

CASINO IMPACT REPORT

AN ASSESSMENT OF THE SOCIAL AND ECONOMIC
IMPACTS OF THE SKYCITY CASINO QUEENSTOWN

October 2023



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Section 1

Executive Summary

1.1 PURPOSE

Queenstown Casinos Limited is applying for a renewal of the casino venue licence for the SkyCity Queenstown Casino (the Casino). Queenstown Casinos Limited's application needs to be accompanied by a Casino Impact Report (CIR) as required by Section 134 of the Gambling Act 2003 (the Act). Under Section 134(3) the impact report must assess the social and economic effects of the:

1. continued operation of the Casino; and
2. closure of the Casino.

This document provides an assessment of the social and economic impacts on the local and regional areas affected by the operation of SkyCity Queenstown Casino.

1.2 BENEFICIAL EFFECTS

This impact assessment shows that SkyCity Queenstown Casino contributes to the Queenstown economy in several ways. It employs 53 people (45 full-time equivalent (FTE)). The Casino spends \$3.35 million per annum in operational expenses with suppliers, of which 41% is spent in Queenstown, and pays wages and salaries of \$3.48 million. The Casino also spends an additional \$0.73 million per annum on capital items, of which \$0.015 million (2%) is spent in Queenstown. Sky City Queenstown Casino Community Trust (the Casino Trust) distributes about \$0.14 million per annum to charities, and the Casino distributes a further \$0.04 million per annum in sponsorships.

When the expenditure, employment and other activities of the Casino are included in a model of the Queenstown Lakes District economy, it generates a total of 60 FTEs, \$9.18 million in value added, and \$4.50 million in household income.

The impacts on the Otago economy are marginally higher. When the gross impacts of the Casino expenditure are aggregated with the tourism generation impacts associated with visitors to Queenstown, and the likely impacts of continued expenditure in Queenstown in the absence of the Casino are subtracted from the previous two items, **the net impact of the Queenstown Casino is an estimated -10 FTEs in employment¹, \$3.73 million per annum in value added, and \$1.07 million per annum in household income.**

¹ The negative net impact on employment arises from the comparatively low employment and higher wages at the Casino per \$million of visitor spend relative to the alternative locations where the visitor spending would occur if the Casino were absent. This impact is explained in the body of the report and we consider that in the labour constrained market, currently being experienced by employers, the ability to generate higher GDP and household income per employee is at worst neutral and generally positive for the economy.

In addition to these economic benefits, SkyCity Queenstown Casino provides a significant entertainment option for (i) residents in Queenstown and Otago, and (ii) for visitors to Queenstown. For residents, the Casino contributes to Queenstown's status as a thriving and fun city. For international visitors, the Casino contributes to Queenstown's status as number 1 in Lonely Planet's list of the nine best places to visit in New Zealand². Queenstown is New Zealand's second most often visited destination by international travellers (after Auckland) with just over a million international visitors in 2019.³

Beyond this, the Queenstown and Otago communities also benefit from the impact of the activities of the community organisations who receive financial assistance from the Casino through either the Trust or direct corporate sponsorships.

1.3 ADVERSE IMPACTS

The adverse effects most often associated with casino operations are gambling harm and crime. There is little evidence of financial crime directly associated with the operation of the Casino, and the local police express very little concern about the impact of the Casino in this regard.

As for 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 whānau. However, this social impact assessment found very low levels of gambling harm that can be directly attributed to SkyCity Queenstown Casino. This is likely because:

- the fact that entry to the Casino is strictly controlled;
- the Casino operates a rigorous host responsibility policy (HRP) once people are inside⁴; and
- the small scale of the Casino means staff are able to provide a high level of oversight of gambling operations.

This social impact assessment looked closely at the potential harm that SkyCity Queenstown Casino was causing among older residents, Māori, Pacific Peoples, and the growing Asian resident community in Queenstown. In each case, the stakeholders consulted for this project were clear that the Queenstown Casino was not a noticeable source of harm to these communities.

² <https://www.lonelyplanet.com/articles/best-places-to-visit-in-new-zealand>

³ <https://www.statista.com/statistics/687393/new-zealand-international-visitors-by-region/>

⁴ Supported by facial recognition cameras, and SkyCity's own mystery shopping programme to ensure compliance with the HRP.

1.4 THE EFFECT OF NON-RENEWAL

This impact assessment concludes that the economic impacts of non-renewal would be minor. In the context of the wider Queenstown Lakes District's employment of 30,000 jobs and GDP of nearly \$3.6 billion per annum, both the direct and net impacts of the Casino are a small fraction of the District's economy. This relatively low impact is not unexpected given the small size of the Casino. This should not be seen as discounting the Casino's value. The analysis has indicated the following points:

- SkyCity Queenstown Casino is a source of employment that appears to be more highly paid than is typical for other hospitality type businesses. Its closure would cause disruption to these staff and it seems likely that any replacement employment would be at lower salary.
- SkyCity Queenstown Casino provides an entertainment option in the city, and its removal would decrease the range of options available as the alternative use of the space is likely to be accommodation.
- SkyCity Queenstown Casino is obviously valued by its patrons, who have indicated high levels of satisfaction with its facilities, and who would be expected to generate consumer surplus from their use of the Casino that is additional to the quantified impacts estimated here.
- Non-renewal would deprive the community of funding for a range of organisations that are also contributing to the wellbeing of Queenstown and the Otago region.
- Rather than reducing gambling harm, closure of SkyCity Queenstown Casino might increase the potential for harm if Queenstown and Otago residents who wish to keep gambling shift to more dangerous types such as Class 4 venues or online gambling.

Section 2

Introduction

2.1 THIS ASSESSMENT

SkyCity Entertainment Group Limited (SCEG) is the parent company of both Queenstown Casinos Limited (QCL) and SkyCity Casino Management Limited (SCML).

QCL is the holder of the casino venue licence for SkyCity Queenstown Casino. SCML holds a casino operator's licence and manages Queenstown Casino on behalf of QCL through a management agreement. QCL is applying for a renewal of its venue licence. As part of this application process, QCL needs to provide a CIR as required by section 134 of the Act.

Section 134 states that an application for the renewal of a casino venue licence must be accompanied by a CIR.

The Act 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 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

In line with section 134(3) of the Act, this report outlines the economic and social impacts of the continued operation of SkyCity Queenstown Casino using the "With Casino" and "Without Casino" scenarios.

2.2 ASSESSMENT DESIGN

This impact assessment followed the approach adopted for the Christchurch Casino impact assessment (2017) and refined during the Dunedin Casino impact assessment (2022). This approach was chosen as the basis of the Queenstown impact assessment because these impact assessments:

1. Were based on a thorough review of the literature on the impacts of casinos; and
2. Were accepted by the Gambling Commission as an appropriate approach.⁵

This report uses Input-Output (I-O) models to estimate the Queenstown and Otago economic impacts of the Casino on employment, household income, and value added, taking into account the trade diversion and tourism effects of the Casino. Appendix One explains the approach, but in summary, 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 local and regional level.
- **Measurement approach:** This study uses appropriate I-O models for quantitative assessment of effects. The results take into account both 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 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 also 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 2019/20 to 2022/23. Some financial years were significantly impacted by the Covid 19 pandemic, and so the results are potentially affected by the lower patron numbers which the Casino experienced.
- **Geographic focus:** The study looks at the local 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.

⁵ The assessment also incorporates matters the Gambling Commission wanted included in the CIR.

It is important to remember that the social impact assessment is about the operation of SkyCity Queenstown Casino and not of the effects of gambling in general (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 SkyCity Queenstown Casino (and on New Zealand generally).

The international literature regarding the social impacts of casino gambling show that the industry has yielded both positive and negative effects on local communities and the lives of local residents. For instance, Giacomassi et al (1999) found that 59% of the respondents favoured casino establishments in their communities. In this research, 65% believed that casinos enhanced the quality of their lives and 77% agreed that casinos led to positive effects on their communities' economy.⁶

Similarly, according to Taylor et al (2006), more than two-thirds (69%) of those surveyed in 2007 believed casinos brought widespread economic benefits to other industries and businesses in their region.⁷

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 report includes research with 201 elected officials and civic leaders about the effects of casinos in their communities. In this sample, 79% said casinos had had a positive impact, whereas 13% saw a negative impact. Some 63% praised casinos as helping other businesses, and 79% believed casinos were responsible corporate citizens.⁸

⁶ 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

⁷ 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)

⁸ 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, carried out between February and September 2023. Appendix One has full details, 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 Queenstown and Otago;
2. an analysis of the media and social media relating to gambling in Queenstown and Otago, and the operations of SkyCity Queenstown Casino;
3. interviews with (N=22) stakeholders and community representatives across Queenstown and Otago;
4. an insitu survey of Casino patrons (N=241);
5. an online survey of Casino members (N=103);
6. a survey of residential neighbours of the Casino (N=24);
7. a survey of business neighbours of the Casino (N=50);
8. a community survey of Queenstown residents (N=206)⁹; and
9. a nationwide survey of residents (N=380).

We consulted with over 1,000 people, across Queenstown, Otago, and New Zealand in preparing this CIR.

Social impacts are regarded as the most difficult phenomenon for researchers to measure scientifically.¹⁰ For this reason the design of the social impact assessment was peer reviewed by Gerard Fitzgerald,¹¹ and he worked closely with the social impact assessment team in a research oversight role throughout the process.

⁹ A community survey of Queenstown residents was added to the assessment design after the neighbourhood survey failed to provide useful responses (24 households).

¹⁰ Oh, H. (1999) "Service quality, customer satisfaction, and customer value: a holistic perspective", *International Journal of Hospitality Management*, 18 (1)

¹¹ 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

Section 34 of the Act Defines casino gambling.

In this Act, casino gambling—

(a) means 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

Under the Act, the number of casinos in New Zealand is capped at six—located in Auckland, Hamilton, Dunedin, Christchurch, and Queenstown (two casino licences).

In 2024 there are five casinos operating in New Zealand, licensed to operate up to 3,033 gaming machines, 207 table games, and 230 semi-automated or fully automated tables games.¹² Data cited by the Ministry of Health (2022¹³) show that 4.0% of New Zealanders had played gaming machines at casinos, and 2.5% had played table games at casinos in the previous 12 months.

The Department of Internal Affairs (DIA) is the primary gambling regulator and policy advisor to the Government on gambling regulatory issues. DIA administers the Act and its regulations, ensures compliance with the legislation, works with the gambling sector to encourage best practice, and publishes statistical and other information concerning gambling.

The 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. These are 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 Act. 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.

¹² 2022 numbers from correspondence with the Deputy Director Operations, Gambling, at Department of Internal Affairs, 18 October 2022

¹³ Ministry of Health (2022) *Strategy to Prevent and Minimise Gambling Harm 2022/23 to 2024/25*. Wellington: Ministry of Health.

2.4 SKYCITY QUEENSTOWN CASINO

SkyCity Queenstown Casino is an integrated entertainment complex, 100% owned by SCEG, New Zealand’s largest tourism, leisure and entertainment company. It is dual-listed on the New Zealand and Australian stock exchanges.

The Queenstown Casino opened on 7 December 2000, the fourth casino to open in New Zealand. The casino venue licence holder, QCL, was jointly owned by SCEG (60%) and Skyline Enterprises Limited (40%). In 2012, SCEG bought Skyline Enterprises’ 40%, and became sole owner. As part of this deal, SCEG sold its 41% stake in Christchurch Casino Limited to Skyline Enterprises.

