

CASINO IMPACT REPORT

AN ASSESSMENT OF THE SOCIAL AND ECONOMIC
IMPACTS OF THE GRAND CASINO DUNEDIN

December 2022



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Section 1

Executive Summary

1.1 PURPOSE

Dunedin Casinos Limited (DCL), trading as the Grand Casino Dunedin, is applying for a renewal of its Venue Licence. As part of this application process, DCL needs to prepare a Casino Impact Report (CIR) as required by Section 134 of the Gambling Act 2003. Section 134(3) of that Act states a CIR must assess the social and economic effects of (i) the continued operation of the Casino; and (ii) the closure of the Casino. This document provides an assessment of the social and economic impacts of the Grand Casino Dunedin on the local and regional area. Assessment of these impacts is based on numerous data sources pertaining to the operation of the Grand Casino.

1.2 BENEFICIAL EFFECTS

This impact assessment shows that the Grand Casino Dunedin contributes to the Dunedin economy in several ways: it currently employs 89¹ staff; spends \$5.35 million per annum in operational expenses with suppliers²; and spends an additional \$1.1 million per annum on capital items³. The Trust associated with the Casino distributes about \$0.1 million per annum to charities, and in 2022 the Casino distributed a further \$0.13 million in sponsorships. All the sponsorships, and 72 percent of the charity distributions, are to organisations in Dunedin. When the expenditure, employment, and other activities of the Casino are included in a model of the Dunedin and Otago economies, the Casino generates a total of 133 FTEs, \$16.9 million in value added, and \$8.2 million in household income.

When these gross impacts of the Casino expenditure are aggregated with the tourism generation impacts associated with visitors to the city, and the likely impacts of continued expenditure in Dunedin in the absence of the Casino are subtracted, the net impact of the Grand Casino Dunedin is an estimated 38 FTEs in employment, \$8.63 million per annum in value added, and \$3.27 million per annum in household income.

The national impacts of the Casino are also important. The Casino generates \$5.7 million in taxes and levies nationally. In the absence of the Casino, we would expect lower contributions to the casino duty and the Department of Internal Affairs (DIA) levy and lower corporate and personal income taxes paid. Scaling from the national impacts of Christchurch Casino, we would expect the Grand Casino Dunedin to generate \$15 to \$21 million in real gross disposable national income (RGDNI) per annum.

1 The average from 2019–2021 was 118 people (99 FTEs).

2 Of which 39 percent is spent in Dunedin.

3 Of which \$0.26 million is spent in Dunedin.

In addition to these economic benefits, the Casino has several beneficial social impacts on Dunedin and the wider Otago region. The most obvious of these is that the Casino provides a significant entertainment option for Dunedin and Otago residents. In this regard, the Casino contributes to Dunedin's status as a thriving and fun city. The Casino also provides an entertainment option to Dunedin's visitors.

It can also be argued that the Casino plays an important advocacy role for the local business community and is contributing to the civic regeneration of Dunedin, south of the Octagon.

1.3 ADVERSE IMPACTS

The adverse effects most often associated with casino operations are gambling harm and crime. In the case of the Grand Casino Dunedin, very little crime is associated with the operation of the Casino, and the local police express very little concern with the impact of the Casino in this regard.

As for gambling harm, there is no doubt gambling-related harm is a real and continuing issue in New Zealand. Gambling harm creates serious health, social, and economic problems for the gambler and their family and whanau. However, this social impact assessment found only low levels of gambling harm directly attributable to the operations of the Grand Casino Dunedin.

This is likely because entry to the Casino is strictly controlled, and that the Casino operates a rigorous host responsibility policy once people are inside. For instance, the latest DIA mystery shopper report⁴ notes that the Grand Casino Dunedin "displayed a good standard of host responsibility and culture in response to the mystery shopper exercise". In addition to this feedback from DIA, in a 2022 letter to the Gambling Commission regarding the Grand Casino Dunedin's Review of its Host Responsibility Programme⁵, a representative from the Salvation Army's Oasis wrote:

...we continue to observe a positive intention to reduce harm, genuine care for patrons, and a willingness to improve their service. Our Dunedin-based staff speak highly of the Host Responsibility team at the Grand Casino.

This is reiterated in the minutes of a 2022 Community Liaison Meeting where a participant from DIA noted:

Grand Casino have [sic] a very high level of host responsibility understanding and compliance ... there had been glowing reports from visits, good feedback, and not too many concerns⁶.

4 Department of Internal Affairs (2017) Sector report: Gaming Machine Mystery Shopper Exercise Results, Department of Internal Affairs, Wellington, June 2017

5 Letter to Blair Cairncross, Executive Director of Gambling Commission, from Lisa Campbell, National Director, and Alaska Dobbs, Public Health Worker, Oasis, 5 August 2022

6 Minutes of Community Liaison meeting, Monday 27 June 2022

This social impact assessment looked closely at the potential harm the Casino was causing among older residents, Māori, Pacific Peoples, and the local Chinese community (with a special emphasis on international students). In each case, the stakeholders consulted for this project were clear that the Grand Casino Dunedin was not a noticeable source of harm to these communities.

1.4 THE EFFECT OF NON-RENEWAL

This impact assessment concludes that the Dunedin City and Otago scale economic impacts of non-renewal would be minimal. This is not because the Casino does not generate economic benefits but because the direct and net economic impact of the Casino are a small fraction of the city's and region's economy. This generally tallies with the information from stakeholders and the neighbourhood survey showing that the Casino is a valued, but not a major player, in the city's economy. This means relatively few businesses are highly reliant on the Casino's operation. A relatively low quantitative impact in the city context is not unexpected, given the small size of the Casino and its domestic and local focus.

However not renewing the licence would significantly affect employees of the casino, who would need to find alternative employment, and for those with hospitality specific skills for a number of them this is likely to be at lower pay. It would also impact on the casino's landlord, and the owners of the casino business. Furthermore, not doing so, it would likely undermine Dunedin's sense of itself as a thriving and fun place to live. At the same time, non-renewal would deprive the community of funding for a range of organisations that are also contributing to the wellbeing of Dunedin and the Otago region.

Rather than reducing gambling harm, closing the Casino might increase the potential for harm should those Dunedin and Otago residents who wish to keep gambling shift to more dangerous forms of gambling. This is a particular risk if the Grand Casino Dunedin gamblers migrate to online gambling.

Section 2

Introduction

2.1 THIS ASSESSMENT

Dunedin Casinos Limited (DCL), trading as the Grand Casino Dunedin, is applying for a renewal of its Venue Licence. As part of this application process, DCL needs to prepare a Casino Impact Report (CIR) as required by Section 134 of the Gambling Act 2003.

The Gambling Act 2003 also sets out the requirements for CIRs, noting in Section 134:

(3) A casino impact report must be prepared by a person approved by the Commission as independent of the applicant, and must—

(a) report on the expected social and economic effects on the local and regional areas affected by the operation of the casino, and on New Zealand generally, of—

(i) the continued operation of the casino; and

(ii) the closure of the casino

This document provides that assessment of the social and economic impacts of the Grand Casino Dunedin on the local and regional area. Assessment of these impacts is based on numerous data sources pertaining to the operation of the Casino.

In this report we describe the economic and social impacts of the continued operation of the Grand Casino Dunedin in 3(i) above as the With Casino scenario, and 3(ii) above as the Without Casino scenario.

2.2 ASSESSMENT DESIGN

This CIR uses an impact design based on the approach adopted in the Christchurch Casino economic impact assessment. This design was used as a starting point, given it was based on a thorough review of the literature on the impacts of casinos and was accepted by the Gambling Commission as an appropriate approach. The assessment also incorporates matters raised by the Gambling Commission as matters it would like to be included in the CIR.

For the economic impact assessment component, this report uses input-output (I-O) models to estimate the Dunedin and Otago economic impacts of the Casino on employment, household income, and value added, considering the trade diversion effects and the tourism effects of the Casino. The approaches used in the impact assessment are outlined in Appendix One but, in short, the economic impact assessment involved the following elements:

- **Impact metrics:** This study reports on the commonly used metrics of value added (~GDP), household income and employment at a city and regional level.
- **Measurement approach:** This study uses appropriate I-O models for quantitative assessment of effects. The results consider the positive impacts of the Casino and the negative impacts of trade diversion away from other businesses when consumers switch spending to the Casino (illustrated by the casino closure scenario in Section 134 3(ii) of the Act). Impacts on tourism are also considered.
- **Issues with combining costs and benefits:** This study quantifies financial costs and benefits of market transactions and describes, where possible, social costs and benefits. It does not put a financial value on these.
- **Time frame:** The study takes a long-term operating perspective and uses three-year average data when modelling the Casino's operations. The period modelled is 2018/19 to 2020/21. The last year of this has been significantly impacted by the COVID-19 pandemic, and so the results are potentially affected by the lower patron numbers the Casino experienced during the pandemic.
- **Geographic focus:** The study looks at the Casino's impacts on the city and region. The analysis indicates the likely magnitude of any national impacts based on its size relative to Christchurch Casino and its associated national impacts.

The social impact assessment component starts with the recognition that this assessment is about the operation of the Grand Casino Dunedin as a whole and is not just an assessment of the effects of gambling (see below). The social impact assessment's purpose is to identify the expected social effects on the local and regional areas affected by the operation of the Grand Casino Dunedin (and on New Zealand generally).

The international literature regarding the social impacts of casinos shows the industry has yielded positive and negative effects for local communities and the lives of residents. For instance, Giacomassi et al found that 59 percent of the respondents favoured casino establishments in their communities. In this research, 65 percent believed casinos enhanced the quality of their lives, and 77 percent agreed that casinos led to positive effects on their communities' economy⁷.

Similarly, according to Taylor et al (2006) more than two-thirds (69 percent) of those surveyed in 2007 believed casinos brought widespread economic benefits to other industries and businesses in their region⁸.

In the United States, the American Gaming Association conducts a regular State of the States research project that captures the state of the industry there, including how it is perceived by the public and elected officials. The 2005 edition of the State of the States report includes research with 201 elected officials and civic leaders about the effects of casinos in their communities. In this sample, 79 percent said casinos had a positive impact, whereas only 13 percent saw a negative impact. Some 63 percent praised casinos as helping other businesses, and 79 percent touted casinos as being responsible corporate citizens⁹.

7 Giacomassi et al (1999) "Attitudes of community leaders in new casino jurisdictions regarding casino gambling's effects on crime and quality of life", *Journal of Gambling Studies*, 15 (2) (1999), pp. 123-147

8 Paul Taylor, Cary Funk, and Peyton Craighill of the Pew Research Center, in *Gambling: As the Take Rises, So Does Public Concern* (May 23, 2006, http://www.americangaming.org/assets/files/aga_2008_sos.pdf)

9 American Gaming Association (2005) 2005 State of the States: The AGA Survey of Casino Entertainment www.americangaming.org/assets/files/

The social impact assessment presented here reflects a significant engagement and assessment process, completed between February and September 2022. A detailed outline of how the social impact assessment was conducted is provided in Appendix One, but the design can be summarised as a multi-phase, mixed-method research design comprising eight components:

1. A review of the literature about gambling and problem gambling in Dunedin and Otago.
2. An analysis of media and social media relating to gambling in Dunedin and Otago and the operations of the Grand Casino Dunedin.
3. Interviews with 30 stakeholders and community representatives across Dunedin and Otago.
4. An in-situ survey of Casino patrons (N=121).
5. An online survey of Casino members (N=238).
6. A survey of residential neighbours of the Casino.
7. A survey of residential businesses of the Casino.
8. A community survey of Dunedin residents (N=363)¹⁰.
9. A mystery shopper research exercise.

Social impacts are regarded as the most difficult phenomenon for researchers to measure scientifically¹¹ and, for this reason, the design of the social impact assessment was peer reviewed by both James Baines¹² and Gerard Fitzgerald¹³. Following this, the social impact assessment team worked closely with the peer reviewers in their capacity as a Research Oversight Group throughout the social impact assessment process.

¹⁰ A community survey of Dunedin residents was added to the assessment design after the neighbourhood survey failed to provide useful responses (17 businesses and 7 households). The sample size of 363 used for the community survey was chosen as this ensures survey results with a maximum margin of error close to the +/-5% threshold considered 'robust'.

¹¹ Oh, H. (1999) "Service quality, customer satisfaction, and customer value: a holistic perspective", *International Journal of Hospitality Management*, 18 (1)

¹² Partner in Taylor Baines and Associates (TBA) and author of the Christchurch Casino Impact Report (2017).

¹³ Principal at Fitzgerald Applied Sociology and contributing author to, Becker, H.A., and Vanclay, F. (eds) (2003) *The International Handbook of Social Impact Assessment: Conceptual and Methodological Advances*. Edward Elgar Publishing Cheltenham, UK

2.3 THE CASINO ENVIRONMENT IN NEW ZEALAND

The Gambling Act (Part 2 Section 34) defines casino gambling as gambling

- (i) for which there are game rules; and
 - (ii) that satisfies those game rules; and
 - (iii) which is conducted in accordance with those game rules; and
 - (iv) to which both a casino venue licence and casino operator's licence apply; but
- (b) does not include gambling conducted by TAB NZ

There are five casinos in New Zealand: one each in Auckland, Hamilton, Christchurch, Dunedin, and Queenstown. The casinos operate 3,033 gaming machines, 207 table games, and 230 semi-automated or fully-automated tables games¹⁴. Data cited by the Ministry of Health (2022) show that in the 12 months prior, 4 percent of New Zealanders had played gaming machines at casinos and 2.5 percent had played table games at casinos.

DIA is the main gambling regulator and policy advisor to the Government on gambling regulatory issues. DIA administers the Gambling Act and its regulations, issues licences for gambling activities, ensures compliance with the legislation, works with the gambling sector to encourage best practice, and publishes statistical and other information concerning gambling. DIA is also responsible for limiting the opportunities for crime and dishonesty associated with gambling.

The Gambling Act sets out requirements for an "integrated problem gambling strategy focused on public health". **The Ministry of Health** is responsible for developing and implementing this strategy, which is refreshed at three-year intervals. *The Strategy to Prevent and Minimise Gambling Harm 2022/23 to 2024/25* is the latest of these strategy documents and took effect from 1 July 2022. This strategy strengthens the focus on better meeting the needs of people affected by harmful gambling and reducing gambling harm-related health inequities for priority populations, including Māori, Pacific, Asian, and young people.

The Gambling Commission is an independent statutory decision-making body established under the Gambling Act 2003. The Commission hears casino licensing applications and appeals on licensing and enforcement decisions made by the Secretary of Internal Affairs in relation to gaming machines and other non-casino gambling activities. The Gambling Commission has the powers of a Commission of Inquiry.

¹⁴ 2022 numbers from correspondence with the Deputy Director Operations, Gambling, at Department of Internal Affairs, October 18th 2022

2.4 DUNEDIN’S GRAND CASINO

Dunedin Casinos Ltd. is a privately held casino, entertainment, and hospitality business owned 42 percent by Lani Hagaman, 33 percent by Christchurch Casino Ltd, and the rest of the shareholding by local businesspeople.

The Casino was granted its licence and commenced operations in October 1999. The business has been operating for 23 years and in 2022 employs approximately 100 staff. The Grand Casino Dunedin is in a building originally named the Grand Hotel, which was built in 1883 by Italian architect Louis Boldini. The interior finishing showcases the Victorian taste in classical architecture. The Casino fits under the zoning category of Commercial Mixed Use and Central Activity Zones, whose rules permit the casino activity.

The Grand Casino’s current hours of operations are:

- 12pm to 12am Sunday through Thursday and
- 12pm to 2am Friday and Saturday

To understand the scale of the Casino’s operation, Table 2.1 outlines the total number of patrons from 2018 to 2022 with weekly average attendance and peak weekly attendance each year.

Table 2.1: Casino patronage by year, weekly average, and weekly peak

	YEM2018*	YEM2019	YEM2020	YEM2021	YEM2022
Annual total	197,199	185,993	176,576	139,223	134,025
Weekly average	3,792	3,577	3,396	2,677	2,577
Weekly peak	5,116	4,583	4,819	3,961	3,769

*YEM = Year Ending March

Table 2.1 demonstrates that the Casino’s peak week number can be heavily influenced by events on in the city in any particular week. For example, the:

- 2018 peak week had an All Blacks Test in it (27/8/2017)
- 2019 peak week included Queen’s Birthday weekend (3/6/2018)
- 2020 peak week included New Year’s Eve (5/1/2020)
- 2021 peak week also included New Year’s Eve (3/1/2021)
- 2022 peak week was ANZAC weekend.

In 2021 and 2022, it is clear that people have been reluctant to visit the Casino due to COVID-19 and its associated restrictions.

An analysis completed by the Commerce Commission in 2004 found that Dunedin was the 'regional market' for the Grand Casino and it is a venue for 'ordinary' gamblers, most of whom travel within their local town (Dunedin) to attend a casino¹⁵.

¹⁵ Commerce Commission (2004) Decision No 523: SkyCity Entertainment Group Ltd and Aspinall (NZ) Limited, 18 May 2004 (Public Version ISSN No. 0114-2720)

Section 3

The Social Environment

3.1 ABOUT OTAGO AND DUNEDIN

At the 2018 Census, Dunedin had a population of 126,000 and the Otago region had a population of 225,000. While Otago grew at a faster rate than the rest of New Zealand (on average), Dunedin’s population grew at half the rate of the rest of the country (Table 3.1 and 3.2):

Table 3.1: Population counts at Census periods

	2006	2013	2018
Dunedin	118,683	120,249	126,255
Otago	193,803	202,470	225,186
New Zealand	4,143,279	4,242,048	4,699,755

Table 3.2: Population growth rate

	2006-2013	2013-2018
Dunedin	+1.3%	+5.0%
Otago	+4.5%	+11.2%
New Zealand	+2.4%	+10.8%

Dunedin and Otago are less ethnically diverse than New Zealand as a whole, although the diversity of both are increasing (Table 3.3, 3.4, and 3.5).

Table 3.3: Population by ethnicity (2018 Census)

	Dunedin	Otago	New Zealand
European	86.6%	86.9%	70.2%
Māori	9.3%	8.7%	16.5%
Asian	7.8%	7.1%	15.1%
Pacific Peoples	3.2%	2.7%	8.1%

Table 3.4: Growth in ethnicity, Dunedin City, 2013-2018

	2013	2018	Change ¹⁶
European	88.3%	86.6%	-1.7%
Māori	7.7%	9.3%	+1.6%
Asian	5.3%	7.8%	+2.5%
Pacific Peoples	2.2%	3.2%	+1.0%

Table 3.5: Growth in ethnicity, Otago region, 2013-2018

	2013	2018	Change
European	89.1%	86.9%	-2.5%
Māori	7.5%	8.7%	+1.8%
Asian	5.2%	7.1%	+2.6%
Pacific Peoples	2.0%	2.7%	+1.2%

It is important to note that while Dunedin is becoming more ethnically diverse (Table 3.4) the percentage of people born overseas remains behind the national average (19.7 percent versus 27.1 percent).

At the 2018 census the median age in Dunedin was 36.8 years (compared with 37.4 years nationally), with:

- 19,914 people (15.8 percent) aged under 15 years
- 33,549 (26.6 percent) aged 15 to 29
- 52,509 (41.6 percent) aged 30 to 64
- 20,289 (16.1 percent) aged 65 or older.
- The median income in Dunedin in 2018 was \$25,500, compared with \$31,800 nationally. 14,367 people (13.5 percent) earned over \$70,000 compared to 17.2 percent nationally.

¹⁶ This column shows the increase in absolute share of the population. This under reports the scale of growth within these ethnic groups. For instance, the Asian population increased by nearly 50 percent between 2013 and 2018 and the Māori population increased by over 20 percent.

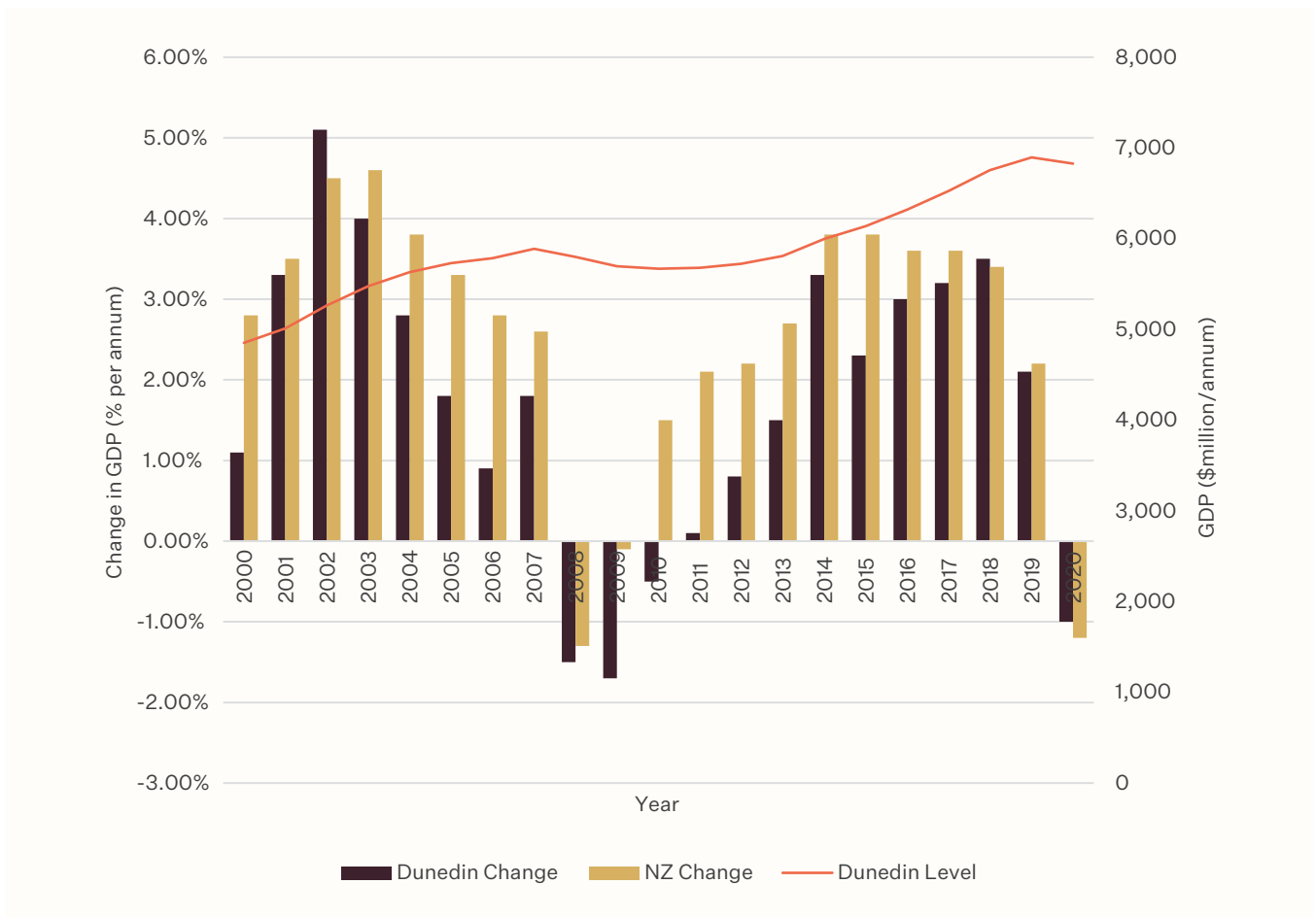
3.2 DUNEDIN’S ECONOMY

3.2.1 GDP AND EMPLOYMENT¹⁷

GDP for Dunedin City TLA is approximately \$6.8 billion, which has grown from \$4.8 billion in 2000 and \$5.7 billion in 2010 (Figure 3). Growth in GDP has tended to be lower than for the country as a whole; from the period 2008 to 2011 the economy of Dunedin was in recession or nil growth. Negative growth was also recorded for the 2021 year, likely associated with the impacts of COVID-19-induced changes in the patterns of work and spending.

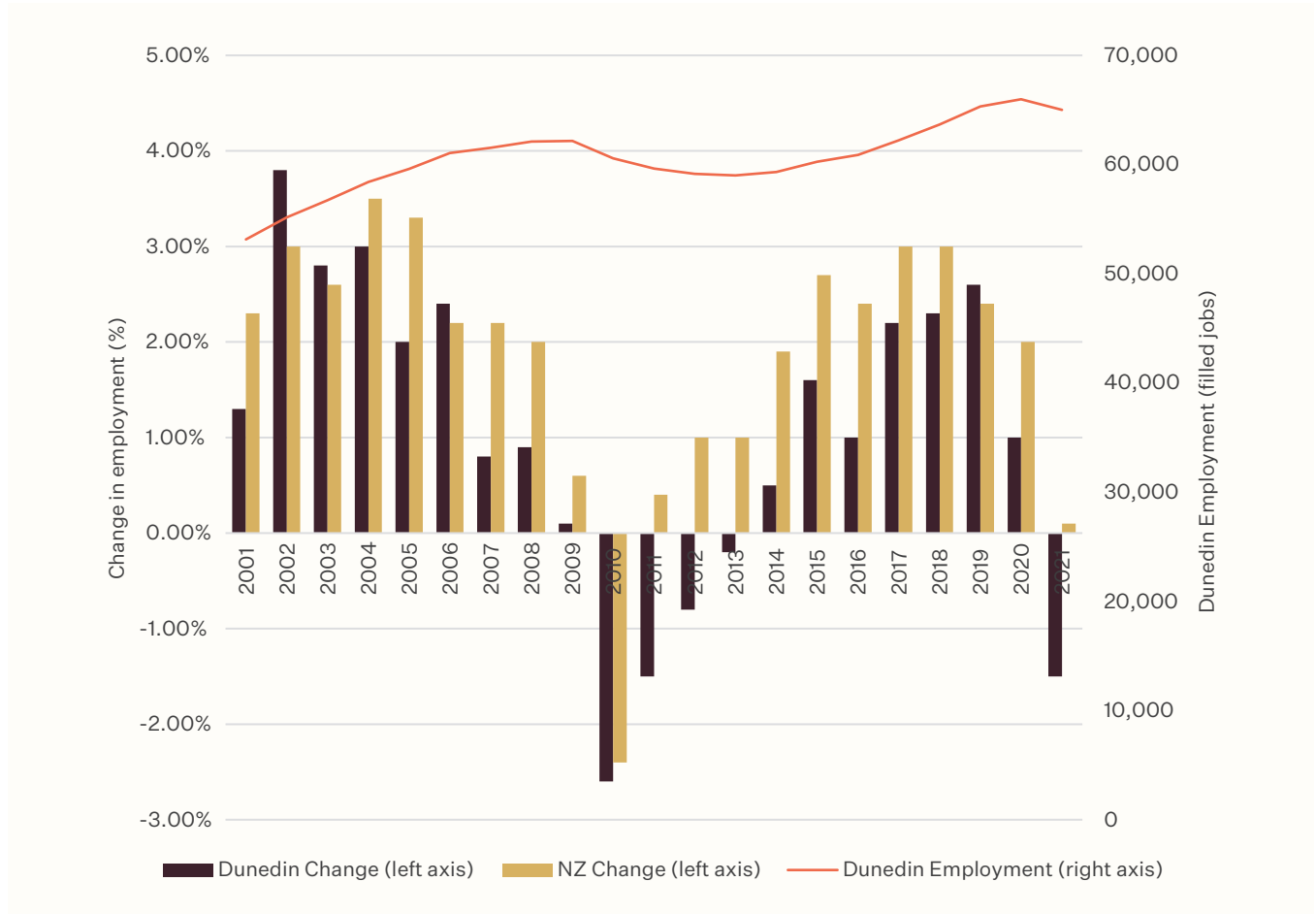
Employment follows a similar pattern, rising from 52,000 in 2000 to 62,000 in 2010 and 68,000 in 2021 (Figure 3.2). Employment growth was nil or negative from 2008 to 2012 and did not recover as quickly from the recession as the country as a whole. Employment in Dunedin decreased more strongly than GDP in 2021.

Figure 3.1: GDP and change in GDP 2000-2021 (\$million/annum)



¹⁷ This section draws largely on the work of Infometrics from the Dunedin section of its Regional Economic Profile series [https://ecoprofile.infometrics.co.nz/Dunedin City](https://ecoprofile.infometrics.co.nz/Dunedin%20City).

Figure 3.2: GDP employment and change in employment, 2000-2021 (filled jobs)



Healthcare (10.3 percent of GDP) and education (8.7 percent) are significantly larger sectors in the Dunedin economy than they are in New Zealand (6.2 percent and 3.2 percent respectively) (Figure 3.3). This weighting reflects the Dunedin Hospital and University of Otago contribution to the local economy. The hospital caters to the lower South Island and is co-located with one of the two major healthcare education institutions in the country (University of Otago Division of Health Science). This combination clearly drives GDP and employment. Healthcare and Education and Training are 15.6 percent and 13.9 percent of employment respectively (Figure 3.4) and thus, collectively, comprise nearly 30 percent of employment in Dunedin.

Figure 3.3: GDP by sector, Dunedin City 2021

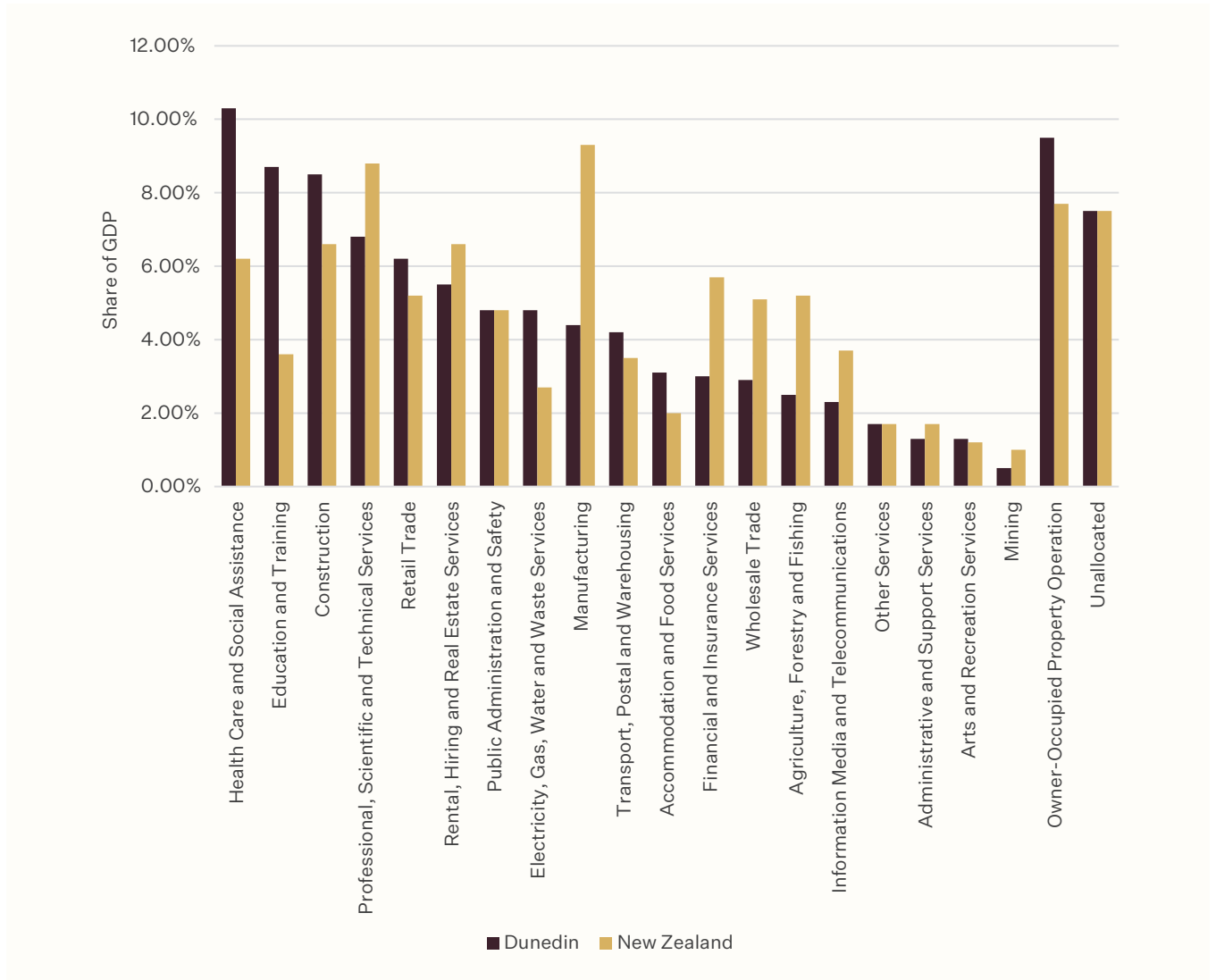
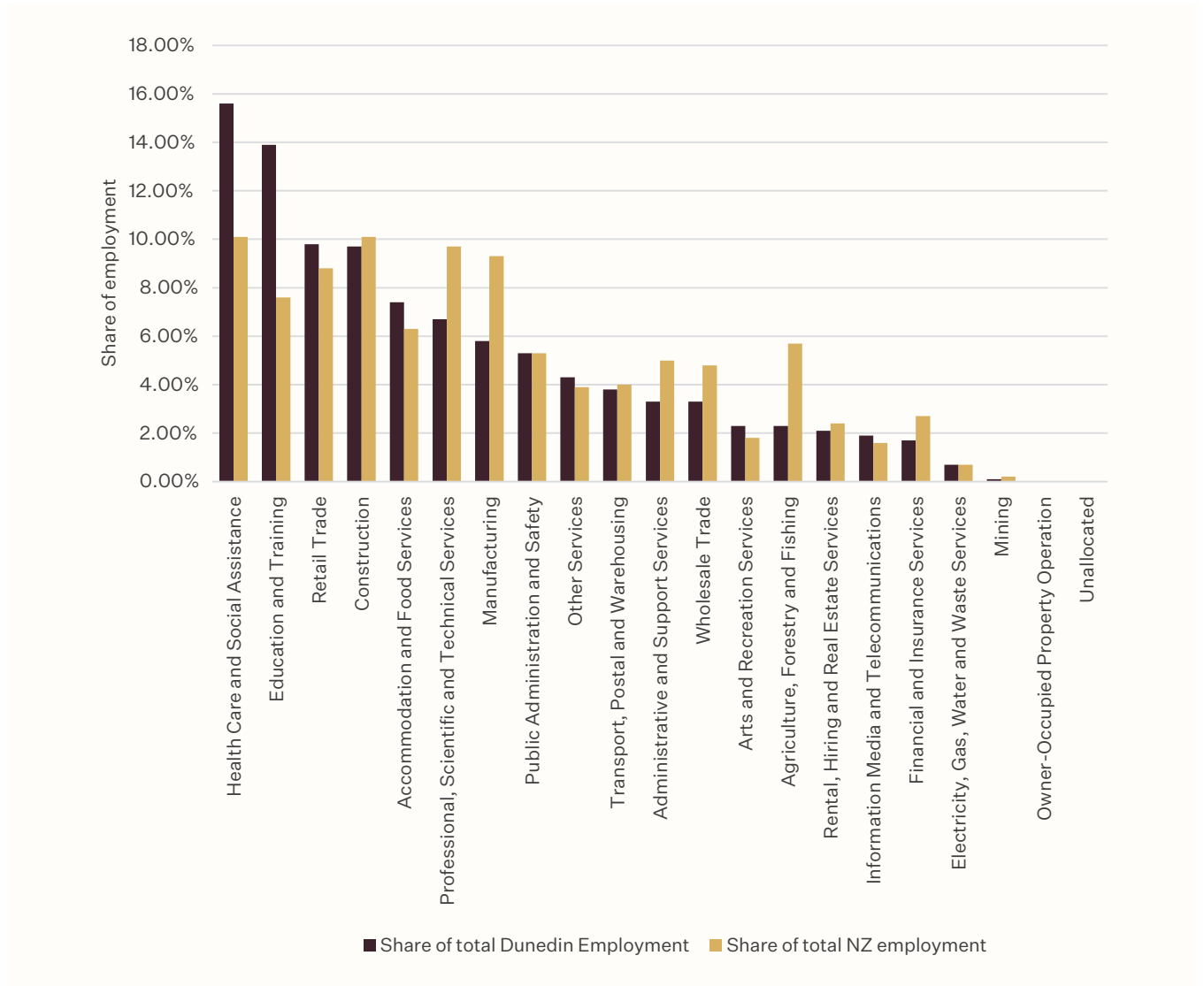


Figure 3.4: Employment by sector, Dunedin City 2021



3.2.2 GROWTH AND PRODUCTIVITY

The four highest growth sectors for Dunedin over the past ten years have been construction, IT/telecoms/media, healthcare, and public administration (Figure 3.5). Of these, IT/telecoms/media and healthcare were the largest contributors to Dunedin’s GDP growth. Ranking of labour productivity is shown in Figure 3.6, but the interesting item in that graph is how few sectors show labour productivity exceeding the national average—utilities, construction, education and training, and accommodation and food services. All other sectors are either approximately the same as or less than the national average labour productivity. This is likely due, in part, to the small nature of the Dunedin economy, lack of economies of scale, and the specific nature of those sectors in Dunedin compared to the country as a whole.

