4.0
Nationals	3.3	3.7
Other	1.2	1.5
Prefer not to say	5.8	5.6
Region		
Inner city of Sydney	37.5	37.4
Other major city (e.g. Newcastle)	11.5	11.9
Outer suburbs of Sydney	28.2	29.5
Regional	19.1	17.5
Rural	3.7	3.7

Table 2: Educational attainment and voting preferences, October 2023

Voting preferences vary by both age and education level, with the Greens and Labor Party support slightly higher among younger and more educated respondents. The Nationals tend to attract support from older respondents with lower levels of education, while One Nation has a modest presence among those with "Trade/TAFE" education and in the senior age group.

Oct.2023 n=1,000	Vote	Greens %	Independent %	Labor Party %	Liberal Party %	Nationals %	One Nation %	Other %	Prefer not to say %	Totals %
Education	Age									
School	18-24 years	8.7	1.6	3.5	2.8	5.4			17.9	4.4
	25-34 years	1.9	1.6	1.5	1.7	2.7	2.5		1.8	1.7
	35-44 years	1.9	1.6	2.7	1.7	2.7	2.5		3.6	2.3
	45-54 years		6.5	2.2	4.2		7.5		5.4	3.1
	55-64 years	1.0	1.6	3.2	5.6	8.1	2.5	13.3	5.4	4.0
	65+ years	4.9	6.5	7.5	9.4	13.5	10.0	13.3		7.7
Trade/TAFE	18-24 years	5.8		2.5	1.0	5.4	5.0		1.8	2.4
	25-34 years	7.8	4.8	3.2	2.1	2.7	10.0		3.6	3.7
	35-44 years	5.8	3.2	5.5	3.1	2.7	5.0		3.6	4.4
	45-54 years	3.9	6.5	3.0	4.2		12.5		7.1	4.1
	55-64 years	3.9	9.7	6.2	4.2	8.1	12.5	13.3	3.6	5.9
	65+ years	3.9	9.7	8.0	9.4	18.9	5.0	13.3		8.0
University	18-24 years	11.7	4.8	4.2	2.8	2.7			3.6	4.3
	25-34 years	10.7	6.5	12.2	16.1	2.7	7.5		21.4	12.6
	35-44 years	12.6	9.7	13.5	8.7	8.1	2.5	6.7	10.7	10.9
	45-54 years	6.8	9.7	10.5	8.4	5.4	7.5	13.3	8.9	9.1
	55-64 years	4.9	9.7	5.7	4.5	5.4		20.0		5.2
	65+ years	3.9	6.5	4.7	9.8	5.4	7.5	6.7	1.8	6.2

Community attitudes to poker machines

We have assessed the validity of our study by comparing the results of several questions with the data from the NSW Gambling Survey 2019.[1] For example, the frequency of use of poker machines is almost identical, suggesting that our study captures a consistent pattern of behaviour.

Table 3: How often do you play poker machines? (Q2)			NSW Prevalence Study
Responses	April 2023 (n=1,007) %	October 2023 (n=1,000) %	
Never	47.4	49.0	47% (no gambling in the last 12 months)
Less than once per year	20.8	20.6	
Several times per year	19.5	17.8	23% (7-24 times per year)
More than once a month	9.2	8.7	9%
More than once a week	3.2	3.9	4%

The timing of the survey coincided with the lead up to the Voice referendum, and this factor may have slightly influenced the results around racism. The increase in awareness of gambling harm suggests that Wesley Mission's reform message is reaching a wider and more diverse audience of NSW residents.

Table 4: What do you think is the most pressing social issue from the list below? (Q1)		
Responses	April 2023 (n=1,007) %	October 2023 (n=1,000) %
Domestic violence	36.2	33.3
Social inequality	22.5	21.9
Illegal drug abuse	16.1	16.4
Gambling/poker machines	10.8	11.7
Racism	8.2	10.0
Alcohol addiction	6.1	6.7

It is positive to see fewer people are using poker machines. The decline in poker machine users is a positive sign, but, the fact that financial losses are on the rise despite this reduction is alarming. This trend strongly suggests that the remaining users may be experiencing heightened levels of harm, which is a troubling trend.

Table 5: How often do you play poker machines? (Q2)		
Responses	April 2023 (n=1,007) %	October 2023 (n=1,000) %
Never	47.4	49.0
Less than once per year	20.8	20.6
Several times per year	19.5	17.8
More than once a month	9.2	8.7
More than once a week	3.2	3.9

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[1] Browne, M et al *NSW Gambling Survey 2019*, 2020 for NSW Responsible Gambling Fund

On the face of it, NSW residents have a good understanding of the poor odds of winning on poker machines. However, younger people between the ages of 18-34, who are identified as the predominant users in prevalence studies, tend to slightly overestimate their fairness compared to the older age groups. This trend is alarming, considering the vigorous marketing campaigns aimed at this demographic.