The Casino is licensed for 12 gaming tables and 86 electronic gaming machines (EGMs).



Section 3

The Social Environment

3.1 ABOUT QUEENSTOWN

Queenstown refers to the regional town on the central northern shore of Lake Wakatipu in the Queenstown Lakes District Council area. It is the second largest urban settlement in Otago after Dunedin. The town consists of a number of suburbs clustered on the northern shore of Lake Wakatipu, along with various neighbourhoods and smaller towns in the south-western part of Central Otago within the Queenstown Lakes District Council territorial authority area (Figure 3.1 and 3.2).

Figure 3.1: Location of Queenstown Lakes District

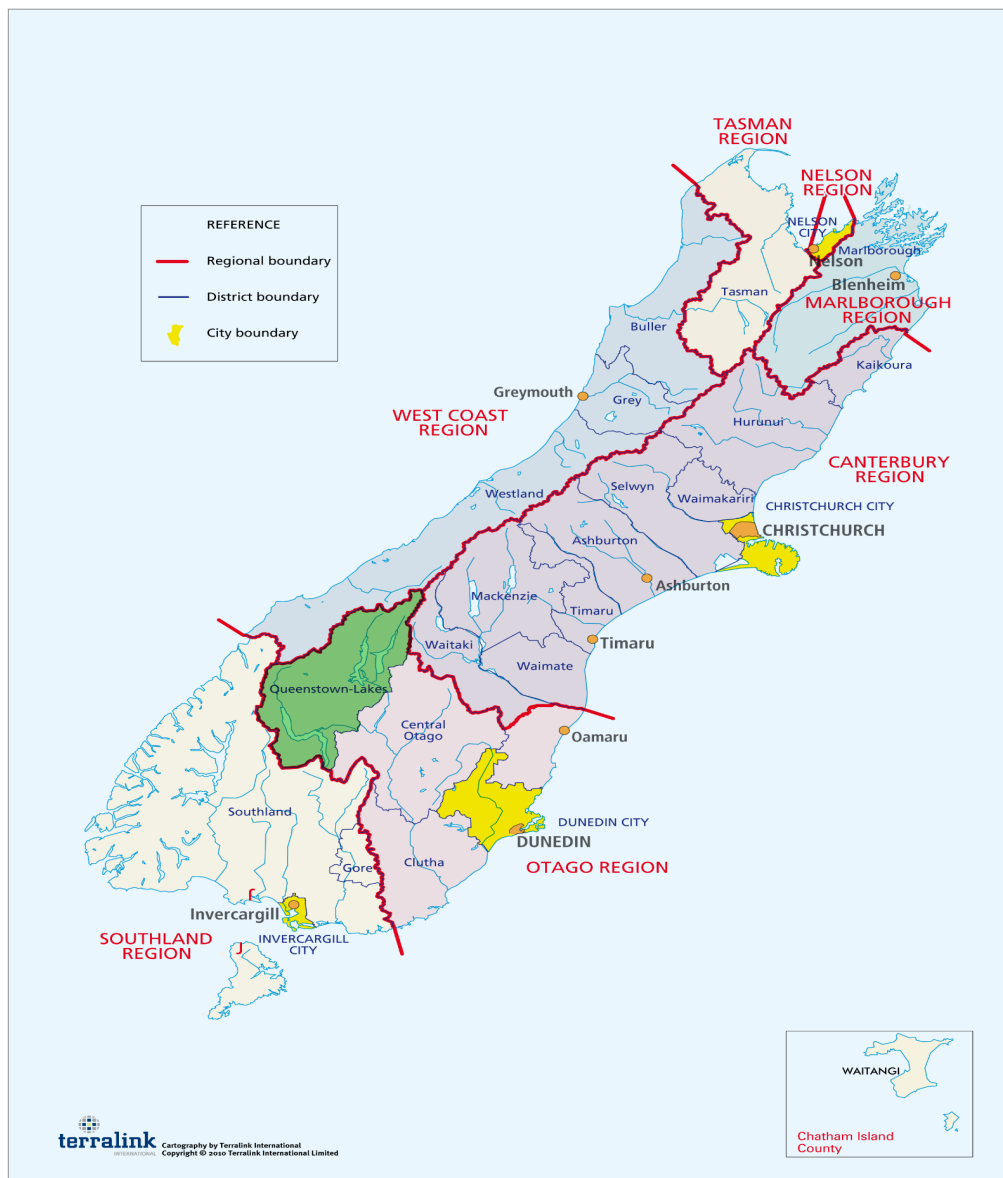
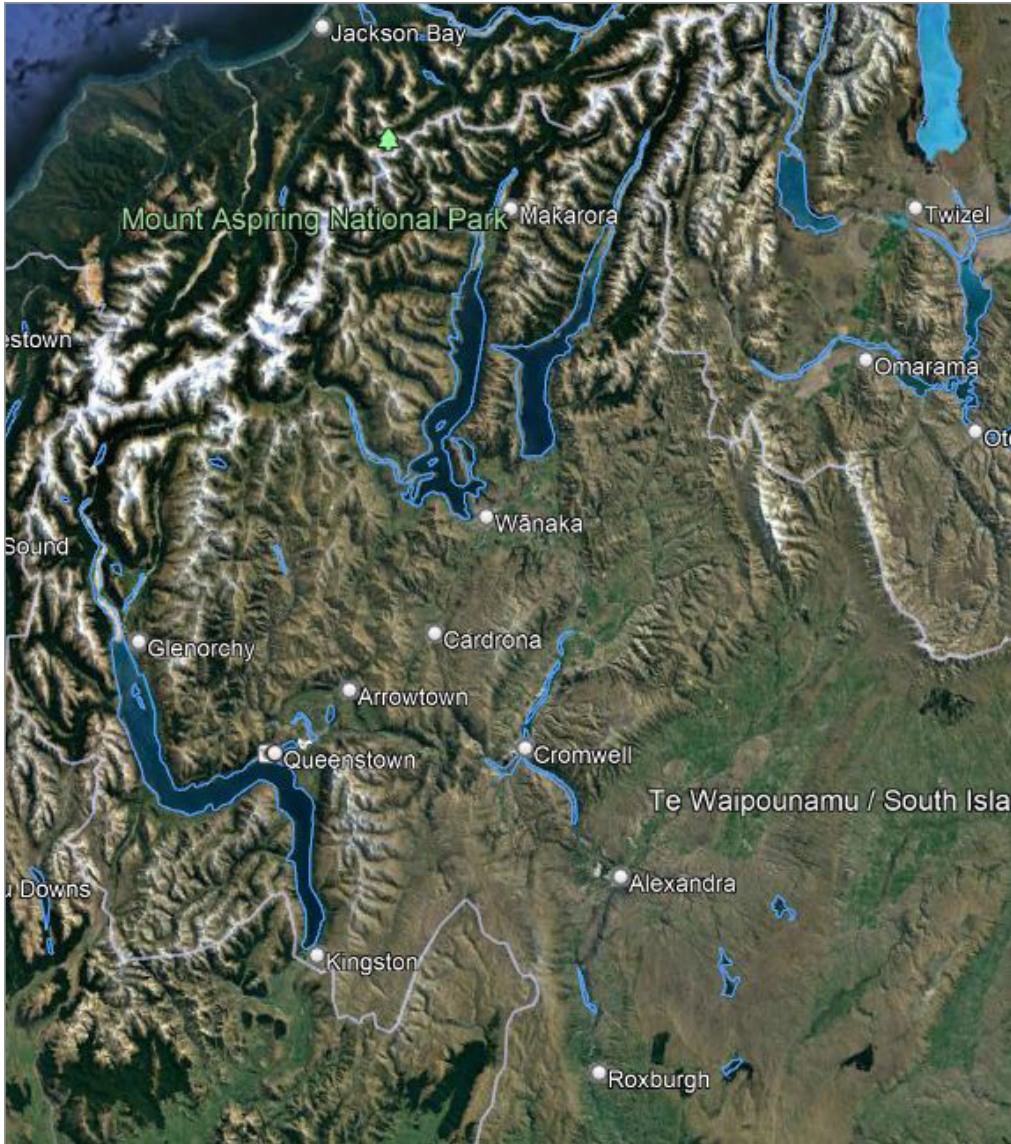


Figure 3.2: Google Earth image of Queenstown and environs



As with many locations, notions of what constitutes “Queenstown” vary. This is evident in the results of a Google search using the term “Queenstown, New Zealand”, and in the areas included by a major local real estate agent under the banner of “Queenstown Suburbs”.¹⁴

¹⁴ <https://www.colliersotago.co.nz/news-and-research/queenstown-suburbs-explained/>

Table 3.1 lists the areas and settlements that appear to make up “greater Queenstown” along with the equivalent Statistics New Zealand (SNZ) census statistical areas that are used for this social profile. Here “UA” indicates that the suburb is included in SNZ’s Queenstown urban area”.¹⁵ Figure 3.3 shows the boundaries of the census statistical areas used in this section of the report.

Figure 3.3: Queenstown urban area (by statistical area unit)

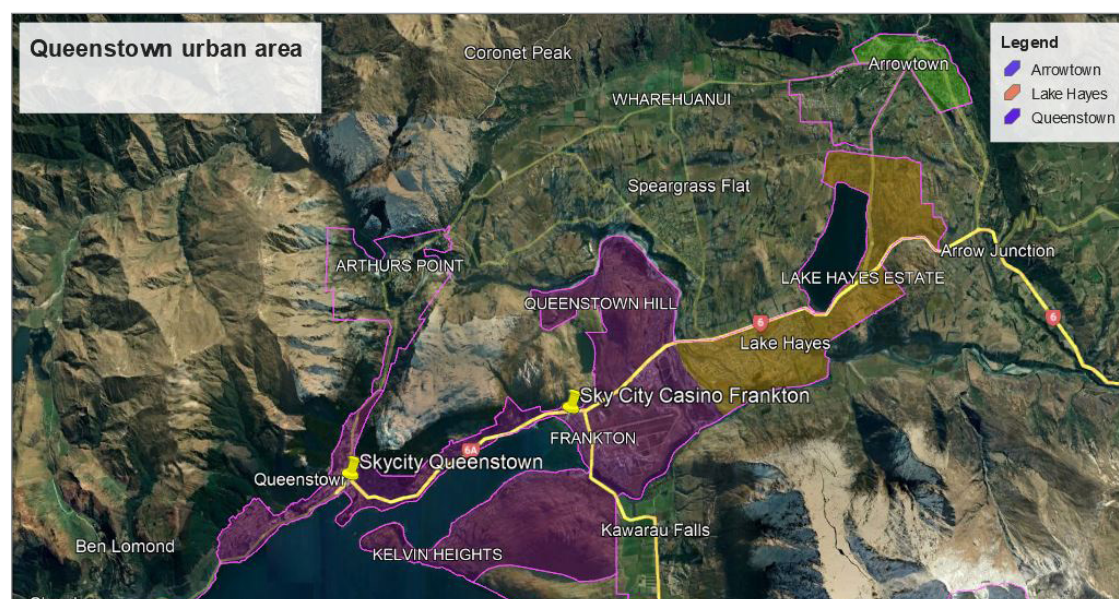


Table 3.1: Suburbs and statistical areas of Greater Queenstown

Suburbs/neighborhoods	Census statistical area name	Urban (UA) or rural
Queenstown downtown area	Queenstown Central Queenstown East	Queenstown UA
Sunshine Bay-Fernhill, a residential area to the west of the downtown area	Sunshine Bay-Fernhill	Queenstown UA
Closeburn, Mt Crighton, and Ben Lomond, west of Sunshine Bay		Rural
Warren Park (a mixed-use area NE along Gorge Road)	Warren Park	Queenstown UA
Arthurs Point (NE Gorge Road adjacent to the Shotover River)	Arthurs Point	Arthurs Point UA
Areas alongside the Frankton Road (on the northern shore of the Frankton Arm of Lake Wakatipu)	Frankton Arm	Queenstown UA
Frankton village, including Queenstown airport	Frankton	Queenstown UA
Kelvin Heights, on the south shore of Frankton Arm	Kelvin Heights	Queenstown UA
Lower Shotover and Lake Hayes Estate, (to the east of Frankton, on the left bank of the Shotover River)	Shotover Country, Lake Hayes Estate	Lake Hayes UA
Jacks Point, a rural residential area south of Frankton	Jacks Point	Rural
Queenstown Hill/Quail Rise (north of Frankton)	Quail Rise	Queenstown UA

¹⁵ SNZ publishes only a very limited range of statistics for medium and minor urban areas such as the communities in the vicinity of Queenstown. Some statistics are derived by summing the data for the SA2s that make up Queenstown UA.