Figure 3.5: Average annual GDP growth 2011-2021, Dunedin City

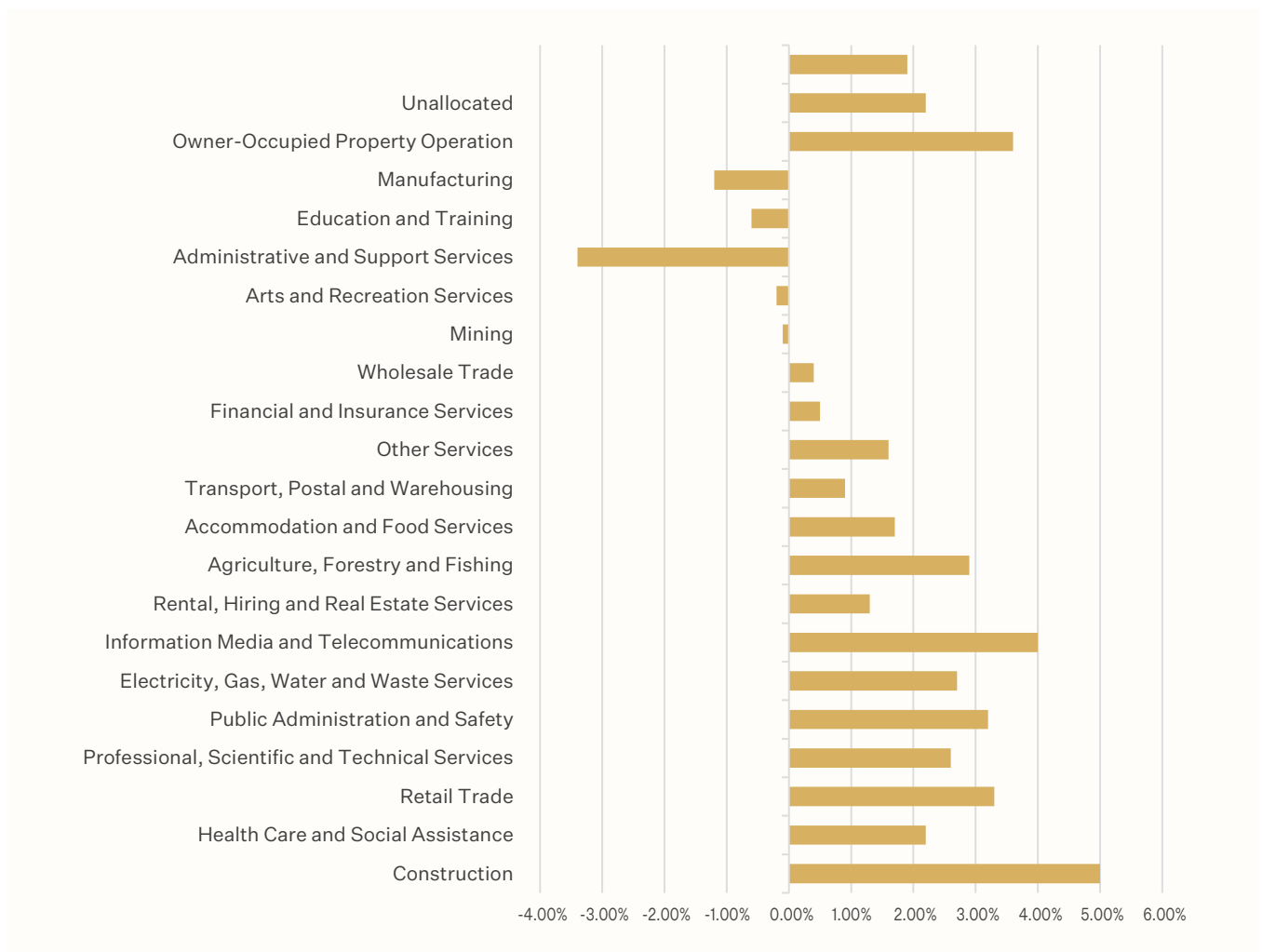
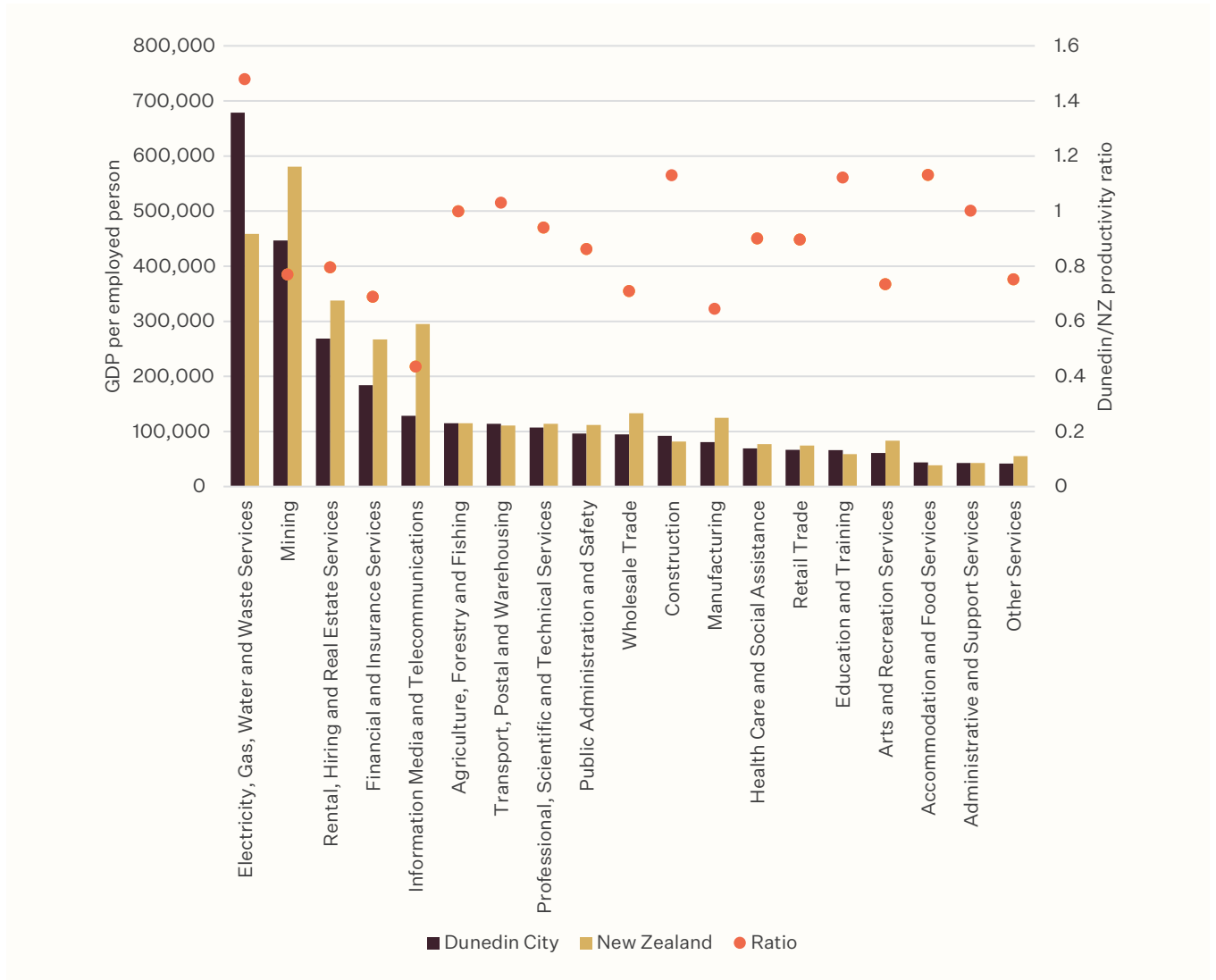


Figure 3.6: Labour productivity, Dunedin City 2021



Focusing specifically on the top five knowledge-intensive industries, higher education and training and vocational education and training are a larger share of employment in Dunedin than in the country as a whole. Primary education and central government administration are similar to the country as a whole. This points again to an economy that is more oriented to knowledge-intensive sectors than the country as a whole (Figure 3.7).

Figure 3.7: Employment for top five knowledge-intensive industries, Dunedin City versus New Zealand, 2021

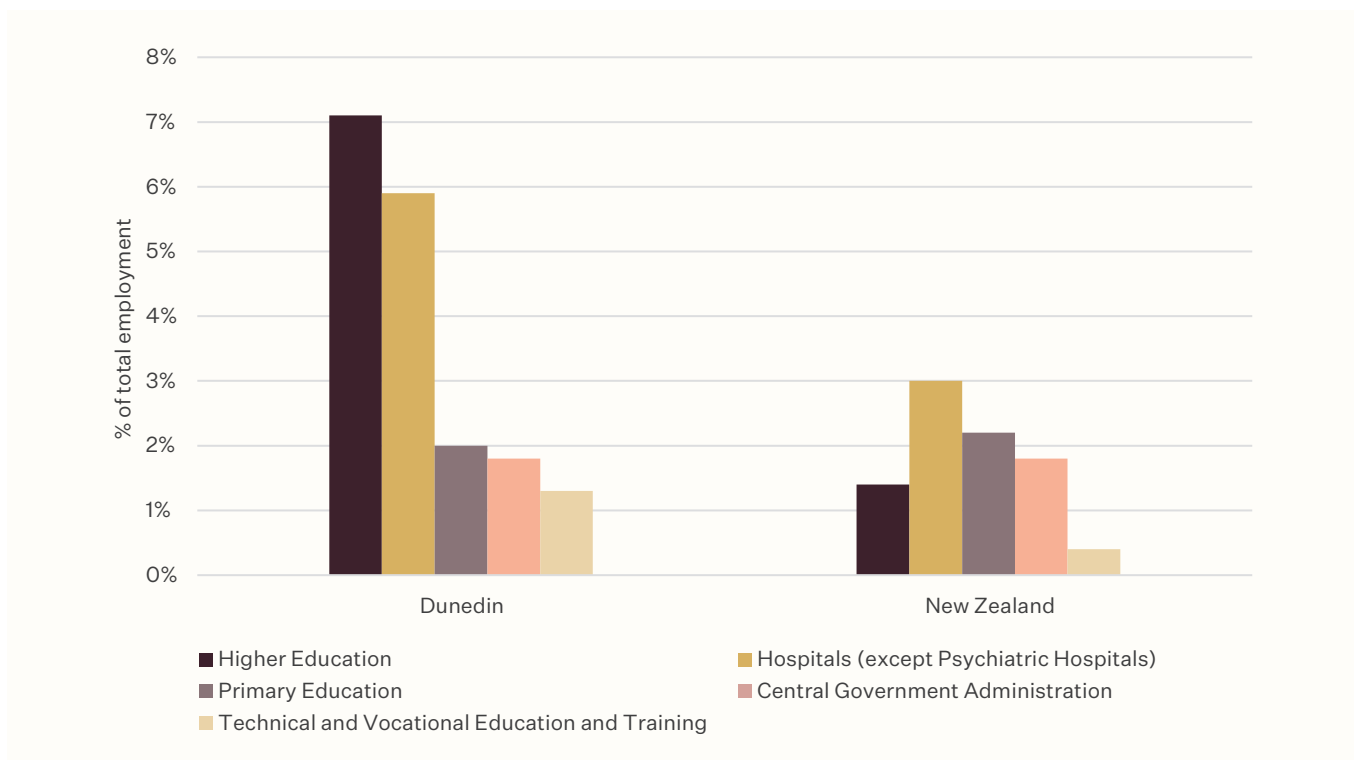


Figure 3.8 shows employment for tourism in the context of other major sectors in the Dunedin economy (those with filled jobs > 2500). It shows that tourism is a reasonably sized sector, ranking between manufacturing and public sector administration as an employer. This size is likely to have been affected by the COVID-19 pandemic. Tourism had been growing consistently (apart from 2009) over the 10 years prior to the pandemic (Figure 3.), but in 2021 the sector shrank 40 percent in Dunedin and over 80 percent nationally. The tourism recovery has the potential to be a strong contributor to economic growth over the next two to three years.

Figure 3. 8: Tourism employment in the context of other major sectors (employment > 2500 filled jobs), Dunedin City versus New Zealand, 2021

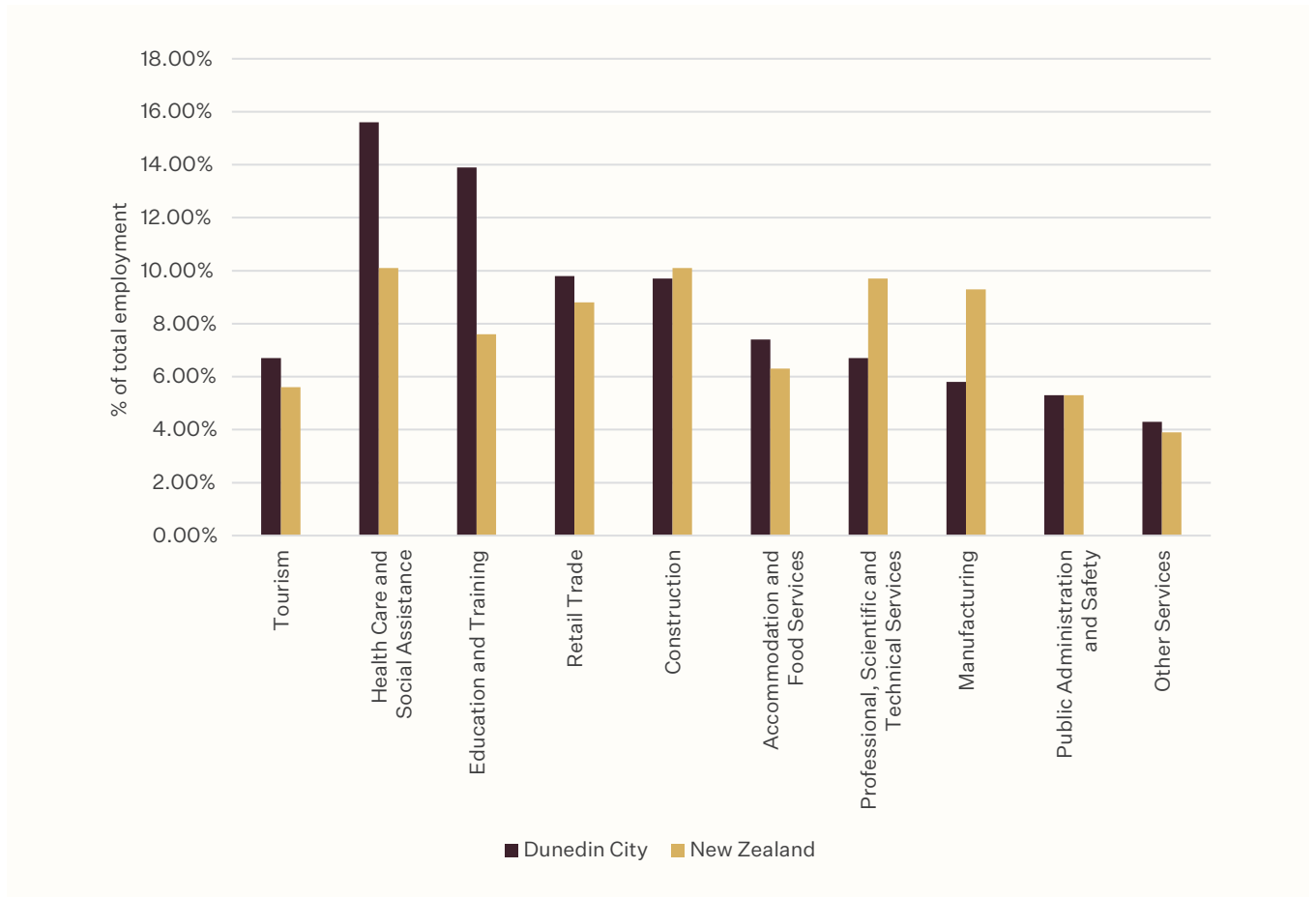
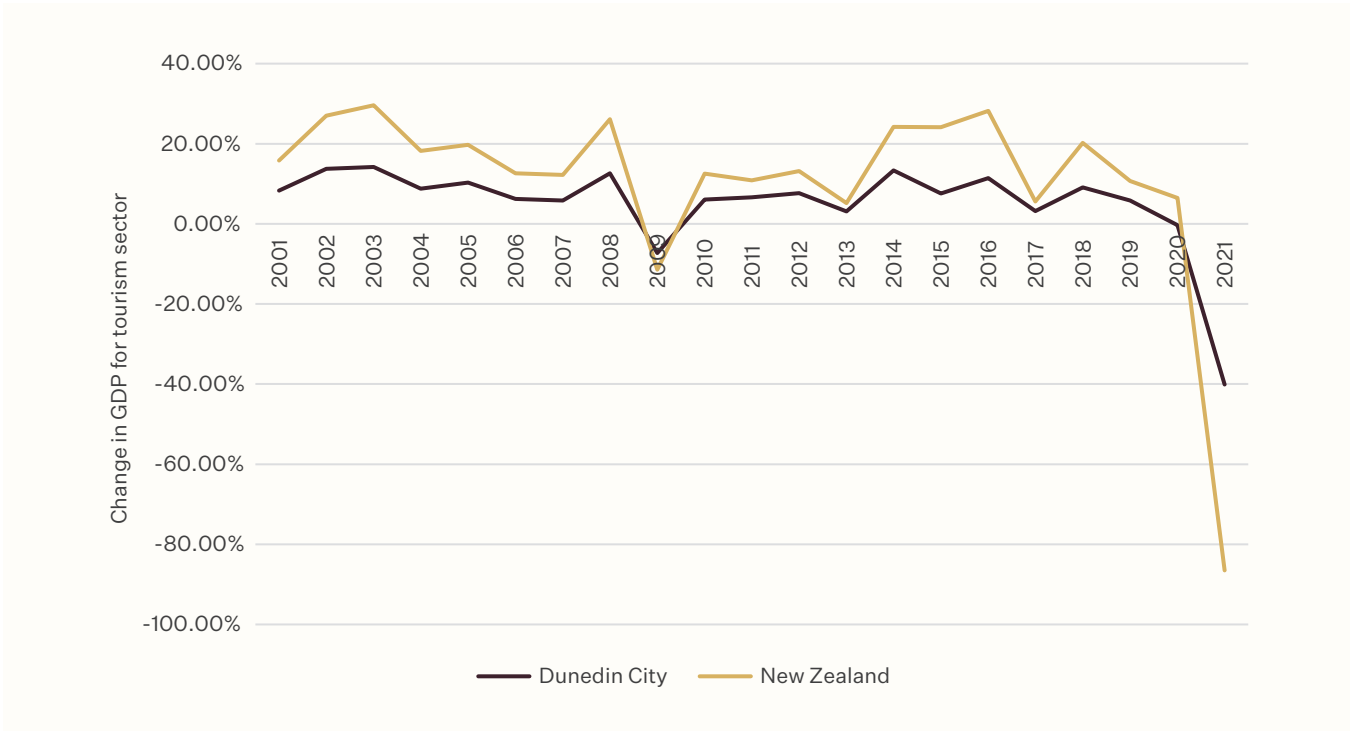


Figure 3.9: Annual change in tourism GDP, Dunedin City versus New Zealand, 2021



3.2.3 WORKERS IN DUNEDIN

Workers in Dunedin generally live in the city area, with 98.4 percent living in Dunedin City in the 2018 census¹⁸. This also showed 34 percent of workers in Dunedin with a bachelor's degree or higher, and 26.3 percent had a post-school qualification. This compares with 25 percent of all people in New Zealand having a bachelor's degree or higher and 19 percent having a post-school qualification. The Dunedin workforce is, therefore, significantly more qualified than that of the rest of New Zealand. The most common fields of study were society and culture (8.9percent), management and commerce (8.7 percent), health (8.7 percent), engineering and related (7.1 percent) and education (5.5 percent).

Over the four years between the 2013 census and 2018 census, 20 percent of people were able to be identified as having moved into Dunedin in that period, while 63 percent had not moved. Given the 25,000-strong student population, many of whom will have moved to Dunedin for their studies, the remaining population were reasonably stably located in Dunedin. Of those moving into Dunedin, 15 percent came from elsewhere in New Zealand, while 5 percent moved to Dunedin from overseas. The population increase over that period was 6 percent (relative to 2018), so there has been net migration into Dunedin from 2013–2018. In general, the Dunedin population has been growing at an average of 0.78 percent over the past ten years, which is more slowly than New Zealand as a whole, at 1.5 percent.

¹⁸ Workers' place of residence | Dunedin City Council | Community profile (idnz.co.nz) accessed 24 May 2022

3.3 THE CASINO NEIGHBOURHOOD

The Grand Casino Dunedin is in the Scenic Hotel Southern Cross complex at 118 High Street, Dunedin, at the centre of what is known among Dunedin residents as ‘The Exchange’: the former financial centre of the city in and around the intersections of Princes, Rattray, and High Streets.

The original Exchange Building was demolished in 1969, though many of the notable and now protected historic buildings in the area remain, including several banks, the former Chief Post Office, the former Wains Hotel (now Fable Dunedin), the Cargill Monument, and the Scenic Hotel Southern Cross.

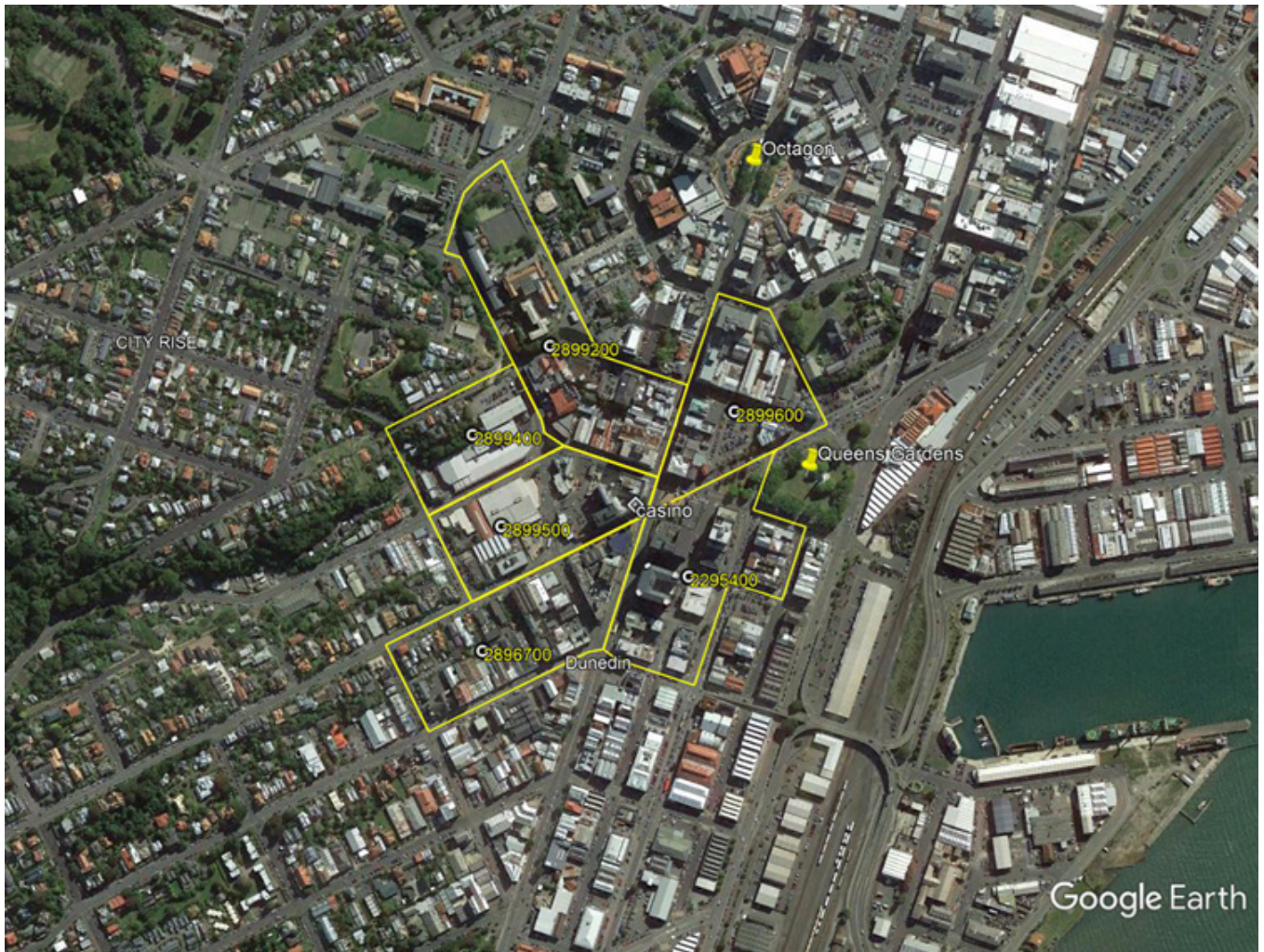
The immediate environment of the Casino, while busy for commerce and hospitality, has not historically been a residential area in Dunedin. The Warehouse District, which lies east of Princes Street toward the Otago harbour foreshore, also contains historic buildings. Likewise, it has not been a residential area but is undergoing renewal, including conversion to residential apartments.

For this assessment, the locality of the Grand Casino Dunedin has been taken to mean the neighbourhood of the Exchange, including lower Princes Street, lower Rattray Street, Canongate, lower Maclaggan Street, lower High Street, Manse Street, and lower Stafford Street, and the area around the Cargill Monument and former Chief Post Office, including Water Street and Jetty Street. This area lies within an approximate 200m radius of the Casino location. Socioeconomic data on the residents of this neighbourhood is available from five relevant meshblocks¹⁹ from the 2018 Census.

The boundaries of these meshblocks are indicated on the Google Earth satellite image below (Figure 3.10, overleaf). To protect people’s privacy, Statistics New Zealand (SNZ) only provides census data for meshblocks where the number of people in a particular category is greater than 20.

¹⁹ The small geographical area for which Census results are provided. Note that use of meshblocks for reporting census data is being phased out and the geographical basis of data reporting is being replaced by Level 1 Statistical Areas (SA1), which are larger than meshblocks and do not fully map onto the meshblock boundaries for the Casino neighbourhood

Figure 3.10: Location of the Dunedin Casino and surrounding census meshblock areas



In 2018, the Census of Population and Dwellings recorded 360 people usually resident in the neighbourhood of the Grand Casino. This is 24 fewer residents than in 2013, when the previous Census was held.

This neighbourhood represents 18 percent of Dunedin Central residents and about 0.3 percent of the total Dunedin City population. Of the five Census meshblocks that make up the Casino neighbourhood, the ‘warehouse precinct’ around the former Chief Post Office had the most residents (Table 3.6).

Table 3.6: 2018 Census counts of residents of the Casino neighbourhood meshblocks

Mesh blocks	Residents in 2018
MB 2895400 – old CPO & Warehouses	105
MB 2896700 - Manse St	129
MB 2899200 – Speights Brewery area	72
MB 2899400 - Lower Maclaggan & High St	18
MB 2899500 - The Exchange & Casino	9
MB 2899600 - Low Princes & Lower Dowling	27
Approximate total	360

On Census night in 2018, there were 504 additional people staying in this neighbourhood, considerably outnumbering the usual residents. This reflects the concentration of hotels in the area, including the Scenic Hotel Southern Cross complex.

In 2018, the five statistical areas (SA1s) that make up the lower Princes Street precinct had a usual resident population of 834. In Dunedin Central (SA2), the inner-city suburb, there were 1,962 usual residents.

As can be seen, the Casino neighbourhood and adjacent areas of the inner city has relatively few permanent residents and, except for the commercially promoted ‘Warehouse Precinct’, does not yet have neighbourhood-based communities²⁰.

The Casino neighbourhood, like the inner city, has a relatively low number of usual residents, and they are typically young adults without children. The limited meshblock Census data on ethnicity indicates that approximately 82 percent of the residents of the Casino neighbourhood were of European ethnicity, and most of the remainder were Asian. The same pattern is evident in the lower Princes Street part of the inner city, where 79 percent of residents were European, 14 percent were Asian, and 10 percent were Māori²¹.

In Dunedin Central, which contains all the downtown area including the Casino neighbourhood, there was a noticeable lower proportion of Europeans (70 percent) and a high proportion of Asians (24 percent).

²⁰ See <http://www.warehouseprecinct.co.nz/>

²¹ Using SA1 census data.

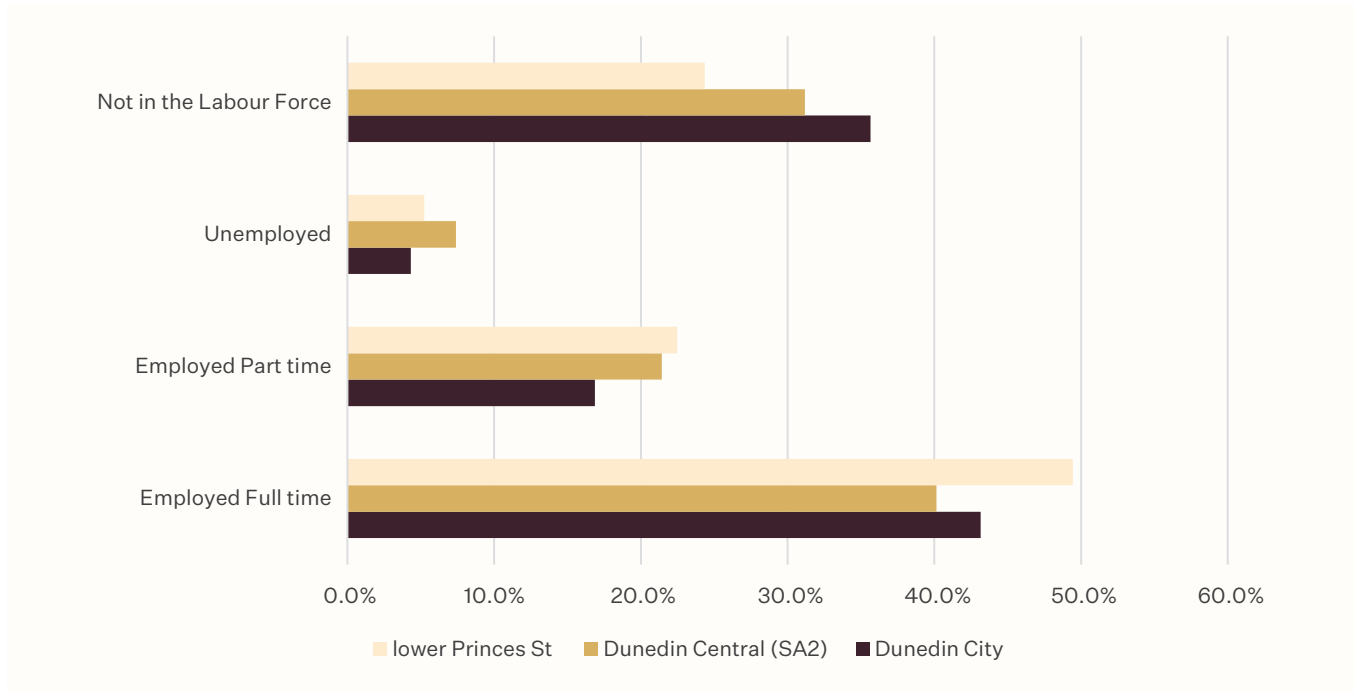
The Census gathers data on each person's residence five years and one year previously. This is an indicator of population mobility or stability. This tells us that in 2018 over half (54 percent) of the residents had lived in the Casino neighbourhood and adjacent streets for less than one year and a further 33 percent for between one and four years. This pattern is evident in Dunedin Central generally, where 59 percent of residents had lived at their address for less than a year and 30 percent for between one and four years. Even considering the large number of young people coming to the city for tertiary study (where 25 percent of people had been resident at their address for less than one year), the population of the Casino neighbourhood is transient.

The 2018 data on the lower Princes Street precinct of the inner city (using SA1 data) shows that only 9 percent of the residents had lived at the same address five years previously: nearly three-quarters of the residents had lived elsewhere in New Zealand, and 46 percent had lived elsewhere in New Zealand one year previously. In terms of arrivals from outside New Zealand, 17 percent had been living overseas five years prior to the 2018 Census. By comparison, residents of Dunedin City are clearly more settled, with 75 percent living in the same place one year previously, and 43 percent five years previously.

The data suggest that compared to the region's population, those living in inner city Dunedin—including the Casino neighbourhood and adjacent areas—are mostly short-term residents; likely to have grown up elsewhere and moved to Dunedin as young adults to study and to work; and likely to move elsewhere within a few years. Among them is a comparatively high proportion of immigrants (probably from Asia) and returning New Zealanders. Such patterns suggest that the Casino neighbourhood is unlikely to have strong or established communities of place, and that the residents are accustomed to people moving and out of the area and to the presence of visitors, shoppers, and commuters, which might be part of the attraction of living in downtown Dunedin.

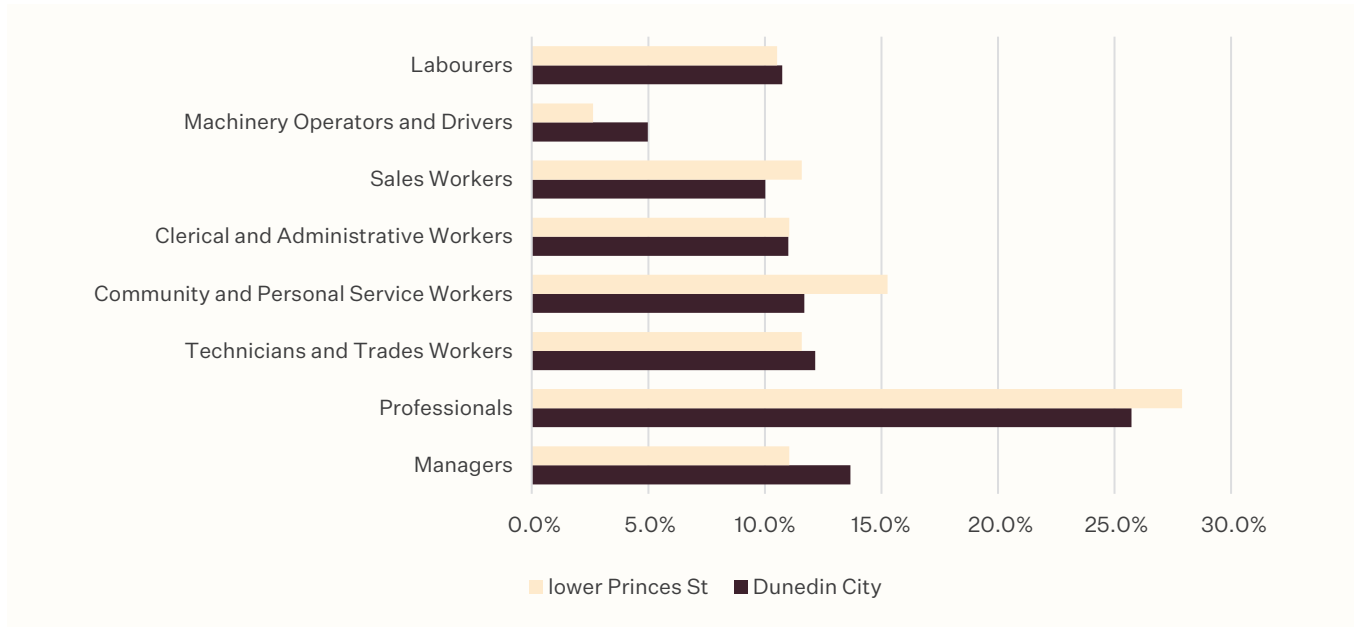
The available Census data on the labour force status of the residents of the Casino neighbourhood indicates that, of the 340 or so who were aged 15 and over in 2018, approximately half were in full time employment; one-fifth were in part-time employment; one-quarter were not in the labour force; and about 5 percent were unemployed. The proportion of these residents who were in employment was lower than in the lower Princes St precinct (72 percent) but higher than in Dunedin Central and in the whole of Dunedin City (62 percent) (Figure 3.11).

Figure 3.11: Labour force profile for Casino neighbourhood



The limited available 2018 meshblock data suggest the working residents of the Casino neighbourhood were more concentrated in managerial, professional, and community and personal service occupations compared with other Dunedin residents. However, the more complete but aggregated SA1-level data show (Figure 3.12) there is little real variation between the occupations of those in the Casino area and the rest of the city.