Table 6: When it comes to the probability of winning money, do you think poker machines are fair? (Q3)		
Responses	April 2023 (n=1,007) %	October 2023 (n=1,000) %
No	88.5	89.0
Yes	11.5	11.0

Table 7: When it comes to the probability of winning money, do you think poker machines are fair? Results adjusted based on numbers in each age group			
Age Group	Yes/No	April 2023 (n=1,007) %	October 2023 (n=1,000) %
18-24	No	86	84
	Yes	14	16
25-34	No	87	83
	Yes	13	17
35-44	No	80	86
	Yes	20	14
45-54	No	92	90
	Yes	8	10
55-64	No	92	97
	Yes	8	3
65+	No	93	93
	Yes	7	7

The data conveys a clear message to club management, revealing that a significant majority of the state—over two-thirds—prefers frequenting clubs without poker machines. Additionally, more than 70% of respondents reject the notion that clubs should depend on poker machine revenue to meet their expenses. These findings should be an encouragement to consider divestment and reallocating the proceeds towards more family friendly activities.

Table 8: Are you more likely to visit clubs with or without poker machines? (Q15)		
Responses	April 2023 (n=1,007) %	October 2023 (n=1,000) %
Clubs without poker machines	67.3	69.1
Clubs with poker machines	32.7	30.9

Table 9: Should clubs rely on poker machines to fund running costs? (Q16)

Responses	April 2023 (n=1,007) %	October 2023 (n=1,000) %
No	78.6	*72.3
Yes	21.4	27.7

* Significant at the 0.05 significance level

Interventions

Demand for interventions to reduce gambling-related harm is growing, with a range of harm-reduction strategies available for implementation as mandatory cashless gambling systems undergo testing. Support for mandatory cashless card system with locked-in loss limits remains high, and is steadily increasing in support across NSW, closely followed by support for shutting down poker machines from midnight to 10am. These findings are consistent across various regions of NSW, from the inner city to rural areas.

These two interventions enjoy multi-partisan support, with majority of voter from different political affiliations-from the Australian Labor Party (ALP), the Liberal Party, the Nationals, the Greens, and Independent voters- in favour of measures aimed at curbing gambling harm. Notably, One Nation voters are less inclined to favour government intervention, but among those voters, there is a preference for implementing the midnight to 10am shutdown of machines.

Table 10: What do you think would be the best intervention by the government? (Q5)

Responses	April 2023 (n=1,007) %	October 2023 (n=1,000) %
Introduce a mandatory cashless gambling card for all venues with daily, weekly and yearly loss limits locked in	32.3	35.8
Introduce midnight closing for poker machine venues instead of 4:00am-6:00am currently	22.4	26.6
A mandate for poker machines to play a negative sound after every monetary loss (April) Require poker machines to be silent (Oct)	10.2	7.1
Make it simpler for people to self-exclude from all poker machine venues in the state instead of a just a maximum of 36 venues	9.7	10.6
No need for intervention by the government	7.5	8.6
Introduce cashless gaming trial of 500 poker machines is enough	6.9	n/a
Let local Councils have more of a say about extra poker machines being introduced into their area	6.7	6.7
Other*	4.3	4.6

Upon conducting a more detailed examination of the most effective government interventions by region, it becomes apparent that the implementation of a mandatory cashless gambling card with set limits enjoys the highest level of endorsement across all regions. This is closely followed by strong support for turning off poker machine operations from midnight to 10am.

Table 11: What do you think would be the best intervention by the government?

Region Best intervention by government	Inner city of Capital city %	Other major city %	Outer suburbs of Capital city %	Regional %	Rural %	Totals %
Introduce a mandatory cashless gambling card for all venues with daily, weekly and yearly loss limits.	36.6	37.0	34.2	33.1	48.6	35.8
Require all poker machines to be switched off from midnight until 10am.	28.3	26.1	27.5	22.3	24.3	26.6
Make it simpler for people to self-exclude from all poker machine venues in the state instead of the current maximum of just 36 venues.	9.9	7.6	12.9	10.9	8.1	10.6
No need for intervention by the government	6.4	11.8	8.1	12.0	8.1	8.6
Require poker machines to be silent	7.0	6.7	6.8	8.0	8.1	7.1
Let local Councils have more of a say about extra poker machines being introduced into their area.	9.4	6.7	5.4	4.0	2.7	6.7
Other (please specify)	2.4	4.2	5.1	9.7		4.6

Although the initial numbers suggest that the effect of the signage change implemented on September1, 2023 was minor and insignificant, a deeper analysis reveals a different story. The data indicates that the removal of signage is expected to play a significant role in reducing gambling-related harm, pointing towards a positive long-term effect of the reform.