Close by, and within easy commuting distance of Queenstown Central, are the growing towns of Lake Hayes (pop 6,760) and Arrowtown (pop 2,950)–both of which are classified by SNZ as “minor urban areas” and whose residents use Queenstown as their main administrative and service centre.

At the time of the 2018 census, the Otago region had a usually resident population of 225,186, of which Queenstown Lakes District had 39,153—including Wānaka and Lake Hawea, the towns of the upper Clutha and Queenstown area. The Queenstown urban area, as described above, had 13,533 usual residents.

Over the past 10 years, while Otago grew at a faster rate than the rest of New Zealand, Queenstown’s population grew almost twice as fast (Table 3.2 and 3.3). If the nearby settlements and towns are included, in 2018 there were over 25,000 usual residents in the greater Queenstown catchment area, and it was growing at about 4% per annum. The SNZ estimate of the Queenstown UA population in June 2022 was 15,800, though the actual post-Covid-19 pandemic figure will not be known until the results of the 2023 census become available.

On census night 2018, there were approximately 16,400 people present in the Queenstown UA, suggesting that at any one time, at least a third of the population of the town consists of visitors.

Table 3.2: Usually resident population counts at Census periods

	2006	2013	2018
Queenstown UA	10,428	11,334	13,539
Otago	193,803	202,470	225,186
New Zealand	4,143,279	4,242,048	4,699,755

Table 3.3: Inter-censal population growth rates

	2006–2013	2013–2018
Queenstown UA	+8.5%	+19.5%
Otago	+4.5%	+11.2%
New Zealand	+2.4%	+10.8%

Queenstown is known as a holiday and sports resort that appeals to younger people, and the age and sex structure of the population in 2018 reflects this, with:

- 1,400 (9.0 %) aged under 15 (19.3% nationally);
- 9,400 (62.0 %) aged 15 to 39, (34.2% nationally);
- 3,250 (21.5%) aged 40 to 64 (31.5% nationally);
- 1,100 (7.3 %) aged 65 or older (15.0% nationally); and
- a median age of 30.8 years (37.4 years nationally).

Queenstown is more ethnically diverse than Otago region as a whole, and almost as diverse as the nation, though in 2018 the population had a very low proportion of Māori and Pacific Peoples (Table 4.).

Table 3.4: Population by ethnicity (2018 Census)

	European	Māori	Asian	Pacifica
Queenstown UA	71.2%	4.5%	17.8%	1.2%
Otago	86.9%	8.7%	7.1%	2.7%
New Zealand	70.2%	16.5%	15.1%	8.1%

In 2018, households in the Queenstown Lakes District had an average annual income of \$109,536, compared with \$99,601 for the nation (Infometrics, 2023). From the census, the median personal annual income for those aged 15 and over was \$40,600, compared with \$30,000 for the Otago region and \$31,800 for the whole of New Zealand. Queenstown therefore sits within a comparatively well-off part of Otago.

Across the Queenstown UA, incomes varied from \$34,200 in Queenstown Central and Warren Park through to \$49,200 in Quail Rise. Of those resident in the Queenstown UA, 14% earned over \$70,000 compared with 17% nationally, 14% in Otago region, and 20% in Queenstown Lakes District.

The data show that there is a clear income divide between those who reside in the oldest areas of Queenstown (e.g., Queenstown Central) where only 5% were earning \$70,000 or more, and those in the outer suburbs and further afield (e.g., Kelvin Heights, Quail Rise, where at least 25% were on high incomes). This divide is even more marked when comparing with the communities of Jacks Point and Lake Hayes.

3.2 QUEENSTOWN'S ECONOMY

3.2.1 GDP AND EMPLOYMENT¹⁶

GDP for Queenstown Lakes District Council (QLDC) territory is approximately \$3.60 billion, up from \$1.07 billion in 2000 and \$1.96 billion in 2010 (Figure 3.4).

Growth in GDP has been significantly higher than for the country as a whole, and while the country was in recession in 2008/09, QLDC reported mild growth. However negative growth of -10% was also recorded for the 2021 year, likely associated with the impacts of Covid-19, as lockdowns and stalled international tourism significantly impacted the district.

Employment follows a similar pattern, rising from 12,000 in 2002 to 20,000 in 2012, and 30,000 in 2022 (Figure 3.5). Employment growth was negative in 2010, associated with the recession, but recovered quickly to growth in 2011. As with GDP, Covid-19 resulted in a significant loss of employment in 2021 of -7.8%, which is less than the decrease in GDP, probably because of government support for tourism employment.

¹⁶ This section draws largely on the work of Infometrics from the Queenstown section of its Regional Economic Profile series <https://ecoprofile.infometrics.co.nz/Queenstown-City>. Funded by Queenstown Lakes District Council.

Figure 3.4 GDP and change in GDP 2002–2022 (\$million/annum) (Source: Infometrics)

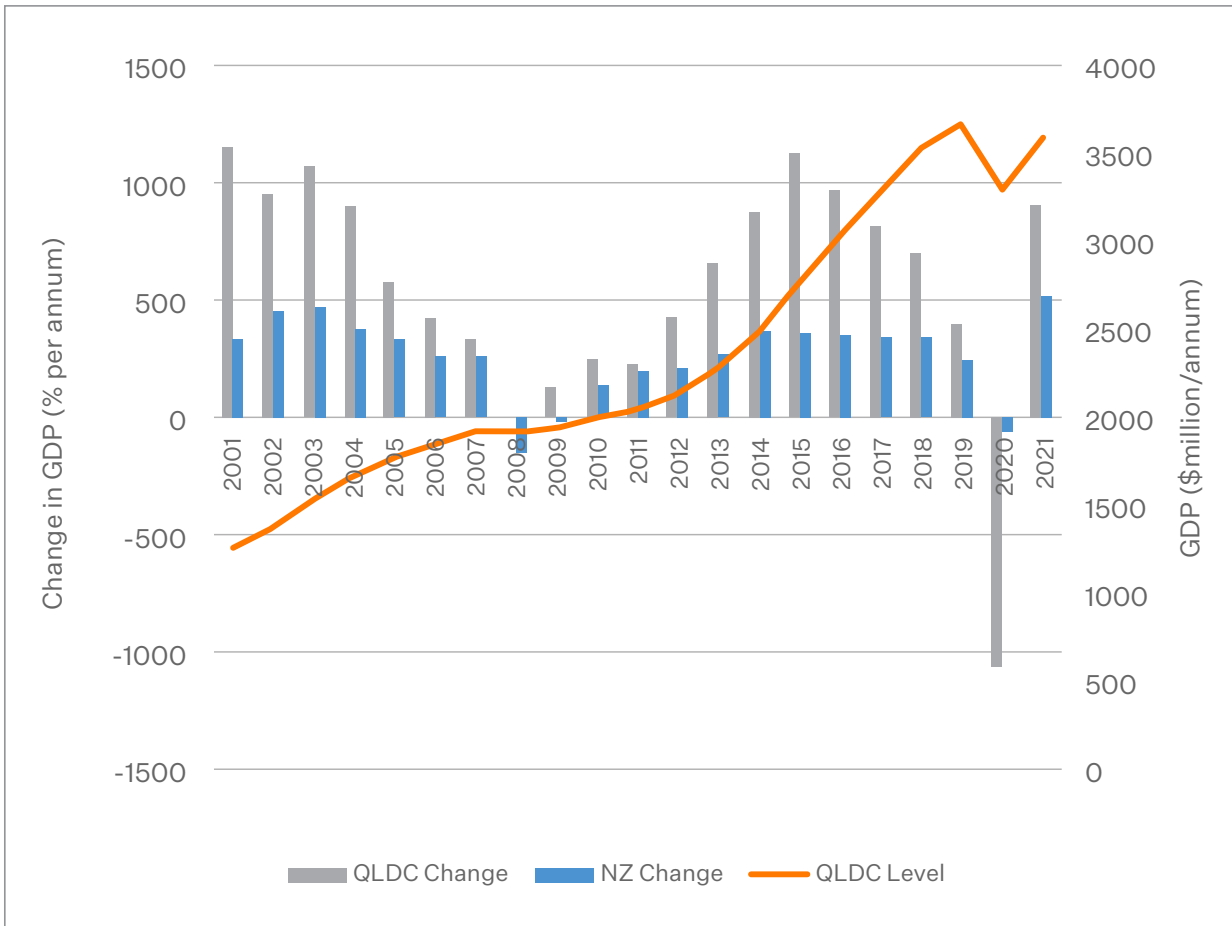
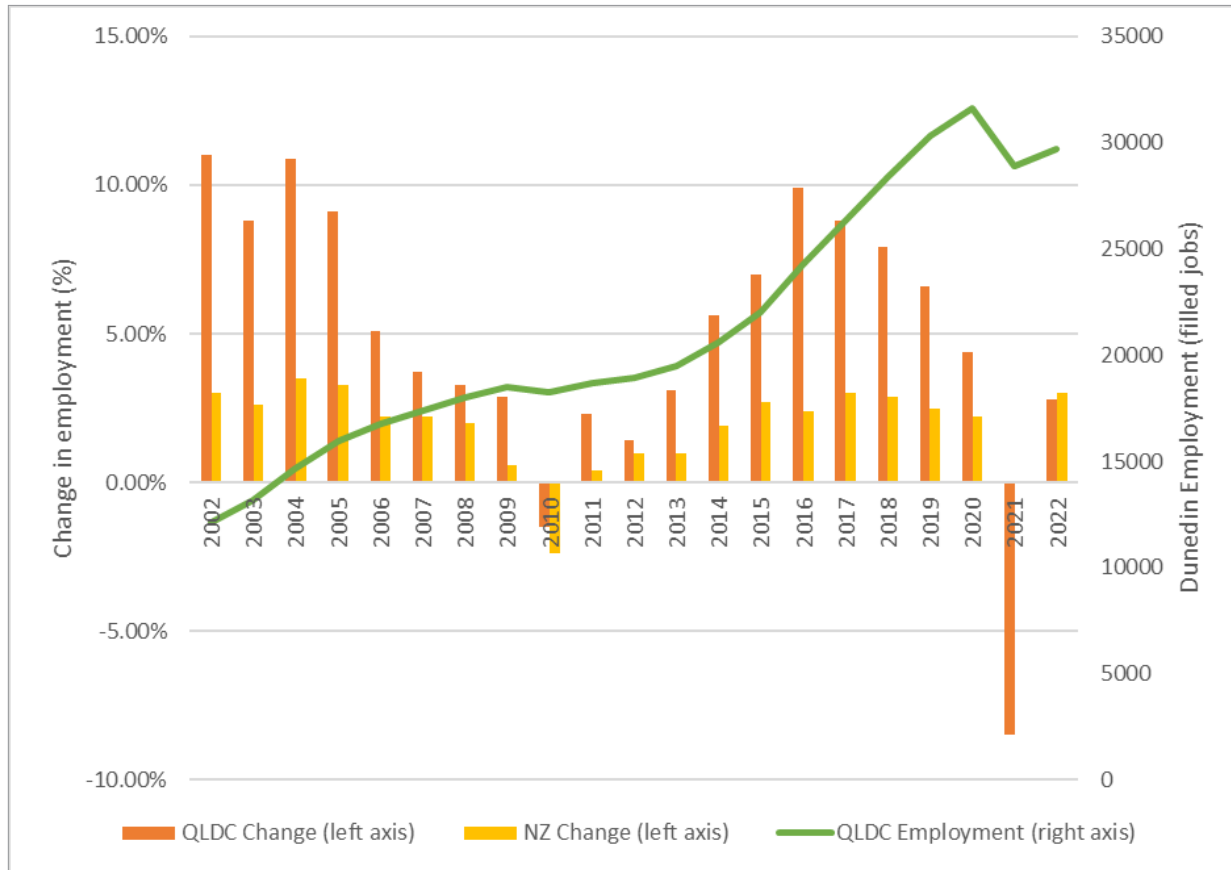