Figure 3.12: Occupational profile for Casino neighbourhood



The 2018 Census provides data on the amount and source of personal incomes at each level of geographical aggregation²². Together, the statistics indicate that those living in the Casino neighbourhood have typical income levels for Dunedin but higher incomes than elsewhere in Dunedin Central.

Within the Casino neighbourhood, those living in the meshblocks closest to the Casino have the lowest average income, while those living in the Warehouse, Manse Street, Low Maclaggan Street, and Lower Princes St/Lower Dowling St meshblocks have above average incomes, with the latter area having a larger proportion of residents in the high-income bracket than other areas. This pattern is also evident in the SA1 data (Table 3.7)

²² Due to confidentiality requirements, income levels were not available for three of the six mesh blocks that make up the Casino neighbourhood, though median income is available for all six mesh blocks.

Table 3.7: Personal annual incomes²³

AREA	Personal annual income	
	% earning \$70,000 or more	Median income \$
Dunedin City	13.5%	25500
Dunedin Central (SA2)	7.6%	17400
SA1s		
7028611- Casino, Speights, OGHS	8.9%	23500
7028612 - Princes W, South of casino	13.2%	24100
7028613 - High-Stafford St /SDA	9.1%	21000
7028614 - Carroll- Stafford- Melville Sts	2.3%	18000
7028615 Settlers, Queens, Warehouses	12.7%	26100
Casino neighbourhood meshblocks		
MB 2895400 - CPO & Warehouses	14.7%	25900
MB 2896700 - Manse St	14.0%	26300
MB 2899200 – Speights	12.5%	23600
MB 2899400 - Lower Maclaggan & High	n/a	45100
MB 2899500 - The Exchange & Casino	n/a	20600
MB 2899600 - Low Princes & Lower Dowling	22.2%	40400

The mean personal incomes for the meshblocks of the Casino neighbourhood are noticeably higher than their median incomes, suggesting there are a handful of high-earning individuals in this downtown area.

²³ Source, Statistics New Zealand, 2018 Census of Population and Dwellings – electronic tables. Otago.

Section 4

Economic Impacts

4.1 THE GRAND CASINO DUNEDIN AND THE DUNEDIN ECONOMY

4.1.1 EXPENDITURE

The Casino spent an average of \$5.35 million with suppliers in the period 2019 to 2021, (\$5.77 in 2019, 5.57 in 2020, and \$4.68 in 2021). COVID-19 had a major effect in the 2021 year but only a minor impact in 2020, as the effects were only felt at the end of the March 2021 financial year.

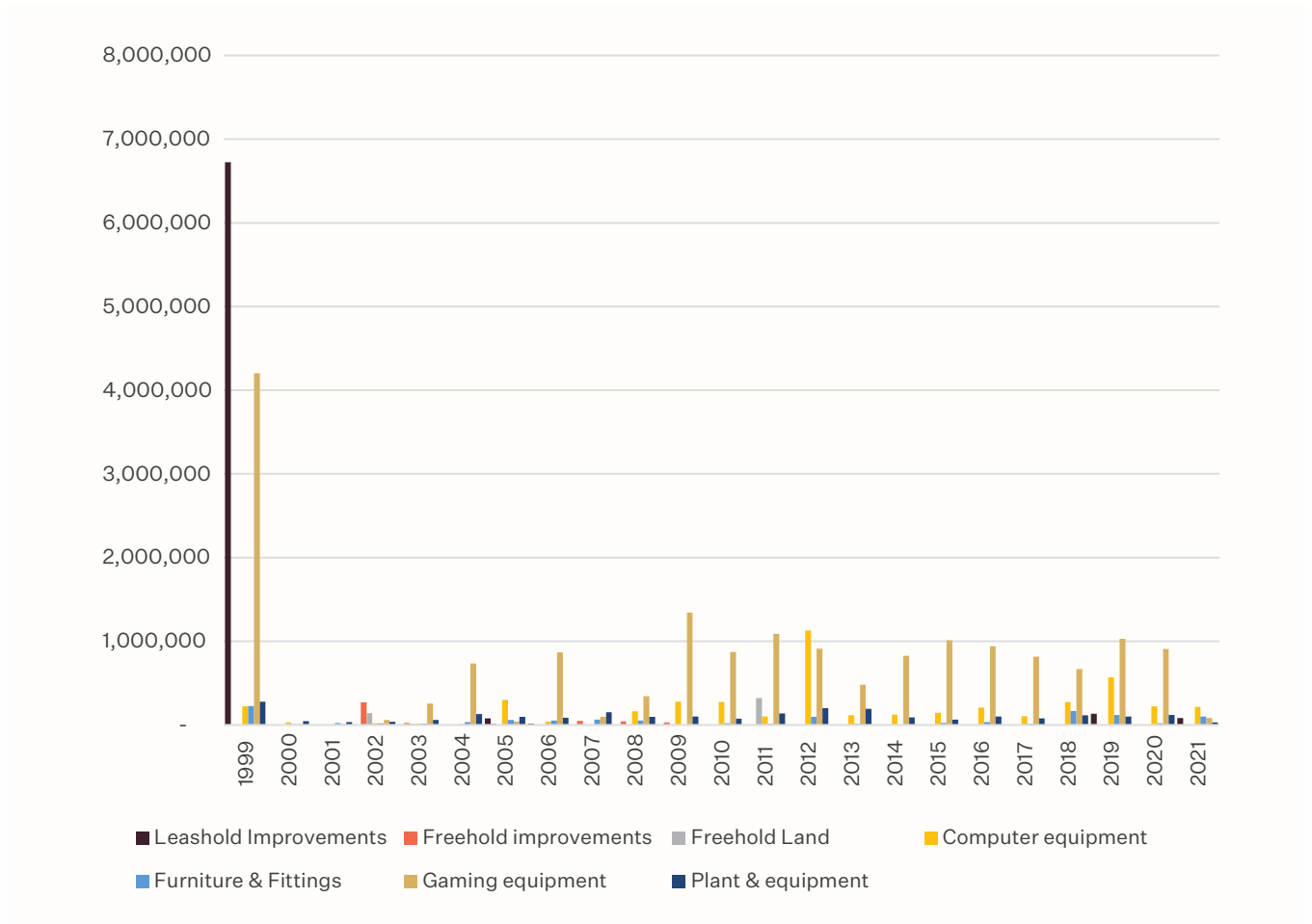
Of this \$5.35 million, 39 percent was spent in Dunedin, 3 percent in Otago outside Dunedin, and 58 percent elsewhere (including some overseas). The largest categories of expenditure in Dunedin were on accommodation (8 percent), lease costs (20 percent) and the grocery, liquor, and tobacco product wholesaling sector. The latter sector is largely associated with food and beverage activities. Of the expenditure outside Dunedin, the only major (greater than 10 percent) sector of expenditure was payments to government, including the problem gambling levy, which comprised 22 percent of total spending.

Major suppliers²⁴ in Dunedin in the food and beverage wholesaling sector and media sector were interviewed about the contribution of the Casino. These entities generally regarded the Casino as an important account with a good payment record.

In addition, the Casino has an annual capital expenditure budget (Figure 4.1). This capital expenditure includes refurbishment of the Casino and its equipment and occasional upgrade of the facilities. The initial fitout of the Casino in 1999 involved \$11.6 million (nominal) in expenditure, the majority of which was for fitout (\$6.7 million) and gaming equipment (\$4.2 million). In the ten years following the initial fitout capital expenditure was low, but from 2009 to 2020 it averaged \$1.4 million per annum, of which \$0.9 million was gaming equipment and \$0.3 million was computer equipment. From 2019 to 2021 capital expenditure averaged \$1.1 million per annum, with \$0.26 million in Dunedin and \$0.8 million elsewhere in New Zealand. A small amount of this was spent on Dunedin construction services, but most was in the furniture, electrical, and hardware retailing sector.

²⁴ Seven clients with more than \$20,000 annual purchases by the Casino. Some other smaller suppliers were also interviewed.

Figure 4.1: Capital expenditure profile, Grand Casino Dunedin 1999 - 2021



4.1.2 EMPLOYMENT

The Casino currently has a payroll of 89, which is a decrease from pre-COVID-19 staffing levels of up to 131 (2019/20). The total expenditure on salaries and wages has averaged \$5.88 million over the 2019 to 2021 period. In total, including salaries, wages, directors’ fees, superannuation, life insurance, medical benefits, training, ACC levies, meals, welfare assistance, and other staff expenses (excluding recruitment), the payroll expenditure has averaged \$6.3 million over the three years, with 2021 significantly affected.

Table 4.1: Staff numbers and FTE, Grand Casino Dunedin

Year	Staff numbers	FTE
2018/19	129	109
2019/20	131	107
2020/21	94	80
2021/22	89	71
Average 2018/19 – 2020/21	118	99

The median earnings at the Casino is in the \$45,000 to \$60,000 category, which is close to the median earnings for Otago (\$52,000 in 2021). The average earnings of \$60,220 for the Casino is very close to the average earnings for Otago (\$61,360). The Casino management reports that staff earnings are higher now that they have base wage rates to the living wage.

Table 4.2: Employees by income category, Grand Casino Dunedin (source: Grand Casino Dunedin, June 2022)

Income	Employees
\$15,001 to \$30,000	18
\$30,001 to \$45,000	16
\$45,001 to \$60,000	30
\$60,001 to \$75,000	10
\$75,001 to \$100,000	6
\$100,001 to \$150,000	5
Over \$150,001	2
Total	87

All staff interviewed for this project spoke highly of the Casino as an employer²⁵. The employment profile in the higher income brackets has been stable, with two-thirds of employees responding to the staff survey with incomes above \$30,000 per annum having been employed at the Casino for more than three years. In the \$15,000 to \$30,000 bracket, only one-third of staff survey respondents had been employed by the Casino for more than three years.

4.1.3 CHARITY DISTRIBUTIONS

The Grand Casino Dunedin pays \$110,000 to the Grand Casino Dunedin Charitable Trust and paid a total of \$2.2 million between October 1999 and September 2021.

The Grand Casino Dunedin’s Charitable Trust donates this money to various organisations in Dunedin and throughout New Zealand. Analysis of the donations received show that the Trust disburses an average of \$101,000 per calendar year. Of this, 72 percent is given to organisations located in Dunedin and the remainder is given to organisations elsewhere in New Zealand.

Table 4.3: Charitable donations by location from Grand Casino Dunedin’s Charitable Trust²⁶

Year	Dunedin (\$000 disbursed)	Elsewhere (\$000 disbursed)	Total* (\$000 disbursed)
2018	\$92	\$8	\$100
2019	\$82	\$40	\$122
2020	\$45	\$36	\$81
Average	\$73	\$28	\$101
Proportion	72%	28%	100%

*Donations are ~0.5% of revenue.

The Dunedin Casino Charitable Trust was established as part of the Dunedin Casino’s licence application process to provide funds for charitable purposes. The objective of the Dunedin Casino Charitable Trust is to assist charitable organisations in:

- the relief of poverty
- the advancement of education
- the advancement of religion
- the advancement of sports for the benefit of the wider community and
- any other charitable purpose deemed beneficial to the community by the Trustees.

25 Although this should not be taken as an unbiased response because of the potential for both selection and response bias

26 Note that the Charitable Trust distributions cover a calendar year, while the Grand Casino Dunedin payments to the trust occur over the October to September year. The timing differences mean that the Trust distributions may not line up exactly with the casino payments.

The Dunedin Casino Charitable Trust distributes its funds to charities in the Dunedin and Otago region through two funding rounds. The May funding round is for a large, one-off grant (in the vicinity of \$50,000) followed by the 'scatter' grant, available in November to numerous organisations.

A representative from the Dunedin Casino Charitable Trust interviewed for this CIR talked about how the Trust was moving its focus to include Central Otago as well as Dunedin. They noted there was much more demand for funding from local charities that the Trust could meet, meaning the grants the Trust provides are "critical to some charities".

It also means the Trust's approach is deliberately to spread its funding as widely as possible, granting many smaller grants to a range of charities. The Trustee said this approach "makes a massive difference to some charities".

If this funding was not available in Dunedin, the Trustee believed the only realistic alternative would be for the parents involved in the charities to fund the activities of those charities. Consequently, the Trustee was clear that if the Dunedin Casinos Charitable Trust was not available "absolutely there would be an impact on communities".

The Trustee noted the Trust's grant money had become even more valuable during the COVID-19 pandemic, where many small businesses no longer had money available to support local charitable causes. They said these local business "just don't have the money they did" to spare.

The Trustee noted there is "always a slight unease when dealing with gambling" sourced money but this is outweighed by the "gratitude that the Casino is doing some good in the community".

4.1.4 CASINO GRANTS AND SPONSORSHIPS

In 2022 the Casino distributed nearly \$130,000 in sponsorships (Table 4.4).

Table 4.4: Casino sponsorship in YEM 2022

	YEM22
Wildlife Hospital	\$50,000
Cricket	\$30,000
Otago NBL	\$10,000
Horse racing	\$8,696
Rugby	\$5,000
Otago NBL Dancers	\$5,000
Orokonui Ecosanctuary	\$,5000
NEV Bowls	\$4,348
Otago Medical Research	\$4,348
Golf	\$,3905
Dunedin Art Show	\$1,750
Dunedin Central Rotary Club	\$1,200
	\$129,247

The amount dedicated to community sponsorships has increased significantly since March 2020 (Table 4.5).

Table 4.5: Changes to Casino sponsorship YEM 2016 to YEM 2020

Mar-22	Mar-21	Mar-20	Mar-19	Mar-18	Mar-17	Mar-16
\$129,247	\$74,360	\$22,821	\$36,746	\$42,595	\$37,270	\$34,416

The stakeholder interviews provided an opportunity to qualitatively examine the value of these sponsorships. These stakeholder interviews mirrored the findings of research conducted by Auckland City Council about community funding²⁷, showing how gambling-sourced funding is essential to many community organisations and how extremely difficult it would be for such funding to be obtained from alternative sources. The key findings of that Auckland City Council survey were:

- 75 percent of respondents indicated their organisation is moderately or totally reliant on gaming funding to fund core business activities²⁸.
- 55 percent of respondents believed there would be a high to extreme risk to their organisation and their core business if they did not receive gaming funding. A further one-quarter (26 percent) said that there would be a moderate risk if they did not receive it.
- 68 percent of respondents said they thought they would be unlikely to find another source of funding if gaming funding was not available.

In the survey of Dunedin residents conducted for this CIR, 69 percent agreed that “gambling generates money that helps fund community groups and other worthwhile causes”.

At the same time, a Councillor from Dunedin City Council was clear that the Council’s sinking lid policy signalled the current Council was moving away from supporting gambling. They noted many of those who submitted on DCC’s policy on Class 4 gambling opposed DCC’s policy because many community organisations needed the Class 4 grants to survive. In response, this Councillor said:

“ I do feel for the small community groups who say if you keep pursuing this policy we’ll have no money [but] we have to decouple [community] funding from gambling ...

27 Cited in True, J. and Cheer, M. (2020) Gaming Machine Gambling Statistics and Research Paper – Information for Territorial Authorities, Paper prepared by Jarrod True and Martin Cheer, Updated February 2020

28 Survey sample of 580 recipients that had received gaming funding

4.1.4.1 SPONSORSHIP CASE STUDY 1:

THE OROKUNI ECOSANCTUARY

The Orokonui Ecosanctuary, Te Korowai o Mihiwaka, is an ecological island wildlife reserve developed by the Otago Natural History Trust in the Orokonui Valley between Waitati and Pūrākaunui, about 20 kilometres to the north of central Dunedin.

A representative from the Orokonui Ecosanctuary Business Board interviewed for this CIR noted that the Grand Casino called them with an offer of sponsorship. This offer was in contrast to the way the Ecosanctuary usually had to approach fundraising:

Researcher: And tell me, in your experience as somebody who has to raise funds, do you often just get calls out of the blue from organisations offering to give you sponsorship?

Orokonui Ecosanctuary Business Board member: No!

In addition to this sponsorship, the Grand Casino Dunedin has also hired the facilities at the Ecosanctuary to host VIP guest events. This magnifies the contribution to the Ecosanctuary:

And I can tell you that the Casino, in sending us \$5,000, probably spends at least that amount more in events. Right. And that is very attractive to us.

The Orokonui Ecosanctuary representative was clear the amount involved was significant for a Charitable Trust like Orokonui. They said:

“ \$5,000 is a very attractive amount, particularly when it’s provided over three years, which to us is extremely attractive.

Part of the appeal of this sponsorship is that it is not tagged to any particular programme or outcome (unlike, for instance, some grants). This makes the contribution even more valuable from the Trust’s point of view. The representative said:

“ And that is a very, very large advantage to us because we are able to use it in our day-to-day expenditure on salaries and administration. When we are applying for money from grants from various organisations that’s often tagged to a particular project. And so in this case it’s not, and that makes it doubly attractive.

The Casino is one of fourteen or fifteen sponsors the Orokonui Ecosanctuary has. Its annual budget is “just under \$1,000,000 per annum” and most of this goes to fund the ten FTE staff positions at the Ecosanctuary.

When asked whether the Casino's contribution was significant considering the annual budget sum, the representative from the Orokonui Ecosanctuary Business Board was adamant:

“ Quite frankly. I would not want to lose the Casino. It's quite important to us to have a spread of donors. In terms of sponsors. I don't want all our eggs in one basket...I would class the Casino as one of the very valuable organizations that we are associated with... I can assure you that the amount that we receive from them is highly valued. Highly valued.

The objectives of the Ecosanctuary can be summarised as:

- To restore the ecological integrity of the Orokonui Valley by providing a pest-free environment where existing native species can thrive and into which absent native species can be safely introduced
- To facilitate the accumulation of and to disseminate knowledge about biodiversity conservation
- To provide opportunities for public participation in biodiversity conservation and management, for advocacy, and for education and
- To maintain financial viability.

This means the Casino's support stretches beyond the staff (all of whom live locally) and the suppliers (who are largely local) into the community benefits of wellbeing and education, contributing to sustainability, and social cohesion.

When asked if the Ecosanctuary had any reservations taking money from a casino, the representative was clear:

“ We had no ethical problems with that. I mean, one of our major contributors, government wise, is the lotteries board. Right. So we're hardly going to pick on the Casino.

4.1.4.2 SPONSORSHIP CASE STUDY 2:

THE WILDLIFE TRUST HOSPITAL

The Wildlife Hospital, Dunedin is based at Otago Polytechnic. The Hospital's veterinary team treat a wide variety of native fauna, including parrots, penguins, reptiles, and sea lions. The Hospital is crucial for the survival of many of these creatures. A representative from the Wildlife Trust Hospital noted that the Hospital treats "over 500" animals per year. They also said:

“ We're at about 180 yellow penguins every year, which is pretty significant because there's only about 169 breeding pairs left on the mainland of New Zealand. So we see a significant portion of the population each year in our hospital.

This representative also noted:

“ Wildlife medicine is pretty specialist deal ... before we were open any wildlife endangered species was being sent up to the North Island to be treated because there wasn't anybody on the South Island that was able to do it.

While people take animals to the Wildlife Trust Hospital from across the South Island, the catchment is largely from South Canterbury across the West Coast and then down through Stewart Island. The Hospital gets some funding from Department of Conservation grants, Dunedin City Council, and corporate sponsors (of which the Grand Casino is one). The annual operating budget is \$500,000, predicted to rise to \$600,000 in the current year. Of this, the Grand Casino Dunedin provides \$50,000 per year.

The Wildlife Trust Hospital representative talked about how the Grand Casino approached them:

“ Oh, man, this is the best. I get an email from somebody saying, hi, we're interested in sponsoring you. Can we get together and talk? So that's what happened.

The sponsorship money is not tagged to any particular outcome, which makes it even more valuable to the Hospital. The representative said:

“ It's just general operating [funding], which is definitely what we need because you may be aware, but most funding sources don't allow salaries in New Zealand, which is insane because that's what makes things go.

And:

Everybody wants to fund something sexy you know, like a piece of equipment or a car or something like that [but] that's just not what makes these things work. We run such a tight ship like most of our expenses are salaries.

This representative was clear:

“ The level of support that the casino is giving to us is pretty big. \$50,000 for us is a lot of money ... It's a three year commitment ...it would put us in a pickle if they weren't around anymore and they decided or they decided not to support us any longer. So for us it's quite substantial ... they're one of our biggest individual sponsors.

When asked about how the Trust felt about taking money from a casino, the representative was clear:

“ Like it or not, so much of the third sector in New Zealand is funded by gambling ... all of that is comes from lotteries. So that's just something that in the broader sector, it's just it's accepted and known. And I guess the fact that the [casino] industry is so highly regulated and monitored does bring some sense of comfort for that.

In addition to this funding, the Grand Casino Dunedin also provides the Hospital with some administrative support, including design assistance for the presentations Hospital staff give to the local community.

The representative from the Wildlife Trust Hospital also valued the nature of their relationship with the Grand Casino. They said:

“ The people that I've worked with have been great, the staff have been great that I've had contact with.

4.1.4.3 SPONSORSHIP CASE STUDY 3:

OTAGO CRICKET

Otago Cricket is the sporting body responsible for administering cricket in the lower half of the South Island. Otago Cricket consists of four districts (Dunedin, Southland, Otago Country, and North Otago) and is one of six major associations in New Zealand engaged in domestic cricket.

Otago Cricket’s responsibilities include the administration and promotion of cricket at all levels—grass roots through to its flagship Volts and Sparks representative sides. Otago Cricket’s commitment to the amateur game includes being in schools, working with clubs, running age group programmes, and offering professional coaching.

The Grand Casino Dunedin is a naming rights sponsor and major sponsor of Otago Cricket²⁹. A representative from Otago Cricket described the Casino as a community partner that both provides sponsorship and ‘activation work’ at events and programmes. The Casino is one of three sponsor partners for Otago Cricket.

Given the level of support provided by the Grand Casino Dunedin, this representative said it would be “quite tricky” to find a replacement sponsor, adding “it wouldn’t be easy to replace at all”. They then added:

“ I really do appreciate what we get from all of our sponsors. But the Casino are at the top of that list. They’ve been excellent.

This representative thought there was alignment between Otago Cricket’s and the Casino’s vision for the local community. They said:

“ The Casino has a genuine desire to support the community that it lives in ... it was all about showing a genuineness and what we do around understanding and supporting the wider community. And I think they’ve never wavered from that.

The sponsorship from the Casino is not tagged to any outcomes and is used as a contribution to Otago Cricket’s operating expenses.

Otago Cricket also receives Class 4 community funding so is happy to receive funding sourced from gambling.

29 To the value of \$30,000 per year from 2021

As the smallest of the six professional teams in the national cricket competition, the representative thought Otago was most at risk should the national competition be restructured. This made continuing to perform well essential, which requires funding. To offset some of this risk, Otago Cricket has been investing in the Otago Sparks, the women’s team (where “the visibility piece for the women’s game has just gone through the roof”³⁰).

30 Note the Otago Sparks won the national one-day competition in 2021/2022.

4.1.4.4 SPONSORSHIP CASE STUDY 4:

OTAGO MEDICAL RESEARCH FOUNDATION

The objective of the Otago Medical Research Foundation (OMRF) is “the furtherance of medical research in Otago”. The OMRF is dedicated to supporting medical research carried out in the Otago region and encouraging young and gifted people to engage in research. It supports innovative, early-stage medical research projects and student scholarships in Otago. The OMRF also funds equipment and facilities for Otago’s medical community of scientists, students, practitioners, and lecturers. Its recipients contribute invaluable medical knowledge that can be applied to medicine and prevention in future. In doing so, the OMRF contributes to the retention of top medical talent and intellectual property in Otago.

A representative from the OMRF interviewed for this CIR noted that for the past two years the Grand Casino Dunedin has funded a summer research scholarship³¹. This OMRF representative said:

“ Our summer research scholarships are kind of special. They allow the students to work on a project and a lab and their area of interest, and they have to have a real project set up that’s going to contribute to the larger body of research within that lab ... these are the researchers of the future.. for most of them, that’s their first and only experience of really working in the lab as if they were part of the lab.

When asked about how important this support was from the Casino, the OMRF representative said:

“ We simply can’t do without it.

When asked whether the OMRF had any ethical reservations about receiving support from a casino, the representative noted they also received Class 4 funding. They were clear:

“ And also there’s a hell of a lot of snobbery around the gaming trust. In my opinion. People don’t seem to have any issue taking money from lotto.

31 \$5000 a year from 2021

The representative also believed that if the Casino were not available in Dunedin, problem gamblers would find other ways to gamble. They said:

“ I actually firmly believe that people who are in that situation are going to continue to be in that situation. They will just move it offshore. Now that you can do the TAB online, I mean, they’re making it easier and easier and easier for people who have those addictions. It’s like any addiction. I do not believe that taking it away solves the issue.

They closed the interview by stating:

“ We’re super excited that [the Casino has] chosen to engage with us again.

4.1.4.5 SPONSORSHIP CASE STUDY 5:

I AM HOPE

I Am Hope aims to promote positive attitudinal societal change regarding mental health throughout New Zealand and fund private care and counselling for young people stuck on waiting lists. I Am Hope offers hope and a voice to young people across New Zealand through various projects. These include school tours, practical courses such as a barber and barista course, and allowing people to share their own journeys through their podcast series ‘HopeCast’.

The Grand Casino Dunedin initially supported I Am Hope through accommodation and hospitality and has more recently become a supporter of the charity. The representative from I Am Hope said:

“ It’s part of a bigger picture. It’s bringing everyone together. You know, here’s the thing. It’s like [the Casino can] say to [its staff] we are supporting, I am Hope. And they go, Oh, cool. So these guys are behind this organization. That’s great.

When asked about how the organisation felt taking sponsorship from a casino, the representative from I Am Hope said they received support from the Lion Foundation and a winery and saw no conflict with either source:

“ You know, everyone likes to stick some money in the pokies. Everyone likes to have a glass of wine. You know what I mean? That’s just how it is.

I Am Hope did not seek or accept Government funding or grants because they wanted to be able to criticise Government policy where necessary.

4.2 WIDER IMPACTS ON DUNEDIN ECONOMY

4.2.1 LOCAL RECREATION AND ENTERTAINMENT

As noted above, the majority (approximately 70 percent) of visitors to the Grand Casino Dunedin are from within the city. The Casino offers a unique product mix including on-site entertainment in the form of gambling, a restaurant, and a bar. While Class 4 gambling exists at other locations, these are confined to electronic machine gambling and occur in pub/sports bar- quality venues. The patron survey results indicate that most (84 percent of the database respondents and 72 percent of the intercept respondents) were satisfied or very satisfied with the Casino’s facilities.

About half of the patrons surveyed (57 percent database, 44 percent intercept) participated in both gambling and other activities when visiting the Casino. For both surveys, 43 percent to 44 percent visited for gaming only, with only a small proportion (1 percent to 13 percent) not involved in gaming at all.

Of the respondents who visited the Casino, 33 percent of residents would have stayed home had they not gone to the Casino (Q15, shown in Table 4.6). Of the non-residents surveyed who were visiting Dunedin for reasons other than the Casino, 15 percent would have stayed in their accommodation if the Casino were not there. These results suggest the Casino has qualities that a proportion of respondents could not find elsewhere in Dunedin, either for gaming or entertainment.

Table 4.6: Alternate activities for visitors to the Grand Casino Dunedin excluding those who would not have come to Dunedin without the Casino (combined database and intercept surveys)

Alternative activity	Proportion of valid residents and non-residents responses	
	Dunedin Residents	Visitors
Gone to a different place for gaming	4%	5%
Visited the Casino for some other activity	7%	9%
Gone to another bar or restaurant	11%	17%
Gone to another bar / restaurant	10%	13%
Gone to a movie / play / concert	10%	6%
Gone shopping	11%	15%
Undertaken some other commercial activity	3%	4%
Undertaken non-commercial activity	6%	5%
Stayed at home or in accommodation	33%	15%
Done something outside Dunedin	4%	10%
Total sample	100%	100%

All stakeholders spoken to consider the Casino to be very good at managing their patrons and ensuring good behaviour both within and around the Casino. They considered the Casino worked well in the neighbourhood, and while not a major attraction, was part of the revitalisation of the precinct.

4.2.2 TOURISM

Stakeholders in the tourism sector who were interviewed did not regard the Casino as a major attraction for the city and viewed it more as part of a smorgasbord of attractions. However, those closely associated with the Casino, particularly the Scenic Circle Hotel, considered it an important component of their business and would be significantly affected if it were to close.

Because both the patron intercept and the patron database surveys have sample size limitations when talking about out of towners (37 out-of-town respondents to the intercept survey and 81 out-of-town respondents to the Casino Club survey), we used different parts of each to assess different aspects of the analysis. To estimate the proportion of visitors from outside the region, this study has used the intercept survey data since we consider this is more likely to be a representative sample of those who visit the Casino because it includes casual visitors who are not members of the rewards programme. This indicates that 31 percent of visitors are from outside the city, with 15 percent from elsewhere in Otago, 15 percent from elsewhere in New Zealand, and 1 percent from overseas. The data is probably not representative of the long term because the impacts of COVID-19 mean international tourism was minimal during the survey period, although it is noted that no database survey respondents were from overseas. To that extent, it is possible that the tourism impacts estimated below are understated.

The 120 respondents who did not live in Dunedin were asked whether they would have come to Dunedin or whether their stay in Dunedin would have been shorter in the absence of the Casino. For estimating the impact on tourism, we separately analysed the Casino Club member and non-member responses. We took this approach because we were concerned that only one non-member indicated they would shorten their stay (and that by only a few hours). For members, 32 percent said they would not come if the Casino were not there, and a further 23 percent who would have stayed less time. From this, we have inferred that it is significantly more likely the Casino Club members are partly or wholly likely to be coming to Dunedin because of the Casino, while non-members visit the Casino incidentally to their visit to Dunedin. Because both surveys were heavily weighted toward Casino Club members, use of combined data would have overestimated the impacts of the Casino on tourism.

We assigned the number of nights fewer stayed to each respondent based on whether they would come to Dunedin without the Casino and how much less time they would stay; results are summarised in Table 4.7³². This shows that for members there was an average of 0.66 nights stayed for non-Dunedin residents, but that for non-members there was only a very small impact (0.017 nights). When weighting these equally for the proportion of member and non-member patrons estimated by Grand Casino Dunedin (50 percent), the weighted average reduction in nights stayed was 0.34.

Table 4.7: Effect of Casino on patron visitor stay in Dunedin

Nights fewer stayed in Dunedin without the Casino	Member responses	Non-Member responses	Total
0 (Casino has no effect)	47	14	61
0.25 (few hours)	8	1	9
0.5 (less than a night, or day visitor who didn't come)	19		19
1 night	11		11
2 nights	15		15
3 nights	3		3
4+ nights	2		2
Total visitors staying less time without the casino	105	15	120
Total nights reduction in stay	69.5	0.25	69.8
Average reduction in nights (per visitor)	0.662	0.017	
Weighting	50%	50%	
Weighted nights fewer	0.331	0.008	0.34

Therefore, it seems likely the Casino is not a major tourist draw for visitors into Dunedin, but it does increase the variety of tourism offerings and, for some specific businesses, is an important component of their tourism business.

For casual visitors to the Casino (exemplified by non-members) the Casino is visited incidentally during travel to the city and appears to play little or no role in their travel decisions. However, for members of the Casino Club, who presumably are more motivated by the Casino's attraction and are more regular visitors, there appears to be a greater impact on their travel behaviour.

³² The change in stay was expressed as 'night' to enable use of the Statistics NZ estimate of spend per visitor-night. For this purpose, a stay of less than half a day was treated as being equivalent of 0.25 nights, and a stay of a full day but not a night was treated as 0.5 nights. Where visitors would not come in the absence of the Casino, the total number of nights they stayed at their last visit was assigned to their response.

Visitor surveys undertaken for various events at the Forsyth Barr Stadium³³ suggest the average visitor to the city spends about \$350³⁴ per night on items other than the event tickets. This value is considerably higher than other historical estimates of typical domestic visitor spending, which are closer to \$150 per visitor night. Stats NZ, however, no longer produces data on average visitor spend per night, let alone data pertaining to Dunedin³⁵. A figure of \$200 per visitor-night equivalent is used for this analysis, which is considered conservative given the age of the Stats NZ data and the greater relevance of the Forsyth Barr stadium visitor analysis to this impact study. For example, 85 percent of the visitor respondents to the Casino who would not come in the absence of the Casino stayed in a hotel as opposed to only 44 percent of those who would have come anyway. This suggests a higher spend is likely among those who consider the Casino an important reason for their visit to Dunedin.

We used the average patronage over the 2018/19 to 2020/21 period to match the account data we have available, which is 168,000 visitors per year, and 1.5 visits to the Casino per trip (from the Christchurch Casino impact study). We also deducted the complimentary accommodation and transport spending by the Casino from the tourism visitor spend. Using these assumptions, the total tourism spend associated with the Casino is \$2.2 million per year. Using the breakdown of regional tourism expenditure in the 2012 Stats NZ Domestic Travel Survey Tables³⁶ indicates a total tourism-related impact arising from the Casino of 21 FTE jobs and \$1.83 million per year of added value, including \$0.83 million per year of additional household income³⁷.

Analysis of the survey responses shows 69 percent of the reduction in tourism visitor nights came from visitors outside Otago. This means the economic impacts of tourism arising from the Casino from the Otago perspective are estimated to be 69 percent of the above figures, or 15 FTE jobs and \$1.3 million per year of added value, including \$0.6 million per year of additional household income.

It should be noted that if the Casino were not in Dunedin, 44 percent of visitors from elsewhere in Otago (not Dunedin) would have gone to a Casino outside the Otago region country (i.e., excluding Queenstown Casino). This suggests the expenditure associated with a reduction in tourism from those Otago-based visitors to Dunedin may not have been retained in the Otago region.

33 Butcher Partners Ltd has estimated the economic impacts of more than a dozen events at the Forsyth Barr stadium in recent years.

34 Eagles \$350, Elton John \$309; France Test \$350; Black Sabbath \$318; Ed Sheeran \$297; Fleetwood Mac \$364. Domestic Travel survey. \$525 per trip (but for multiple nights – average not given).

35 The last domestic travel data appears to be 2012.

36 <https://nzdotstat.stats.govt.nz/wbos/Index.aspx?DataSetCode=TABLECODE7579>

37 The impact is significantly affected by the visitor spending mix (i.e., the proportion of visitor spending that goes to each industry). MBIE national average mix figures would give lower figures

<https://www.mbie.govt.nz/immigration-and-tourism/tourism-research-and-data/tourism-data-releases/tourism-and-the-economy/>. The figures using the MBIE expenditure would be \$3.3 million in expenditure, 24 FTE, \$2.0 million VA, and \$1.2million HHI.

Data from economic impact analyses of events at Forsyth Barr stadium would give higher economic impacts.

4.2.3 CASINO NEIGHBOURHOOD

Businesses in the immediate vicinity of the Casino were surveyed for their opinions of the Casino. Seventeen responses to this neighbourhood business survey were obtained. Table 4.8 shows the businesses that responded are predominantly food and beverage operations (53 percent) and retail (35 percent). One hotel and one supermarket were included in the survey response. About half were standalone businesses, with the remainder part of larger businesses in Dunedin (12 percent) and New Zealand (35 percent). Only one was an international company.

No businesses indicated the Casino was a factor in their choice of location, and only two respondents (12 percent) considered that closure of the Casino would have a major impact on their business (strongly agree or agree) with most neutral or disagreeing that closure would have a major impact. A greater proportion (36 percent) agreed that the closure of the Casino would have some impact on the economy in that location or in Dunedin more widely (36 percent). About half considered that if the Casino closed, other entertainment attractions would readily replace it, but only three respondents considered the city would be better off without the Casino. The survey indicates that Grand Casino Dunedin is not a major feature of the local neighbourhood, and its closure is not considered likely to impact, positively or negatively, on businesses in the immediate environment.

Table 4.8: Business types for neighbourhood business survey, Grand Casino Dunedin

Respondent Type	Number	Proportion
Supermarket	1	6%
Food and beverage	9	53%
Hotel	1	6%
Retail	6	35%
Total	17	100%

Section 5

Beneficial Social Impacts

5.1 ENTERTAINMENT BENEFITS

5.1.1 QUANTITATIVE ASSESSMENT OF ENTERTAINMENT

The most obvious benefit of the Grand Casino Dunedin is that visiting it—to gamble or to enjoy the hospitality on offer—provides entertainment to many residents across Dunedin and Otago. In this regard, it is part of the suite of entertainment options that make Dunedin a vibrant and fun city.