Table 12: Have you noticed that venues have taken down their external poker machine-related signage? (Q18)

Responses	October 2023 (n=1,000) (%)
No	73.3
Yes	26.7

Table 13: Given the absence of this external signage, are you: (Q19)

Responses	October 2023 (n=1,000) (%)
Less likely to enter a venue to gamble on poker machines	13.0

Table 13: Given the absence of this external signage, are you: (Q19)

More likely to enter a venue to gamble on poker machines	6.2
The signage does not influence my decisions	43.5
I do not gamble on poker machines	37.3

The data supporting the removal of external signage as a means to reduce harm becomes apparent in the results for those who gamble at least once a month. Existing research suggests that there is a substantial number of people who gamble regularly and are severely impacted by gambling-related harm. This group tends to overlook not only external signage, but also internal signage related to seeking help, indicating a complex challenge in addressing gambling-related issues.

Encouragingly, with the removal of triggering or enticing external signage, between **a quarter and a third** of frequent gamblers nonetheless report being more likely to stay away from poker machines, as a result of this change, which can effectively contribute to reducing the harm they experience.

Table 14: Intention to enter venues without signage vs gambling frequency

Responses (n=1,000) Gambling frequency à Intention to enter venue â	Never %	Less than once a year %	Several times a year %	More than once a month %	More than once a week %
Do not gamble on poker machines	65.7	19.9	5.6		
Less likely to enter	6.7	13.6	20.2	25.3	28.2
More likely to enter	2.9	7.3	5.6	18.4	17.9
Signage does not influence	24.7	59.2	68.5	56.3	53.8

The question regarding turning off poker machines from midnight to 10 am was posed in October 2023, and it garnered overwhelming support, with 82.4% of respondents in favour. This strong support underscores the public's endorsement of measures aimed at mitigating gambling-related harm during late-night hours.

Table 15: 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? (Q20)

Responses	October 2023 (n=1,000) (%)
No	17.6

Table 15: 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? (Q20)

Yes	82.4

One third of NSW residents indicate that they know someone who has experienced harm due to poker machines. This finding suggests that the 16% harm rate from previous prevalence studies maybe under-reporting in NSW, presenting a strong argument for the Minister or Office of Responsible Gambling (ORG) to conduct further research to establish the true incidence of gambling-related harm.

Additionally, introducing the idea that people may be unaware of harm experienced by their family or friends significantly reduces the "No" response, highlighting a potential lack of awareness of harm within personal circles. However, it does not substantially alter the "Yes" response.

Table 16: Do you have a colleague, family member or friend who has been harmed by playing poker machines? (Q9)

Responses	April 2023 (n=1,007) %	October 2023 (n=1,000) %
No	68.8	54.6
Yes	31.2	31.5
Don't know		13.9

Questions in the survey related to the cashless gambling trial varied between the April and October surveys due to the establishment of the Independent Panel to oversee the trial in the intervening period. Results indicate that details of the system are not yet well known to the public.

Table 17: Should the NSW government abandon the trial of cashless gambling on poker machines and instead commit now to the full implementation of a cashless system with daily, weekly and yearly loss limits? (Q7)

Responses	October 2023 (n=1,000) %
Yes	54.9
No	45.1

Table 18: Were you aware of this cashless gambling trial? (Q6)

Responses	April 2023 (n=1,007) %	October 2023 (n=1,000) %
Yes	46.9	39.6
No	53.1	60.4

Community attitudes to government action

Public confidence in the NSW government's commitment to reducing gambling harm has notably diminished over the last six months, reflecting a change in public opinion.

Table 19: Are you confident that the NSW government is fully committed to addressing gambling harm? (Q8)		
Responses	April 2023 (n=1,007) (Q7) %	October 2023 (n=1,000) (Q8) %
Yes	45.9	33.1
No	54.1	66.9

** wording in April: A Minns Labor government will introduce a 12-month cashless gaming trial in New South Wales, which will begin on 1 July 2023 The trial will include 500 of the total 87,000 poker machines, with a mix of pubs and clubs across NSW Are you confident that the incoming government are fully committed to addressing gambling harm??

The prevalent sentiment among NSW residents is clearly that the government should be doing more to address the issue of gambling harm. This number is rising, despite changes such as the prohibition of external signage enacted on September 1, 2023. This outcome emphasises the urgency for the Minister and Premier to listen to the public's concerns.