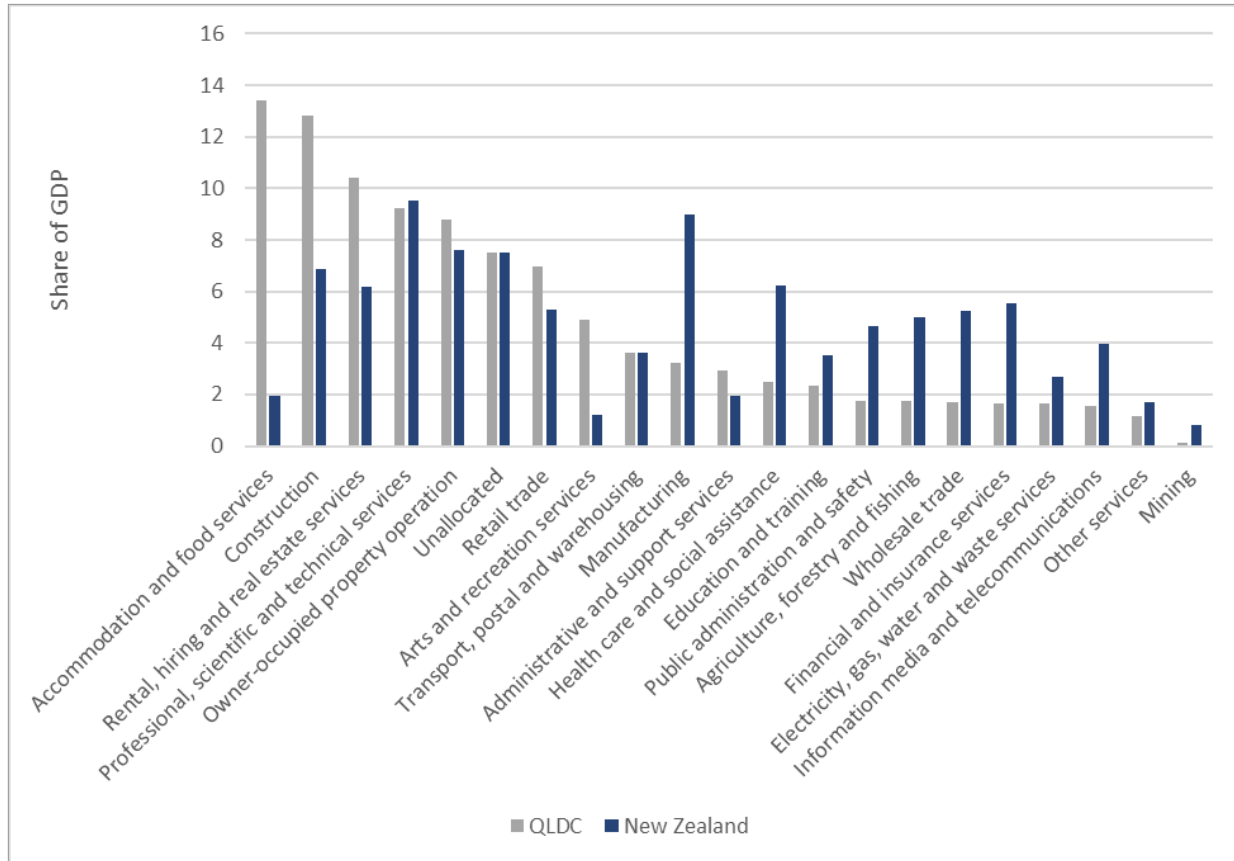
Figure 3.5 QLDC and NZ employment and change in employment, 2002–2022 (filled jobs) (Source: Infometrics)



Accommodation and food services are the largest industry in the Queenstown area (13.4% of GDP) followed by construction (12.8%) and rental, hiring and real estate (10.4%), and these are all significantly larger sectors in the Queenstown economy than they are in New Zealand.

This distribution reflects the tourism sector’s contribution, and associated with that has been the growth in population which has driven construction and real estate. Of the remaining sectors, retail trade and arts and recreation services are larger in QLDC than in NZ as a whole (Figure 3.6). Thus we see a picture of an economy heavily reliant on tourism and population growth.

Figure 3.6 GDP by sector, QLDC 2022 (Source: Infometrics)



Growth and Productivity

The four highest growth sectors for Queenstown over the last 10 years have been construction; professional, scientific and technical services; electricity, gas, water and waste services; and health care (Figure 3.7). The sectors with the highest labour productivity are all relatively small in Queenstown, and most of the larger sectors such as accommodation and food services have relatively low labour productivity, reflecting the service-intensive nature of these industries and the relatively low returns per person employed.

Ranking of labour productivity is shown in Figure 3.8, but the interesting item in that graph is how few sectors show labour productivity exceeding the national average. Notably, accommodation and food services has much higher labour productivity than the national average, perhaps reflecting Queenstown’s premium location and low vacancy rates. Many other sectors are either approximately the same as or less than the national average labour productivity. This is likely to be in part due to the small nature of the Queenstown economy and lack of economies of scale.

Figure 3.7 Average annual GDP growth by sector 2012–2022, QLDC
Sectors sorted by 2022 size largest at top (Source: Infometrics)

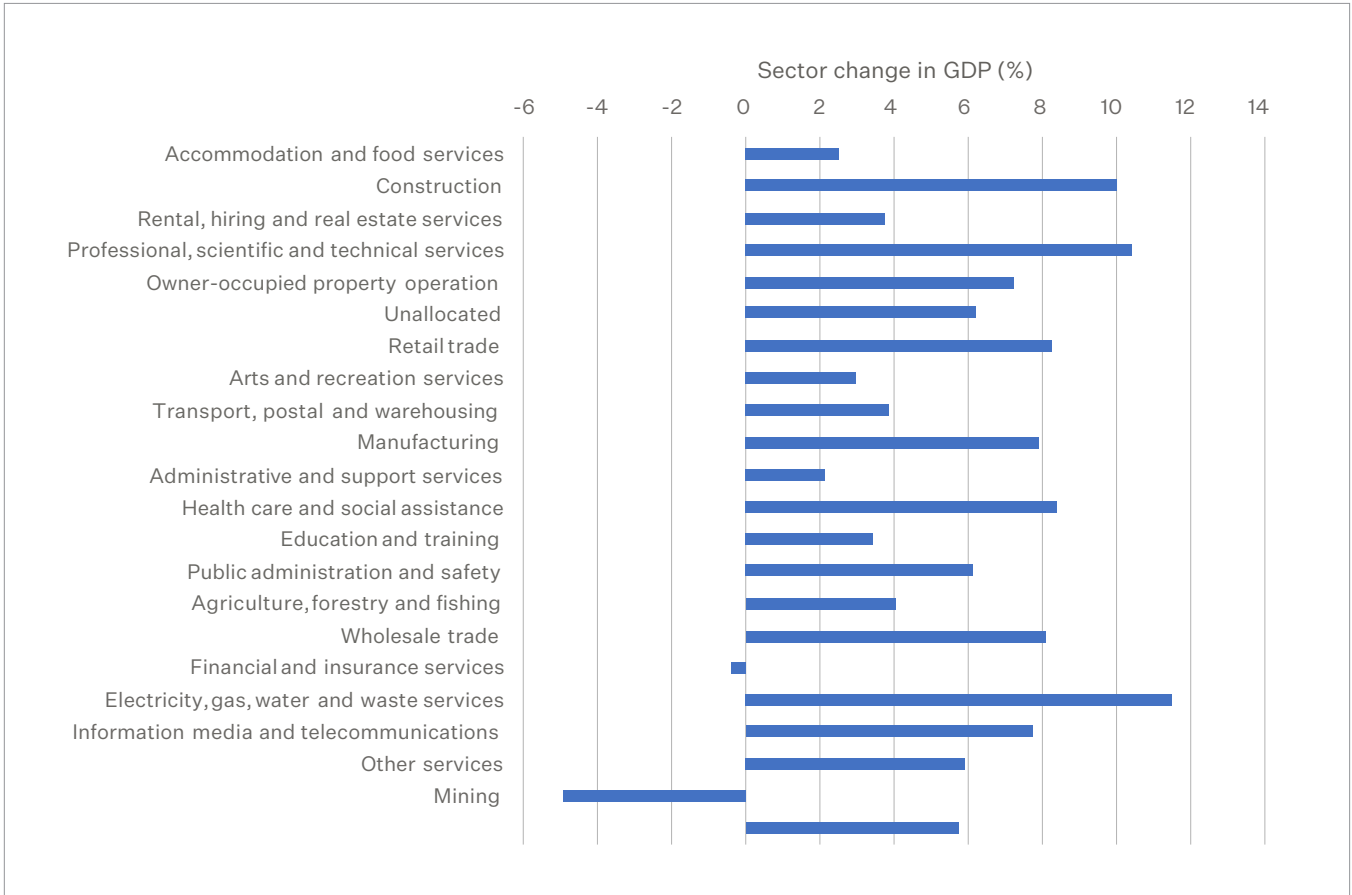
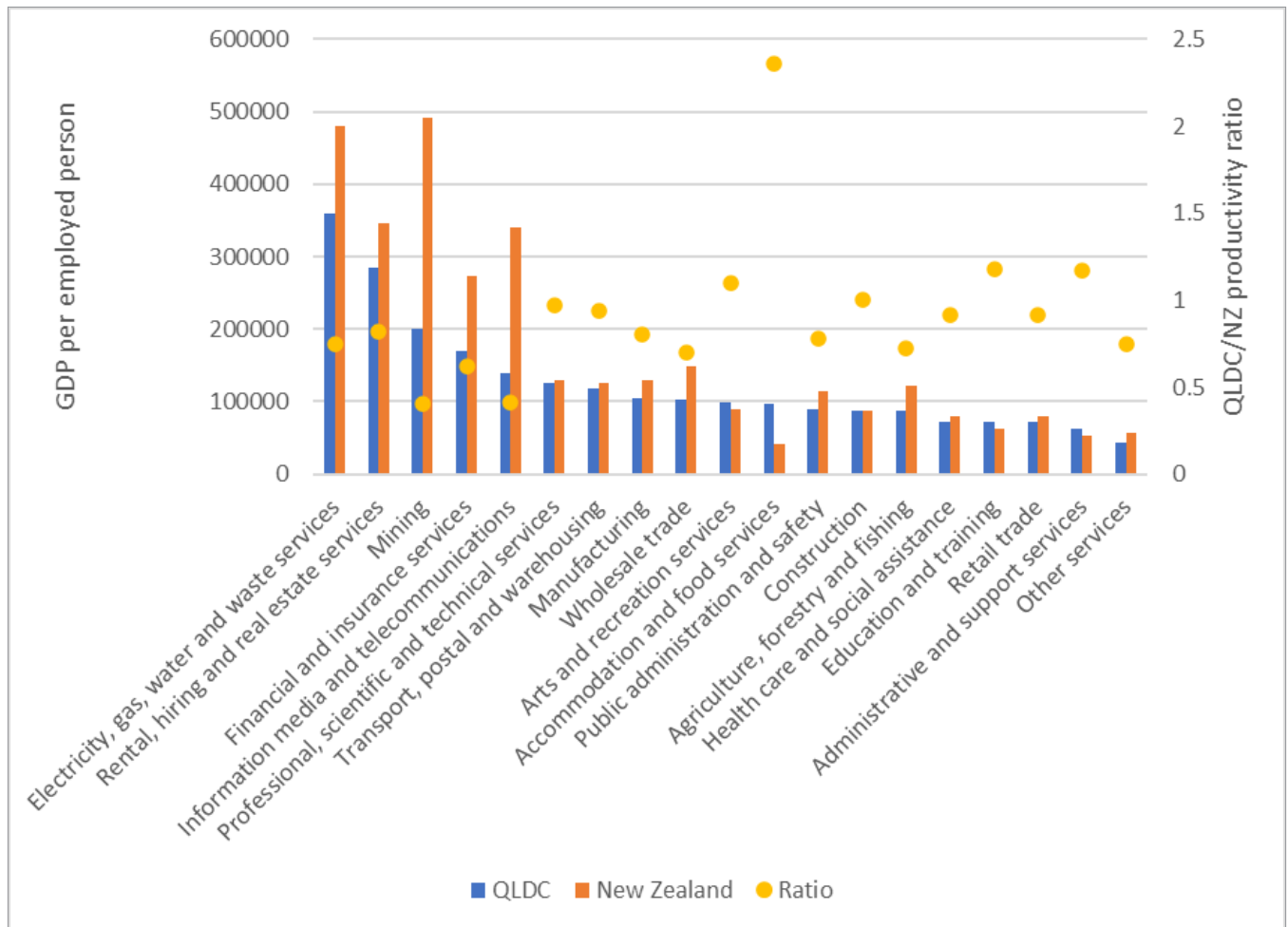