This is reflected in the Dunedin City Council’s Quality of Life Survey 2020, which found Dunedin residents perceive their city as thriving and a fun city³⁸. Dunedin scores well in this Quality of Life Survey compared to other New Zealand cities, with 90 percent of residents rating rate their overall quality of life positively (compared to a nationwide average of 87 percent).

In the Dunedin community survey completed for this CIR³⁹, 73 percent of residents said they had been to the Casino (with these split into roughly two-thirds who said they gambled while there and one-third who said they did other things while there).

Table 5.1: Community engagement with Grand Casino Dunedin

I have never been to Dunedin’s Grand Casino	27%	
I have been to the Casino but didn’t do any gambling	24%	Total 73%
I have been to the Casino and have gambled	49%	
Total	100%	

In that same community survey, 61 percent of the respondents said visiting the Casino had given them ‘pleasure and fun’⁴⁰. Dunedin residents were also likely to agree that, for most people, a visit to the Casino is a fun night out with family and friends (72 percent) and “Dunedin’s Casino is an important part of the city’s entertainment offering” (54 percent)⁴¹.

38 In 2020 a total of 675 Dunedin residents completed the Quality of Life Survey

Dunedin City Council (2020) Dunedin City Council Quality of Life Survey 2020 https://www.dunedin.govt.nz/_data/assets/pdf_file/0010/866557/2020-quality-of-life-survey-dunedin.pdf

39 With a total sample of N=363

40 This community survey used questions drawn from the literature about attitudes toward casinos and gambling. This includes the scales developed in Sutton, R., and Griffiths, M. (2008) “The Casino Attitudes Scale”, *Journal of Mental Health and Addiction* 6:244-248; Rousseau, G., and Venter, D. (2002) “Measuring Consumer Attitudes Towards Gambling”, *Journal of Industrial Psychology* 28(2) 87-92; and Ligthelm, A. (2001) “Community attitudes towards Casinos and the estimated magnitude of problem gambling”, *African Sociological Review* Vol. 5 No. 2 (2001) 122-132.

41 A full summary of the community survey results are presented in Section 9 of the appendices

In the combined patrons’ survey⁴² completed for this CIR, 81 percent of survey participants came from Dunedin or elsewhere in Otago (Table 5.2).

Table 5.2: Where patrons reside

Dunedin	67%	Total 81%
Elsewhere in Otago	14%	
New Zealand	19%	
NET	100%	

The same patrons’ survey shows a high level of satisfaction with the Grand Casino Dunedin, with 85 percent saying they were satisfied or very satisfied with the Casino on their last visit (Table 5.3).

Table 5.3: Patrons’ satisfaction with the Casino

Very satisfied	41%	Total 85%
Satisfied	44%	
Neutral	9%	
Dissatisfied	3%	
Very dissatisfied	4%	

To measure how well their experience matched their expectations, the 121 Casino patrons surveyed while on site in the Casino were asked:

Based on your experience at the Casino today, how likely are you to recommend the Grand Casino to your family, friends or colleagues?

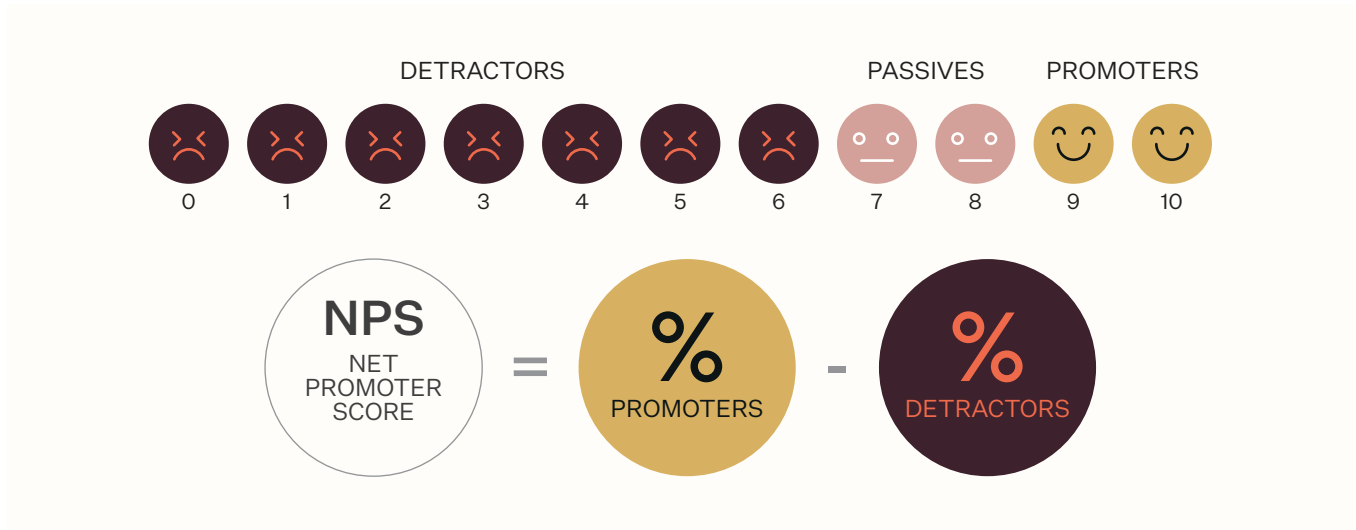
This question is a variation of the Net Promoter Score⁴³ developed by the Harvard Business School and is an internationally recognised method for summarising customer experience. In this method, the ratio of promoters to detractors is calculated using an eleven-point scale (0-10). Those who rate the provider as a 9 or 10 are considered ‘promoters’, while those who rate the provider between 0 and 6 are considered ‘detractors’⁴⁴. By subtracting the percentage of detractors from the percentage of promoters, a ‘net’ promoter score can be calculated (Figure 5.1):

42 With a total sample size of 359 patrons

43 Net Promoter Score™ Satmetrix

44 Scores of 7 or 8 are considered neutral.

Figure 5.1: The logic of the ‘net’ scoring system



The net promoter approach results in scores that run from -100 to +100 and scores in the middle of this distribution are typical. The overall score given by the 121 Casino patrons surveyed in situ was +21. Perceptive Research, who run Customer Monitor in New Zealand and publish local industry NPS benchmarks, rate this as a ‘strong’ score⁴⁵.

While this overall NPS is positive, the +21 score masks some interesting patterns among this group of patrons. The first is that a small number of respondents had a very negative experience at the Casino, with 4 percent rating their likelihood to recommend at zero. But nearly half of these patrons (46 percent) rated it a 9 or 10.

⁴⁵ <https://www.customermonitor.com/blog/what-is-a-good-nps-score-for-the-hotel-industry>

GAMBLING AS ENTERTAINMENT

While assessing the impact of the Grand Casino Dunedin, it is important not to understate the benefits that accrue from gambling as entertainment. This is perhaps best captured by Patrick Basham and John Luik (2011) who, writing in Economic Affairs, note:

[G]ambling may be considered a recreational outlet, similar to entertainment and leisure products and services. Those who participate in gambling activities do so voluntarily and, in return, receive intrinsic benefits from their consumption. [C]onsumers gambling for entertainment purposes are purchasing gambling just as they would purchase tickets for the cinema or a symphony.

And:

In fact, gambling is a terrific form of entertainment. Within this charged environment, individuals become part of a world away from the burden and drudgery of their daily routine. Adults find themselves at play, interacting and socialising in a safe environment amongst their peers ... perfectly rational people play because they get their kicks at a price they find reasonable⁴⁶.

Most people appear to gamble without experiencing any significant harm and appear to enjoy the activity. The Health and Lifestyles Survey shows 70 percent of New Zealanders participate in some form of legal gambling on an occasional basis⁴⁷.

⁴⁶ All Basham P, Luik J. The Social Benefits of Gambling. Economic Affairs. 2011;31(1):9-13.

⁴⁷ Thimasarn-Anwar, T., Squire, H., Trowland, H. & Martin, G. (2017). Gambling report: Results from the 2016 Health and Lifestyles Survey. Wellington: Health Promotion Agency Research and Evaluation Unit.

5.1.2 QUALITATIVE INSIGHTS INTO THE ENTERTAINMENT BENEFITS OF THE GRAND CASINO

In the stakeholder interviews completed for this CIR the theme of the entertainment benefits conferred on Dunedin by the Casino came up often. A Dunedin City Councillor who sits on the Economic Development Committee described the Casino as an “asset” for Dunedin:

“ I also see it as a good fun environment that a lot of people seem to enjoy. Because there’s enough going on that’s not just around the gaming and the tables and everything else.

They added:

“ It has an attractive environment ... It’s a welcoming space.

A representative from Otago Cricket made the same point while talking about how they used the Casino:

“ I go to the casino for dinner because I think the food there is really, really good. I think it’s like anything - towns need to have variety to be able to actually offer that spice. And yes, whether some people like them or not, they do attract people into cities.

The Councillor who sits on the Economic Development Committee also thought the Casino was a tourism asset for the city:

“ When I talk to groups that have come down to play golf ... I can tell you they make it part of its destination for a lot of like if they’re coming up from Invercargill on a golf trip or coming through from Alex or something like that, the boys would go and have a couple of nights at the casino and say, Oh yeah, let’s go have some fun at the casino and that type of thing. So it’s part of the destination, it’s part of the entertainment of why they come to Dunedin.

They also highlighted the appeal of having a safe open-late place to be entertained:

“ You don’t see people in there being intoxicated or abusing liquor or anything on that basis. You know, you’re going into a safe environment where you can’t say that about a lot of the places in the Octagon.. If you want to drink at 11:00 at night and you want to be in a safe environment, you know, where you’re not going to get harassed, the Casino is a great place to go and have a drink.

A representative from Enterprise Dunedin⁴⁸ saw the Casino’s value as being part of a mix of entertainment options available in the city:

“ I think it’s one of the forms of entertainment that the city offers. It’s just part of the mix and for those that are wanting something a little bit different, that just gives them an option.

A representative from NZME put it like this:

“ People are going out there to have a great night, you know, it’s entertainment for them. It’s no different than going out to the movies ... it’s just another way of getting entertainment.

The Enterprise Dunedin representative also noted that having the Casino gave Dunedin some comparative advantage because “not every location has a casino”. Which means this person saw opportunity:

“ It could well be a drawcard for people to come to the city, in which case, it would make a much greater contribution. I mean, our overall goal as a city council is to grow jobs and grow economic wealth for our community.

They also noted the Casino was part of the regeneration of the Southern part of the city and said:

“ [That part of the city is] regenerating and I think it’s becoming an exciting part of the city again, historically; it was the heart of the city for both retail and hospo. You’re starting to see a lot more place-based activities there. So some very good bars [and it’s] well known now as an attractive place to go for food and drink..

⁴⁸ Enterprise Dunedin is a department of the Dunedin City Council and is the city’s lead agency for economic development initiatives and destination marketing. Enterprise Dunedin is the primary driver for the city’s Economic Development Strategy in partnership with key organisations representing business, education, and local Iwi.

Another Dunedin City Councillor saw the Casino as offering significant entertainment benefits to the City:

“ I believe that having ... the Casino has a social benefit for Dunedin ... people go to the Casino for fun. I know people that go on a fairly regular basis and they tell me the food is good, the entertainment is good, they enjoy, you know, people do like bright lights, bright flashing lights and big city buzzy stuff happening. People like that. They like getting dressed up. They like the sophisticated atmosphere and it's all controlled.

They added:

“ And I've had people comment to me and make unsolicited comments about, oh, you know, - it's great time at the Casino or I love the meal at the Casino, or we all went to the Casino afterwards and had a great night – you know this kind of thing. People want to have somewhere to go in the city afterwards and late night.

A trustee of Aotearoa Gaming Trust⁴⁹ made the same point when they told the research team:

“ One of the things that we hear about the Casino in Dunedin is that it's one of the few safe late night venues for people. So if you're in town and you feel like you want to drink late at night, the Casino gives that option.

49 Aotearoa Gaming Trust (formerly The Southern Trust) a Class 4 Gaming Machine Society. Aotearoa Gaming Trust is dedicated to running a socially responsible gaming operation that in turn generates funding for community organisations. Since its inception approximately \$328 million has been distributed to communities around New Zealand.

Adding that Dunedin's nightlife had changed and become more dangerous for older people:

“ The Octagon is fearful. Late at night I would not go there. And in fact I've been with people and we've gone into the Casino after being out for dinner and the bar is very nice, the staff are really good and we might decide that we want to have a bit of a punt or whatever, and I'd rather be there than down in the Octagon.

This second Dunedin Councillor the research team talked to also highlighted the social benefits having a casino brought to Dunedin:

“ [Casinos] do have a social benefit for the city, not the least of which is that the profits, the share of profits is paid back to the community and funds sporting and other socially, socially beneficial activity.

This Councillor believed if Dunedin did not have a Casino, locals would still gamble but it would mean that:

“ The profits will go illegal or online to some overseas place that pays no tax, no GST and no social good return to the city.

5.2 QUALITATIVE INSIGHTS INTO ANCILLARY BUSINESS BENEFITS OF THE GRAND CASINO DUNEDIN

Section 4 of this CIR (above) has identified the economic benefits that accrue to Dunedin because of the expenditure and employment of the Casino. In addition to these, the stakeholders in this research identified the following business benefits of the Casino's operation.

A representative from Allied Press (the publisher of the *Otago Daily Times*) talked about the role the Grand Casino Dunedin played in the local business community and particularly the leadership the Casino's current CEO had demonstrated:

“ I think [the Casino's CEO] has done a great job and she's definitely lifted the profile.

The representative from Otago Cricket made a similar point:

“ We see [the Casino's Chief Executive] at a lot more of the events. She's out in the community a lot more,

Beyond this, the *Otago Daily Times* representative noted the Casino had raised its profile generally. They said:

“ They've done a rebranding exercise, which has given them a lot more profile and they've had in the past ... generally it seems to be a well-run organisation.

This person also noted the Casino was seen as a “good employer” in Dunedin:

“ They've got a very controlled environment. So when I compare them to, say, poker machines or in pubs and all that, you know, they're far more responsive than those types of organisations. So I think generally they're perceived as a good, for the city and good for the employees and generally [the Casino is] well perceived.

They also noted that the Casino was playing a role in the regeneration of Dunedin City:

“ The Vogel Street area, the heritage precinct has definitely picked up and there's some quite nice cafes and all that. So it has been a bit of regeneration down that path in the buildings. Actually, even the Fable Hotel, which is long further has been done up. So there is a bit of regeneration work going on.

They were clear that not having the Casino would be a significant loss for the city:

“ I think it would be quite a loss to the city if their licence wasn't renewed... first of all, I'd say is that if it went away, I think it's another it would be a loss to the city. And I think we lose financially. And also I think it'd be a loss from a social perspective because it gives people choices. Not everyone wants to go and watch the opera. Not everyone wants to go and watch the rugby. But some people want to go and enjoy having a flutter on the pokies or at the tables.

They also saw the Casino as being a safer environment for people to gamble in:

“ A casino is a lot more controlled than if they're at the local pub and they're only doing the pokies and in the parties.

The representative from the Wildlife Trust Hospital also thought the Grand Casino Dunedin was making a difference to its neighbourhood and the appeal of the city:

“ I think actually the area around the Casino is starting to see a little bit more activity. There's a bit more investment on Princes Street, which is definitely overdue. And yeah, I think people are realizing it doesn't have to be centered in the Octagon, which is nice.

A Councillor from Dunedin City Council thought the city could make more of this opportunity:

“ One of the things that we could do as a city council, we could put a bit of encouragement into that area to be a tourist precinct, a hospitality precinct. So, you know, we have some accommodation, but we also have office blocks and we've got some empty shops. And that street right outside the front of the hotel could be a whole lot better and welcoming for tourists. And that would be a really a good use.

A representative from NZME similarly said:

“ And so I think in that sense, you know, the Casino is an asset to the city. So that people can enjoy a night out in that area of the city.

This NZME representative also made the point that the Casino acted as an incubator for talent that went on to benefit the city and region:

“ In terms of as an employer... they are kind of a breeding ground for talent. A lot of staff have gone on to do great things within the region, but they kind of hone their skills at the casino.

They also noted that the Casino played a role on promoting businesses within the region:

“ One of the things that they do is a business series, where they profile businesses, organizations in the community that they think deserve kind of a bit of a spotlight on them because of the great work they're doing. And so they're basically funding, essentially advertising or promotion for third party companies, companies that are not affiliated with them but they think are worthy of being profiled in that sense.

Section 6

Adverse Social Impacts

The most common adverse effects associated with casino operations are gambling harm and crime. These perceptions are then related to a lowered quality of life for residents⁵⁰. In the case of Dunedin's Grand Casino, there seems little of either impact (gambling harm or crime) that can be directly attributed to the operation of the Casino.

6.1 GAMBLING HARM

6.1.1 QUANTITATIVE ASSESSMENT OF GAMBLING HARM

There is no doubt that gambling-related harm is a real and continuing issue in New Zealand. Gambling harm creates serious health, social, and economic problems for the gambler and for their family and whanau. In 1999 the Australian Productivity Commission estimated that seven people are adversely affected to varying degrees by a severe problem gambler's behaviour⁵¹.

As noted in the previous section, gambling is a common activity for between 70 and 80 percent of New Zealanders. For most, there is little risk of harm. Jarrod True and Martin Cheer (2020) argue that New Zealand has a very low problem gambling rate by international standards⁵².

True and Cheer (2020) also show that while Dunedin accounts for approximately 2.5 percent of New Zealand's population, it only accounts for 1 percent of new problem gambling cases and 2 percent of all cases where people seek help for problem gambling. In this regard, Dunedin, despite having a casino, seems to be less likely to have problem gamblers seeking help than other centres in New Zealand⁵³.

How much of the problem gambling in Dunedin can be attributed to the Casino is uncertain, but it may be an estimated 20 presentations to problem gambling counselling services. This estimate is calculated in the following way:

- According to Ministry of Health data, nationally, the casino sector accounts for approximately 20 percent of all presentations to problem gambling services.
- In the year 2017/18 there were a total of 4941 presentations to problem gambling services.
- If the True and Cheer (2020) 2 percent figure is correct (that Dunedin represents 2 percent of all cases number of people who seek help for problem gambling), this means there were an estimated 99 presentations to problem gambling services in Dunedin.

50 Gambling Research Exchange Ontario (ND) Perceived Negative Social Impacts and Benefits from Casino Development, Research Snapshot, Gambling Research Exchange Ontario <https://www.greo.ca/en/index.aspx>

51 Productivity Commission (1999) Australia's Gambling Industries, Summary, Report No. 10, AusInfo, Canberra

52 True, J. and Cheer, M. (2020) Gaming Machine Gambling Statistics and Research Paper: Information for Territorial Authorities, True Legal, Hamilton, February 2020.

53 The corollary of this being if the Casino were creating a significant extra problem gambling issue in Dunedin, the city would be above the national averages for new cases and total cases of help seeking.

- If 20 percent of these presentations are attributable to the Casino, that means an estimated total of 20 people in that year experienced problem gambling as a result of the Casino’s activities⁵⁴.

The research is clear that problem gambling is most associated with electronic gaming machines (EGMs). DIA notes that approximately two in five regular gamblers on gaming machines experience problems with gambling⁵⁵. The Grand Casino Dunedin has 180 EGMs (although it has been operating only 120 under its COVID-19 restrictions), compared to 391 EGMs in 23 Class 4 locations across Dunedin. When all 571 EGM machines in Dunedin City are operating, the Casino accounts for 31 percent of the total.

Yet the quantum of gambling harm that can be attributed to the Grand Casino Dunedin is uncertain because the casino environment has stricter qualifying criteria than other gambling venues and a much more intensive host responsibility policy.

In terms of **qualifying** criteria, to enter the Casino a person must be 20 years of age or older, and proof of age can be requested. The Casino is clear that it provides a ‘premier experience’ to its guests and requires ‘a neat and tidy standard of dress at all times’. The Grand Casino Dunedin has a stated commitment to host responsibility, and for the year April 2021 to June 2022 over 1500 people were denied entry (Table 6.1).

Table 6.1: Denial of entry into Casino, April 2021 to June 2022

Underage	91
Dress code	460
Intoxicated	1049

In terms of host responsibility, the Casino takes its role as a responsible host seriously and recognises it has an important role to play in preventing and minimising alcohol and gambling-related harm for its customers and staff.

The Grand Casino Dunedin is clear that it is “committed to providing a fun and safe environment for all customers and staff”. The Casino’s *Host Responsibility Policy* is consistent with the Gambling Act 2003 in that its purpose is to (among other things⁵⁶) prevent and minimise the harm caused by gambling, including problem gambling, and facilitating responsible gambling. This *Host Responsibility Policy* includes safeguards regarding:

⁵⁴ Clearly there are many assumptions baked into these estimated totals. Nor do these estimates provide a clear distinction between the harm caused by the EGMS located in the Casino vs the harm that arises from the table games.

⁵⁵ ‘About problem gambling’. Department of Internal Affairs, <https://www.dia.govt.nz>

⁵⁶ The Grand Casino’s Problem Gambler Identification Policy is a subset of its wider Host Responsibility Policy.

- **Continuous presence in the Casino:** Continuous presence is where a customer is present at the Casino (but not necessarily gaming continuously) for a period of 12 hours or more.
- **Continuous play:** Continuous play is where a customer is gaming continuously for five hours or more.
- **Agreed limitation:** The Agreed Limitation Programme is a harm minimisation initiative for all loyalty card customers⁵⁷. Under this programme, the customer and the Casino agree that it will support the at-risk customer to gamble without experiencing harm. This might include self-imposed limits on the number of visits to the Casino, limits on the hours spent gaming on any given visit, and limits on the money spent on any visit. Participation is closely monitored and reassessed.

Note the Agreed Limitation Programme is distinct from an exclusion. Customers can choose to self-exclude from the Casino (see Appendix Three), to self-exclude from multiple venues, or be excluded by the Casino itself. Once an exclusion is in place, before someone can re-enter a casino the following criteria need to be met:

- the exclusion period must have lapsed
- they must have attended counselling
- a counsellor must write to the Casino stating that the customer is no longer likely to experience gambling-related harm
- the Casino needs to have a verbal discussion with the counsellor and
- the Casino will conduct an interview with the excluded person⁵⁸.

All interactions, observations, and assessments of potentially at-risk gamblers are logged in iTrak, the Casino's computerised Incident Reporting and Risk Management System.

The casino spent \$613,000 in 2022 and \$643,000 (projected) in 2023 on harm reduction including software, staff and consultant costs. The Grand Casino Dunedin's Host Responsibility Policy is highly regarded by stakeholders (see below). For instance, DIA has a mystery shopper campaign that sends undercover gamblers to test whether patrons showing signs of potential gambling addiction were adequately dealt with by venue staff. The latest mystery shopping report⁵⁹ shows the Casino "displayed a good standard of host responsibility and culture in response to the mystery shopper exercise". In 2022 Research First repeated this mystery shopping exercise and found the same high standards of compliance (see Section 8.2).

⁵⁷ The Casino may also offer it to all such customers who are identified as being at risk of harm.

⁵⁸ Note that the final decision on re-entry to the Casino sits with Casino staff. A representative from the Grand Casino Dunedin noted that there were occasions when the Casino had refused to re-admit a person who had completed counselling and been signed off by a counsellor.

⁵⁹ Department of Internal Affairs (2017) Sector report: Gaming machine mystery shopper exercise results, Department of Internal Affairs, Wellington, June 2017

In addition, the report notes that the three casino businesses in New Zealand (SkyCity, Christchurch, and Dunedin)

have put considerable focus on harm minimisation practice since 2014, and we have noted a significant change in culture with a stronger focus on preventing and minimising harmful gambling [by Casinos].

The DIA mystery shopping report also commended the Grand Casino Dunedin for its efforts in:

- providing extra resource to its host responsibility team by establishing responsible gambling host roles, increasing staff training, and providing greater supervision by staff of patrons on the gaming floor
- providing staff with additional access to host responsibility logs to record their observations of patron behaviour. This has resulted in the number of harm minimisation observations increasing significantly
- ensuring Casino staff formally check-in annually with regular-carded players to discuss their gambling patterns
- increasing its gambling harm team with the addition of a Responsible Gambling Host role. This role will be an additional resource on the gaming floor.

In addition to this feedback from DIA, in a 2022 letter to the Gambling Commission regarding the Casino's Review of its Host Responsibility Programme⁶⁰, a representative from the Salvation Army's Oasis wrote:

“...we continue to observe a positive intention to reduce harm, genuine care for patrons, and a willingness to improve their service. Our Dunedin-based staff speak highly of the Host Responsibility team at the Grand Casino.

This is reiterated in the minutes of a 2022 Community Liaison meeting where a participant from DIA noted⁶¹:

“Grand Casino have a very high level of Host responsibility understanding and compliance ... there had been glowing reports from visits, good feedback, and not too many concerns⁶².

60 Letter to Blair Cairncross, Executive Director of Gambling Commission, from Lisa Campbell, National Director, and Alaska Dobbs, Public Health Worker, Oasis, August 5th 2022

61 The Grand Casino Dunedin convenes regular problem gambling liaison meetings to discuss host responsibility issues. These issues relate primarily to operational activities, for example, referrals and exclusions, etc. These are also opportunities to discuss broader sector initiatives

62 Minutes of Community Liaison meeting, Monday June 27th 2022

In March 2022 the Grand Casino Dunedin introduced facial recognition software to, among other things, help better manage patrons with multivenue exclusions. By August 2022, the introduction of this software had resulted in the Casino identifying 21 patrons excluded from other venues.

6.1.2 QUALITATIVE INSIGHTS INTO GAMBLING HARM AND THE GRAND CASINO

A Dunedin City Councillor who sits on the Economic Development Committee acknowledged there had been high-profile problem gambling cases at the Casino but believed these were often used by the Casino's critics as though they were representative of a much broader problem rather than the rare events they were⁶³. This Councillor was also adamant that if the Casino were not in Dunedin, those who wanted to gamble would still find a way to do so:

“ People that want to gamble with a casino ... If they can't do it in Dunedin, would choose to go to Christchurch. Queenstown.

This Councillor also said:

“ [people who want to close the Casino] don't understand that actually how much money would have gone out of the country through COVID when the casinos were shut, when people went gambling offshore. They went online where there's absolutely no regulations, you know, but companies were based out of the Ukraine, Cyprus, all sorts of places like that where there was no regulation and very little payouts. So very little return.

Another Dunedin City Councillor echoed these sentiments, noting:

“ Humans have a natural proclivity to gambling and for some people it becomes problem gambling. Now that is never, ever stopped or extinguished by prohibiting gambling, all that happens is that gambling is driven underground.

This Councillor also believed that the level of scrutiny in the Casino made it the safest environment to police problem gambling:

“ Then it is clear, you know, that the problem gamblers can get help. Yes. And so they get spotted and get helped and they get they should be taken out. So they get culled out of the Casino so that people go to the casino for fun.

63 The Christine Keenan case from 2006 was cited by a number of stakeholders in this research.

As noted above, for those who have been excluded by the Casino, a condition of re-entry is that the patron receives counselling or treatment from an approved problem gambling service provider. The Salvation Army's Oasis service provides this counselling in Dunedin, which means the exclusion remains in place until an Oasis counsellor assesses the patron is no longer at risk of problem gambling or gambling harm. A representative from the Salvation Army's Oasis⁶⁴ believed there has been an increase in demand for problem gambling services in Dunedin but said the most significant causes were Class 4 EGMs and online gambling. However, they thought the Casino contributed to the ecosystem of gambling harm by making gambling appear glamorous in its advertising:

“ They contribute to it by the advertising and the advertising they do. And as a as a fun place to go.

The respondent worried this advertising would work particularly well on old and lonely people, who they saw as the most vulnerable. A worry was expressed that the visibility of the Casino and its advertising in Dunedin made gambling appear 'normal'.

When asked about the community benefits provided by the Grand Casino Dunedin, the representative from the Salvation Army's Oasis was sceptical:

“ They don't give much out into the community [and what they do give] out actually the gamblers have put it in so it's not their money anyway.

For this representative, the solution to problem gambling was the eradication of all forms of gambling.

A representative from the Problem Gambling Foundation's Southern branch⁶⁵ believed there was a significant hidden aspect to problem gambling in Dunedin (as elsewhere across New Zealand):

“ Well, I guess we know that there's a lot of people who don't engage with services, so we don't know the exact numbers.

64 The Salvation Army Oasis centres were formally established in June 1997 and today includes offices in Auckland, Hamilton, Tauranga, Wairarapa, Wellington, Christchurch and Dunedin, with additional satellite clinics in a range of regions. In addition to these centres, Oasis also provides outreach services via phone, text, and video calls. The Oasis programme is funded by the Ministry of Health to provide preventing and minimising gambling harm clinical and public health services. <https://oasis.salvationarmy.org.nz/about-us>

65 The Problem Gambling Foundation's mission is "preventing and reducing gambling harm for all tangata in Aotearoa with integrity, mana and innovative solutions".

This representative characterised the demand as ‘steady’:

“ I’ve been here nearly five years now and the rate of people coming to the service has certainly not dropped. It does have peaks and flows like ... every week there’s probably a new referral or two or three.

When asked if there were parts of the population who were more likely to experience gambling harm, the representative noted that:

“ I notice a lot of the harm is happening predominantly in the poorer socioeconomic areas of Dunedin ... but I get clients right across the board to very wealthy business high. And plenty of money kind of people and Central Otago and everything like that.

The representative from the Problem Gambling Foundation acknowledged that more gambling harm was associated with Class 4 EGMs than with casinos but believed the Grand Casino Dunedin created a unique risk because of its opening hours:

“ The Casino represents a place which is open longer than standard venues like a pub or tavern. So they provide the one place that’s kind of got that. And so quite a few of my clients have accessed it because it’s the only place available to go to late at night when they might finish work.

The respondent also noted older people could be particularly at risk, and this may become more of a problem as Dunedin’s population continues to age⁶⁶. The representative said:

“ And there’s quite a large population of, of older folk as well who will also go to the Casino as opposed to a [Class 4] venue because it feels safer. Yeah, well, that car park and all that stuff is accessible. The staff treat them like royalty and family friends and makes it very attractive for people who might be lonely or socially isolated to access that service.

66 Dunedin’s population is ageing, with 21 percent of the population projected to be 65 years or over by 2028 (compared to 16 percent in 2018). By 2038 the 65 years and over demographic will be Dunedin’s second-largest age group (after the 25 years and under-age group). <https://www.dunedin.govt.nz/council/annual-and-long-term-plans/10-year-plan-2021-2031/section-4/significant-forecasting-assumptions>

This representative also acknowledged the Casino worked hard to minimise risk and talked about the value in the regular Casino liaison meetings:

“ It’s if they have a concern about someone, if they know that they’ve been a client of myself or even a licence, that they might say, Ah, we’ve got some concerns for someone that might be on your books without breaking their anonymity. And quite often we might have an idea who they might be.

This extended to the way the casinos across New Zealand worked together to share information on who is excluded:

“ We do have people that do travel and sometimes [who] might have self-excluded themselves from Auckland, SkyCity and then they go to Dunedin and think it’s going to be alright and find that it’s actually a multi [venue exclusion] but they will go to Queenstown or Auckland and see if they can get away with it.

The representative also noted that the smaller size of the Grand Casino Dunedin (and the Dunedin community in general) made it easier to manage potential risks than elsewhere:

“ I guess because it’s a relatively small casino ... they do pick up on people who do try and enter if they have been excluded. But it is a small place. And so they’re generally aware of the people who go regularly anyway.

One concern the PGF representative had was the settings for checking in with gamblers:

“ I had feedback that [a patron was] surprise at not being shoulder tapped more often .. it’s 5 hours, but a lot of people sort of say, well, why was it more often?

The point this representative was making is that host responsibility policies are set by casinos themselves and not centrally regulated⁶⁷. The PGF would like to see this changed, so it is clear why the rules are set the way they are (e.g., why a five-hour window for intervention?). The PGF would also like to see more pre-committed limits and especially ones that can be set in the machines. The respondent said:

“ The safest approach to gambling [is] where you have to pre-commitment. You can’t increase your spend until you’ve had a rest period of 24 hours.

67 Although they are audited and approved by DIA.

When asked if they could recall an example of when the Casino noticeably failed to discharge its responsibilities toward somebody that has a gambling problem, they said:

“ I think some of the elderly can kind of get by [because] they look pretty harmless but they can be doing a lot of harm in that regards... over the years we've had a few children of elderly, you know, that have got really upset about it.

From memory, the representative thought casinos accounted for 10 percent of presentations for PGF services. They were also worried about the growth on online gambling and the lack of oversight there and said:

“ I mean, it's the same product, basically, but it's on your smartphone, right? [Online gambling] needs regulation and that's one of the benefits of the Casino, you could say is that it's highly regulated.

The PGF representative was clear that shutting the Casino would not improve the incidence of problem gambling in Dunedin:

“ I don't think [that closing the Grand Casino is the answer] because a lot of people have the ability to just travel to Queenstown, which is not that far from here.

And:

“ By the way, [the PGF] is not anti-gambling .. we're not here to try and close the Casino down. We'd just like to see them take responsibility for the harm, and. And there's always going to be tension for them because, you know, they make money out of it.

A counsellor at CareNZ (a drug and alcohol counselling service) who used to work at the Problem Gambling Foundation noted the Casino's branding meant it was seen as presenting entertainment and hospitality rather than gambling, and this might create hidden problems:

“ Their whole business is being highly hospitable in a structured pattern way, then making people feel good and comfortable and welcoming and significant and important. So that's what draws Dunedin people in and so they will often go there for special occasions.

Which means it is possible that there could be:

“ a pocket of problem gambling and Dunedin that doesn't well picked up by the stats, and that is people who are reasonably comfortable, comfortably off. If they are managing their finances. They're gambling problem is a social embarrassment to them, and they don't go for help. So some of the problem gamblers that are there, there won't be your stereotypical ones.

The CareNZ counsellor also wondered if there was a subset of gamblers who only ever gamed in the Casino, meaning they may not take their gambling elsewhere if the Casino were not available:

“ One of the things about the Casino [is] some people who gamble there wouldn't be seen at a Class 4 venue. That's too cheap for them if you like.

6.2 GAMBLING HARM AND AT-RISK POPULATIONS

The previous section has addressed the question of gambling harm in general. Nationwide research shows that some population groups are more at risk of gambling harm than others, particularly Māori, Pacific peoples, some Asian communities, young people, and people on lower incomes⁶⁸. In addition, the stakeholder interviews completed for this social impact assessment (previous section) identified older people as potentially being at risk in Dunedin. The following sections addresses the question of the potential harm being done to these population groups by the Grand Casino⁶⁹.

6.2.1 IMPACTS ON OLDER RESIDENTS

In 2021⁷⁰ 17 percent of Dunedin’s residents were aged 65 and over, compared to a national average of 16 percent. According to the Dunedin City Council, by 2038 the 65-years-and-over demographic will be Dunedin’s second-largest age group⁷¹. A number of the stakeholders consulted for this social impact assessment expressed concerns about the impact of the Casino on this older resident group.

It is certainly the case that customers of the Grand Casino Dunedin skew older. In the patrons’ survey conducted for this assessment, 64 percent of the patrons were over 60 compared to 30 percent of the population (Table 6.2)⁷².

Table 6.2: Patrons’ ages (Patrons’ survey)

	Patrons	Population
20-39	11%	38%
40-59	25%	31%
60+	64%	30%
NET	100%	100%

68 Ministry of Health. 2022. Strategy to Prevent and Minimise Gambling Harm 2022/23 to 2024/25. Wellington: Ministry of Health

69 Note that these sections do not include young people as they are explicitly excluded from participating in casino gambling.

70 <https://ecoprofile.infometrics.co.nz/Dunedin%20City/Population/>

71 <https://www.dunedin.govt.nz/council/annual-and-long-term-plans/10-year-plan-2021-2031/section-4/significant-forecasting-assumptions>

72 These figures are different to the total population statistics quoted in the introductory text because this table only shows the population share of the over 20 population in Dunedin (i.e., it removes those under 20).

Table 6.3: Patrons’ ages (Membership database)

	Members	Population
20-39	29%	38%
40-59	32%	31%
60+	39%	30%
NET	100%	100%

Despite this over-representation among Casino patrons and members, the data show that older residents are much less likely to be excluded from the Grand Casino Dunedin than other patrons (Table 6.4).

Table 6.4: Exclusions 2018 to May 2022

Age	
20-39	51%
40-59	39%
60+	10%

The sensible conclusion from this is that, while a number of stakeholders worry that older residents in Dunedin are more at risk of gambling harm due to the Grand Casino’s operation, there is little evidence this is the case. In the qualitative research component of the social impact assessment, a representative from Grey Power Otago was not aware of any systemic issue with problem gambling among the older residents in Dunedin / Otago. The respondent said:

“ It has been in the past but not latterly [since COVID-19] we have found that people are reluctant to go out where there are other people and they’ve got to socialise and especially in our age group.