Table 20: Do you think the NSW government is doing enough for poker machines and gambling reform? (Q4)		
Responses	April 2023 (n=1,007) %	October 2023 (n=1,000) %
No	69.8	73.4
Yes	30.2	26.6

Interestingly, there is a slight increase in numbers of residents who think citizens/voters and reform advocates can influence gambling policy, with politicians ranking third in this regard.

Table 21: Who do you believe has the strongest say on gambling policy in NSW? (Q13)		
Responses	April 2023 (n=1,007) %	October 2023 (n=1,000) %
Industry lobby	32.5	33.4
Citizens/voters	25.5	25.3
Politicians	24.7	22.9
Media	10.2	9.5
Academics and reform advocates	7.1	8.9

Trust in the government's ability to regulate the industry among NSW residents has declined, with nearly 70% expressing mistrust, up from 64.7% in April.

Table 22: Do you trust the government to stand up to the gambling industry (Q14)		
Responses	April 2023 (n=1,007) %	October 2023 (n=1,000) %
Yes	35.3	30.5

Table 22: Do you trust the government to stand up to the gambling industry (Q14)		
No	64.7	69.5

The slight percentage change observed between April and October 2023 surveys is within the margin of error, but together, these responses show a clear majority of residents have concerns about who is driving public policy on gambling reform.

Table 23: Do you believe the gambling lobby has too much influence on NSW politics? (Q10)		
Responses	April 2023 (n=1,007) %	October 2023 (n=1,000) %
Yes	65.9	64.6
No	34.1	35.4

Table 24: Do you believe the gambling lobby has too much influence on the NSW Labor Party? (Q11)		
Responses	April 2023 (n=1,007) %	October 2023 (n=1,000) %
Yes	59.9	61.7
No	40.1	38.3

Neither the ALP nor the Liberals can take comfort from these results, which are consistent across NSW. Among those who have formed an opinion, a quarter view either the ALP or the Liberals as the weakest on reform. Interestingly, the Nationals, who are more reluctant than their Coalition partners to take reform steps, are not considered weak on gambling. While results are correlated with voting patterns, Labor and Greens voters are dissatisfied with their own party's handling of the issue.

Given the strong correlation between this question and voting patterns, caution should be exercised when interpreting the results. Political allegiances could sway respondents' answers, potentially skewing the data and introducing bias. For a more detailed analysis, refer to Table 26.

Table 25: Which political party/grouping do you believe is WEAKEST on gambling reform? (Q12)	
Responses	October 2023 (n=1,000) %
Greens	8.9
Independent	4.6
Labor Party	26.4
Liberal Party	22.8
Nationals	4.9
One Nation	6.4
Other (specify)	4.5
Prefer not to say	21.5

Delving further into data on political parties, it becomes evident that respondents' perceptions of party weakness align closely with their own voting patterns, with one notable exception being the Greens. In addition, Labor voters also expressed dissatisfaction with their party's performance.

Table 26: Which political party/grouping do you believe is WEAKEST on gambling reform?

Responses   October 2023 (n=1,000)

Voter → Weakest party ↓	Greens %	Independent %	Labor Party %	Liberal Party %	Nationals %	One Nation %	Other %	Prefer not to say %	Totals %
Greens	22.3	12.9	5.7	9.8	8.1	10.0			8.9
Independent	6.8	4.8	4.5	4.9	5.4		6.7	1.8	4.6
Labor Party	14.6	33.9	21.2	38.8	40.5	32.5	6.7	5.4	26.4
Liberal Party	24.3	19.4	34.9	11.9	5.4	25.0	20.0	3.6	22.8
Nationals	5.8	3.2	6.0	3.1	16.2			3.6	4.9
One Nation	5.8	8.1	6.5	7.7	2.7	7.5		1.8	6.4
Other	1.9	4.8	3.2	4.5	2.7	5.0	66.7	1.8	4.5
Prefer not to say	18.4	12.9	18.0	19.2	18.9	20.0		82.1	21.5

Facial Recognition Technology

This particular question was not asked in April 2023. Generally, there appears to be a belief by customers that both CCTV (Closed-Circuit Television) or FRT (Facial Recognition Technology) act as deterrents against undesirable behaviour in public places, though they often do not differentiate between the two technologies. There is a high level of trust in the installation of cameras for this purpose. However, customers typically express minimal concern for privacy unless the issue is specifically raised. At the same time, there is a noticeable sense of resignation to surveillance practices.