Figure 3.8 Labour productivity, QLDC 2022 (Source: Infometrics)



Focusing specifically on the knowledge-intensive industries, Figure 3.9 shows the share of employment for these types of industries in QLDC compared with New Zealand as a whole. QLDC has a much lower share of workers in knowledge-intensive industries than does the country as a whole, although this share has grown over the 20 years since 2002. This supports the picture of an economy focused on relatively low-skilled jobs servicing the tourism sector, but with growth associated with greater remote working as knowledge workers are able to live in the district while working in sectors not actually represented in the district.

Figure 3.9 Knowledge-intensive industries as a proportion of employment (filled jobs), QLDC vs NZ 2002–2022 (Source: Infometrics)

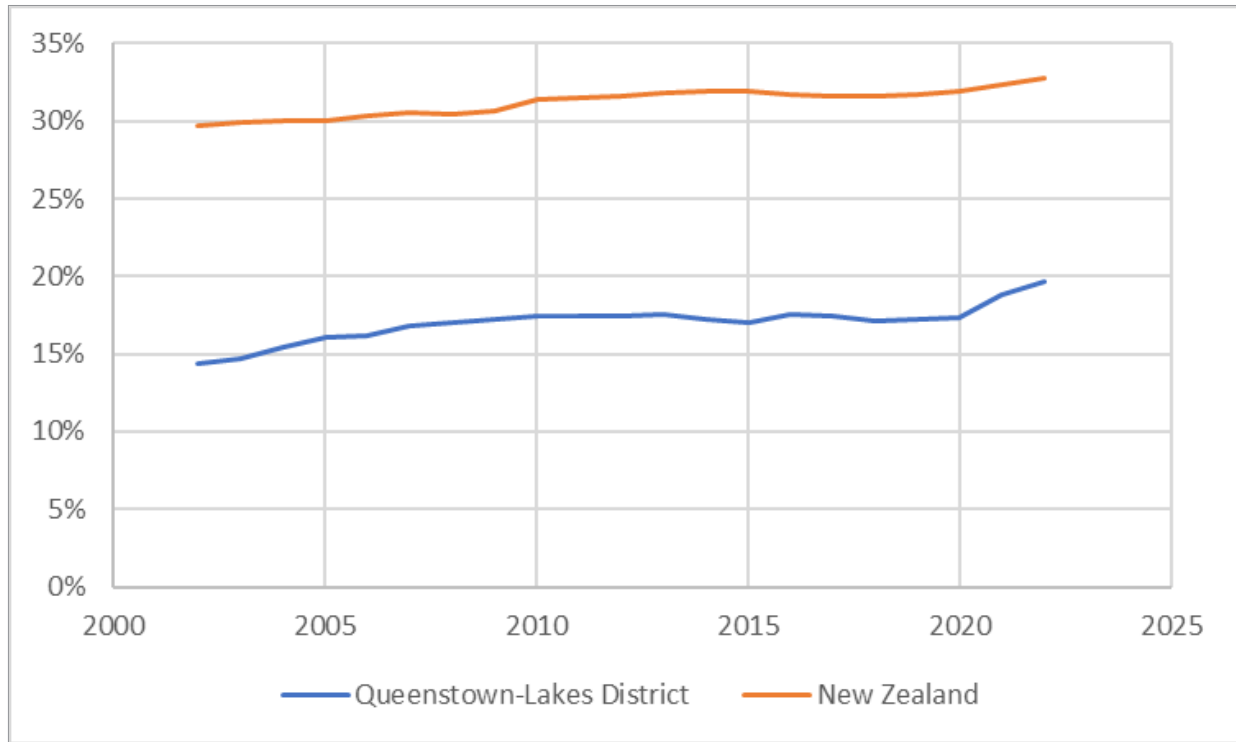


Figure 3.10 shows employment for tourism in the context of other major sectors in the Queenstown economy (those with filled jobs). It shows that tourism is by far the largest sector, comprising 33% of employment. The next largest sector is construction with 17.6% of employment. Tourism had been growing consistently over the last 20 years (Figure 3.11) although not always faster than the national average. In 2021 the sector shrank 46% in Queenstown and over 37% nationally. It has, however, recovered strongly and grew 14% in 2022 despite the lack of international visitors during much of that year.

Figure 3.10 Tourism employment in the context of other major sectors (employment > 11500 filled jobs), QLDC vs New Zealand, 2022 (Source: Infometrics)

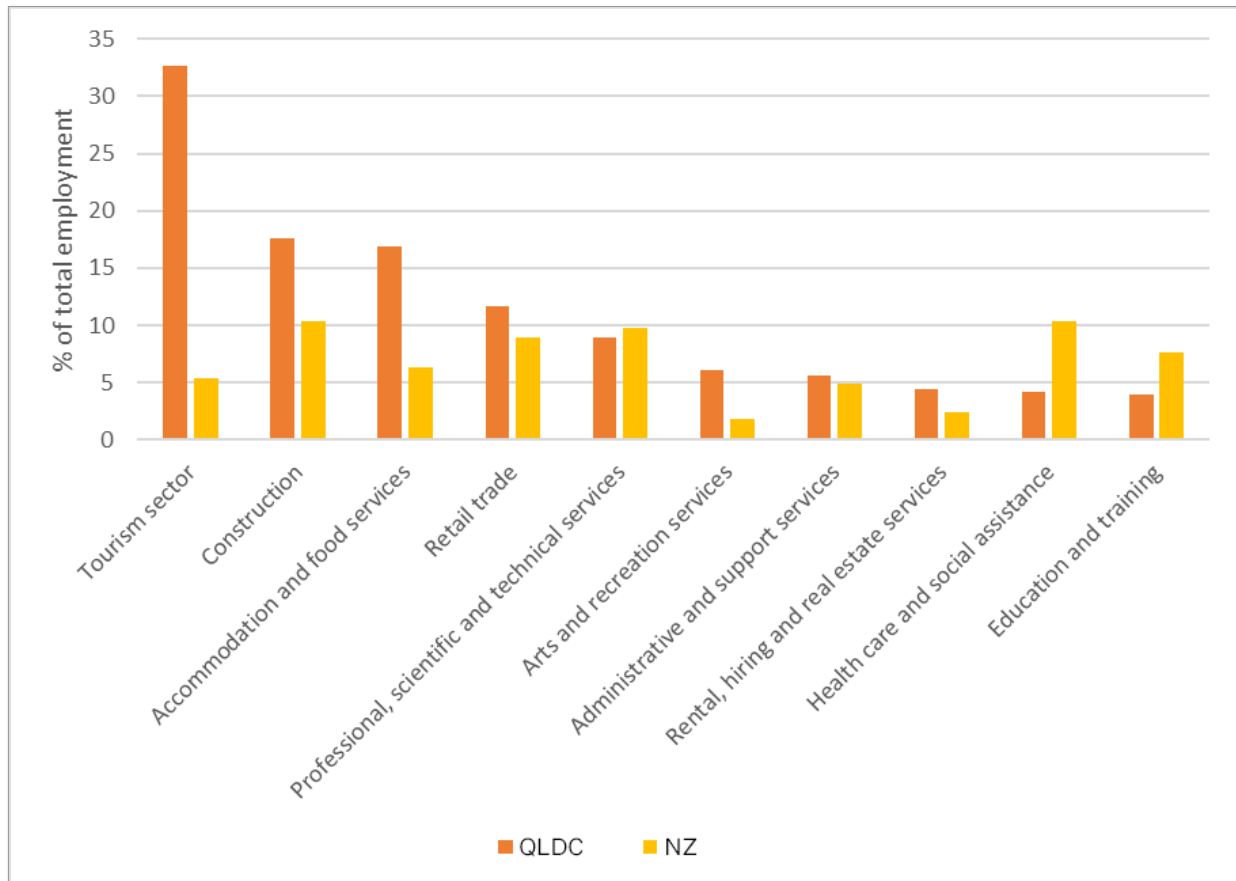
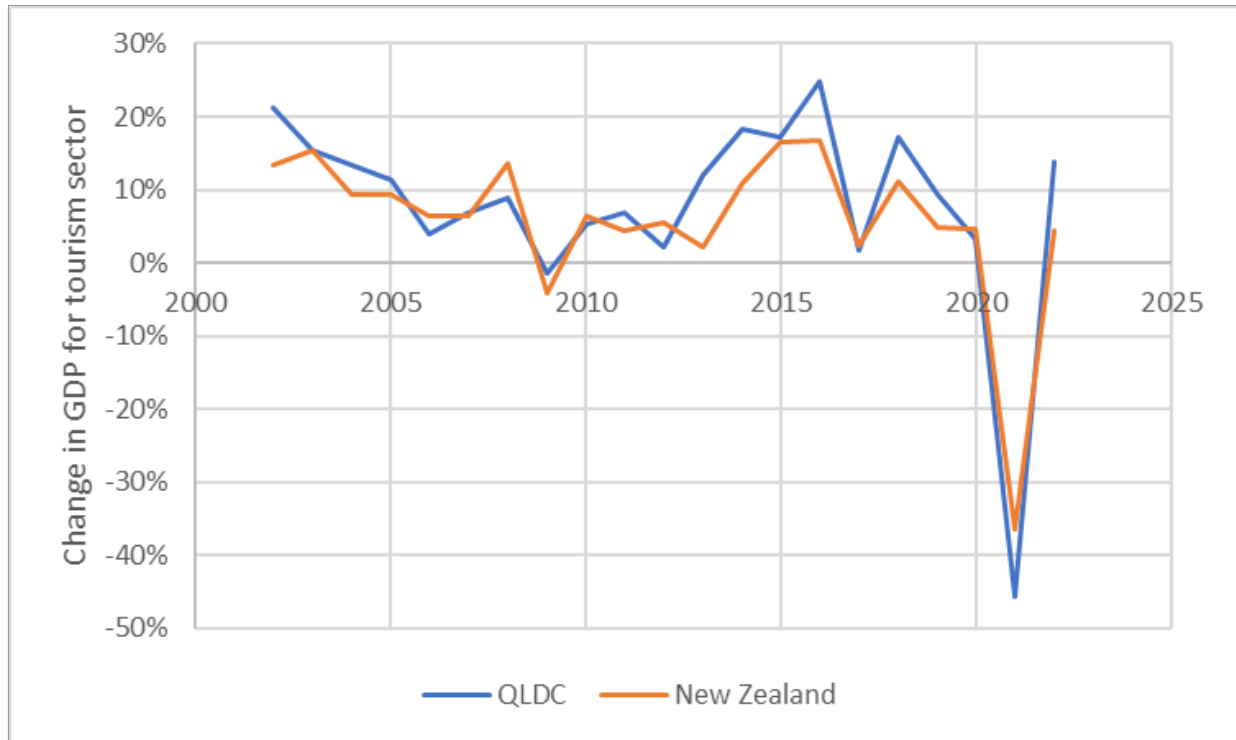