The respondent raised this question (about the prevalence of problem gambling at the Casino among older residents) at a branch meeting of Grey Power and no one at that meeting believed problem gambling was a particular concern for older residents in Otago. The Grey Power representative said:

“ To be honest with you, we have not actually found amongst our population that it seems to be a real issue.

Instead, the Grey Power Otago representative believed loneliness and social isolation were a much larger problem for this group, and the Casino helped address it:

“ The Casino feels like a safe place to drink for older people, not just the elderly but older people in general ... it’s always been a comfortable place to go as well.

A representative from Age Concern Otago had a very similar view. When asked about gambling among older residents in Dunedin they said:

“ No, it certainly hasn’t flagged as an issue. We’ve had no complaints. I’ve talked to our elder abuse social worker last week after your first inquiry and said, what do we know about older people and casinos?

The elder abuse social worker told the representative from Age Concern Otago:

“ And they said, well, no, it’s nothing. Nothing’s come to light. You know, from our point of view, it’s more about loneliness and self-isolation⁷³.

This representative was also clear that if gambling was a problem, it was unlikely to be associated with the Casino:

“ I don’t think they necessarily hook into gambling at the Casino so much. They might visit the odd pub out there and have a go on the pokies. But again, we don’t see that as so much of an issue. It’s certainly not reported through to us.

The representative talked about the relatively small size of the Grand Casino Dunedin and the level of scrutiny in place, meaning it was unlikely an older person could gamble for long periods, across many nights, without being noticed. In contrast, it is much easier to pass unnoticed at various pubs and clubs where the EGMs are.

73 When talking about older residents in Dunedin it is important to note that this is a group of the population that is particularly susceptible to being socially isolated and experience feelings of loneliness. Some commentators see this as a significant risk to wellbeing, with an often quoted statistics that loneliness has the impact on mortality as smoking 15 cigarettes a day (Tate, N (2018) “Loneliness Rivals Obesity, Smoking as Health Risk”, WebMD; and fact checked and judged to be true by EUFACTCHECK, a fact-checking project of the European Journalism Training Association (EJTA) <https://eufactcheck.eu/factcheck/true-long-term-loneliness-is-as-damaging-to-your-health-as-smoking-15-cigarettes-a-day/>

This representative was also clear that the Casino offered entertainment and hospitality that appealed to older residents because it was both safe and an enjoyable environment:

“ In days gone by I was involved with another organisation, RSA, and we used to have occasional trips down to the Casino and we’d get a cheap and cheerful meal and a bit of a night out.

A trustee of Aotearoa Gaming Trust made a similar point:

“ There seems to be quite a lot of older people [at the Casino] ... they like to meet up with their friends and have a nice coffee or put 20 bucks through the machines or whatever. And so it’s more of a social environment. It’s a very different environment in Dunedin than it is at SkyCity in Auckland, for example. It seems to be a lot more community focused projects than in the SkyCity because it’s a smaller venue.

The representative also highlighted the money the Grand Casino Dunedin channelled back into the community through grants, sponsorships etc. When asked if they thought there were reservations about where this money originated, the representative from Age Concern was clear:

“ Their money is as good as anyone else’s.

6.2.2 IMPACTS ON MĀORI RESIDENTS

As noted earlier in this report, Māori are more likely to experience gambling harm than other population groups. One longitudinal study by the Ministry of Health found that Māori and Pacific adults are five-to-eight times more likely to become problem gamblers than other New Zealanders⁷⁴.

In 2018, 9 percent of the population in Dunedin City identified as Māori (Table 6.5). Dunedin has three marae for Ngāi Tahu, each with its own whareniui. Arai te Uru marae in Wakari includes the Arai te Uru whareniui. Ōtākou marae in Otakou includes the Tamatea whareniui. Huirapa / Puketeraki marae in Karitāne includes the Huirapa whareniui.

Table 6.5: Population by ethnicity (2018 Census)

	Dunedin	Otago	New Zealand
European	86.6%	86.9%	70.2%
Māori	9.3%	8.7%	16.5%
Asian	7.8%	7.1%	15.1%
Pacific peoples	3.2%	2.7%	8.1%

In contrast to the population share (9 percent), Māori comprised just 4 percent of the those in the patron survey completed for this social impact assessment (Table 6.6).

Table 6.6: Casino patrons by ethnicity

Māori	4%
Pacific Peoples	1%
Pākehā/New Zealand European	83%
Asian	8%
Middle Eastern/Latin American/African	0%
Other (please specify)	4%
Prefer not to say	3%
NET	100%

⁷⁴ Cited in Te Ao - Māori News Gambling harm to Māori and Pasifika part of Health Ministry review Sunday 5 September 2021

Casino staff report low levels of at-risk gambling activity by Māori, having excluded just eight Māori patrons between November 2018 and May 2022.

The Social Impact Assessment team talked to a representative from Te Rūnanga o Ōtākou who described the Grand Casino as “a well-run ship” and was clear that for Māori:

“ If you’re thinking about problem gambling in Dunedin, there are better places to look [than the Grand Casino]⁷⁵.

A representative from an organisation that provides training programmes and support to organisations that are working with Māori clients talked about how problem gambling formed part of their comprehensive assessment screening tool. This organisation was particularly focused on the harm that problem gambling did to the whanau of the gambler. But this representative was also clear that the Casino was not strongly associated with problem gambling among Māori in Dunedin and Otago:

“ Here in South Dunedin, where we are, has a really low - probably the lowest - socio economic demographic area in the city. And, of course it’s jam packed full of pokie rooms.

In contrast, they observed the Grand Casino Dunedin appealed much more to older residents from elsewhere in the city.

“ When I look at the Casino here [in Dunedin] it looked to me a very mature scene, a very mature group [because] they’ve got a dress code, right.

And:

“ So for Māori they’re more likely to frequent the pokie machine bars.

This representative acknowledged that a lot of community funding came from gambling and labelled this “an ethical dilemma”.

While no fan of gambling in general, this representative thought (i) there were other forms of gambling that were much more harmful to the local Māori community and (ii) removing a gambling option would likely drive those that wanted to gamble to other formats:

“ There are so many more accessible mediums available freely to people there.

⁷⁵ Note that the Social Impact Assessment team had no response to its requests for interviews with representatives from the University of Otago’s Ngāi Tahu Māori Health Research Unit (NTMHRU).

This representative noted that casinos in general had taken host responsibility much more seriously over time, saying:

“ I think casinos have cleaned up their act a lot. They do in a lot of ways support the communities that they live in.

This representative from Te Rūnanga o Ōtākou thought there were more ways the Grand Casino Dunedin could support the local Māori community, particularly by ensuring more community funding goes to organisations responding to problem gambling in the Māori community:

“ Well, actually, if our people are in there and pouring money into it, I'd rather see that money go back into our communities rather than to other white communities.

This representative also thought the Casino could support the local Māori community through its hiring practices and professional development offered to Māori staff.

6.2.3 IMPACTS ON PACIFIC PEOPLES

In 2018, 3 percent of the population in Dunedin City identified as Pacific Peoples (Table 6.7). In contrast, just 1 percent of the participation in the patrons' survey did.

Table 6.7: Population by ethnicity (2018 Census)

	Dunedin	Otago	New Zealand
European	86.6%	86.9%	70.2%
Māori	9.3%	8.7%	16.5%
Asian	7.8%	7.1%	15.1%
Pacific Peoples	3.2%	2.7%	8.1%

Table 6.8: Casino patrons by ethnicity

Māori	4%
Pacific Peoples	1%
Pākehā/New Zealand European	83%
Asian	8%
Middle Eastern/Latin American/African	0%
Other (please specify)	4%
Prefer not to say	3%
NET	100%

Casino staff report low levels of at-risk gambling activity by Pacific Peoples. The social impact assessment team had no response to its requests for interviews with representatives from Pacific Trust Otago. However, when talking about gambling in the Pacific community, a Dunedin City Councillor from the Pacific community said:

“ It’s not the Casino itself that is the problem. The elders in the Pacific Peoples community in Dunedin go there for entertainment.

6.2.4 IMPACTS ON ASIAN RESIDENTS

In 2018, 8 percent of the population in Dunedin City identified as Asian (Table 6.9), the same share as participants in the patrons’ survey. However, Chinese patrons made up 16 percent of exclusions between November 2018 and May 2022, leading many of the stakeholders in this research to express a concern that the Chinese community was particularly affected by the Casino’s operation.

Table 6.9: Population by ethnicity (2018 Census)

	Dunedin	Otago	New Zealand
European	86.6%	86.9%	70.2%
Māori	9.3%	8.7%	16.5%
Asian	7.8%	7.1%	15.1%
Pacific peoples	3.2%	2.7%	8.1%

Table 6.10: Casino patrons by ethnicity

Māori	4%
Pacific Peoples	1%
Pākehā/New Zealand European	83%
Asian	8%
Middle Eastern/Latin American/African	0%
Other (please specify)	4%
Prefer not to say	3%
NET	100%

Table 6.11: Exclusions November 2018 – May 2022

European / New Zealander	50%
Chinese	16%
Indian	10%
Māori /other Pacific	10%
Middle Eastern	1%
Other	7%
Other Asian	2%
	100%

According to research conducted for Asian Family Services⁷⁶, 25 percent of the Asians that gamble in New Zealand do so at a table in a casino⁷⁷. This research also shows that Asians aged 18 to 29 were the most likely to gamble on casino tables. Among the Asian gambling population, problem gamblers make up 18.4 percent (which equates to 13.8 percent of all Asians in New Zealand).

The challenge for this social impact assessment is establishing how much of this applies to the Chinese community in Dunedin. A representative from the Otago and Southland Chinese Association was clear that there was a good relationship between the Asian community in Otago and the Casino. But there have also been specific cases where members of the community have had problems with gambling at the Casino. The representative said:

“ The Chinese community like to gamble.

But they are also much less likely to go to pubs, which makes the Casino an attractive option. The community skews older and are often those looking for entertainment after they close their restaurants or take-away shops late at night. The Casino is a safe and attractive environment:

“ A safe place to be entertained.

⁷⁶ Asian Family Services (2012) New Zealand Asian Responsible Gambling Report 2021, Asian Family Services, Auckland, May 2021

⁷⁷ Compared to 27.6 percent that had gambled on an EGM, and 19.7 percent that had gambled online. Note this research does not distinguish between EGMs in casinos and other locations.

But problem gambling has never been raised as an issue at Association meetings. If problem gambling is an issue for these residents, it remains one that is hidden (the representative noted that social issues are rarely talked about in Association meetings). At the same time, the representative was clear that the Casino plays an important role:

“ For parts of our community it is an important source of entertainment where they feel safe ... the Casino does serve a function for the Chinese Community.

Another high-profile representative from the Chinese Community also noted that:

“ The Chinese Community use the Casino as a kind of social club.

This representative noted that in the early days of the Casino the local Chinese community were worried about potential harm to vulnerable people and those that could not afford to gamble. But they were also clear that the Casino had addressed this because of the focus on harm reduction that has come from the Gambling Commission and been enshrined in the current legislation (they said “the discipline of the whole industry has improved”).

The respondent also thought that over time casinos have generally got back to “giving back to the community” and in Dunedin this included the Casino giving back to the Chinese community.

A third representative from the Chinese community did not frequent the Casino but noted that their father went to the Casino to socialise, and that it was very much seen as a safe, warm environment where people could “get fed”.

Representatives from Asian Family Services⁷⁸ noted the subset of the Asian community in Dunedin that may be exposed to gambling harm, and which would be overlooked by the local Chinese Association, is the international student population. This is a group that might look to the Casino to address the sense of dislocation, social isolation, and loneliness these students frequently experience in a new culture. One of the Asian Family Services representatives said:

“ If you know how buzzing our [Asian] culture is, what the night life is like [in Asia], you’ll know [that] moving to Otago is a huge adjustment to a lot of international students.

And:

“ We hear the same story over and over again when you talk to international students is that they lonely, you know, like they didn’t have friends. They don’t know where to go.

This is supported by the *New Zealand Asian Responsible Gambling Report 2021*, which shows that loneliness is the second most common risk factor for Asian gambling (behind lack of financial budgeting / planning).

Because the Grand Casino Dunedin is open late, and because it is a safe environment, the Casino is seen as likely to be attractive to these international students. The Asian Family Service representatives talked about how these students might not realise that gambling can become addictive, and that these students are unlikely to seek help for their behaviour once it becomes harmful.

These representatives also noted that the changes to international students due to the COVID-19 pandemic might mask how potentially serious this is. The respondent noted that pre-pandemic, Dunedin had up to 3,000 international students but it now has closer to 300.

The Asian Family Service representatives referred to research that shows gambling starts early with Asian students, with 30 percent of East Asian secondary school students in New Zealand reporting they had gambled or bet precious things or money (i.e., scratchies, lotto, pokies, cards or coin games, TAB betting, gambling on the Internet or mobile phone for money or prizes, casino, or bets with family or friends)⁷⁹.

78 Asian Family Services is contracted by the Ministry of Health to provide support for gamblers, family members, and other people who are negatively affected by someone else’s problem gambling, either in the past or at present. These services include one-on-one counselling services, couple counselling, group counselling, and other social work services. These services are free to those who have been affected by gambling harm.

79 Peiris-John, R., Kang, K., Bavin, L., Dizon, L., Singh, N., Clark, T., Fleming, T., & Ameratunga, S. (2021). *East Asian, South Asian, Chinese and Indian Students in Aotearoa: A Youth19 Report*. Auckland: The University of Auckland. Note that the figure for participation in gambling by East Asian is in than reported by European students (37%)

Despite these concerns, representatives in Dunedin believed they were unsubstantiated. The international student representative from The University of Otago's International Students Association⁸⁰ did not think this was a serious problem in Dunedin:

“ In Dunedin ... it's like a small, small issue, but not something that's too much of a concern.

And:

“ My sense is that [the international students] always are too busy or too tired to be able to go out and you'll find that the cases of they don't drink much actually.

This representative did not see the Casino as a risk for most international students from Asia as they were too young to visit, saying:

“ You'll find that most of the Asian students here that are quite young so are going into the casino is quite an intimidating experience as well.

This representative was clear:

“ I'm not too concerned about gambling, the being vulnerable thing, for the Asian peoples here in Dunedin.

The representatives from Asian Family Services wanted to be clear that the Casino conferred considerable benefit to the international student community, saying:

“ [The Grand Casino provides] entertainment to large members of the Chinese community, It [has] some benefits for the Chinese community as well as the potential for harm.

The respondent was clear that Asian Family Services is not anti-gambling but about creating settings where Asian people “feel safe and still able to enjoy [gambling]”. One suggestion these representatives had was working with the Casino and the University of Otago to help educate international students through their orientation process about the potential for gambling harm.

80 Formerly known as International Committee (ICOM). Established in 2020, the Otago International Students' Association (OISA) serves to represent international students and domestic students with international background studying at the University of Otago. OISA is the umbrella body for all OUSA affiliated cultural clubs to relay the issues and concerns of international students.

6.3 ANTISOCIAL BEHAVIOUR

As noted at the start of Section 6, the second most common adverse effect associated with casino operations is crime. As with gambling harm (see previous section), despite these concerns, there seems very little crime or anti-social behaviour that can be directly attributed to the operation of the Grand Casino Dunedin.

6.3.1 QUANTITATIVE ASSESSMENT OF GAMBLING HARM

The New Zealand Crime and Victims Survey collects information about New Zealanders' experience of crime. This survey has run each year from 2018, asking a nationally representative sample of 8,000 New Zealanders about their experiences with crime. The latest data from this survey (conducted in June 2022) show that Dunedin remains one of the safest places in New Zealand⁸¹.

In addition, recorded crime is going down in Dunedin and Otago. Police data show decreases in thefts, drug crime, unlawful entry, traffic offences and “acts intended to cause injury” in Otago. It is a similar story in Dunedin City, with recorded crime reducing from July 2021 to June 2022 and ‘violent crimes’ showing a particular decline (Figure 6.1).

There are few crimes recorded in the Casino neighbourhood (Figure 6.2), and few of these are likely attributable to the Casino's activity (see below). This is supported by the Casino's data on how many patrons they have asked to leave the site due to behavioural issues—just three between April 2021 and June 2022 (Table 6.12).

81 Ministry of Justice. 2022. New Zealand Crime and Victims Survey. Cycle 4 survey findings. Descriptive statistics. June 2022. Results drawn from Cycle 4 (2020/21) of the New Zealand Crime and Victims Survey. Wellington: Ministry of Justice

Figure 6.1: Recorded violent crime in Dunedin City 2021-2022

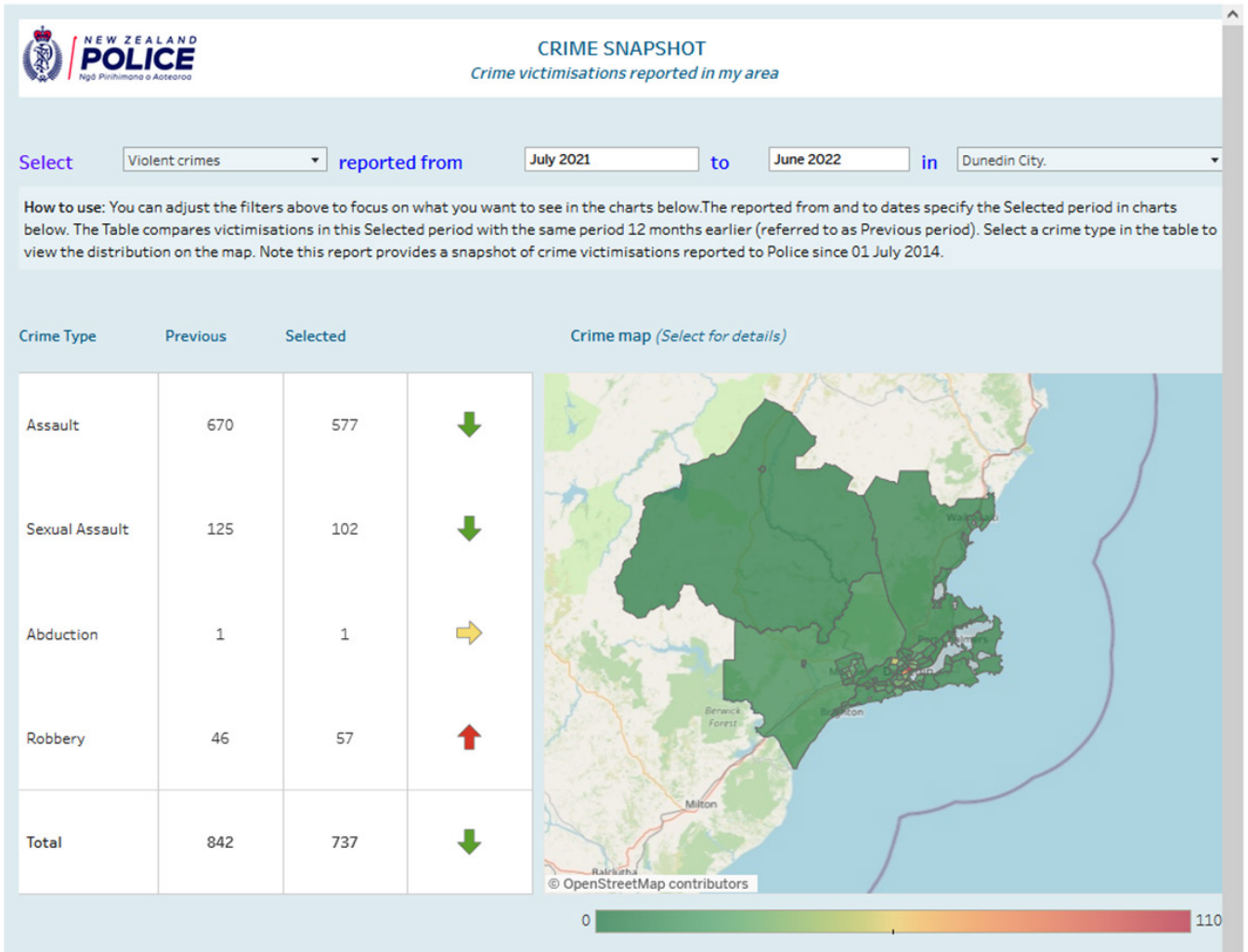


Figure 6.2 Recorded crime in Casino neighbourhood 2022

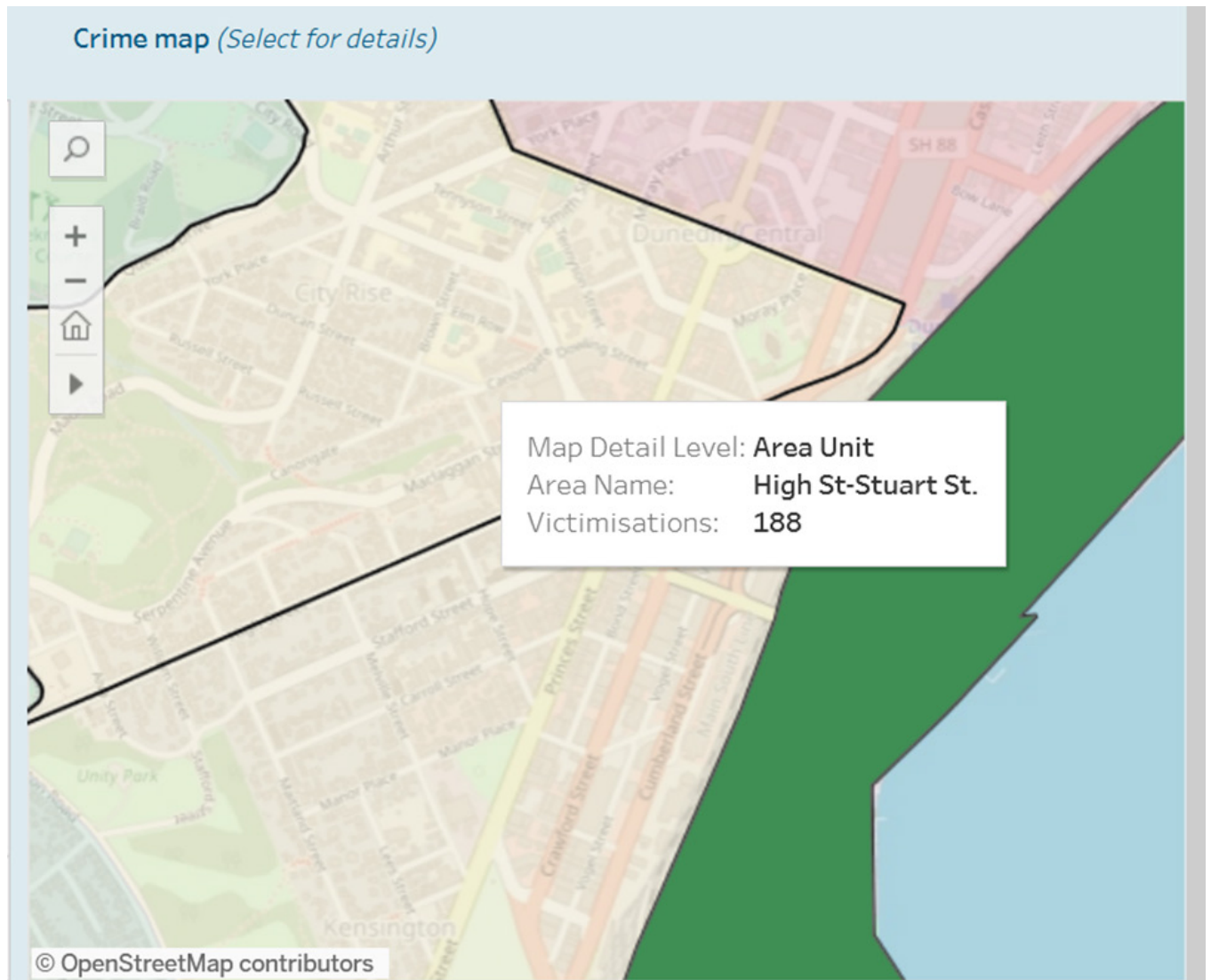


Table 6.12: Patrons asked to leave Casino, April 2021 to June 2022

Reason for exit	Number
Behaviour	3
RSA (Responsible Service of Alcohol)	28
Request to leave due to previously being denied	22

6.3.2 QUALITATIVE INSIGHTS INTO ANTI-SOCIAL BEHAVIOUR AND THE GRAND CASINO

A representative from the Dunedin Police was clear the Grand Casino Dunedin was not a location of concern for local Police. The respondent said:

“ [The Grand Casino] doesn’t bring a lot of work our way ... there’s only been probably a handful of jobs in the last six months or so that I’m aware of that have actually occurred outside the Casino and they’re not necessarily to do with the Casino.

This representative thought the reason for this was because the Casino is a low-risk venue and does a good job of managing its risks:

“ The security team do a good job ... we’ve generally got a good relationship with them.

And added:

“ But on the whole, I think there’s not a lot of crime down in that area. And I don’t think probably any of the crime or – maybe a very small amount of that crime - would be driven by the Casino being there.

The representative from the Problem Gambling Foundation acknowledged the Grand Casino did a good job of managing antisocial behaviour and the risk of antisocial behaviour when they said:

“ I know they’re very good at monitoring who goes in as far as obvious gang members and stuff like that. They’ll turn people away if they have any worries about that.

A representative from Enterprise Dunedin reiterated this point, noting:

“ I haven’t heard anything that would suggest that, you know, the Casino and Dunedin has an antisocial element to it. ... The behaviour is pretty well controlled. Yeah, I haven’t heard of anything.

A representative from NZME was amused at the question about anti-social behaviour and responded:

“ No, not at all. In fact, almost the opposite.. Imagine a bunch of really politely behaved people who as they skew more elderly, let's say, enjoying themselves, Yeah. Not a hotbed of social disorder.

6.4 MONEY LAUNDERING

The Grand Casino Dunedin is a regulated reporting entity and is subject to the Anti-Money Laundering and Countering Financing of Terrorism Act 2009 (AML/CFT Act). The purpose of this Act is to keep New Zealand free from illegal activity conducted through businesses and financial institutions. The AML/CFT Act places obligations on the Casino, such as:

- a requirement to know its customers
- a requirement to verify the identity of its customers conducting certain transactions
- where necessary, a requirement to verify the source of a customer's wealth or the source of a customer's funds.

As part of this social impact assessment, the research team talked to a representative from Opportune, a company specialising in delivering services to clients in audit, risk management, governance and compliance. Opportune is experienced in AML, particularly in running audits and helping venues implement their programme and risk assessments.

Brought in to help the Casino when an AML audit said further work needed to be done, the Opportune Representative was clear this was due to changing requirements rather than a decline in performance from the Casino:

“Initially the audits they got back were clean and fine, they then got an audit back which said that they weren't and that surprised them. And that was because the bar had got raised in terms of the threshold of compliance. The reason they missed that, that subsequent audit is just because the expectations changed or legislation changed and they needed to keep up with it.

The Opportune representative then outlined how they worked with the Casino on staff training, identifying customers more rigorously, and risk profiling customers once in the Casino. They also talked about how the Casino introduced technologies to help with some of the new processes (such as online identification verification providers).

The research team then asked the representative from Opportune “What's your observation of how well the Grand Casino has followed the systems and the processes you've put in place?”. The consultant replied:

“My interaction with them for the last 12 months? They were hot on [AML], it got full attention until it got correct. And then by the end of my time the they got probably as good a reply as you can get from a DIA inspector who was just saying thank you, you now look sufficient.

And:

“ So my observations would be the board were hot on it. The CEO was very hot on it, as in driving it to make sure it was getting done and also just being across what the issues were.

The Opportune consultant then offered this general statement of support for the Casino:

“ So I support [the Grand Casino] in terms of I definitely support any business that's trying to make Dunedin even a bit better. We've had some pretty reasonable growth over the last few years. They do look after that building. It does look nice. They are sort of a nice location. I guess it's sort of got a synergy with the Southern Cross Hotel there. So from that point of view, I'm certainly supportive of them. Without a doubt. And, you know, if tourists or other people want to come to town to use the facility, then great. Yeah.

Section 7

With Versus Without Scenarios

This section uses the data collected to assess the impact if the Casino were to close. It does this by comparing two scenarios:

- The modelled impact of the Casino of the Dunedin and Otago economy (With Casino scenario) and
- The modelled alternative spending of those who would no longer visit the Casino if it were closed (Without Casino scenario).

7.1 WITH CASINO SCENARIO

7.1.1 GRAND CASINO DUNEDIN OPERATIONS

For the purposes of estimating the economic impacts of the Casino, its budgets over the period 2019 to 2021 were reviewed. While we would have expected COVID-19 to have had some impact on turnover in the year to March 2020 and a much greater impact in the year to March 2021, this is not obvious in the financial performance of the Casino: its total revenue was \$17.5 million, \$17.3 million, and \$17.3 million in the three years (Table 7.1), although this includes a government wage subsidy in the 2021 financial year⁸². This is despite the number of visitors to the Casino declining from an average 196,000 in the three years prior to COVID-19 to 136,000 for the 2021 and 2022 years (Table 7.2).

The Casino management team reports being affected by lockdowns and limits on patronage due to public health spacing requirements. It seems likely that patrons made up for the missed spending during lockdowns with higher spending when they were able to attend, at least in the 2021 year. Profit appears to be higher in the COVID-19-affected 2021 year, which is a result of maintained revenue with lower expenses and labour costs.

Table 7.1: Key financial measures, Grand Casino Dunedin 2018/19 to 2020/21

Item	Mar-19	Mar-20	Mar-21	Average
Revenue (\$m)	\$17.5	\$17.3	\$17.3	\$17.4
Labour (\$m)	\$6.6	\$6.8	\$5.4	\$6.3
Expenses (\$m)	\$5.7	\$5.5	\$4.6	\$5.3
Depreciation	\$1.5	\$1.6	\$1.5	\$1.5
Taxation (\$m)	\$1.1	\$1.0	\$1.6	\$1.2
Profit (\$m)	\$2.7	\$2.4	\$4.1	\$3.1

⁸² These figures differ from the financial statement revenues, which net off various payments and complimentarys and include provisions for bonus points and jackpots.

Table 7.2: Grand Casino Dunedin patron numbers, 2018 to 2022

Year	2017/18	2018/19	2019/20	2020/21	2021/22	Average 2018/19 to 2020/21
Total patrons	197199	185993	176576	139223	134025	167264
Average weekly patrons	3792	3577	3396	2677	2577	3217
Peak week patrons	5116	4583	4819	3961	3769	4454

7.1.2 FLOW-ON IMPACTS

Discussions were held with both Casino suppliers and Casino accounting staff so Casino expenses could be allocated to appropriate industry groups⁸³ and an assessment made of their geographic source. To assess economic impacts, the source was split between Dunedin, Other Otago, and Outside Otago.

Expenditure by supplier by year was analysed and aggregated into an average expenditure by supplier. Each supplier was allocated to a region (Dunedin, rest of Otago, rest of New Zealand). This gave us expenditure by industry by location.

As part of this process, purchases by the Casino from the various sectors of wholesale and retail trade (primarily cost of goods sold (CoGS) shown in the Casino accounts but also items such as cleaning items, fuel etc.) were split between ‘gross margin’ of wholesale and retail trade (which is the concept used in the economic model) and the costs incurred by wholesale and retail trade in purchasing those goods. In the case of energy firms (Genesis Gas, Contact Energy) the analysis was split between generation and local distribution.

Goods and services that have been invoiced by an out-of-region company but supplied from a branch operating within the region (e.g., rubbish collection) were coded as part purchases from within the region and part purchases from the head office that provided administration and management services.

The expenditure within Dunedin, broken down by industry, was incorporated into a city economic model developed for this project⁸⁴, and a similar process was carried out for expenditure within Otago (including Dunedin) for an Otago economic model. This enabled calculation of the total economic impact on the city and the region of the Casino’s operations.

83 Accounting codes are quite different from the industry groups used in the economic model.

84 Butcher Partners Ltd developed a regional model using the GRIT method, which has been the basis of all previous regional economic impacts of casinos. The model used was based on the most recent NZ Inter-Industry study, which was released by Statistics NZ in December 2021, and is for the 2019-20 financial year. Butcher Partners Ltd has been developing and providing such regional models for more than 20 years, and the company’s models have been widely used by economic consultancies in New Zealand.

7.1.3 PATRON EXPENDITURE

The Casino revenue was used as the basis for estimating patron expenditure. For these purposes, direct cash incentive payments to patrons were deducted from the total revenue. This was necessary for the purposes of equalising expenditure in both the With Casino and Without Casino scenarios and ensures calculating the negative economic impacts of expenditure, which the Casino displaces from other forms of household consumption, is appropriately based. Hence, the gross average revenue of the Casino is \$17.375 million per annum but, of this, some \$0.481 million is paid back to households. Therefore, the total expenditure (equal to the displaced expenditure in the No Casino scenario) is only \$16.897 million⁸⁵.

7.1.4 GROSS IMPACTS OF WITH CASINO SCENARIO

The Casino directly generates 99 FTE⁸⁶ jobs, \$6.2 million of earned gross household income⁸⁷, and \$12.8 million of value added. The latter figure includes wages and salaries, profit, interest, depreciation, and taxes, including gaming taxes. Once indirect effects are considered, the Casino generates total impacts in Dunedin of:

- 133.1 FTE jobs
- \$8.2 million of earned gross household income
- \$16.9 million of value added.

From the Otago region perspective, the impacts are very slightly higher and are estimated to be:

- 133.3 FTE jobs
- \$8.2 million of earned gross household income
- \$17.0 million of value added.

Table 7.3: Direct and flow-on impacts in Dunedin from the Casino

Indicator	Direct operations	Dunedin (including flow on) Operations	Dunedin (including flow on) CAPEX	Total Dunedin (including flow on)
Employment (FTEs)	99	131.6	1.5	133.1
Value added (\$m)	\$12.8	\$16.8	\$0.1	\$16.9
Gross household income (\$m)	\$6.2	\$8.2	\$0.1	\$8.2

⁸⁵ The \$0.904 million repaid to households is attributed to operating surplus in the IO table modelling.

⁸⁶ Note that this figure covers the average FTEs for the 2019 - 2021 period, and differs from the current 71 FTEs noted in Section 4.1.2

⁸⁷ i.e., excluding income from dividends

Table 7.4: Direct and flow-on impacts in Otago from the Casino

Indicator	Direct operations	Otago (including flow on) operations	Otago (including flow on) CAPEX	Total Otago (including flow on)
Employment (FTEs)	99	131.9	1.5	133.3
Value added (\$m)	\$12.8	\$16.8	\$0.1	\$17.0
Gross household income (\$m)	\$6.2	\$8.2	\$0.1	\$8.2

Dunedin encompasses all the urban areas in the vicinity and has a very large non-urban area in geographical terms. Hence, the Casino makes very few purchases from Otago outside of Dunedin. There are also no other main centres, and the major alternate centers of Alexandra and Queenstown are somewhat distant. Because of this, the economic multipliers for individual industries are almost the same for Otago as for Dunedin. This results in the differences between the Dunedin and Otago impacts being very small and likely to be below the margins of error for this study. For this reason, we have not reported the impacts for Otago any further in this report, and they can be assumed to be almost identical to the Dunedin impacts.

7.1.5 COMPARISONS OF GROSS IMPACT

The direct employment impact of the Casino estimated above on turnover (net of incentive payments back to players) of around \$16.9 million is equivalent to six jobs per \$million, which is considerably higher than the national average for gambling of 1.8 jobs per \$million. The Casino’s total impact of 7.9 jobs per \$million is also higher than the national average, despite Dunedin being much less self-sufficient in inputs than New Zealand as a whole.

Nonetheless, the employment impact per \$ million is considerably less than most other entertainment industries and alternative activities that players might otherwise undertake.

7.2 WITHOUT CASINO SCENARIO

7.2.1 DIVERTED SPEND

Input-output models give the most useful view of the impacts at a city and regional level, provided trade diversion effects are considered. The Without Casino scenario allows the impact of this trade diversion to be considered by assessing the impact of the spending casino patrons would be likely to undertake in the absence of the casino.

To estimate the level of trade diversion, the intercept and database surveys asked patrons what they would have done had they not gone to the Casino⁸⁸. Three key assumptions were made in estimating this trade diversion. It was assumed that:

- those Dunedin residents who said they would have otherwise stayed at home would, in the long term, have transferred their casino spend to a typical mix of Dunedin household consumer spending
- those visitors who said they would otherwise have stayed in their accommodation would have spent nothing additional in the absence of their visit to the Casino
- those patrons who said they would have gone to some other activity would have spent the same amount at that activity as they spent at the Casino⁸⁹.