All these assumptions notwithstanding, there is still a significant level of concern (24.4%) or ambivalence (32.7%) towards the use of these technologies. This suggests that the apparent support (43.1%) for their implementation should be interpreted with caution, as a substantial portion of the population may have reservations or uncertainties. These issues and nuances are discussed in more detail in the Wesley Mission's FRT Discussion paper.

Table 27: How would you feel about the introduction of Facial Recognition Technology (FRT) into all pubs and clubs? (Q17)

Responses	October 2023 (n=1,000) %
I believe FRT in pubs and clubs would greatly enhance security and I fully support it	23.2
I think FRT could be beneficial for safety reasons and generally support its introduction	19.9
I am uncertain about the benefits and potential drawbacks of FRT	18.7

Table 27: How would you feel about the introduction of Facial Recognition Technology (FRT) into all pubs and clubs? (Q17)

I have some reservations about privacy and misuse of data, but I can see some benefits in the use of FRT	11.3
I believe FRT in pubs and clubs is an invasion of privacy and strongly oppose its use	12.9
I don't know enough about FRT to form an opinion	14.0

Upon a thorough analysis of the data, we were unable to discern any specific patterns in the responses to Facial Recognition Technology (FRT) when considering variables such as age, education, or place of residence. This suggests a uniformity in opinions across different demographics, highlighting the complexity of public sentiment towards FRT.

However, voting intentions show a clear and compelling pattern, with Nationals and particularly One Nation voters very strongly opposed to FRT. Voters from the Independents, ALP, Liberal, and Greens parties surprisingly demonstrate a more open and accepting attitude towards surveillance technologies.

One possible explanation for this pattern could be that Nationals and One Nation voters tend to strongly resist government interventions, perceiving FRT as an initiative driven by government, rather than a measure from the industry to avoid the imposition of mandatory cashless cards.

This same opposition to intervention is consistent across many of the same voting groups, as reflected in their other responses. Interestingly, Nationals voters do show support for mandatory cashless cards, deviating from their usual stance against government-led interventions.

Table 28: How would you feel about the introduction of Facial Recognition Technology (FRT) into all pubs and clubs?

Responses (n=1,000)	Greens %	Independent %	Labor Party %	Liberal Party %	Nationals %	One Nation %	Other %	Prefer not to say %	Totals %
I believe FRT in pubs and clubs would greatly enhance security and I fully support it (= strongly supportive)	20.4	29.0	27.2	23.4	18.9	2.5	6.7	14.3	23.2
I think FRT could be beneficial for safety reasons and generally support its introduction (= supportive)	25.2	12.9	19.7	24.5	13.5	15.0	13.3	5.4	19.9
I am uncertain about the benefits and potential drawbacks of FRT in pubs and clubs (= mixed feelings/neutral)	22.3	14.5	20.9	16.1	10.8	17.5	13.3	21.4	18.7
I have some reservations about privacy and misuse of data, but I can see some benefits in the use of FRT. (= concerned)	9.7	16.1	10.5	11.9	16.2	5.0	6.7	14.3	11.3
I believe FRT in pubs and clubs is an invasion of privacy	11.7	19.4	8.2	10.5	24.3	50.0	33.3	14.3	12.9

Table 28: How would you feel about the introduction of Facial Recognition Technology (FRT) into all pubs and clubs?

and strongly oppose its use. (= strongly opposed)									
I don't know enough about FRT to form an opinion. (= unsure)	10.7	8.1	13.5	13.6	16.2	10.0	26.7	30.4	14.0

Name Choice for awareness week

In 2019 the NSW Upper House made a decision to rename the awareness week from Responsible Gambling Awareness Week to Gambling Harm Awareness Week, aligning with the nomenclature used in SA, Vic, Tas, ACT and New Zealand. However, the then Minister opted for a different approach and endorsed a name change to "GambleAware" for all gambling services and the awareness week. It's important to note that "GambleAware" (spelled like that) is already the name of an existing gambling education charity in the United Kingdom, which is funded by bookmakers.

The name choices, "Gambling Harm Awareness Week" and "Responsible Gambling Awareness Week," are almost equally popular, indicating their strong resonance across a broad demographic. The phrase "Responsible Gambling" continues to resonate in public consciousness because the tag lines on sports gambling advertisements have only undergone changes as of March this year, following years of promoting the "Gamble Responsibly" message.

Table 29: Like many issues, there is an annual awareness week for gambling harm What do you think the best name should be for that week (Q21)

Responses	October 2023 (n=1,000) %
Gambling Harm Awareness Week	35.5
Responsible Gambling Awareness Week	33.3
GambleAware Week	19.1
Safer Gambling Week	12.1