Figure 3.11 Annual change in tourism GDP, QLDC vs New Zealand, 2002–2022 (Source: Infometrics)



Workers in QLDC

Of the workers in QLDC, 32% have a bachelor’s degree or higher (25% nationally), and 8.6% had no qualification (18% nationally). The Queenstown workforce is therefore significantly more highly qualified than that of the rest of New Zealand.

Over the year prior to the 2018 census, 70% of people had not moved their residence, 21% had moved to Queenstown from elsewhere in New Zealand, and 7% had moved there from overseas. The population increase over the five years between the 2013 census and the 2018 census was 39%, so there has been strong net migration into Queenstown from 2013 to 2018. In general, the Queenstown population has been growing at an average of 5.2% over the last ten years, which is significantly faster than the country as a whole at 1.4%.

3.3 THE CASINO NEIGHBOURHOOD

3.3.1 CONTEXT

For this assessment, we have taken the locality of the Queenstown Casino to be the town centre area of Queenstown with the immediate neighbourhood being the census area (statistical area 1, number 7028171) that centres on Beach Street where the Casino is located. The boundaries of this and immediately adjacent areas are indicated on the Google Earth satellite image below (Figure 3.12). For the purposes of comparison, census data on the casino neighbourhood's "parent" suburb, Queenstown Central, as shown in Figure 3.12. In SNZ terminology, this is a statistical area 2 (SA2)¹⁷.

The Queenstown Casino lies at the heart of the hospitality and commercial area of downtown Queenstown, with its immediate neighbours being shopping malls, bars, restaurants and cafes, retail stores, offices, tourism agents, and other services in support of tourism. At least five hotels and hostels lie within 1.5km of the Casino.

A young adult traveller and blogger ("Bailey"), in writing about living in downtown Queenstown in 2022 said:

There are literally hundreds of bars and restaurants all within a few hundred meters. The food is good, really good... the bars lure you in with awesome live music and bar food deals... Queenstown is full of backpackers who work in hospitality and party when they are off as well as rich tourists here on a short holiday. And for some reason, the combination of the two out partying makes for a wild and fun night for people from all corners of the globe. (2022: <https://destinationlesstravel.com/living-in-queenstown/>)

Colliers, a local real estate agent, describes Queenstown thus:

The town centre has extremely sought-after housing. There's ample property within walking distance of town, with residences ranging from luxury apartments to family homes on high-value land, and rental properties often occupied by multiple tenants. (Colliers, 2023, op. cit.)

¹⁷ SA2s "are functional areas that represent a community that interacts together socially and economically. They often align with Suburb and Locality boundaries." (SNZ 2023).

The following sections provide a socio-demographic profile of those who were residing in the Casino neighbourhood in 2018 based on the census. The character of that population is presented in comparison with the parent suburb, Queenstown Central, the wider local government district of Queenstown Lakes District, and Otago region as a whole. Unless otherwise indicated, all data comes from SNZ published tables and was accessed from the SNZ website in 2023.

Figure 3.12: The Casino location and adjacent SA1 census areas of downtown Queenstown



Figure 3.13: Queenstown Central suburb boundaries



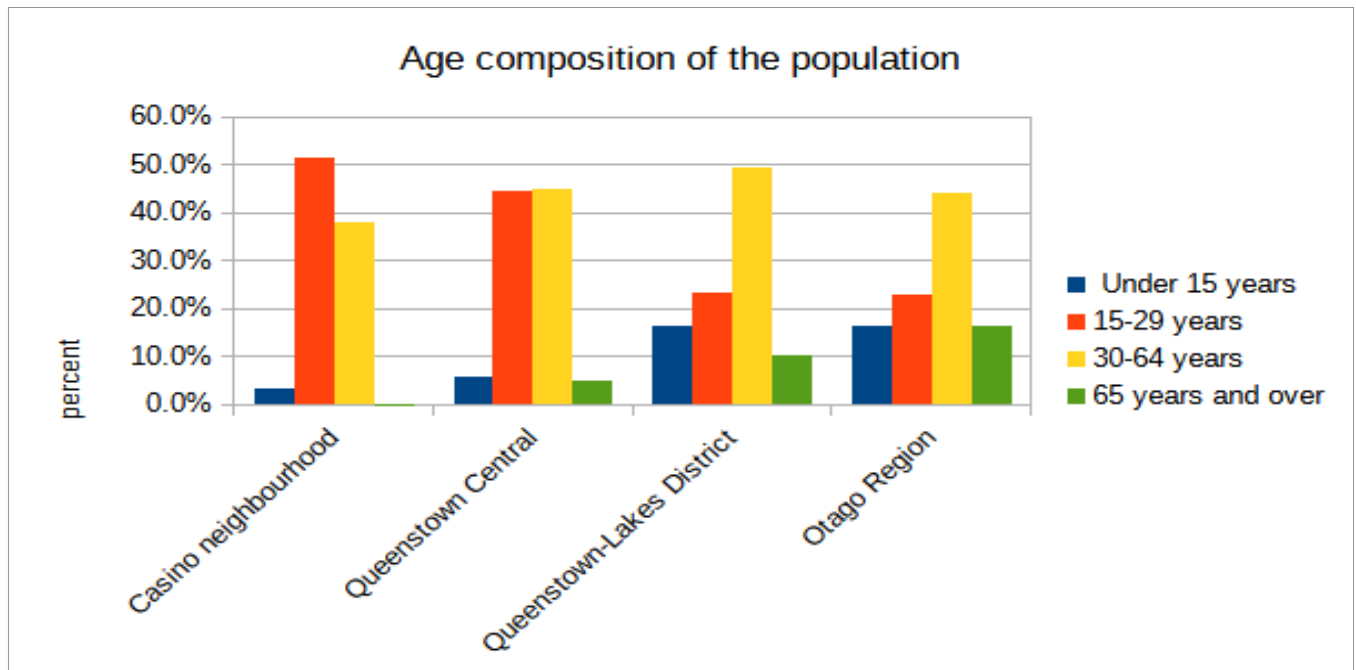
3.3.2 POPULATION

In 2018, there were 87 people living in the neighbourhood of the Casino, made up of 54 males (62%) and 33 females (38%). In downtown Queenstown (the Queenstown Central statistical area) there were 1,017 residents, 52% of them males and 48% females. On census night itself, there were 225 people staying in the Casino neighbourhood, and 3,567 in Queenstown Central, essentially two visitors for every resident.

The usual residents of the Casino neighbourhood and the downtown area are noticeably younger than elsewhere in the district and the region. For example, in 2018 the median age of residents of the Casino neighbourhood was 28, compared with 30 for the downtown area, 34 for the wider district, and 38 for Otago region. The residents of the Casino neighbourhood have also been getting younger on average, with the median age down from 30 in 2006 and 2013.

In 2018, there were no children (aged under 15) and no one aged 60 or over living in the Casino neighbourhood, with the vast majority of the residents being males in their 20s and 30s (Figure 3.14). The pattern is similar across Queenstown Central suburb although there are more middle-aged people than in the strict Casino precinct.

Figure 3.14: Age composition



The Casino neighbourhood, like the inner city, therefore has a relatively low number of usual residents, and they are typically young adults without children—confirming that the area is business/commerce focused rather than residential.