This calculation of diverted spending is shown in Table 7.5 and estimates \$11.32 million per annum would still be spent by Dunedin residents in Dunedin in the absence of the Casino and \$4.01 million spent by visitors. This would see a total of \$15.33 million in continued expenditure in Dunedin in the absence of the Casino.

The value of the spend diverted away from household consumption and from other activities was calculated using net casino revenue⁹⁰ and multiplying this by the proportion of visitors undertaking each alternative activity. The economic impact of this diverted spend was estimated by applying relevant economic multipliers for Dunedin to these impacts. These are shown in Table 7.6 and give an estimated total of 119 FTEs of employment retained in the city, \$10.25 million value added, and \$5.82 million in household income in the absence of the Casino.

In terms of an alternative use of the space, the Board of the Casino and Southern Cross management have indicated that the most likely use of the space would be further conference rooms for the Southern Cross Hotel. However, the current conference spaces in the hotel have a low-use rate (approximately 30 percent). We consider it unlikely, therefore, that any additional economic activity in the city, above that indicated in the analysis of trade diversion, is likely to result from the alternative use of the space.

88 Coded as Question 15 in both surveys.

89 There were only four patrons who were not gaming and who gave valid responses on alternative activities and would have undertaken an activity in Dunedin. We have not included them in the analysis and do not think this has affected the results.

90 Net of cash prizes given by the Casino back to consumers, which the Casino treats as expenditure.

Table 7.5: Spending transferred in the absence of Grand Casino Dunedin

Alternative activity without gaming (all responses)	Alternative activities (proportion of respondents)		Spend transferred		
	Dunedin residents	Visitors	Residents	Visitor	Total (\$m)
Gone to a different place for gaming	4%	5%	\$0.46	\$0.22	\$0.68
Visited the Casino for some other activity	7%	9%	\$0.77	\$0.36	\$1.14
Gone to another bar or restaurant	11%	17%	\$1.27	\$0.70	\$1.97
Gone to another bar / restaurant	10%	13%	\$1.17	\$0.54	\$1.71
Gone to a movie / play / concert	10%	6%	\$1.09	\$0.23	\$1.33
Gone shopping	11%	15%	\$1.27	\$0.61	\$0.66
Undertaken some other commercial activity	3%	4%	\$0.35	\$0.15	\$0.50
Undertaken non-commercial activity	6%	5%	\$0.73	0	\$0.73
Stayed at home or in accommodation (resident)	33%	15%	\$3.76	\$0.59	\$4.34
Stayed at home or in accommodation (visitor)	0%	0%		\$0.21	\$0.21
Not sure/something else	0%	0%			0
Imported goods	0%	0%			\$1.22
Out-of-town spending	4%	10%	\$0.45	\$0.41	\$0.86
Total sample	100%	100%	\$11.32	\$4.01	\$15.33
Wouldn't visit Dunedin	0%	0%		\$1.52	\$1.52
				Total Spending	\$ 16.85

Table 7.6: Estimating flow on impacts from trade diversion in Without Casino scenario

Sector	Multipliers from Dunedin tables			Total impact		
	Employment (FTE/million)	Value added	Household income	Employment (FTE)	Value added (\$million/annum)	Household income (\$million/annum)
Gambling activities	4.8	0.94		3.3	\$0.64	\$0.22
Food and beverage services	12.9	0.88	0.58	14.6	\$1.00	\$0.66
Food and beverage services	12.9	0.88	0.58	25.4	\$1.73	\$1.14
Food and beverage services	12.9	0.88	0.58	22.0	\$1.50	\$0.99
Heritage and artistic activities	13.1	1.05	0.68	17.4	\$1.39	\$0.90
Retail trade (35 % gross margin) - Recreational, clothing, footwear, personal accessories	13.1	1.01	0.6	8.6	\$0.66	\$0.39
Sport and recreation services	11.1	0.87	0.6	5.5	\$0.43	\$0.30
Typical Dunedin consumption	4.29	0.57	0.24	3.1	\$0.42	\$0.18
Typical Dunedin consumption	4.29	0.57	0.24	18.6	\$2.48	\$1.04
Trade Diversion impacts (FTE, \$million/annum)				118.6	\$10.25	\$5.82

7.2.2 COMPARING WITH CASINO SCENARIO VERSUS WITHOUT CASINO SCENARIO

The total net impacts of the Casino are shown in Table 7.7. This adds the gross impacts of the Casino’s expenditure together with the tourism generation impacts associated with visitors to the city. The trade diversion impacts, which are the likely impacts of continued expenditure in Dunedin in the absence of the Casino, are subtracted from the previous two items. The net impact is an estimated 38 FTEs in employment, \$8.63 million per annum in value added, and \$3.27 million per annum in household income.

Table 7.7: Comparison of With versus Without scenarios for the Grand Casino Dunedin

Item	Employment (FTE)	Value added (VA) (\$million/annum)	Household income (HHHI) (\$million/annum)
Casino gross impacts (With Casino scenario)	133	\$16.90	\$8.20
Tourism generation impacts (With Casino scenario)	23	\$1.98	\$0.90
Trade diversion (Without Casino scenario)	-119	-\$10.25	-\$5.82
Net impacts of Casino⁹¹	38	\$8.63	\$3.27

7.2.3 IMPACTS ON CONSUMER AND PRODUCER SURPLUS

Benefits consist of increases in consumer and producer surplus, terms which refer to the difference between what something costs to produce and what it is worth to consumers. The producer surplus is the difference between the price at which the producer would be willing to sell the item and the price at which it is actually sold. Consumer surplus is the difference between the price at which the consumer would have been willing to buy the item rather than do without, and the price they actually had to pay. It is likely that if the Casino does not produce any consumer surplus, consumers will not come to the Casino, and if there is no producer surplus, producers will not continue to operate the Casino.

Gambling is a form of entertainment undertaken by approximately 70 percent of the population, with lotto as the most popular of these (Thimasarn-Anwar et al, 2018). It is assumed gambling produces a consumer surplus to the gambler, and that at least some of this consumer surplus will be lost if they are no longer able to gamble at the Casino. Of the total of those surveyed, only 23 percent said they would not gamble if the Casino were not present (Table 7.8). However, we note that the results of the intercept survey suggest about half of respondents wouldn’t gamble without the Casino. The proportion of those who would not gamble without the Casino are those who do not receive any consumer surplus from gambling elsewhere, because the cost of gambling to them is more than or equal to any benefit they derive from it.

⁹¹ Total may not add up to items above because of rounding differences.

About one-quarter of respondents would not have gambled elsewhere in Dunedin or at another casino if the Grand Casino Dunedin were not available (Table 7.6). We are unable to determine whether the gambling spend transferred inside Dunedin to other gambling spend represents an increase or decrease in producer surplus. Of those gambling in Dunedin, 6 percent would do it online and a further 23 percent would transfer their spending to outside Dunedin. This transfer of spending to other locations represents a definite loss of producer surplus to the Dunedin economy, and in the case of the online gambling, likely also a loss to the New Zealand economy. Although the magnitude of this producer surplus loss is unknown, the estimate of real gross disposable national income (RGDNI) (see section below) can be used as a proxy for estimate of the producer surplus at the national level.

The net economic benefit of the Casino is the difference between the sum of the Grand Casino Dunedin consumer and producer surplus and the sum of the consumer and producer surplus associated with alternative consumption and investment. We have not attempted to calculate this because of measurement difficulties.

Table 7.8: Alternate gambling options, Grand Casino Dunedin patrons database survey responses⁹²

If the Casino in Dunedin were not here, would you be likely to gamble at other places in Dunedin?	Dunedin residents (% of total sample)	Elsewhere in NZ (% of total sample)
At a club	3%	3%
At a pub	25%	10%
At the races	4%	4%
Online betting	6%	2%
Buy some / more lotto tickets	13%	3%
Other (please specify)	2%	1%
I wouldn't gamble	12%	12%
Total sample	65%	35%

⁹² Note that respondents were able to choose more than one option. The proportion of the total sample represented for each of the gambling options is pro-rated from the gambling options share of the total respondents. Thus, if a respondent chose both club and pub as alternate options, their response was apportioned 50 percent to each. This ensures that the proportions represented in each cell represents the probability of the option being chosen, subject to the assumption of equal probability to each choice.

Table 7.9: Alternate Casino gaming options, Grand Casino Dunedin patrons database survey responses

If the Casino in Dunedin were not here, would you be likely to gamble at other casinos?	Dunedin residents (% of total sample)	Elsewhere in NZ (% of total sample)
Queenstown	12%	12%
Christchurch	14%	10%
Hamilton	1%	1%
Auckland	7%	5%
In Australia	7%	5%
Other (please specify)	3%	1%
I wouldn't gamble	20%	3%
Total sample	65%	35%

7.2.4 TAX EFFECTS OF DUNEDIN CASINO

There are \$5.7 million per year in taxes and levies directly associated with Grand Casino Dunedin operations. These include PAYE (\$1.7m), GST (\$1.7m), income tax (\$1.2m), casino duty and DIA levy (\$1.2m) (Table 7.10).

Table 7.10 Taxes and levies paid by Grand Casino Dunedin

Tax or levy	Mar-19	Mar-20	Mar-21	Average
PAYE	\$1,737,766	\$1,877,490	\$1,489,525	\$1,701,594
GST	\$1,627,963	\$1,840,257	\$1,551,859	\$1,673,360
Income tax	\$1,082,936	\$956,047	\$1,625,625	\$1,221,536
Casino duty	\$756,632	\$748,550	\$716,785	\$740,656
DIA levy	\$446,000	\$446,000	\$385,701	\$425,900
Problem gambling levy	\$15,283	\$13,695	\$1,589	\$10,189
Total	\$5,666,580	\$5,882,039	\$5,771,083	\$5,773,234

In addition, there is likely to be some further payment of personal income tax as the owners of the Casino receive profit distributions. The Casino shareholding is split between Lani Hagaman (42 percent), Christchurch Casino Ltd (33 percent), Stuart McLaughlin (10 percent), and minority shareholders (15 percent). It is estimated that over 95 percent of the beneficial owners are New Zealand residents, so almost all the Casino's profits are retained within New Zealand and, hence, any associated personal tax remains in New Zealand.

Some of this tax and levy paid by Grand Casino Dunedin will be replaced by transferred spending and changes in taxes for the alternate places where spending occurs, as described above. If the Casino were to close:

- a) A significant proportion of the Casino Duty and DIA levy would be lost, since 24 percent of respondents indicated they would not gamble in the absence of the Casino.
- b) Company tax is likely to be much less because the Casino has a much higher-than-average ratio of profits to sales than the non-gambling businesses from which it diverts spending.
- c) Transfer of spending to online gambling would also result in loss of income tax, GST PAYE and gambling duties.
- d) PAYE will be less because:
 - a. the average pay at the Casino is considerably higher than average pay in other industries to which spending would be transferred. (HHI/FTE ratio of \$62,000 \$/FTE in the With Casino scenario vs \$49,000/FTE in the Without Casino scenario)
 - b. household income would be \$4.2 million lower without the Casino, which at an average New Zealand tax rate (OECD, 2022) of 19.4 percent is equal to \$0.82 million.

It is unlikely that GST would decrease significantly unless the current spending at the Casino was diverted to savings or other overseas spending.

7.2.5 NATIONAL EFFECTS

As noted in the technical appendix, we have not undertaken a CGE model of the Casino's operation because of the small scale of the operation relative to the sensitivity of such models to quantify differences between scenarios. However, we can compare the likely effects of Grand Casino Dunedin with the estimated national \$70 million real gross national disposable income (RGNDI) effects from the Christchurch Casino.

Grand Casino Dunedin is about 22 percent to 30 percent of the size of Christchurch Casino (30 percent by gambling revenue, 28 percent by total revenue, 22 percent by FTEs, and 24 percent by patrons). A direct scaling would give an estimated \$15 to \$21 million in RGNDI for Grand Casino Dunedin. However, there appear to be very few international visitors to Grand Casino Dunedin versus about 4 percent of the visitors to Christchurch Casino, and we think that the likely impacts of Grand Casino Dunedin on RGNDI will be a few percentage points lower as a result.

7.2.6 SUMMARY OF ECONOMIC IMPACTS

The Grand Casino Dunedin contributes to the Dunedin economy in several ways (Table 7.11). It employs 89 people (71 FTEs) and the average from 2019 to 2021 was 118 (99 FTEs). The Casino spends \$5.35 million per annum in operational expenses with suppliers, of which 39 percent is spent in Dunedin. An additional \$1.1 million per annum is spent on capital items, of which \$0.26 million is spent in Dunedin. The Trust associated with the Casino distributes about \$0.1 million per annum to charities, and the Casino distributes a further \$0.04 million per annum in sponsorships. All the sponsorship, and 72 percent of the charity distributions, are to organisations in Dunedin.

Table 7.11 Direct impacts of Grand Casino Dunedin (2018/19- 2020/21)

Item	Total	Dunedin based
Employment (FTE)	99	99
Operational spending (\$m)	\$5.5	\$2.1
Capital spending	\$1.1	\$0.26
Gambling Trust distribution	\$0.1	\$0.073
Sponsorship	\$0.04	\$0.04
Tourism (proportion of visitors)	31%	

When the expenditure, employment and other activities of the Casino are included in a model of the Dunedin and Otago economies, the Casino generates a total of 133 FTEs, \$16.9 million in value added, and \$8.2 million in household income. When these gross impacts of the Casino's expenditure are aggregated with the tourism generation impacts associated with visitors to the city, and the likely impacts of continued expenditure in Dunedin in the absence of the Casino are subtracted from the previous two items, the net impact of the Grand Casino Dunedin is an estimated 38 FTEs in employment, \$8.63 million per annum in value added, and \$3.27 million per annum in household income (Table 7.12).

Table 7.12 Comparison of With versus Without scenarios for Grand Casino Dunedin

Item	Employment (FTE)	Value added (VA) (\$million/annum)	Household income (HHI) (\$million/annum)
Casino gross impacts (With Casino scenario)	133	\$16.90	\$8.20
Tourism generation impacts (With Casino scenario)	23	\$1.98	\$0.90
Trade diversion (Without Casino scenario)	-119	-\$10.25	-\$5.82
Net impacts of Casino⁹³	38	\$8.63	\$3.27

In the context of the wider city employment of 68,000 jobs and GDP of nearly \$7 billion per annum, both the direct and net impact of the Casino are a small fraction of the city’s economy. This generally tallies with the information from stakeholders and the neighbourhood survey, which says the Casino is a valued but minor player in the city economy, with few businesses highly reliant on the Casino. A relatively low impact in the city context is expected given the size of the Casino and its domestic focus.

This should not be seen as discounting the Casino’s value. The analysis has indicated that:

- The Casino is a source of employment that appears to be valued by its employees. Its closure would cause disruption to them, and it seems likely that any replacement employment would be of lower salary than at the Casino.
- The Casino provides a unique entertainment option in the city, which would not be replaced by any likely alternative use of the space.
- The Casino is obviously valued by its patrons, who have indicated high levels of satisfaction with the facilities at the Casino and who would be expected to generate consumer surplus from their use of the Casino that is additional to the quantified impacts estimated here.

The national impacts of the Casino are also important. It generates \$5.7 million in taxes and levies nationally, and in the absence of the Casino we would expect lower contributions to casino duty and DIA levy and lower corporate and personal income taxes paid. Scaling from the national impacts of Christchurch Casino, we would expect the Grand Casino Dunedin to generate \$15 to \$21 million in RGNDI per annum.

⁹³ Totals may not add up to items above because of rounding differences.

7.3 SOCIAL CONSEQUENCES

7.3.1 LOSS OF AMENITY

This social impact assessment has demonstrated that the Casino confers entertainment benefits to its users and contributes to Dunedin’s status as thriving and a fun city. Moreover, it can be argued that it helps address social isolation for some at-risk groups in Dunedin such as the elderly and the Chinese community.

In addition to this, the Grand Casino Dunedin provides support to local charities through its Trust and helps support a range of community organisations through sponsorships that would be hard to replace. There is also an argument that the Casino makes an important contribution to the business community in Dunedin through the leadership it demonstrates and activities it supports. In this regard, this social impact assessment is broadly in line with those social assessments of North American casinos that show casinos enhance the quality of life of many in the community and have a positive effect on communities and their economies⁹⁴.

In the community study that accompanies this social impact assessment, we asked residents directly if they thought “Dunedin would be better off with or without the Casino”. Only 15 percent of respondents thought it would be better off without the Casino, while nearly one-third thought Dunedin was a better place for having the Casino. The majority were either not sure or neutral (note that 27 percent of these respondents had never been to the Casino).

Table 7.13 Community attitudes toward Grand Casino Dunedin

Dunedin would be a much better place without a casino	6%	15%
Dunedin would be a somewhat better place without a casino	9%	
I’m not sure or am neutral about the Casino	54%	
Dunedin is a somewhat better place with a casino	25%	32%
Dunedin is a much better place with a casino	7%	

Table 7.14: Community engagement with Grand Casino Dunedin

I have never been to Grand Casino Dunedin	27%
I have been to the Casino but didn’t do any gambling	23%
I have been to the Casino and have gambled	49%
Total	100%

⁹⁴ Giacomassi et al (1999) “Attitudes of community leaders in new casino jurisdictions regarding casino gambling’s effects on crime and quality of life”, Journal of Gambling Studies, 15 (2) (1999), pp. 123-147

While the community survey prompted residents for their opinion about the operation of the Casino, the social listening exercise⁹⁵ completed as part of this social impact assessment showed very low levels of community concern on social media channels about the Casino. Where discussions did occur, they were typically related to recommendations about what to do in Dunedin or, sometimes, a patron celebrating a notable win.

7.3.2 NO REDUCTION IN ANTISOCIAL BEHAVIOUR

In contrast to the positive benefits noted above, the most common adverse effects associated with casino operations are gambling harm and crime. The analysis outlined above argues there is negligible crime directly associated with the Casino and, hence, it cannot be argued that no-renewal will contribute to public safety in Dunedin.

7.3.3 LITTLE REDUCTION IN GAMBLING HARM

As for gambling harm, there is no doubt that gambling-related harm is a real and continuing issue in New Zealand. This social impact assessment has argued that the quantum of gambling harm directly attributable to the Grand Casino Dunedin is likely to be small. Moreover, it is reasonable to assume this harm could increase in a scenario of no-renewal if gamblers migrate to forms of less-regulated gambling. Therefore, understanding the impact of non-renewal requires understanding what would happen to the gambling behaviour currently undertaken at the Casino.

In the patrons’ survey, participants were asked in two ways what they would do if the Grand Casino Dunedin was not available for gambling. These results show that approximately one-third of current Casino patrons would not gamble (Table 7.15 and 7.16).

Table 7.15: If the Casino in Dunedin were not here, would you be likely to gamble at other places in Dunedin?⁹⁶

At a club	9%
At a pub	47%
At the races	10%
Online betting	9%
Buy some / more lotto tickets	18%
Other (please specify)	3%
I wouldn't gamble	35%
NET	100%

⁹⁵ Social listening (aka social media listening) is the process of identifying and assessing what is being said about a company or issue on social media channels. Typically, conversations in these channels can provide an insight into salient or emerging issues.

⁹⁶ Multiple answers allowed, hence sums to more than 100%

Table 7.16: If the Casino in Dunedin were not here, would you be likely to gamble at other casinos?

Queenstown	48%
Christchurch	48%
Hamilton	5%
Auckland	25%
In Australia	20%
Other (please specify)	5%
I wouldn't gamble	28%
NET	100%

The argument that the absence of the Casino might increase gambling harm is supported somewhat by the fact the patrons in the intercept survey (N=121) who said they were most likely not to gamble elsewhere were also those that scored lowest on the truncated Problem Gambling Severity Index (PGSI) questions added to that survey⁹⁷. In contrast, those with the highest scores nominated online gambling and gambling at clubs as their likely alternative to casino gambling (Table 7.17).

Table 7.17: Likelihood to gamble elsewhere by PGSI scores

If the Casino in Dunedin were not here, would you be likely to gamble at other places in Dunedin						
	At a club	At a pub	At the races	Online betting	Buy some / more lotto tickets	I wouldn't gamble
PGSI average	0.375	0.186	0.306	0.700	0.275	0.041

⁹⁷ The PGSI is the standardised measure of at risk behaviour in problem gambling. The PGSI asks participants to self-assess their gambling behaviour over the past 12 months by scoring themselves against nine questions. This enables gamblers to be categorised as non-problem gamblers, low-risk gamblers, moderate-risk gamblers, and problem gamblers. In the patrons' survey conducted for this research, four PGSI questions were asked and a truncated PGSI score was calculated by weighting the responses. Lower scores mean less risk or problem gambling.

It is perfectly reasonable to argue that gambling harm could increase in Dunedin if the Grand Casino was not available and the Casino's patrons who wanted to keep gambling shifted to more dangerous forms of gambling. This is a particular risk if the Casino gamblers were to move to an unregulated form of gambling such as online gambling. The Salvation Army's Social Policy and Parliamentary Unit notes⁹⁸

“ We expect online gambling has the potential to be even more dangerous for people and whānau than pokie machines and other forms of gambling because of the ease of access and the private, hidden, or isolated nature of this form of gambling.

The Salvation Army also reports that during the lockdown, when gambling in casinos and Calls 4 venues were not available,

“ SKYCITY noted that their registrations to their online overseas gambling site significantly increased during lockdown. This is consistent with the increased number of clients, accessing preventative and minimising gambling-harm services post-lockdown, reporting significant problems with online gambling. Many clients are presenting with stress and anxiety, in crisis, coming out of lockdown period.

This increased gambling harm scenario is supported by evidence from the Christchurch Casino and what happened to gambling behaviour in Christchurch following the Casino's closure after the 2011 earthquake. This shows that expenditure on Class 4 EGMs increased significantly when the Casino was closed. The Christchurch Casino CIR states:

“ These data therefore provide compelling evidence that, if the Casino were to close, a substantial number of people who currently gamble on Casino EGMs would transfer their gambling activity to Class 4 venues It would also be logical to conclude that another possible consequence of closing the Christchurch Casino might well be the re-emergence of several illegal card games in the City⁹⁹.

98 Tanielu, R (2021) Just A Click Away: Online Gambling In Aotearoa, Salvation Army Social Policy Analysis and Parliamentary Unit, April 14, 2021

99 Baines, J. and Butcher, G. (2017) Casino Impact Report: An assessment of the social and economic impacts of the Christchurch Casino. Report commissioned by Christchurch Casino for the Gambling Commission, 29th November 2017.

In the social listening conducted as part of this social impact assessment, this question of online gambling was also present. In particular, conversations about gambling on the video stream site *Twitch* spiked during the period of social media monitoring. *Twitch* currently allows a category of streamers called “Slots”, which primarily consists of live streams of online slot machine websites, with some streams presenting a casino-like environment with a dealer and familiar casino games. There has been a robust debate about whether *Twitch* is an appropriate platform for this content, given the audience, which skews younger and includes children.

This pattern is consistent with international trends, where the longer lockdown periods provide more data about shifting gambling patterns. For instance, research from the University of Bristol published in the *Journal of Gambling Studies* showed regular male gamblers were particularly prone to gambling more often online during the public lockdown in the United Kingdom. The research builds on other evidence, including the YouGov COVID-19 tracker study, which found that regular gamblers turned to new online options during lockdown¹⁰⁰.

The Ministry of Health notes concerns about the growing opportunities for online gambling, including those offered by overseas-based gambling operators, and their potential to increase harmful gambling behaviour. The Ministry is particularly concerned about the potential impact of online gambling on vulnerable groups including Māori, Pacific Peoples, and young people. The Ministry is clear that people using overseas gambling websites are much more likely to be at risk of experiencing harm¹⁰¹.

100 Alan Emond, Agnes Nairn, Sharon Collard, Linda Hollén. Gambling by Young Adults in the UK During COVID-19 Lockdown. *Journal of Gambling Studies*, 2021; DOI: 10.1007/s10899-021-10029-y

101 Ministry of Health. 2022. Strategy to Prevent and Minimise Gambling Harm 2022/23 to 2024/25. Wellington: Ministry of Health.

Section 8

Appendices

Assessment Design

8.1 ECONOMIC IMPACT DESIGN

8.1.1 ECONOMIC EFFECTS

“Effects” can refer to economic impacts, economic costs and benefits, or both. The initial *ex ante* assessments of New Zealand casinos in the 1990s generally focused on the economic impacts¹⁰² of casinos using Input-Output (I-O) models, and this approach is also taken by most of the studies identified in a literature review by the Christchurch Casino study¹⁰³. The more comprehensive studies consider not only the positive direct and flow-on economic impacts of a casino’s operations but also the negative (“trade diversion”) effects of a reduction in consumers’ spending in other businesses, as their spending shifts from these areas and toward casinos. Studies may also consider the effects of the Casino on tourism and the associated economic impacts.

8.1.2 USE OF IMPACT-OUTPUT MODEL

This report uses I-O models to estimate the Dunedin and Otago economic impacts of the Casino on employment, household income, and value added¹⁰⁴, taking into account the trade diversion effects and the tourism effects of the Casino. The next level of analytical sophistication is a Computable General Equilibrium (CGE) model exploring the macro-economic analysis. A CGE model considers the re-allocation of resource among industries when a casino is opened and calculates the change in national GDP. While a CGE analysis can conceptually be done at the regional level, there are significant limitations at this scale. Moreover, CGE models are less suitable for establishing the impacts on employment¹⁰⁵, which is of major interest at the city and regional level. Because the Grand Casino Dunedin is a relatively small operation, CGE analysis has not been used in this analysis to estimate the effects of the Casino on real national disposable income at a national level as was undertaken in the case of the Christchurch Casino analysis. It was considered likely that the scale of the Grand Casino Dunedin impacts would be too small relative to the margins of error of the CGE model. Therefore, the CGE model would not be sensitive enough to adequately resolve the changes associated with the With and Without scenarios for the Grand Casino Dunedin.

102 Generally speaking, impacts reported are employment and value added (with the latter being virtually the same as Gross Domestic Product and, in accounting terms, equivalent to EBITDA plus salaries and wages)

103 Morgan (2016). Literature Review of the Social Impacts of Casinos and Butcher, 2017. Addendum - Economic Impacts of Casinos

104 Value added is calculated by summing profit before tax, interest and depreciation (EBITDA) and wages and salaries

105 Generally a CGE model is ‘closed’ with regard to the labour market and assumes that total regional employment is unaffected by the Casino, and the labour market clears by adjustments to the real wage rate.

There are changes to other values of interest to the community in addition to those of the market economy (non-market costs and benefits). Gambling generates recognised social costs through problem gambling, and while some studies have attempted to put a dollar value on these social costs, no such attempt has been made in this report. This does not imply that such costs are irrelevant but, rather, that valuation of these social costs is an extremely imprecise exercise—primarily because of the uncertainty associated with estimating both the number of affected people and the costs of the harm per affected person.

There are also unquantified impacts of the Casino associated with increased consumer choice in entertainment and the social vitality of the city, with these increasing the attractiveness of the city as a visitor destination and for residents. It is the view of the authors that this weighing up of market costs and benefits against other unquantified costs and benefits is best undertaken by the Gambling Commissioners, who will consider Grand Casino Dunedin’s application for a renewal of its venue licence. The purpose of this economic and social assessment is to enable the Commissioners to weigh the values affected by the Casino in an informed manner.

8.1.3 ISSUES CONSIDERED IN APPROACH

This economic assessment uses the approach adopted in the Christchurch Casino economic impact assessment, since this was based on a thorough review of the literature on the impacts of casinos and was accepted by the Gambling Commission as an appropriate approach. The assessment also incorporates matters raised by the Gambling Commission as matters it would like to be included in the CIR. In the context of the economic impacts, the Gambling Commission has requested that the CIR include:

Facilities

- a) prior Casino expenditure on improvements
- b) Casino capital works budget and
- c) survey responses from past visitors regarding the standard of the casino facilities (as an additional topic to the survey below)

Economic effects

- d) existing data held by the Casino in relation to the residence of the customers, their reasons for visiting, the frequency of their visits, and their expenditure
- e) existing data held by local authority or tourism organisations on the extent and importance of visits to the Casino by tourists
- f) in both cases, endeavour to identify the extent to which the visiting the Casino was a reason for, or part of, the planned tourist experience.

Combining the literature review and the requests from the Gambling Commission provides a list of issues that need to be considered in the economic assessment. These issues, together with the way in which they are addressed in this study, are described below.

- **Impact metrics:** This study reports on the commonly used metrics of value added (~GDP), household income, and employment at a city and regional level.
- **Measurement approach:** This study uses appropriate input-output models for quantitative assessment of effects. The results take into account the positive impacts of the Casino and the negative impacts of trade diversion away from other businesses when consumers switch spending to the Casino (illustrated by the Casino closure scenario in Section 134 3(ii) of the Act). Impacts on tourism are also considered.
- **Issues with combining costs and benefits:** This study quantifies financial costs and benefits of market transactions and describes, where possible, social costs and benefits but does not put a financial value on these.
- **Time frame:** The study takes a long-term operating perspective and uses three-year average data when modelling casino operations. The period modelled is 2018/19 to 2020/21. The last year of this has been significantly impacted by the COVID-19 pandemic, so the results are potentially affected by the lower patron numbers the Casino experienced during the pandemic.
- **Geographic focus:** The study looks at the city and regional impacts. The analysis indicates the likely magnitude of any national impacts based on its size relative to the Christchurch Casino and its associated national impacts.

8.1.4 ESTIMATING ECONOMIC IMPACTS

Dunedin City and Otago region economic impacts have been estimated using appropriate city and regional input-output models. The models have been modified by including a Dunedin Casino industry, the input structure of which was developed using actual Casino expenditure data averaged over a three-year period. While input-output models have their limitations, assuming as they do that there is spare capacity in the economy and the Casino has not “squeezed out” other businesses by making labour and capital scarce, the alternative is to use general equilibrium models. These have their own limitations, particularly at a city and regional level. It is our view that input-output models give the most useful view of the impacts at a city and regional level, provided trade diversion effects are taken into account. At the national level, the balance of modelling limitations shifts, and it is felt the most appropriate approach is to use CGE modelling. However, because of the small scale of the Grand Casino Dunedin, these impacts have not been calculated using CGE modelling, and the regional impacts should be used as a proxy for the national impacts. Where the national impacts are likely to differ from the regional impacts, these have been described qualitatively based on the Grand Casino Dunedin’s size relative to the Christchurch Casino and its associated national impacts (Section 0). Detail of the development of the input-output models is given in 0. This report is based on:

1. The actual financial operating data of the Casino over the three years to March 2021.
2. Detailed analysis of the Casino’s ‘accounts payable’ records to determine where the Casino suppliers are located.
3. A survey of 359 Casino patrons to find out how they think the Casino affected their activity and spending decisions and, if they were visitors to Dunedin, their travel decisions.
4. A survey of Casino staff on where they reside and their income and expenditure patterns.

The economic impact assessment in the body of this report contains the following components:

1. A description of the Dunedin economy as background for the effects.
2. A detailed description of the way in which the Casino directly and indirectly affects the local and regional economies via its operations. This includes its expenditure, employment, sponsorship and gambling trust distributions.
3. A qualitative description of the effects of the Casino at a wider economy level. This includes comments on the impacts of the Casino on adjacent businesses and benefits of a wider choice to consumers.
4. A modelling of the interactions between the Casino and the wider economy and estimates the impact of the scenarios with and without the Casino operating.

5. A description of the ways in which the Casino might affect consumer and producer surplus .
6. A description of the tax effects of the Casino from a central government perspective, including consideration of the effect of transfers to electronic gaming machines at the Casino from other Class 4 gaming premises, and the geographic distribution of the profits of the Casino according to place of residence of the shareholders.
7. A description of the national impacts of the Grand Casino Dunedin through a comparison with the estimated national effects of the Christchurch Casino.

8.1.5 DEVELOPMENT OF THE INPUT-OUTPUT TABLE

For the purposes of estimating the economic impacts of the Casino, casino budgets over the period 2019 to 2021 were reviewed. While we would have expected COVID-19 to have had some impact on turnover in the year to March 2020 and a much greater impact in the year to March 2021, this is not obvious in the financial performance of the Casino, with total revenue being \$17.5 million, \$17.3 million, and \$17.3 million in the three years. These revenues also differ from those in the Casino's financial statements, which use a slightly different basis and net off bonus point and jackpot provisions. A wage subsidy in the 2021FY also appears in the financial statement but not the accounts used for this analysis.

Discussions were held with both casino suppliers and casino accounting staff so that casino expenses could be allocated to appropriate industry groups and an assessment made of their geographic source. To assess economic impacts, the source was split between Dunedin, Other Otago, and Outside Otago.

The expenditure within Dunedin, broken down by industry, was incorporated into a city economic model developed for this project. A similar process was carried out for expenditure within Otago (including Dunedin). This enabled calculation of the total economic impact of the operations of the Casino on the city and the region.

Process: Expenditure by supplier by year was aggregated and divided by three to give average expenditure. Each supplier was allocated to a region (Dunedin, rest of Otago, rest of New Zealand). This gave us expenditure by industry by region.

Purchases by the Casino from the various sectors of wholesale and retail trade (primarily CoGS shown in the Casino accounts but also items such as cleaning items, fuel etc.) needed to be split between 'gross margin' of wholesale and retail trade (which is the concept used in the economic model) and the costs incurred by wholesale and retail trade in purchasing those goods.

In a few cases (e.g., Genesis Gas, Contact Energy) the analysis needed to split between generation and local distribution.

Goods and services that have been invoiced by an out-of-region company but supplied from a branch operating within the region (e.g., rubbish collection) needed to be coded as part purchases from within the region and part purchases from the head office that provided administration and management services.

Treatment of Club Casino redemptions and cash payments to players for promotions

These have been treated as an offset to Casino revenues for the purposes of calculating the negative economic impacts of expenditure the Casino displaces from other forms of household consumption. Hence, the gross revenue of the casino is \$17,375 million per annum but of this some \$0.481 million is cash paid back to households. Hence, displaced expenditure is only \$16.85 million.

8.2 SOCIAL IMPACT DESIGN

8.2.1 SOCIAL IMPACT ASSESSMENTS

The International Association for Impact Assessment (IAIA) define social impact assessment as:

The processes of analysing, monitoring, and managing the intended and unintended social consequences, both positive and negative, of planned interventions (policies, programs, plans, projects) and any social change processes invoked by those interventions¹⁰⁶.

Social Impact Assessment (SIA) is a mature methodology and there is a considerable body of international literature covering most aspects of SIA and its practice including texts, guidebooks, case studies, and reviews.

Professional practice standards for SIA (including foundation values and principles and ethical guidelines) have been developed and promulgated by the International Association for Impact Assessment (IAIA, 2003). Practitioner groups in different countries have adapted these for local practice (e.g., by the New Zealand Association for Impact Assessment). A range of textbooks and guidelines are available for prospective assessors, including a New Zealand textbook (Taylor et al, 2004) and bibliography (Taylor & Fitzgerald, 1991).

There are many models for how to conduct an SIA, though they have the same basic content (Burdge and Vanclay, 1995). The design used for the social impact assessment of the Grand Casino Dunedin is consistent with those principles. Similarly, SIA makes uses of a range of tools or techniques for prediction and estimation of effects and typically uses a 'mixed methods' approach for data gathering and analysis. A mix of methods is used to increase validity and broaden impact coverage.

106 <https://www.iaia.org/wiki-details.php?ID=23>

8.2.2 SIA DESIGN PRINCIPLES

When compiling this approach to the social impact assessment of the Grand Casino Dunedin, the research team referenced the lessons learned from the assessment of the Christchurch Casino (James Baines and Geoff Butcher, 2017) and the principles developed by the Canadian Consortium on Gambling Research (Robert Williams, Jürgen Rehm, Rhys Stevens, 2011). As a result, this outline has been informed by the following emerging best practice principles about assessing the social impacts of gambling:

- **Comprehensively assess all potential social impacts:** This principle ensures all potential impact areas are covered. The Canadian Consortium on Gambling Research uses an impact framework based on the work of Anielski & Braatan (2008) to ensure the broadest range of impacts are included.
- **Recognise that assessing some social impacts is a qualitative assessment:** Because social impacts include how stakeholders experience the effects of gambling, there will always be an element of subjectivity in impact reports such as this one. This means impact assessments need a mix of qualitative and quantitative methods to ensure these voices are heard. This is also why the Canadian Consortium on Gambling Research recommends reporting ‘impacts’ rather than ‘costs and benefits’.
- **Use a counterfactual to provide meaningful comparisons:** To fully understand the impacts of a casino, it is important to create a comparative condition. The purpose of this counterfactual comparison is to enable assessments to legitimately assess the ‘effect size’ of the casino’s impact¹⁰⁷.
- **Report the limitations and parameters of these results:** The Canadian Consortium on Gambling Research is also clear that all impact assessments are a function of “the context in which the study was conducted”. This means that social impact studies need to report faithfully on the parameters of the assessment and its limitations.

Beyond these principles, the social impact assessment design used here followed the lessons learned in the assessment of the Christchurch Casino (James Baines and Geoff Butcher, 2017). In particular, this social impact assessment is built around a mixed method approach.

¹⁰⁷ This is also why The Canadian Consortium on Gambling Research recommends using longitudinal designs where possible. At the same time, the Consortium notes that most impact studies are ‘snapshots’ of one moment in time.

Mixed method approaches like this combine quantitative and qualitative approaches and start from the argument that the **combination** of approaches provides a better understanding of research problems and complex phenomena than either approach alone. It makes this argument because the strengths of one approach can complement the restrictions of another. In particular:

- Quantitative research involves data collected from many participants and can indicate the frequency and distribution of impacts as well as the relationships between them. These data can then be used to model those impacts in the community.
- Qualitative research involves in-depth data collected from a smaller number of participants and is used to explore and illustrate impacts. These qualitative insights provide a way of interpreting the statistical trends found in the quantitative data.

In addition to this combination of quantitative and qualitative research, the social impact assessment also combines primary and secondary data sources where:

- Primary data are those collected by the researchers themselves. These data can directly assess specific local impacts and be targeted at priority groups. However, primary data collection is generally slow and resource intensive.
- Secondary data comprise information that has been collected in the past by people outside the research team. This includes official government statistics, research conducted by others, media reports, etc.

8.2.3 ASSESSMENT DESIGN

The CIR is a substantive piece of work required for the casino venue licence renewal process. As such, it is important that it provides the most rigorous assessment of impacts possible.

To do this for the social impact assessment, the research team used an eight-part assessment design:

1. A review of the literature about gambling and problem gambling in Dunedin and Otago.
2. An analysis of the media and social media relating to gambling in Dunedin and Otago and the operations of the Grand Casino Dunedin.
3. Interviews with 30 stakeholders and community representatives across Dunedin and Otago.
4. An in-situ survey of Casino patrons (N=121).
5. An online survey of Casino members (N=238).
6. A survey of residential neighbours of the Casino.
7. A survey of residential businesses of the Casino.
8. A community survey of Dunedin residents (N=363)¹⁰⁸.

To provide oversight of the research process, a Research Oversight Group was created, comprising James Baines¹⁰⁹ and Gerard Fitzgerald¹¹⁰.

8.2.4 SECONDARY SOURCE ANALYSIS

The first step in the social impact assessment was a secondary source review to outline the community context the Grand Casino Dunedin operates within. This included identifying and accessing data the Casino had about:

- the scale and composition of its patrons/visitors, their visitation patterns, and the nature of the activities they engage in while at the Casino
- the organisations and groups that receive any kind of support from the Casino and
- the relationships the Casino has with various social agencies including problem gambling addiction services, other social service agencies in the city, etc.

The design of this stage was informed by the work done by Baines and Butcher (2017) in their assessment of the Christchurch Casino.

¹⁰⁸ A community survey of Dunedin residents was added to the assessment design after the neighbourhood survey failed to provide useful responses (17 businesses and 7 households). The sample size of 363 used for the community survey was chosen as this ensures survey results with a maximum margin of error close to the +/-5 percent threshold considered 'robust'.

¹⁰⁹ Partner in Taylor Baines and Associates (TBA) and author of the Christchurch Casino Impact Report (2017).

¹¹⁰ Principal at Fitzgerald Applied Sociology and contributing author to Becker, H.A., and Vanclay, F. (eds) (2003) *The International Handbook of Social Impact Assessment: Conceptual and Methodological Advances*. Edward Elgar Publishing Cheltenham, UK

8.2.5 MEDIA AND SOCIAL MEDIA ANALYSIS

Separate to the secondary source analysis was a media and social analysis element. The purpose of this part of the social impact assessment was to understand what has been said about the Grand Casino Dunedin in electronic media. To do this, Research First used its *Panorama* social listening tool¹¹¹. Social listening involves analysing content on social media platforms for mentions and conversations related to the topic of interest (and then analysing these conversation to see if they reveal patterns about those conversations). For this project, *Panorama* was used to identify mentions of the Grand Casino Dunedin (and related words) on Twitter, YouTube, Reddit, Pinterest, Facebook, Instagram and Tik Tok.

8.2.6 KEY STAKEHOLDER INTERVIEWS

The first primary data collected for this social impact assessment came from 30 key stakeholder interviews, including interviews with representatives from:

- Aotearoa Gaming Trust
- Asian Family Services
- AUT Gambling Centre
- CareNZ
- Dunedin Casino Charitable Trust
- Dunedin City Council
- Dunedin Wildlife Hospital
- Enterprise Dunedin
- Grey Power Otago
- I Am Hope
- MediaWorks
- NZME
- NZ Police Otago
- Opportune
- Orokonui Ecosanctuary
- Otago Age Concern
- Otago Cricket
- Otago Daily Times
- Otago Medical Research Foundation
- Problem Gambling Foundation
- Salvation Army Oasis
- Te Rūnanga o Ōtākou
- University of Otago International Students Association

111 <https://researchfirst.co.nz/panorama/>

These stakeholders were selected to ensure the social impact assessment covered the full range of casino impacts such as:

- Planning issues, amenity, etc.
- Role in local economy
- Social contribution
- Social issues (gambling, budgeting, advice services, health etc.)
- Order and disorder—facility and gambling
- Management performance and compliance, regulation etc.

This engagement was done using in-depth interviews. These interviews were between 20 and 60 minutes long and semi-structured in nature. With this kind of interviewing, the researcher starts from a list of topics to cover and prompts to use but remains open to following other issues of concern to the participants. This provides the flexibility to allow the interviews to develop in novel and unsuspected ways as well as reproduce the social processes involved in opinion development. The spontaneity this engenders reduces defence mechanisms and self-editing and encourages respondents to share genuine opinions.

Interviews were conducted through a combination of face-to-face meetings, phone, and videoconference interviewing. The method of engagement was matched to the participants' preference, as this helped facilitate engagement, build rapport, and minimise the burden on participants.

8.2.7 IN-SITU SURVEY OF CASINO PATRONS

An 'intercept' survey is a research method used to gather on-site feedback from an audience. Intercept surveys are often used at events, restaurants, conferences, and in shopping malls to collect patron perception information. During an intercept survey, the interviewer may approach a patron to ask about their experience at the event, facility, or restaurant. Results from the intercept surveys allow the client organisation to obtain feedback from their target audience while the information is still fresh in their minds. For this social impact assessment, the research team had two surveyors in-situ for a total of 37 hours, covering weekdays, weeknights, weekends, and weekend evenings. The 37 hours of intercepting resulted in 121 valid completed surveys.

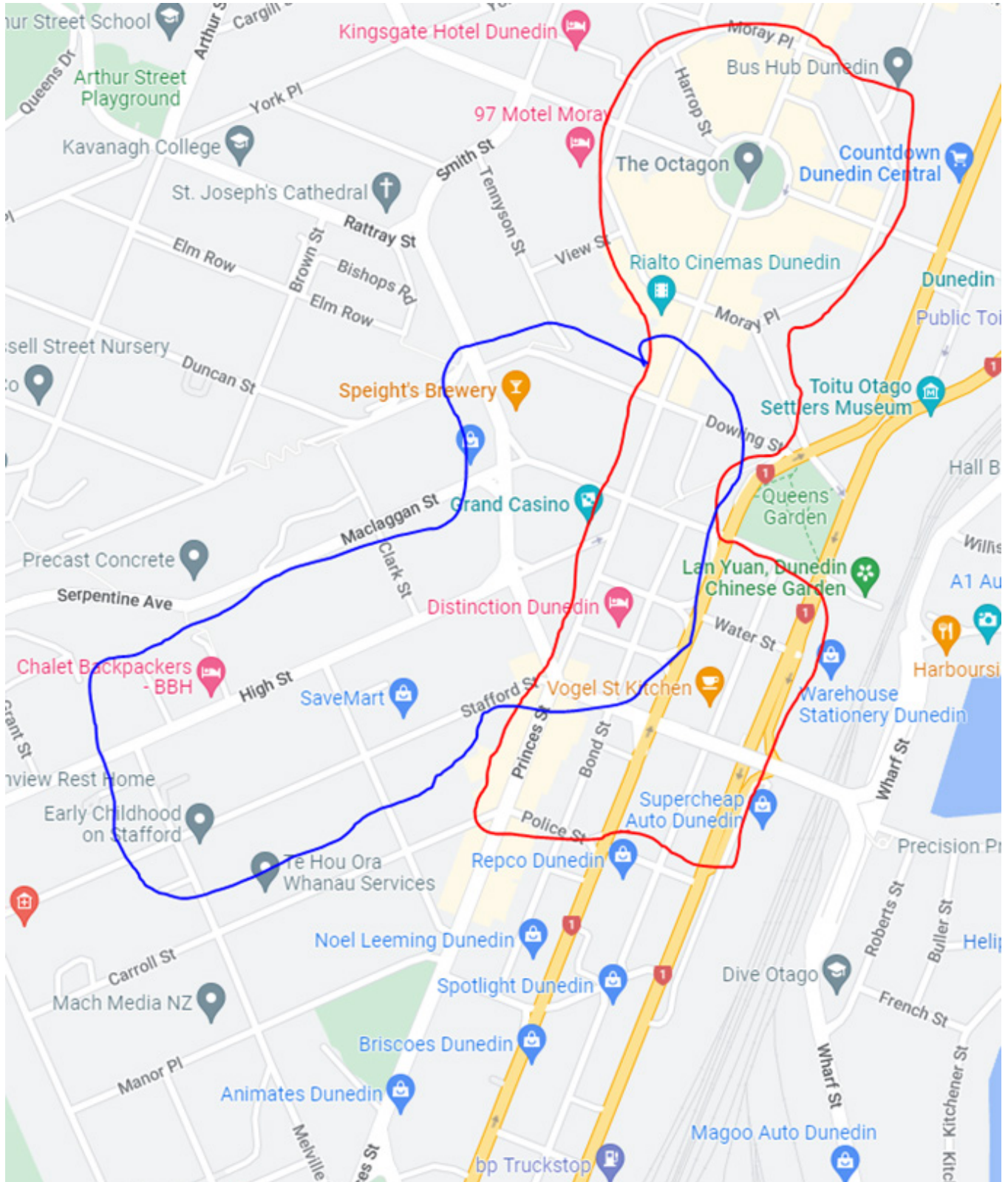
8.2.8 DATABASE SURVEY OF CASINO PATRONS

The research team created an online survey for those patrons on the Grand Casino Dunedin's database, which the Casino sent out to these members. An online-only method was chosen to give participants the ability to complete the survey at a convenient time. The survey collected 238 valid responses (from 342 total responses), with an average completion time of eight minutes.

8.2.9 NEIGHBOURHOOD SURVEYS

The initial idea was to survey the residents and businesses in the immediate neighbourhood of the Grand Casino Dunedin. The research team soon discovered there are precious few of either in the neighbourhood, and the neighbourhood surveying was abandoned in favour of a wider community survey (see below). Before the survey was abandoned, the research team went door to door and interviewed six residential neighbours (in six hours of trying) and interviewed 17 businesses (in ten hours of trying). Figure 8.1 shows the approximate areas visited, with red representing businesses and blue representing residential catchments.

Figure 8.1: Neighbourhood survey catchments



8.2.10 DUNEDIN-WIDE COMMUNITY SURVEYS

A survey of Dunedin residents was completed using a list of contacts from a commercial panel provider. The survey sample was structured to ensure a demographically representative sample of residents in the greater Dunedin area. The survey achieved 363 valid responses (from 416 total responses) and average completion time was five minutes. Fieldwork was completed between 5 August and 11 August 2022.

8.2.11 STAFF SURVEY

Although technically part of the economic impact assessment, the research team also completed a survey of Casino staff. The staff survey was an online link sent out to staff by the Grand Casino Dunedin. This survey achieved 52 valid responses (from 130 total responses) and average completion time was nine minutes. Fieldwork was completed between 10 June and 25 June 2022.

8.2.12 2022 MYSTERY SHOPPING EXERCISE

Mystery shopping is a technique commonly used by organisations to measure the quality of customer service and collect information about products and service delivery. It also known as ‘shadow shopping’ or ‘secret shopping’. As the name suggests, the method involves having researchers pose as customers to observe and record their experiences to ensure these comply with the policies and expectations of the providers.

The Department of Internal Affairs runs a programme of mystery shopping to help assess compliance with gambling regulations. This involves sending undercover gamblers to gambling venues to test whether patrons showing signs of potential gambling addiction were adequately dealt with by venue staff.

Although the Grand Casino Dunedin fared well in the last DIA mystery shopping exercise, this was from 2017 (with the data collected in 2016/17). As a result, Research First repeated the exercise in late 2022 with the Grand Casino Dunedin again performing well. This 2022 exercise used the same scenarios as DIA did in 2017. Details of these are provided below:

Scenario 1: Response to Cues About Gambling Harm

The mystery shopper enters the casino and starts playing. 1.5 hours later player starts to exhibit signs of agitation, in earshot of casino staff about how the machine is not paying out and mentions the amount that he/she has already spent. After another couple of hours player progressively becomes more and more agitated and starts pushing the buttons really hard making noise. If spoken to by staff, player should mention how unlucky he/she is today while their previous experience was a good one and that’s why they are trying to come back and re-create the experience only this time the money is running out and not even get a free spin/ feature

112 Department of Internal Affairs (2017) Sector report: Gaming machine mystery shopper exercise results, Department of Internal Affairs, Wellington, June 2017

Shop completed Wednesday 7 December 2023

- Arrived approximately 3pm and left around 8.15pm
- Staff were present on the gaming floor, often doing a sweep every 5-10 minutes for the majority of the shopper's 6 hours within the casino.
- During the first 4 hours, the interaction with staff was a simple check-in, asking how the day had been, and if the shopper had any luck on the machines.
- In the final few hours however it was clear that staff were actively walking around and talking with people who may have a problem, multiple times the shopper saw customers being approached who had sat in the same chair for 1+ hours,
- At 4 hours and 20 minutes into the exercise the shopper expressed in the presence of a staff member that s/he hadn't hit a feature in a while and that s/he needed to win the losses back. The staff member came over to check in, offered to buy a drink, and asked if the shopper needed anything else. After this there was a notable increase in casino staff near the shopper. In the hour following staff checked in with the shopper three times to see how they were doing.
- Finally, after gambling for 5.5 hours the shopper was approached by the manager who sat with the shopper and explained that they had been gambling for over 5 hours, and due to Casino policy, I needed to leave the gaming floor for at least 30 minutes before returning.

Scenario 2: Assessing staff response to long hours of play

Player plays for up to 12 hours, shows no general or harmful signs of gambling but:

- Visit begins 6 hours into the first shift – to see shift log handover
- Visits should be halfway through one shift and shopper should stay in the same bank of machines
- Player needs to play continuously (or at the very least not have more than 30 minutes cumulative break over a 5 hour period)

Shop completed Wednesday 7 December 2023

- Arrived 12.40 and left 11.45pm. Had break from 5.15 to 5.55pm
- Was approached by a casino staff member before break asking about welfare
- About 2.5 hrs after break had two approaches within 15 mins of each other, again asking about welfare and enjoyment
- Made 3 x \$200 withdrawal, with no comment from staff.
- Gambled for nearly 6 hrs with no break. Stayed in same bank for 99% of time.
- Staff engaged with people around me, and it was clear they knew some personally from the type of discussion.

- Order a drink 4 times and attendants were very friendly as were all staff when I interacted with them, asking about my welfare.

Scenario 3: Assessing staff response to declined cash withdrawals

The player goes to casino and plays for 45 mins. Over the next hour player visits the same ATM machine 4 times and withdraws \$20 - each transaction successfully. Goes back and plays for another hour and goes to the main cashier to withdraw cash from EFTPOS. Player tries to withdraw \$120, this declines. Player tries to withdraw \$80.00, this declines and then tries for \$40.00 which declines.

Shop completed Wednesday 14 December 2023

- The security guard/ doorman welcomed the shopper and checked their ID
- After the first withdrawal a floor manager asked did a welfare check with the shopper
- After the first withdrawal there was a new security guard/doorman on staff who did a welfare check in
- After the 4th withdrawal the same security did a welfare check in.
- My second to last interaction with staff was with a staff member at the counter. I asked if I could withdraw \$120, he started to take the cash out of the register but my card declined. He then handed me a small green pamphlet with some info about asking for help with gambling, number of gambling helpline etc and said it was policy to give these out.
- I asked if I could have \$80 instead. Declined. He began to feel uncomfortable and said if my card declined again that would be it.
- I then asked for \$40 out. Declined.
- Exercise terminated.

8.2.13 DATA ANALYSIS

COMBINING INSIGHTS

The strength of mixed method research designs like this one is in the combination of insights from across different methods. What researchers look for most in mixed method projects are the common themes across different parts of the project. This is known as ‘triangulation’ and describes the use of multiple sources and perspectives to create a coherent picture of the topic being studied. By constructing such a picture from multiple standpoints and approaches, researchers can be assured that it presents a robust and valid view.

A NOTE ABOUT QUALITATIVE ANALYSIS

The peer review of the Christchurch CIR identified a need for CIRs to be more explicit about how they handle their qualitative data. Qualitative data deal with perceptions, motivations, emotional responses and ‘gut feelings’. Qualitative data are not only exploratory and illustrative in nature but also highly ‘textured’. In practice, this means qualitative data typically involve the following:

- Transcripts
- Notes
- Worksheets and posters (if used);
- Photos of whiteboards (if used); and
- Notes from the debrief with the research team

This process of data ‘analysis’ is about searching for patterns and regularities in the data collected. In all cases, analysis can be thought of as a process consisting of the following steps:

1. **Data reduction:** Because researchers are interested in patterns, analysis begins by reducing the collected data into a manageable form. This involves ‘coding’ the data into distinct categories. In qualitative research this is done by compiling coding ‘memos’ (see below).
2. **Data organisation:** Once the data have been ‘reduced’ into a manageable form, they are then organised around certain themes. Qualitative research generally does this by creating text strings (and is often completed by qualitative data analysis software).
3. **Data interpretation:** The final step is to use the patterning of data to make some decisions and draw the conclusions. Here patterns and regularities are identified and explanations offered.

Note that qualitative researchers are unable to summarise their data in the shorthand of statistics like quantitative researchers (precisely because the point of qualitative research is to preserve as much of the original ‘texture’ of the data as possible). Instead, coding in qualitative research involves reading through the collected notes and transcripts as soon as they have been written and ‘marking up’ the text as the researcher cycles through the data. This involves making a series of notes about the data known as ‘memos’. These memos highlight interesting research themes, data that seems to sit outside research themes, and those places where the researcher might need to collect more data. These codes are then compiled into a summary around the research themes. As these summaries are refined through subsequent data analysis, they start to morph into the body of the final research report. This process is outlined in detail in Tolich and Davidson (1999), and this will inform how the research team makes sense of the qualitative data here.

HOW TRUSTWORTHY ARE QUALITATIVE INSIGHTS?

The question of how trustworthy qualitative insights are is one of methodology rather than method (i.e., it concerns the philosophical assumptions that underpin the method). In sum, this means qualitative researchers argue for different standards than those used by quantitative researchers for judging the quality of research. One common approach identifies four criteria for judging the soundness of qualitative research (Table 8.1).

Table 8.1: Criteria for judging qualitative research

Qualitative research	Traditional criteria
Credibility	Internal validity
Transferability	External validity
Dependability	Reliability
Confirmability	Objectivity

These criteria are:

- **Credibility:** The credibility criterion involves establishing that the results of qualitative research are credible or believable from the perspective of the participants in the research. Since from this perspective, the purpose of qualitative research is to describe or understand the phenomena of interest from the participants’ eyes, the participants are the only ones who can legitimately judge the credibility of the results¹¹³.
- **Transferability:** Transferability refers to the degree to which the results of qualitative research can be generalised or transferred to other contexts or settings. The qualitative researcher can enhance transferability by doing a thorough job of describing the research context and the assumptions that were central to the research. The person who wishes to ‘transfer’ the results to a different context is then responsible for making the judgment of how sensible the transfer is.
- **Dependability:** The traditional quantitative view of reliability assumes replicability or repeatability. Essentially, it is concerned with whether the researcher would obtain the same results if they could observe the same thing twice. The idea of dependability, on the other hand, emphasises the need for the researcher to account for the ever-changing context within which research occurs. The research is responsible for describing the changes that occur in the setting and how these changes affected the way the study was approached.
- **Confirmability:** Qualitative research tends to assume that each researcher brings a unique perspective to the study. Confirmability refers to the degree to which the results could be confirmed or corroborated by other researchers.

¹¹³ This is why experienced qualitative researchers spend a part of each interview or discussion ‘reflecting’ what they have heard and end each session by ‘testing’ the key messages they have drawn from each group.

Section 9

Dunedin Casino: Community Attitudes Survey

9.1 Dunedin Casino: Community Attitudes Survey

Table 1: Survey Participants by Connection to the Casino

I have never been to Dunedin's Grand Casino	27%	98
I have been to the Casino but didn't do any gambling	23%	85
I have been to the Casino and have gambled	49% ↑	179
Prefer not to say	0% ↓	1
NET	100% ↑	363

Table 2: Survey Participants by Connection to the Casino by Age

	20-24	25-34	35-44	45-54	55-64	65+
I have never been to Dunedin's Grand Casino	50%	27%	30%	18%	25%	27%
I have been to the Casino but didn't do any gambling	45%	29%	9%	26%	25%	20%
I have been to the Casino and have gambled	5%	44%	58%	55%	50%	53%
Prefer not to say	0%	0%	2%	0%	0%	0%
NET	100%	100%	100%	100%	100%	100%

Table 3: Survey Participants by Frequency of Engagement with Casino

I went once but haven't been back	44% ↑	116
I go there one or two times a year	45% ↑	120
I go a few times a year, between three and ten times	9% ↓	23
I go there about once a month on average	2% ↓	4
I go there regularly (once a week or more)	0% ↓	1
NET	100% ↑	264

Table 4 Gambling Forms by Harm Rating (1=least harmful, 5 = most harmful)

Online gambling	3.9
Gaming machines in clubs and pubs ('pokies')	3.8
Casino gambling	2.9
TAB and sports betting	2.6
Lotto and scratch-to-win tickets	1.8

Table 5: Agreement with Statements about Gambling

Gambling has given me pleasure and fun	48%
For most people gambling is a harmless recreational activity	55%
Gambling generates money that helps fund community groups and worthwhile causes	67%
Given the opportunity, I would ban all forms of gambling	20%

Table 6: Disagreement with Statements about Gambling

Gambling has given me pleasure and fun	25%
For most people gambling is a harmless recreational activity	25%
Gambling generates money that helps fund community groups and worthwhile causes	15%
Given the opportunity, I would ban all forms of gambling	52%

Table 7: Agreement with Statements about the Dunedin Casino

Visiting Dunedin's Casino has given me pleasure and fun	61%
For most people, a visit to the Casino is a fun night out with family and friends	72%
For most people, a visit to the Casino is a harmless recreational activity	68%
Dunedin's Casino is an important part of the city's entertainment offering	54%
Dunedin Casino provides jobs for locals	89%
Dunedin Casino encourages responsible gambling	48%
Given the opportunity, I would close the Casino	16%

Table 8: Disagreement with Statements about the Dunedin Casino

Visiting Dunedin's Casino has given me pleasure and fun	15%
For most people, a visit to the Casino is a fun night out with family and friends	12%
For most people, a visit to the Casino is a harmless recreational activity	13%
Dunedin's Casino is an important part of the city's entertainment offering	23%
Dunedin Casino provides jobs for locals	2%
Dunedin Casino encourages responsible gambling	15%
Given the opportunity, I would close the Casino	55%

Table 9: Attitudes toward Closing the Casino

Dunedin would be a much better place without a casino	6%
Dunedin would be somewhat better place without a casino	9%
I'm not sure, or am neutral about the Casino	54%
Dunedin is a somewhat better place with a casino	25%
Dunedin is a much better place with a Casino	7%
NET	100%

Table 10: Attitudes toward Closing the Casino by Age

	20-24	25-34	35-44	45-54	55-64	65+
Dunedin would be a much better place without a casino	0%	5%	4%	11%	0%	7%
Dunedin would be somewhat better place without a casino	15%	11%	4%	9%	5%	10%
I'm not sure, or am neutral about the Casino	75%	56%	58%	57%	55%	44%
Dunedin is a somewhat better place with a casino	5%	25%	26%	20%	30%	28%
Dunedin is a much better place with a Casino	5%	3%	8%	3%	10%	12%
	100%	100%	100%	100%	100%	100%

9.2 SAMPLE

Table 11: Survey Participants by Gender

Male	54% ↑	196
Female	46% ↑	166
NET	100% ↑	363

Table 12: Survey Participants by Age

20-24	6% ↓	20
25-34	22% ↑	79
35-44	15%	53
45-54	18%	65
55-64	11%	40
65+	29% ↑	105
NET	100% ↑	363

Table 13: Survey Participants by Ethnicity

Pākeha/NZ European	84% ↑	304
Asian	7% ↓	24
Māori (please list your iwi)	4% ↓	15
All other ethnicities NET	9% ↓	32
Prefer not to say	2% ↓	6
NET	100% ↑	363

Table 14: Survey Participants by Household Size

1	17%	63
2	39% ↑	141
3	17%	62
4	15%	55
5	7% ↓	25
6+	4% ↓	14

Table 15: Survey Participants by Household Income

Under \$15,000	2% ↓	6
\$15,001 to \$30,000	9%	34
\$30,001 to \$45,000	11%	41
\$45,001 to \$60,000	9%	34
\$60,001 to \$75,000	14%	50
\$75,001 to \$100,000	16% ↑	57
\$100,001 to \$150,000	20% ↑	72
Over \$150,001	9%	31
Prefer not to say	10%	38
NET	100% ↑	363

Section 10

Exclusions

10.1 SELF-EXCLUSIONS

By law, any person can enter a gaming machine venue or casino and request to be excluded for up to two years. This involves showing identification, completing a form, and having a photo taken (so staff can ensure they recognise you if you attempt to gamble on site).

Once this process is complete, the self-exclusion becomes legally binding. Breaches of the self-exclusion are liable for a fine of up to \$500, and the venue manager can be liable of a fine of up to \$5000.

10.2 MULTI-VENUE EXCLUSIONS (MVEs)

Multi-Venue Exclusion (MVE) is a tool to enable people to self-exclude from multiple gaming machine venues in their region without having to visit each site. This is an easy administrative legal process and breaching an MVE carries the same penalties as a normal self-exclusion (a fine of up to \$500 for the excluded person and up to \$5000 for the venue manager).

The Salvation Army Oasis and other gambling harm services can help a person obtain an MVE. They will typically need to meet with a gambling counsellor and show identification, fill out a form, and have a photo taken.

10.3 EXCLUSIONS FROM LOTTO, TAB, AND ONLINE GAMBLING

Lotto has many options for people to block themselves from MyLotto games and promotions and set spending limits through MyLotto accounts. People can also request to exclude themselves from retail Lotto stores. The Responsible Gambling section of the Lotto website has more information.

TAB also allows spending limits to be set, and individuals can also suspend their accounts or self-exclude from TAB stores. The Responsible Gambling section of the TAB website has more information.

Section 11

Gambling Trends in New Zealand

Most New Zealanders gamble at least occasionally. Estimates suggest that in 2020, 69.3 percent (about 2.8 million New Zealanders aged 16 and older) had participated in some form of gambling in the previous 12 months.

The most popular forms of gambling in 2020 were Lotto NZ products (59 percent), followed by informal gambling such as playing cards with friends (35 percent), sports, dog- or horse-race betting provided by TAB New Zealand (10.9 percent), gaming machines at a pub or club (9.6 percent), gaming machines at casinos (4.0 percent), table games at casinos (2.5 percent), and online gambling on overseas websites (2.6 percent)¹¹⁴.

In general, expenditure on gambling is declining. Table 11.1 shows that New Zealanders spent nearly \$2.3 billion on gambling in the year ending June 2020. The impacts of the COVID-19 restrictions might be seen, in that all forms of gambling expenditure decreased in 2020, except for Lotto gambling that can be done online.

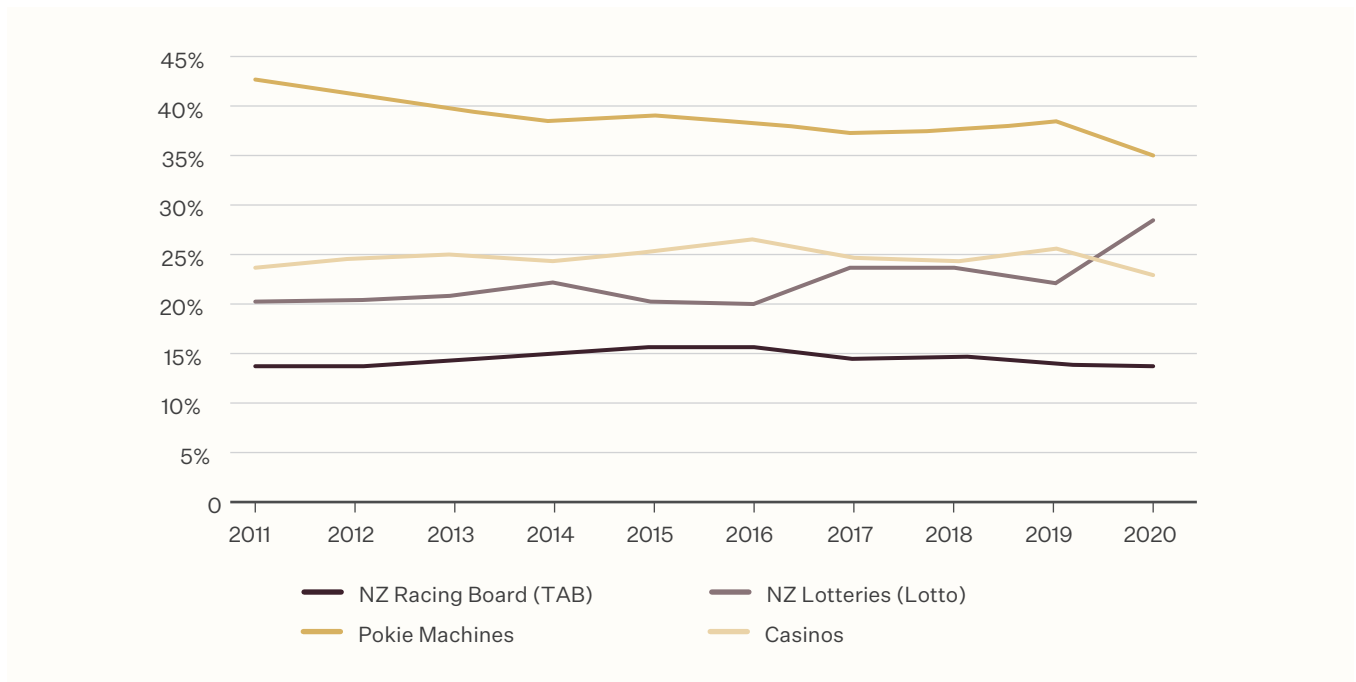
Table 11.1: Annual gambling expenditure 2015–2020 (Reproduced from Tanielu, 2021)

Gambling activity	2015/16 \$m	2016/17 \$m	2017/18 \$m	2018/19 \$m	2019/20 \$m
NZ RACING BOARD (TAB)	\$342	\$338	\$350	\$332	\$315
NZ LOTTERIES COMMISSION	\$437	\$555	\$561	\$530	\$631
GAMING MACHINES (outside Casinos)	\$843	\$870	\$895	\$924	\$802
CASINOS	\$586	\$572	\$578	\$616	\$504
TOTAL	\$2209	\$2334	\$2383	\$2402	\$2252

¹¹⁴ Ministry of Health. 2022. Strategy to Prevent and Minimise Gambling Harm 2022/23 to 2024/25. Wellington: Ministry of Health.

Figure 11.1 shows the proportion of gambling spend from the four main sources of gambling in New Zealand. Gambling losses through EGMs have gradually declined over the past 10 years, but they still make up the largest share of gambling losses in our country. The proportion of losses through casinos and the TAB have remained consistent over the past decade¹¹⁵.

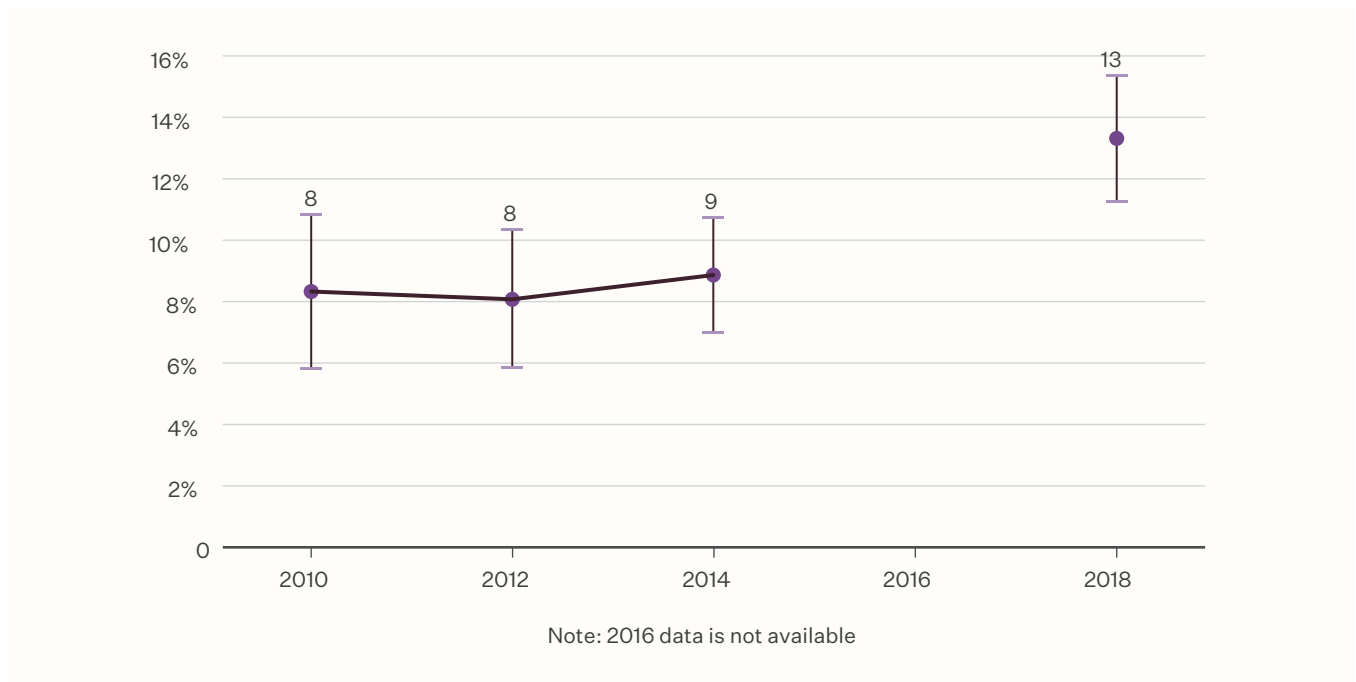
Figure 11.1: Proportion of gambling losses 2011-2020 (Reproduced from Tanielu, 2021).



¹¹⁵ In Tanielu, R (2021) Just A Click Away: Online Gambling In Aotearoa, Salvation Army Social Policy Analysis and Parliamentary Unit, April 14, 2021

The report these data are drawn from (Tanielu, 2021) is clear that online gambling rates have increased significantly since 2014. It also cites work from the Health Promotion Agency warning that online gambling rates are likely to continue to increase with young people being exposed to online gambling via in-game gambling (Figure 11.2).

Figure 11.2: Increase in online gambling in New Zealand, 2014- (Reproduced from Tanielu, 2021).



Section 12

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Section 13

Instruments of data collection

GRAND CASINO SOCIAL AND ECONOMIC ASSESSMENT RESEARCH 2022 CONSENT FORM

March 18th 2022



ABOUT THIS RESEARCH

The Grand Casino (formerly Dunedin Casino) is applying for a renewal of its venue license. As part of this application process, the Grand Casino needs to prepare a Casino Impact Report (CIR) to present to the Gambling Commission.



This report needs to identify the expected social and economic effects on the local and regional areas affected by:

- the continued operation of the casino; and
- the closure of the casino; and

Research First Ltd and LWP Ltd have been appointed as the independent experts to conduct the social and economic impact assessment. They will be completing this assessment by assembling the relevant evidence and talking to a range of stakeholders.