Residential mobility

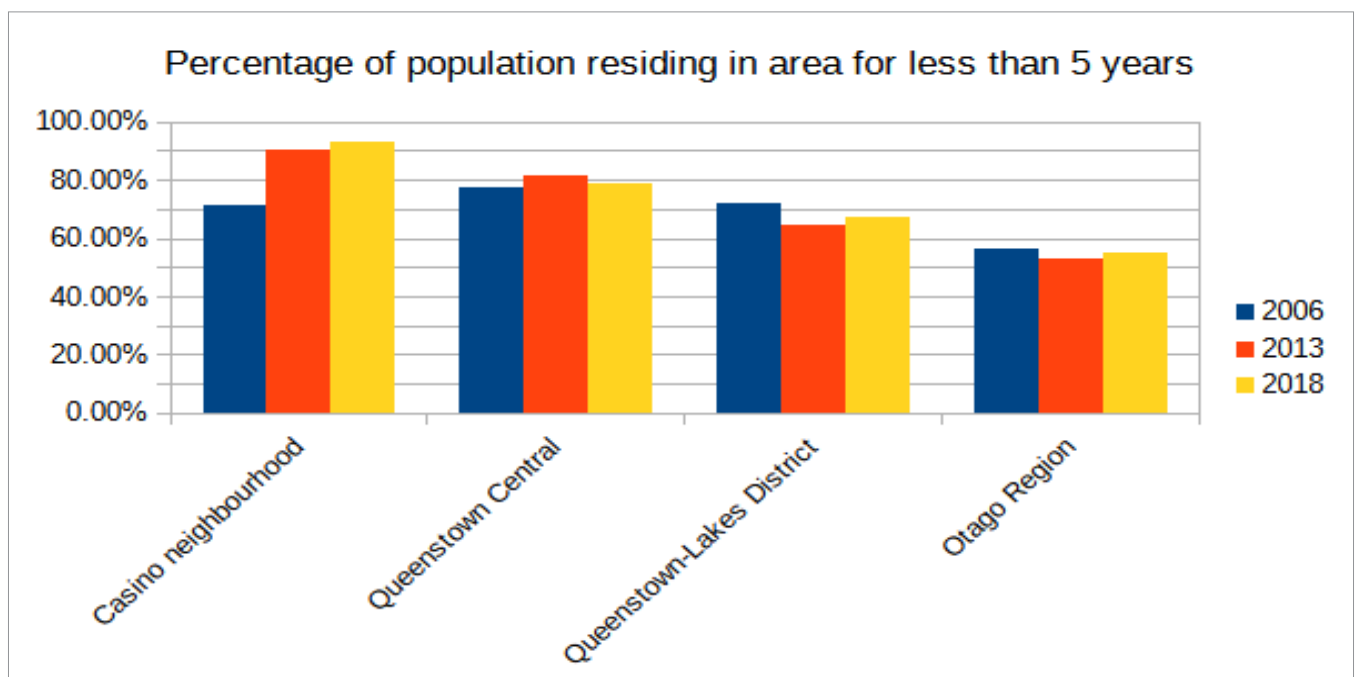
The census gathers data on how long each person has lived at their residence, as well as where their residence was one year and five years previously.

The available data show that the population of the Casino neighbourhood, which is low, is very transient. For instance, in 2013, 67% of the “usual residents” had been living there less than one year, and 27% for one to four years, with no one having been there longer. Indeed, no one was recorded as having lived in the same place five years previously, and only 12 of the 87 residents (14%) had been there one year prior. Five years previously (2013) 85% of the residents were living overseas, and one year previously (2017) 47% were living overseas—not surprising since 90% were recorded as being born outside New Zealand.

The population of the Casino neighbourhood has become more transient over the past decade, as indicated in Figure 3.15. This pattern of transience is somewhat evident in Queenstown Central generally, though less marked than in the Casino neighbourhood. In Queenstown Central in 2018, 38% of residents had lived at their address for less than a year and 41% for one to four years—together making a higher percentage of short-to-medium-term residents than found in the wider district and region. So, while Queenstown Central also had a comparatively transient population in 2018, it retained some longer-term “permanent” residents.

In both instances, the population is dominated by young people who were born overseas, the majority having arrived in Queenstown in the previous five years.

Figure 3.15: Percentage of population residing in area for less than five years



No census data on birthplace are available for the residents of the Casino neighbourhood, but are available for the SA2s, including Queenstown Central. Of the residents in this area in 2018, 82% had been born overseas compared with 41% of those in Queenstown Lakes and 22% in the whole of Otago.

The picture is that, compared with the region's and district's populations, those living in downtown Queenstown, including the Casino neighbourhood, can be described in this way.

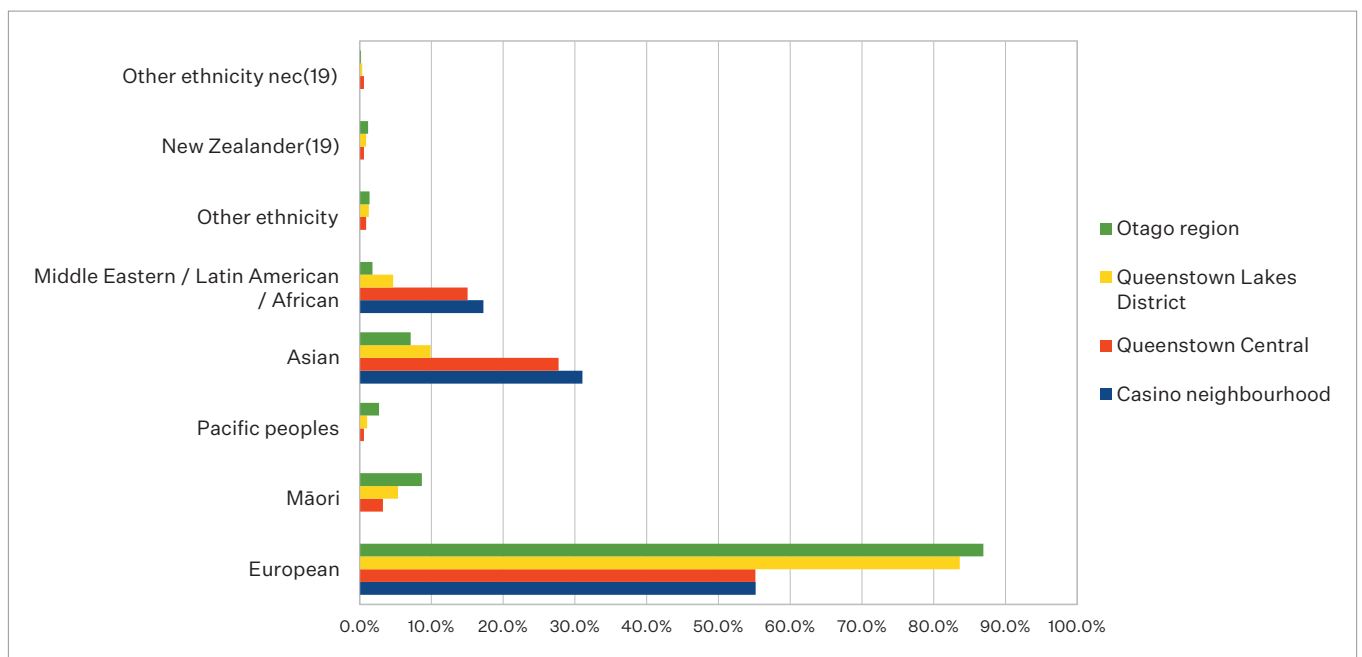
- Most are short-term residents.
- The majority are males in their 20s and 30s.
- They have come to New Zealand within the past 2 years, mostly from Europe.
- They moved to Queenstown to play and work as part of an extended holiday,
- They will move elsewhere within a year or two.

Together, these data imply that the Casino neighbourhood is unlikely to have an enduring community of place, and that Queenstown's residents, in addition to the presence of international and domestic tourists and domestic seasonal holiday makers, are accustomed to having young people moving in and out of the area seeking work and accommodation.

Ethnicity

The census data on ethnicity of the usual resident population indicate that the Casino neighbourhood and Queenstown Central are more ethnically diverse than elsewhere in the district and the region, with 55% of the residents being of European ethnicity, 30% Asian, and 16% other (Figure 3.16). But there were no or few Māori or Pacific people resident in the Casino neighbourhood in 2018.

Figure 3.16: Ethnicity of usually resident population 2018



Families and households

For the 2018 census, 56% of the Casino neighbourhood residents and 47% of the Queenstown Central residents were either unwilling to provide information on their relationship status or the data were otherwise unavailable. This percentage of non-response is much lower for the district as a whole and Otago region (22% and 14% respectively).

Nevertheless, the available data show that among those in the Casino neighbourhood for whom the information was available, 92% had never been married or in a civil union or were unpartnered. This compares with 51% unpartnered in Queenstown Central, 32% in Queenstown Lakes District, and 40% across the Otago region.

Among the 30 or so female residents aged 15 or over in the Casino neighbourhood, almost none (81%) in 2018 had children. Similarly in Queenstown Central there were relatively few women with children (30%) compared with the wider district's and region's women (43% and 36% with children respectively). These findings are consistent with the age profile of the respective populations, and especially the Casino neighbourhood, where there were no children recorded in 2018.

Education

2018 Census data on educational attainment of the residents of the Casino neighbourhood and Queenstown Central generally is incomplete, with data available for 59% and 63% of the usual residents respectively.

The available data show that while a high proportion had an overseas secondary school qualification, the Casino neighbourhood residents are less qualified than others: in 2018, 25% of the residents had a tertiary diploma, degree, or post graduate qualification, compared with 46%, 45%, and 33% of those in Queenstown Central, the wider district, and the region respectively.

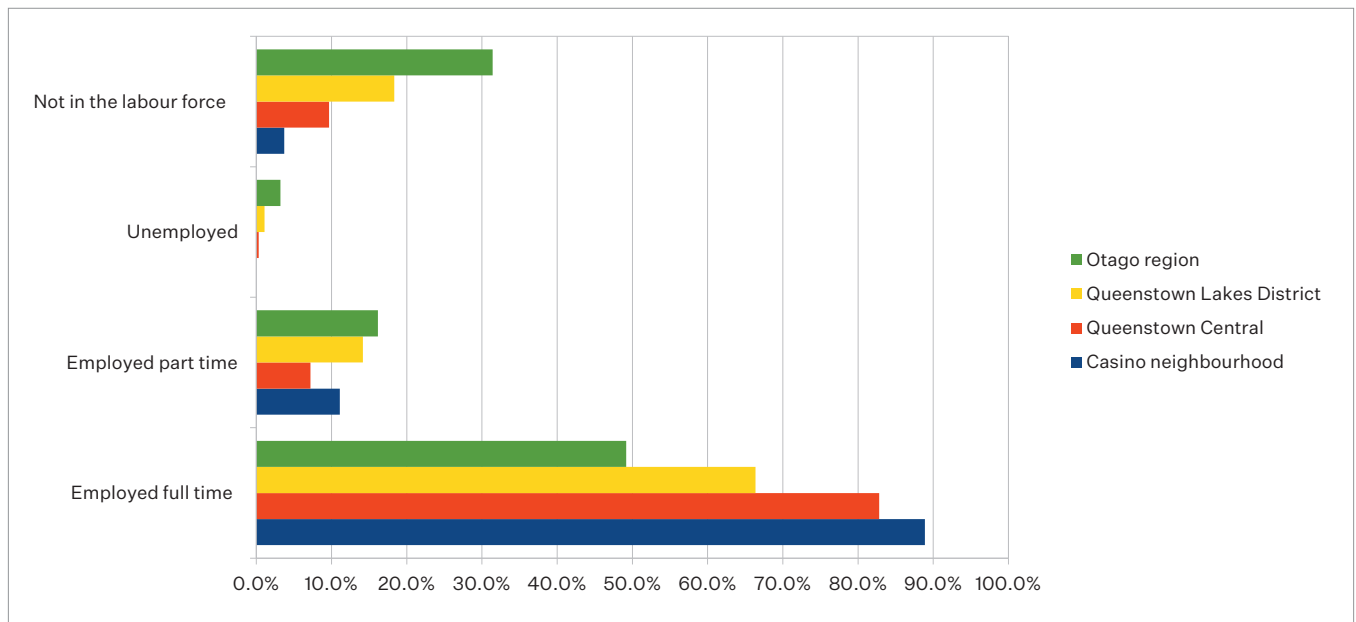
At the time of the 2018 census, 14% of Casino neighbourhood residents aged 15 and over were in full- or part-time study, though there is no information on which institutions were involved. The Southern Institute of Technology (Queenstown Campus) and the Queenstown Resort College are known to offer tertiary-level hospitality and tourism-related certificate courses in Queenstown, which some of the downtown residents were attending in 2018. Elsewhere in the district 18% were in study at the time of the 2018 census.