ABOUT THIS INTERVIEW CONSENT FORM

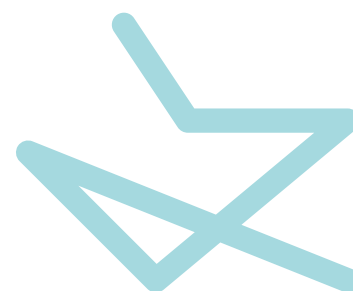
Thank you for agreeing to be interviewed as part of this impact assessment project.

The stakeholder interviews that form this part of this Casino Impact Report will take between 30 and 60 minutes to complete. Participants will not be named in the final report (unless they explicitly asked to be).

We don't anticipate that there are any risks associated with your participation but you have the right to stop the interview or withdraw from the research at any time.

By signing overleaf you explicitly agree to being interviewed and consent to how the information contained in their interview will be used.

This consent form is necessary for us to ensure that you understand the purpose of your involvement and that you agree to the conditions of your participation.



THE INTERVIEW CONSENT FORM

By signing this form you acknowledge that you approve the following:

- The interview will be recorded and a transcript will be produced.
- Any summary interview content, or direct quotations from the interview, will be anonymized so that you cannot be identified in the report. Care will also be taken to ensure that other information in the interview that could identify yourself is not revealed
- The actual recording will be securely stored and deleted once the venue license hearing is completed.
- Any variation of the conditions above will only occur with your further explicit approval

And by signing this form you certify the following:

- I understand that my words may be quoted directly.
- I understand that I will not receive any benefit or payment for my participation;
- I understand that I can request a copy of the transcript of my interview and may make edits I feel necessary to ensure the effectiveness of any agreement made about

Signed by Participant	Signed by the researcher
Name:	Name:
Position:	Position:
Date:	Date:



2022 GRAND CASINO PATRON SURVEY QUESTIONNAIRE FOR CUSTOMERS ON DATABASE

Final Version March 25th 2022



INTRODUCTION

We are researching the economic effects of the Dunedin Casino on the communities of Dunedin and Otago based on what has actually been experienced in the past.



This research is required by the Gambling Commission and commissioned by Dunedin Casino Ltd.

Collecting primary data from those who visit the Casino is a major part of understanding this impact. We want to know what activities, if any, you would have undertaken instead had you not come to the casino, and if you are a visitor to Dunedin, we want to know how it affected the duration of your stay in the city, in Otago and in New Zealand.

Your individual responses will be treated in absolute confidence by the researchers. We would be grateful for your participation in this research. However, you are entitled to withdraw from this research at any stage if you choose to do so.

Only aggregated results will be published.



ABOUT YOU

1. Where do you live?

<input type="radio"/>	Dunedin (<i>Skip to Q4</i>)
<input type="radio"/>	Elsewhere in Otago (<i>Skip to Q6</i>)
<input type="radio"/>	NZ (<i>Skip to Q6</i>)
<input type="radio"/>	Overseas

2. Which Country are you from?

3. How long do you expect to be in NZ?

<input type="radio"/>	Less than a year (<i>Skip to Q6</i>)
<input type="radio"/>	More than a year (<i>Skip to Q6</i>)



IF YOU'RE A DUNEDIN RESIDENT

4. If you live in Dunedin, how often do you think you visit the Grand Casino on average?

<input type="radio"/>	Daily or more than once a week
<input type="radio"/>	About once a week
<input type="radio"/>	Fortnightly (twice per month)
<input type="radio"/>	About once a month
<input type="radio"/>	2-6 times per year
<input type="radio"/>	6-12 times per year
<input type="radio"/>	About once per year
<input type="radio"/>	About once every 3-5 years
<input type="radio"/>	Less often than that
<input type="radio"/>	Don't know

5. How often do you think you gamble at other locations - such as pubs or clubs or even online?

<input type="radio"/>	Daily or more than once a week
<input type="radio"/>	About once a week
<input type="radio"/>	Fortnightly (twice per month)
<input type="radio"/>	About once a month
<input type="radio"/>	2-6 times per year
<input type="radio"/>	6-12 times per year
<input type="radio"/>	About once per year
<input type="radio"/>	About once every 3-5 years
<input type="radio"/>	Less often than that
<input type="radio"/>	Don't know



IF YOU'RE A VISITOR TO DUNEDIN

6. What kind of accommodation did you stay in **during your last visit** to Dunedin?

<input type="radio"/>	Hotel
<input type="radio"/>	Motel
<input type="radio"/>	Backpackers
<input type="radio"/>	Campground / Camper Van
<input type="radio"/>	Private rental / Air BnB / Book a Batch / etc
<input type="radio"/>	Staying with a friend or relative
<input type="radio"/>	Not staying overnight

7. How long did you stay in Dunedin **during your last visit** ?

<input type="radio"/>	One day only (<i>Zero nights</i>)
<input type="radio"/>	Multiple nights <i>(Please state how many nights you intend to stay in Dunedin)</i>

8. On that occasion (your last visit to Dunedin), would you have visited Dunedin at all if the Dunedin Casino was not here?

<input type="radio"/>	Yes
<input type="radio"/>	No (<i>Skip to Q10</i>)

9. Would you have stayed less time in Dunedin during that visit if the Casino was not there?

<input type="radio"/>	Yes
<input type="radio"/>	No (<i>Skip to Q10</i>)

10. How much less?

<input type="radio"/>	Few hours less
<input type="radio"/>	Half a day
<input type="radio"/>	One whole day (zero nights)
<input type="radio"/>	Multiple nights less <i>(Please state how many nights less)</i>



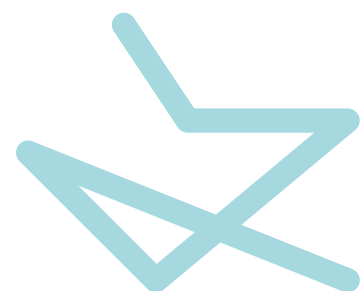
IF YOU'RE A NEW ZEALAND RESIDENT

11. If you live in New Zealand, how often do you think you visit any Casino on average?

<input type="radio"/>	Daily or more than once a week
<input type="radio"/>	About once a week
<input type="radio"/>	Fortnightly (twice per month)
<input type="radio"/>	About once a month
<input type="radio"/>	2-6 times per year
<input type="radio"/>	6-12 times per year
<input type="radio"/>	About once per year
<input type="radio"/>	About once every 3-5 years
<input type="radio"/>	Less often than that
<input type="radio"/>	Don't know

12. How often do you think you gamble at other locations - such as pubs or clubs or even online?

<input type="radio"/>	Daily or more than once a week
<input type="radio"/>	About once a week
<input type="radio"/>	Fortnightly (twice per month)
<input type="radio"/>	About once a month
<input type="radio"/>	2-6 times per year
<input type="radio"/>	6-12 times per year
<input type="radio"/>	About once per year
<input type="radio"/>	About once every 3-5 years
<input type="radio"/>	Less often than that
<input type="radio"/>	Don't know



ALL RESPONDENTS

13. Which of the following activities are you typically involved with at the Dunedin Casino?

<input type="radio"/>	Gaming only (<i>Skip to Q15</i>)
<input type="radio"/>	A mix of gaming and entertainment and other activities (<i>Skip to Q15</i>)
<input type="radio"/>	No gaming but entertainment and other activities

14. On your last visit to the casino, if you had not come to the Dunedin Casino what would you have done instead?	In Dunedin	Outside of Dunedin	No specific area	I wouldn't have visited
Gone to a bar / restaurant	1	2	3	9
Gone to a movie / play / concert	1	2	3	9
Gone shopping	1	2	3	9
Undertaken some other commercial activity <input type="text" value="(Please specify)"/>	1	2	3	9
Undertaken non-commercial activity	1	2	3	9
Stayed at home or in accommodation	1	2	3	9
Not sure				



15. When thinking about your last visit to the casino, if you had not come to the Dunedin Casino what would you have done instead of gaming . Would you have	In Dunedin	Outside of Dunedin	No specific area	I wouldn't have visited
Gone to a different place for gaming	1	2	3	9
Visited the Dunedin Casino for some other activity	1	2	3	9
Gone to another bar or restaurant	1	2	3	9
Gone to another bar / restaurant	1	2	3	9
Gone to a movie / play / concert	1	2	3	9
Gone shopping	1	2	3	9
Undertaken some other commercial activity <input type="text" value="(Please specify)"/>	1	2	3	9
Undertaken non-commercial activity	1	2	3	9
Stayed at home or in accommodation	1	2	3	9
Not sure	1	2	3	9
Something else <input type="text" value="(Please specify)"/>	1	2	3	9

IF YOU'RE GAMING

16. If the Casino in Dunedin were not here, would you be likely to gamble at other places in Dunedin? Select all that apply.

<input type="checkbox"/>	At a club
<input type="checkbox"/>	At a pub
<input type="checkbox"/>	At the races
<input type="checkbox"/>	Online betting
<input type="checkbox"/>	Buy some / more lotto tickets
<input type="checkbox"/>	Other <input type="text" value="(Please Specify)"/>
<input type="checkbox"/>	I wouldn't gamble

17. Are you a member of the Dunedin Casino Players Club?

<input type="checkbox"/>	Yes
<input type="checkbox"/>	No



A BIT MORE ABOUT YOU

18. What gender do you identify with?

<input type="radio"/>	Male
<input type="radio"/>	Female
<input type="radio"/>	Gender diverse
<input type="radio"/>	Prefer not to say

19. Which age bracket are you in?

<input type="radio"/>	20-40
<input type="radio"/>	40-60
<input type="radio"/>	60+

20. Which ethnic group or groups do you belong to? *Multi choice*

<input type="radio"/>	Māori (please list your iwi) <input type="text"/>
<input type="radio"/>	Pacific Island
<input type="radio"/>	Pākehā/NZ European
<input type="radio"/>	Asian
<input type="radio"/>	Other (please specify)
<input type="radio"/>	Prefer not to say



2022
GRAND CASINO
NEIGHBOURHOOD
BUSINESS
QUESTIONNAIRE

Version 1.3 April 17th 2022



INTRODUCTION

We are researching the economic and social effects of the Dunedin Casino on the communities of Dunedin and Otago. This research is required by the Gambling Commission and commissioned by Dunedin Casino Ltd.



Collecting primary data from businesses around the Casino is a major part of understanding this impact. We'd like to know how important the Casino is to businesses in the neighbourhood, as well as what the Casino is like as a neighbour.

Your individual responses will be treated in absolute confidence by the researchers. We would be grateful for your participation in this research. However, you are entitled to withdraw from this research at any stage if you choose to do so.

Only aggregated results will be published.



ABOUT YOU

1. How do you describe your business **in this location** (what is the main type of activity your business does in this location)?

--

2. How long has your business been in this location?

1	2	3	4	5	9
Less than one year	Between one and two years	Between two and five years	Between five and ten years	More than 10 years	Don't know Not sure

3. Is this business in this location part of a larger business?

<input type="radio"/>	No Skip to Q6
<input type="radio"/>	Yes - it is part of a larger business in Dunedin
<input type="radio"/>	Yes - it is part of a larger business in New Zealand
<input type="radio"/>	Yes - it is part of a larger business internationally

4. What proportion of employees for the whole business work in this location?

<input type="radio"/>	1 - 10%
<input type="radio"/>	11 - 20%
<input type="radio"/>	21 - 40%
<input type="radio"/>	41 - 50%
<input type="radio"/>	61 - 80%
<input type="radio"/>	81 - 100%
<input type="radio"/>	Don't know



THE CASINO AND YOUR LOCATION

5. Did the existence of the Casino influence your choice of location?

<input type="radio"/>	Yes
<input type="radio"/>	No Skip to Q7

6. How or why did the Casino influence your choice of location?

7. What percentage of your business do you think is attributable to the Casino being in the neighbourhood?



THE CASINO AND YOU

8. Have you had any direct business dealings with the Casino?

<input type="radio"/>	Yes
<input type="radio"/>	No

9. What is the nature of those dealings?

10. How much do you agree or disagree with these statements about the Casino?

	Strongly agree	Agree	Neither	Disagree	Strongly disagree	Do not know
If the Casino closed it would have a major impact on my business in this location	1	2	3	4	5	9
If the Casino closed it would have some impact on Dunedin's economy in this location	1	2	3	4	5	9
If the Casino closed it would have a major impact on business in Dunedin	1	2	3	4	5	9
If the Casino closed it would have some impact on business in Dunedin	1	2	3	4	5	9
If the Casino closed other entertainment attractions would readily take its place	1	2	3	4	5	9
The Casino is an important part of Dunedin's business community	1	2	3	4	5	9
Dunedin would be better off without a Casino	1	2	3	4	5	9



A BIT MORE ABOUT YOU

11. How many paid employees (including the owner working in the business) does the business have?

<input type="radio"/>	I'm answering for the whole business	<input type="radio"/>	0
<input type="radio"/>	I'm answering for just this one location	<input type="radio"/>	1
		<input type="radio"/>	0
		<input type="radio"/>	1
		<input type="radio"/>	2
		<input type="radio"/>	3
		<input type="radio"/>	4-5
		<input type="radio"/>	6-9
		<input type="radio"/>	10-19
		<input type="radio"/>	20-49
		<input type="radio"/>	50-99
		<input type="radio"/>	100 +
		<input type="radio"/>	Don't know

12. How much of a reduction in revenue has Covid caused to your business?

<input type="radio"/>	I'm answering for the whole business	<input type="radio"/>	No reduction or an increase in revenue
<input type="radio"/>	I'm answering for just this one location	<input type="radio"/>	1 - 10%
		<input type="radio"/>	11 - 20%
		<input type="radio"/>	21 - 40%
		<input type="radio"/>	41 - 50%
		<input type="radio"/>	61 - 80%
		<input type="radio"/>	81 - 100%
		<input type="radio"/>	Don't know

13. What was your revenue for the last financial year?

<input type="radio"/>	I'm answering for the whole business	
<input type="radio"/>	I'm answering for just this one location	
<input type="radio"/>	Declined	



2022 GRAND CASINO NEIGHBOURHOOD BUSINESS QUESTIONNAIRE

Version 1.1 March 25th 2022



INTRODUCTION

We are researching the economic effects of the Dunedin Casino on the communities of Dunedin and Otago based on what has actually been experienced in the past.



This research is required by the Gambling Commission and commissioned by Dunedin Casino Ltd.

Collecting primary data from businesses around the Casino is a major part of understanding this impact. We'd like to know how important the Casino is to businesses in the neighbourhood, as well as what the Casino is like as a neighbour.

Your individual responses will be treated in absolute confidence by the researchers. We would be grateful for your participation in this research. However, you are entitled to withdraw from this research at any stage if you choose to do so.

Only aggregated results will be published.



ABOUT YOU

1. How do you describe your business **in this location** (what is the main type of activity your business does in this location)?

--

2. How long has your business been in this location?

1	2	3	4	5	9
Less than one year	Between one and two years	Between two and five years	Between five and ten years	More than 10 years	Don't know Not sure

3. Is this business in this location part of a larger business?

<input type="radio"/>	No Skip to Q6
<input type="radio"/>	Yes - it is part of a larger business in Dunedin
<input type="radio"/>	Yes - it is part of a larger business in New Zealand
<input type="radio"/>	Yes - it is part of a larger business internationally

4. What proportion of employees for the whole business work in this location?

<input type="radio"/>	1 - 10%
<input type="radio"/>	11 - 20%
<input type="radio"/>	21 - 40%
<input type="radio"/>	41 - 50%
<input type="radio"/>	61 - 80%
<input type="radio"/>	81 - 100%
<input type="radio"/>	Don't know



THE CASINO AND YOUR LOCATION

5. Did the existence of the Casino influence your choice of location?

<input type="radio"/>	Yes
<input type="radio"/>	No Skip to Q7

6. How or why did the Casino influence your choice of location?

7. What percentage of your business do you think is attributable to the Casino being in the neighbourhood?



THE CASINO AND YOU

8. Have you had any direct business dealings with the Casino?

<input type="radio"/>	Yes
<input type="radio"/>	No

9. What is the nature of those dealings?

10. How much do you agree or disagree with these statements about the Casino?

	Strongly agree	Agree	Neither	Disagree	Strongly disagree	Do not know
If the Casino closed it would have a major impact on my business in this location	1	2	3	4	5	9
If the Casino closed it would have some impact on Dunedin's economy in this location	1	2	3	4	5	9
If the Casino closed it would have a major impact on business in Dunedin	1	2	3	4	5	9
If the Casino closed it would have some impact on business in Dunedin	1	2	3	4	5	9
If the Casino closed other entertainment attractions would readily take its place	1	2	3	4	5	9
The Casino is an important part of Dunedin's business community	1	2	3	4	5	9
Dunedin would be better off without a Casino	1	2	3	4	5	9



A BIT MORE ABOUT YOU

11. How many paid employees (including the owner working in the business) does the business have?

<input type="radio"/>	0
<input type="radio"/>	1
<input type="radio"/>	2
<input type="radio"/>	3
<input type="radio"/>	4-5
<input type="radio"/>	6-9
<input type="radio"/>	10-19
<input type="radio"/>	20-49
<input type="radio"/>	50-99
<input type="radio"/>	100 +
<input type="radio"/>	Don't know

12. How much of a reduction in revenue has Covid caused to your business?

<input type="radio"/>	No reduction or an increase in revenue
<input type="radio"/>	1 - 10%
<input type="radio"/>	11 - 20%
<input type="radio"/>	21 - 40%
<input type="radio"/>	41 - 50%
<input type="radio"/>	61 - 80%
<input type="radio"/>	81 - 100%
<input type="radio"/>	Don't know

13. What was your revenue for the last financial year (include on the part of the business in this location)?

Or

<input type="radio"/>	Declined
-----------------------	----------



2022
GRAND CASINO
PATRON
INTERCEPT
SURVEY
QUESTIONNAIRE

Version 1.3 April 17th 2022



INTRODUCTION

We are researching the economic effects of the Dunedin Casino on the communities of Dunedin and Otago based on what has actually been experienced in the past.



This research is required by the Gambling Commission and commissioned by Dunedin Casino Ltd.

Collecting primary data from those who visit the Casino is a major part of understanding this impact. We want to know what activities, if any, you would have undertaken instead had you not come to the casino, and if you are a visitor to Dunedin, we want to know how it affected the duration of your stay in the city, in Otago and in New Zealand.

Your individual responses will be treated in absolute confidence by the researchers. We would be grateful for your participation in this research. However, you are entitled to withdraw from this research at any stage if you choose to do so.

Only aggregated results will be published.



ABOUT YOU

1. Where do you live?

<input type="radio"/>	Dunedin (<i>Skip to Q4</i>)
<input type="radio"/>	Elsewhere in Otago (<i>Skip to Q6</i>)
<input type="radio"/>	NZ (<i>Skip to Q6</i>)
<input type="radio"/>	Overseas

2. Which Country are you from?

3. How long do you expect to be in NZ?

<input type="radio"/>	Less than a year (<i>Skip to Q6</i>)
<input type="radio"/>	More than a year (<i>Skip to Q6</i>)



IF YOU'RE A DUNEDIN RESIDENT

4. If you live in Dunedin, how often do you think you visit the Grand Casino on average?

<input type="radio"/>	Daily or more than once a week
<input type="radio"/>	About once a week
<input type="radio"/>	Fortnightly (twice per month)
<input type="radio"/>	About once a month
<input type="radio"/>	2-6 times per year
<input type="radio"/>	6-12 times per year
<input type="radio"/>	About once per year
<input type="radio"/>	About once every 3-5 years
<input type="radio"/>	Less often than that
<input type="radio"/>	Don't know

5. How often do you think you gamble at other locations - such as pubs or clubs or even online?

<input type="radio"/>	Daily or more than once a week
<input type="radio"/>	About once a week
<input type="radio"/>	Fortnightly (twice per month)
<input type="radio"/>	About once a month
<input type="radio"/>	2-6 times per year
<input type="radio"/>	6-12 times per year
<input type="radio"/>	About once per year
<input type="radio"/>	About once every 3-5 years
<input type="radio"/>	Less often than that
<input type="radio"/>	Don't know



IF YOU'RE A VISITOR TO DUNEDIN

6. What is the **primary** reason for your visit to Dunedin?

7. What kind of accommodation are you staying in while in Dunedin?

<input type="radio"/>	Hotel
<input type="radio"/>	Motel
<input type="radio"/>	Backpackers
<input type="radio"/>	Campground / Camper Van
<input type="radio"/>	Private rental / Air BnB / Book a Batch / etc
<input type="radio"/>	Staying with a friend or relative
<input type="radio"/>	Not staying overnight

8. How long do you expect to stay in Dunedin on this visit?

<input type="radio"/>	One day only (<i>Zero nights</i>)
<input type="radio"/>	Multiple nights <i>(Please state how many nights you intend to stay in Dunedin)</i>

9. Would you have stayed less time in Dunedin if the Dunedin Casino was not here?

<input type="radio"/>	Yes
<input type="radio"/>	No (<i>Skip to Q11</i>)

10. How much less?

<input type="radio"/>	I wouldn't have come at all
<input type="radio"/>	Few hours less
<input type="radio"/>	Half a day
<input type="radio"/>	One whole day (zero nights)
<input type="radio"/>	One or more nights <i>(Please state how many nights less)</i>



IF YOU'RE A NEW ZEALAND RESIDENT

11. If you live in New Zealand, how often do you think you visit any Casino on average?

<input type="radio"/>	Daily or more than once a week
<input type="radio"/>	About once a week
<input type="radio"/>	Fortnightly (twice per month)
<input type="radio"/>	About once a month
<input type="radio"/>	2-6 times per year
<input type="radio"/>	6-12 times per year
<input type="radio"/>	About once per year
<input type="radio"/>	About once every 3-5 years
<input type="radio"/>	Less often than that
<input type="radio"/>	Don't know

12. How often do you think you gamble at other locations - such as pubs or clubs or even online?

<input type="radio"/>	Daily or more than once a week
<input type="radio"/>	About once a week
<input type="radio"/>	Fortnightly (twice per month)
<input type="radio"/>	About once a month
<input type="radio"/>	2-6 times per year
<input type="radio"/>	6-12 times per year
<input type="radio"/>	About once per year
<input type="radio"/>	About once every 3-5 years
<input type="radio"/>	Less often than that
<input type="radio"/>	Don't know



ALL RESPONDENTS

13. Which of the following activities do you expect to be involved with at the Dunedin Casino today?

<input type="radio"/>	Gaming only (<i>Skip to Q15</i>)
<input type="radio"/>	A mix of gaming and entertainment and other activities (<i>Skip to Q15</i>)
<input type="radio"/>	No gaming but entertainment and other activities

14. When thinking about this visit to the casino, if you had not come to the Dunedin Casino today what would you have done instead?

	In Dunedin	Outside of Dunedin	No specific area	I wouldn't have visited
Gone to a bar / restaurant	1	2	3	9
Gone to a movie / play / concert	1	2	3	9
Gone shopping	1	2	3	9
Undertaken some other commercial activity <input type="text" value="(Please specify)"/>	1	2	3	9
Undertaken non-commercial activity	1	2	3	9
Stayed at home or in accommodation	1	2	3	9
Not sure				



15. When thinking about this visit to the casino, if you had not come to the Dunedin Casino today what would you have done instead of gaming on this visit would you have.	In Dunedin	Outside of Dunedin	No specific area	I wouldn't have visited
Gone to a different place for gaming	1	2	3	9
Visited the Dunedin Casino for some other activity	1	2	3	9
Gone to another bar or restaurant	1	2	3	9
Gone to another bar / restaurant	1	2	3	9
Gone to a movie / play / concert	1	2	3	9
Gone shopping	1	2	3	9
Undertaken some other commercial activity <input type="text" value="(Please specify)"/>	1	2	3	9
Undertaken non-commercial activity	1	2	3	9
Stayed at home or in accommodation	1	2	3	9
Not sure	1	2	3	9
Something else <input type="text" value="(Please specify)"/>	1	2	3	9



IF YOU'RE GAMING

16. If the Casino in Dunedin were not here, would you be likely to gamble at other places in Dunedin? Select all that apply.

<input type="checkbox"/>	At a club
<input type="checkbox"/>	At a pub
<input type="checkbox"/>	At the races
<input type="checkbox"/>	Online betting
<input type="checkbox"/>	Buy some / more lotto tickets
<input type="checkbox"/>	Other
	<input type="text" value="(Please Specify)"/>
<input type="checkbox"/>	I wouldn't gamble

17. Are you a member of the Dunedin Casino Players Club?

<input type="checkbox"/>	Yes
<input type="checkbox"/>	No

18. Have you bet more than you could really afford to lose?

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5
Never	Rarely	Sometimes	Often	Always

19. Have you borrowed money or sold anything to gamble?

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5
Never	Rarely	Sometimes	Often	Always

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

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5
Never	Rarely	Sometimes	Often	Always

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

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5
Never	Rarely	Sometimes	Often	Always



A BIT MORE ABOUT YOU

22. What gender do you identify with?

<input type="radio"/>	Male
<input type="radio"/>	Female
<input type="radio"/>	Gender diverse
<input type="radio"/>	Prefer not to say

23. Which age bracket are you in?

<input type="radio"/>	20-40
<input type="radio"/>	40-60
<input type="radio"/>	60+

24. Which ethnic group or groups do you belong to? *Multi choice*

<input type="radio"/>	Māori (please list your iwi) <input type="text"/>
<input type="radio"/>	Pacific Island
<input type="radio"/>	Pākehā/NZ European
<input type="radio"/>	Asian
<input type="radio"/>	Other (please specify)
<input type="radio"/>	Prefer not to say



Grand Casino

RESIDENTS' ATTITUDES TOWARD DUNEDIN'S GRAND CASINO

Community Survey Questionnaire July 25th 2022



1. INTRODUCTION

Thanks for taking a few minutes to complete this survey about Dunedin's Grand Casino. This survey is being conducted by Research First, an independent market research company bound by the code of professional practice of our industry body, the Research Association of New Zealand. You can read more Research First [here](#) and you can read their data privacy and data security policy [here](#). As you work through this survey please remember that (i) there are no right or wrong answers to any of the questions, and (ii) everything you say will be treated in strictest confidence.

Before we start:

SC1. Which Dunedin suburb do you live in?

SC2. Do you currently work in, or have you recently worked in, any of these industries?

	Yes	No
Marketing or market research?	<input type="radio"/>	<input type="radio"/>
Advertising?	<input type="radio"/>	<input type="radio"/>
For a casino?	<input type="radio"/>	<input type="radio"/>

SC3. Which gender do you identify with?

<input type="radio"/>	Male
<input type="radio"/>	Female
<input type="radio"/>	Another gender
<input type="radio"/>	Prefer not to say

SC4. How old were you at your last birthday?

<input type="radio"/>	Under 18
<input type="radio"/>	18-24
<input type="radio"/>	25-34
<input type="radio"/>	35-44
<input type="radio"/>	45-54
<input type="radio"/>	55-64
<input type="radio"/>	65+
<input type="radio"/>	Prefer not to say

2.THE CASINO AND YOU

Q1. To start with, which of these best describes you?

<input type="radio"/>	I have never been to Dunedin's Grand Casino SKIP TO Q3
<input type="radio"/>	I have been to the Casino but didn't do any gambling
<input type="radio"/>	I have been to the Casino and have gambled
<input type="radio"/>	Prefer not to say SKIP TO Q3

Q2. Which of these best describes how often you go to Dunedin's Grand Casino

- | | | | | |
|-----------------------------------|------------------------------------|--|--|--|
| <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 1 | 2 | 3 | 4 | 5 |
| I went once but haven't been back | I go there one or two times a year | I go a few times a year, between three and ten times | I go there about once a month on average | I go there regularly (once a week or more) |

3. HOW YOU FEEL ABOUT GAMBLING IN GENERAL

Q3. Thinking about the different kinds of gambling available in New Zealand, please rate which of these you think is most harmful and which you think is least harmful?

RANDOMISE ANSWERING OPTIONS

	Most Harmful	Least Harmful
a. Lotto and scratch-to-win tickets		
b. TAB and sports betting		
c. Online gambling		
d. Gaming machines in clubs and pubs ('pokies')		
e. Casino gambling		

Q4. How much do you agree or disagree with these statements about gambling in general?

RANDOMISE ANSWERING OPTIONS

	Strongly agree	Agree	Neither	Disagree	Strongly disagree	Do not know or not applicable
a. Gambling has given me pleasure and fun	1	2	3	4	5	9
b. For most people gambling is a harmless recreational activity	1	2	3	4	5	9
c. Gambling generates money to fund community groups and other worthwhile causes	1	2	3	4	5	9
d. The gambling industry thrives on vulnerable people, exploiting greed and weakness	1	2	3	4	5	9
e. Given the opportunity, I would sign a petition prohibiting all forms of gambling	1	2	3	4	5	9

4. HOW YOU FEEL ABOUT THE CASINO

Q5. How much do you agree or disagree with these statements about Dunedin's Grand Casino in particular?	Strongly agree	Agree	Neither	Disagree	Strongly disagree	Do not know or not applicable
RANDOMISE ANSWERING OPTIONS						
a. Visiting Dunedin's Casino has given me pleasure and fun	1	2	3	4	5	9
b. For most people, a visit to the Casino is a night out with family and friends	1	2	3	4	5	9
c. For most people, a visit to the Casino is a harmless recreational activity	1	2	3	4	5	9
d. Dunedin's Casino is an important part of the city's entertainment offering	1	2	3	4	5	9
f. Dunedin's Casino thrives on vulnerable people, exploiting greed and weakness	1	2	3	4	5	9
g. Given the opportunity, I would sign a petition against the Casino's operations	1	2	3	4	5	9

Q6. Finally, would Dunedin would be better off with or without a Casino?

- 1
 Dunedin would be a **much better place without** a casino
- 2
 Dunedin would be **somewhat better place without** a casino
- 3
 I'm not sure, or am **neutral** about the Casino
- 4
 Dunedin is a **somewhat better place with** a casino
- 5
 Duendin is a **much better place with** a Casino



5. ABOUT YOU

To finish up we just need to know a little about you. Remember that everything you write in this survey will be *treated in the strictest confidence*.

Q7. How many people usually live in this household (counting yourself)?

<input type="radio"/>	1
<input type="radio"/>	2
<input type="radio"/>	3
<input type="radio"/>	4
<input type="radio"/>	5
<input type="radio"/>	6+
<input type="radio"/>	Prefer not to say

Q8. Approximately, what was the total income for your household in the last year?

<input type="radio"/>	Under \$15,000
<input type="radio"/>	\$15,001 to \$30,000
<input type="radio"/>	\$30,001 to \$45,000
<input type="radio"/>	\$45,001 to \$60,000
<input type="radio"/>	\$60,001 to \$75,000
<input type="radio"/>	\$75,001 to \$100,000
<input type="radio"/>	\$100,001 to \$150,000
<input type="radio"/>	Over \$150,001
<input type="radio"/>	Prefer not to say

Q9. Which ethnic group or groups do you belong to? *Multi choice*

<input type="radio"/>	Māori (please list your iwi) <input type="text"/>
<input type="radio"/>	Pacific Peoples
<input type="radio"/>	Pākehā/NZ European
<input type="radio"/>	Asian
<input type="radio"/>	Middle Eastern/Latin American/African
<input type="radio"/>	Other (please specify)
<input type="radio"/>	Prefer not to say



6. THANK YOU

That is it! Thank you for taking the time to fill in the survey.



2022 GRAND CASINO SOCIAL IMPACT QUESTIONNAIRE [GAMBLING]

April 2022



INTRODUCTION

We are researching the social impacts of the Grand Casino on the communities of Dunedin and Otago. This research is required by the Gambling Commission and commissioned by the Grand Casino. Your responses to these questions will be treated in confidence and you will not be mentioned in the research report unless you ask to be.



ABOUT YOU

1. To start with, can you tell me what your organisation does, and how long it has been doing it in Dunedin / Otago?
2. How does your work in Dunedin / Otago fit with the work your organisation does elsewhere in New Zealand (if applicable)?
3. How much autonomy does your office / staff in Dunedin / Otago have from the rest of your organisation?



ABOUT PROBLEM GAMBLING

4. How large is the problem gambling problem in Dunedin /Otago?
5. Are there particular groups in Dunedin who are more likely to experience problem gambling than others?
6. Have these groups changed over time?
7. Has the problem gambling problem in Dunedin / Otago changed over time?
8. What is the Casino's contribution to this problem gambling problem in Dunedin?
9. Tell me about the problem gambling you see or deal with at the Dunedin Casino.
10. If there is a problem gambling problem associated with the Casino, is this related to the machines (pokies) or the tables or both?
11. What controls should be in place to reduce the potential for gambling harm at casinos in general?
12. How well does the Grand Casino do in terms of identifying and protecting at-risk gamblers?
13. Is there anything else you'd like to say about the Grand Casino in Dunedin that we haven't covered?



2022 GRAND CASINO STAFF SURVEY QUESTIONNAIRE

Final Version May 12th 2022



INTRODUCTION

We are researching the social and economic effects of the Grand Casino on the communities of Dunedin and Otago. This research is required by the Gambling Commission and commissioned by Grand Casino Ltd.



Collecting primary data from **staff** is a major part of understanding this impact, hence this short survey.

Your individual responses will be treated in absolute confidence by the researchers. We would be grateful for your participation in this research. However, you are entitled to withdraw from this research at any stage if you choose to do so.

Only aggregated results will be published. For your information, we have included link to our privacy policy (please click <https://researchfirst.co.nz/privacy-policy>)



1. ABOUT YOU

1. How many years have you worked at the Casino?

<input type="radio"/>	Fewer than 3 years
<input type="radio"/>	3-5 years
<input type="radio"/>	6-10 years
<input type="radio"/>	11-15 years
<input type="radio"/>	16-20 years
<input type="radio"/>	20+ years
<input type="radio"/>	Prefer not to say

2. Approximately, what was your total income from the Casino in the last year?

<input type="radio"/>	\$15,001 to \$30,000
<input type="radio"/>	\$30,001 to \$45,000
<input type="radio"/>	\$45,001 to \$60,000
<input type="radio"/>	\$60,001 to \$75,000
<input type="radio"/>	\$75,001 to \$100,000
<input type="radio"/>	\$100,001 to \$150,000
<input type="radio"/>	Over \$150,001
<input type="radio"/>	Prefer not to say

3. What proportion of your earnings do you receive in your bank account after deductions (tax, ACC, Kiwisaver, etc)

<input type="radio"/>	20%
<input type="radio"/>	21-40%
<input type="radio"/>	41-60%
<input type="radio"/>	61-70%
<input type="radio"/>	71-80%
<input type="radio"/>	81-90%
<input type="radio"/>	91-100%
<input type="radio"/>	Prefer not to say



4. Of the pay you receive in your bank account (after deductions), what proportion do you spend each month

<input type="radio"/>	20%
<input type="radio"/>	21-40%
<input type="radio"/>	41-60%
<input type="radio"/>	61-70%
<input type="radio"/>	71-80%
<input type="radio"/>	81-90%
<input type="radio"/>	91-100%
<input type="radio"/>	Prefer not to say

5. Can you please describe what proportion of your monthly spend is in Dunedin, elsewhere in Otago not Dunedin, and outside of Otago?

Item	Proportion in Dunedin (%)	Proportion in the Otago region not in Dunedin (%)	Proportion elsewhere (%)	Total
Food and beverages				100%
Clothing and footwear				100%
Telephone, internet, etc				100%
Education				100%
Health				100%
Household contents (furniture, appliances, bedding, etc)				100%
Household utilities (electricity, rates etc)				100%
Transport				100%
Recreation, subscriptions, memberships etc				100%
Travel				100%
Other				100%



6. How do you usually describe (i.e., name) the suburb or neighbourhood you live in?

7. How many years have you lived in your current house?

<input type="radio"/>	Fewer than 3 years
<input type="radio"/>	3-5 years
<input type="radio"/>	6-10 years
<input type="radio"/>	11-15 years
<input type="radio"/>	16-20 years
<input type="radio"/>	20+ years
<input type="radio"/>	Prefer not to say

8. How many people usually live in this household (counting yourself)?

<input type="radio"/>	1
<input type="radio"/>	2
<input type="radio"/>	3
<input type="radio"/>	4
<input type="radio"/>	5
<input type="radio"/>	6+
<input type="radio"/>	Prefer not to say

9. Which ethnic group or groups do you belong to? *Multi choice*

<input type="radio"/>	Māori (please list your iwi) <input type="text"/>
<input type="radio"/>	Pacific Peoples
<input type="radio"/>	Pākehā/NZ European
<input type="radio"/>	Asian
<input type="radio"/>	Middle Eastern/Latin American/African
<input type="radio"/>	Other (please specify)
<input type="radio"/>	Prefer not to say





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