3.3.3 EMPLOYMENT PATTERNS

The 2018 census data on the labour force status of the residents of the Casino neighbourhood indicates that, of the population (all of whom were aged 15 or over), 89% were in full-time employment and almost all the rest in part-time employment (Figure 3.17). Almost no one was recorded as not in the labour force. The situation in Queenstown Central suburb was similar, with 83% of the 960 people aged 15 and over in full-time employment and 7% in part-time employment, and the remainder not in the labour force (for example, studying). In both downtown areas, almost all were working as paid employees, with only one or two residents recorded as self-employed.

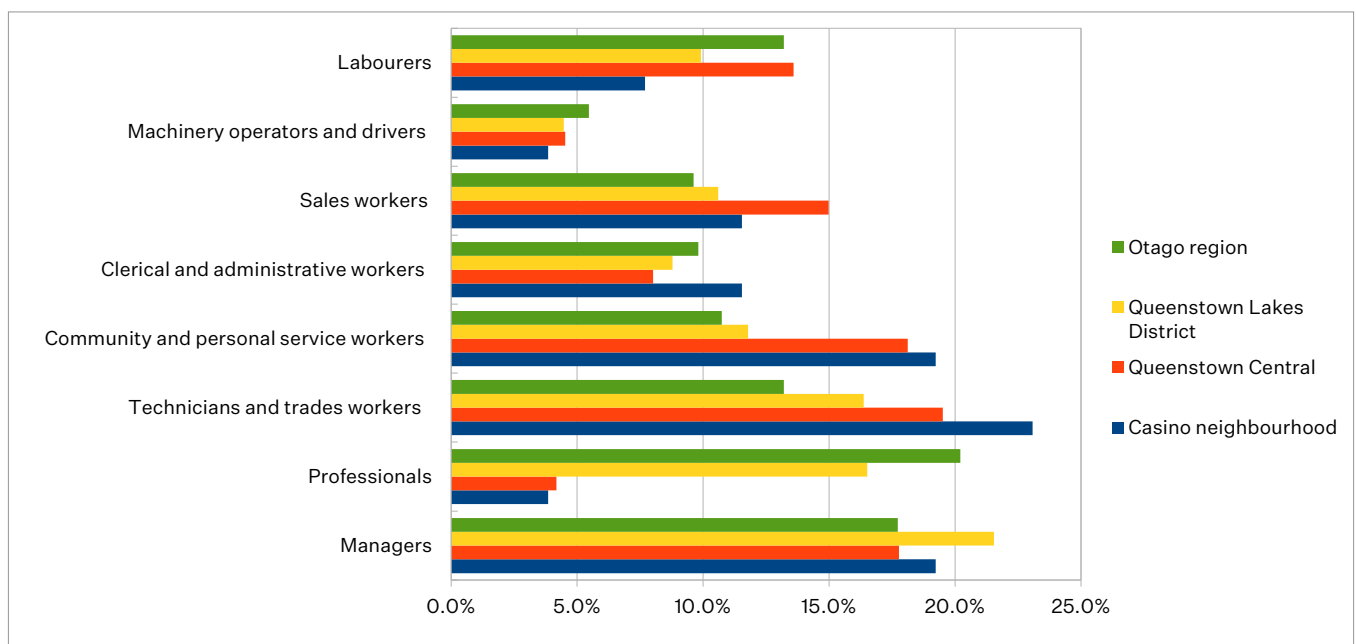
The Queenstown situation contrasts with that in the wider Queenstown Lakes District and the region as a whole, where, 66% and 49% respectively were full-time workers and 14% and 16% part time. The district had a higher-than-average percentage of working people who were employers or self-employed: 22% compared with 17%. The census data reinforce the picture that the Casino neighbourhood is populated, albeit sparsely, by young adults on extended international working holidays, or studying locally.

Figure 3.17: Labour force status of resident population 2018



As noted, all of the residents of the Casino neighbourhood were in the labour force in 2018, and they tended to be working mostly as community and personal services workers, and technical services and trades workers compared with residents of Queenstown Lakes District and Otago Region (Figure 3.18). There were also few professionals and blue-collar workers living in the neighbourhood. Queenstown Central was similar, except it had higher proportions of sales and blue-collar workers.

Figure 3.18: Occupational profiles

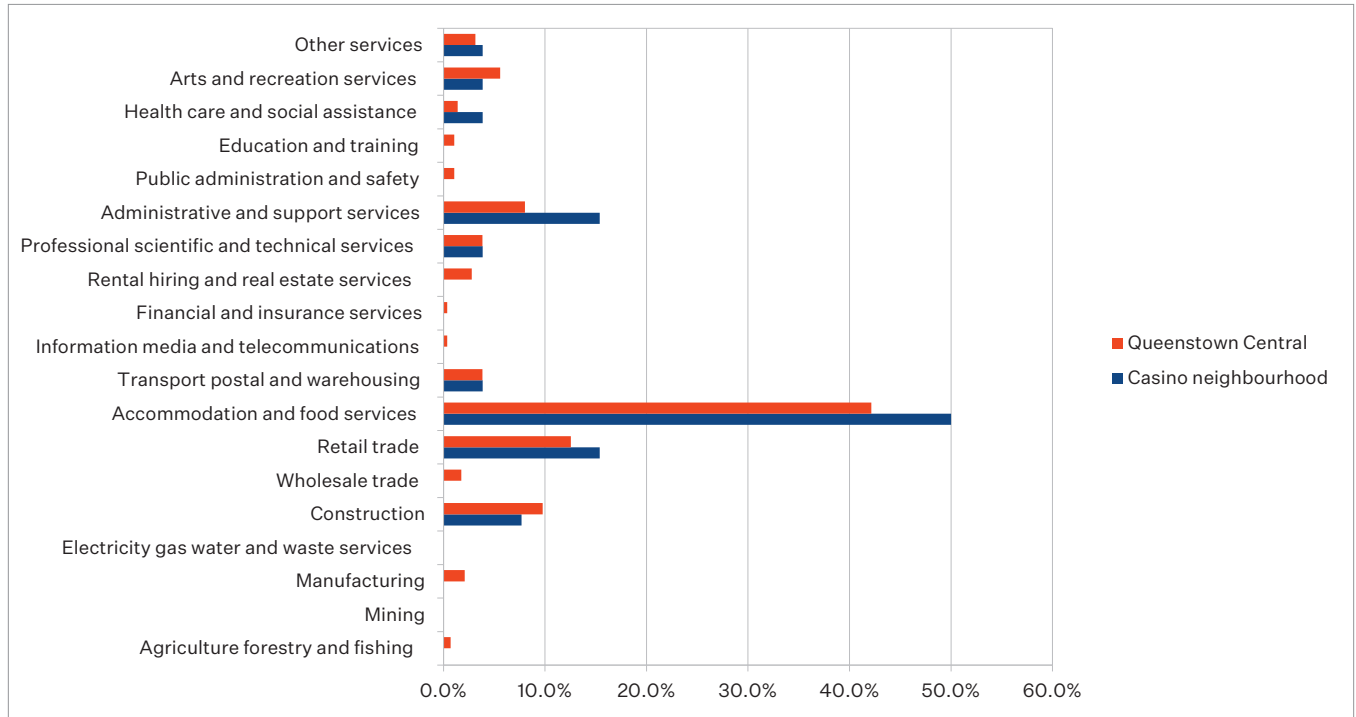


The working residents of the Casino neighbourhood and more generally Queenstown Central work mainly in the accommodation and food services sector, accounting for 50% and 42% of workers respectively, compared with 10% regionally. Next is administrative and support services and retail trade, which together account for 31% of the Casino neighbourhood’s residents’ jobs.

The census also recorded the occupations of those who worked in the Casino neighbourhood and Queenstown Central but did not necessarily live there. In 2018, vastly more people worked in the Casino neighbourhood and Queenstown Central than lived there: 1,614 versus 81, and 4,092 versus 960.

While all occupational groups are represented among those who work in Queenstown Central and the Casino neighbourhood, as expected for a commercial, tourism and service hub, the area has high proportions of sales workers, clerical and administrative workers, and service workers.

Figure 3.19: Sector of employment



The census data on place of work by industry of employment reflects the Casino neighbourhood’s and Queenstown Central’s role as the service, commercial and hospitality hub for Central Otago, with accommodation and food services being the dominant sector of employment (providing 1,500 such jobs in Queenstown Central – 380 in the Casino neighbourhood alone), followed by retail trade, and arts and recreation.

The 2018 census provides data on the amount and source of personal incomes of the usual residents. At the time, those living in the Casino neighbourhood had above average incomes for Otago but below average for Queenstown Lakes District, primarily because very few (4%) were on high annual incomes of \$70,000 p.a. or more, while comparatively few (18%) were on low incomes (under \$20,000).

The Casino neighbourhood residents’ incomes were lower than their immediate Queenstown Central neighbours, with median annual incomes respectively \$31,900 and \$34,300. The median annual income for Queenstown Lakes District residents was \$40,600.

Almost all the Casino neighbourhood residents (96%) were receiving wages and salaries paid by an employer, followed by ACC or equivalent payments (11%), and self-employment income (7.4%), with very few in receipt of a government benefit or income support. The pattern is similar for Queenstown Central, but quite different from the rest of Otago where 63% were in receipt of wages and salaries, 16% receiving income from self-employment, 18% from investments and dividends, and 19% receiving National Superannuation or similar. Queenstown Lakes is distinguished by its high proportion of residents earning income from self-employment or a business, and investments.

3.3.4 HOUSING AND LIVING PATTERNS

There are limited published data on accommodation and housing from the 2018 census for the Casino neighbourhood. However, data are available on the housing in the Queenstown Central suburb.

It indicates that in 2018 there were 354 occupied dwellings of which 285 were private dwellings (59% being separate houses) and 69 were non-private dwellings. Compared with the district and the region, Queenstown Central had twice the proportion of joined dwellings (i.e., apartments) and a high proportion of non-private dwellings. Local occupied private dwellings were typically small in size, with an average of 2.3 bedrooms compared with 2.7 elsewhere in Queenstown Lakes District.

In addition to the occupied dwellings, Queenstown Central had approximately 156 unoccupied dwellings in 2018, representing approximately 30% of all housing stock. These were mostly likely holiday homes. In Queenstown Lakes District as a whole, 28% of dwellings were unoccupied at the time of the census. The census data suggest that the quality of accommodation in Queenstown Central is of comparatively low standard, with 28% of private dwellings being recorded as damp and 22% having internal mould, compared with 9% and 6% respectively in the wider district, and 17% and 12% across the region's homes.

Census data on households says that in 2018 there were approximately 12 households living in private dwellings in the Casino neighbourhood, similar to the situation in 2013, and all of them were rented. In Queenstown Central, 81% of households were in rented accommodation, while across the district, only 37% were renting. Of the Queenstown Central households, 88% had at least one motor vehicle, and they had a similar level of access to the internet as households across Otago but had a lower access to mobile telephones.

Section 4

Economic Impacts

4.1 EXPENDITURE

The Casino spent an average of \$3.36 million per annum with suppliers in the period 2020 to 2023, (\$2.98 million in 2020 to \$3.89 million in 2023) (excluding wages and salaries). Covid had some effect in the 2021 year due to lockdowns, mainly in terms of a reduction in staff.

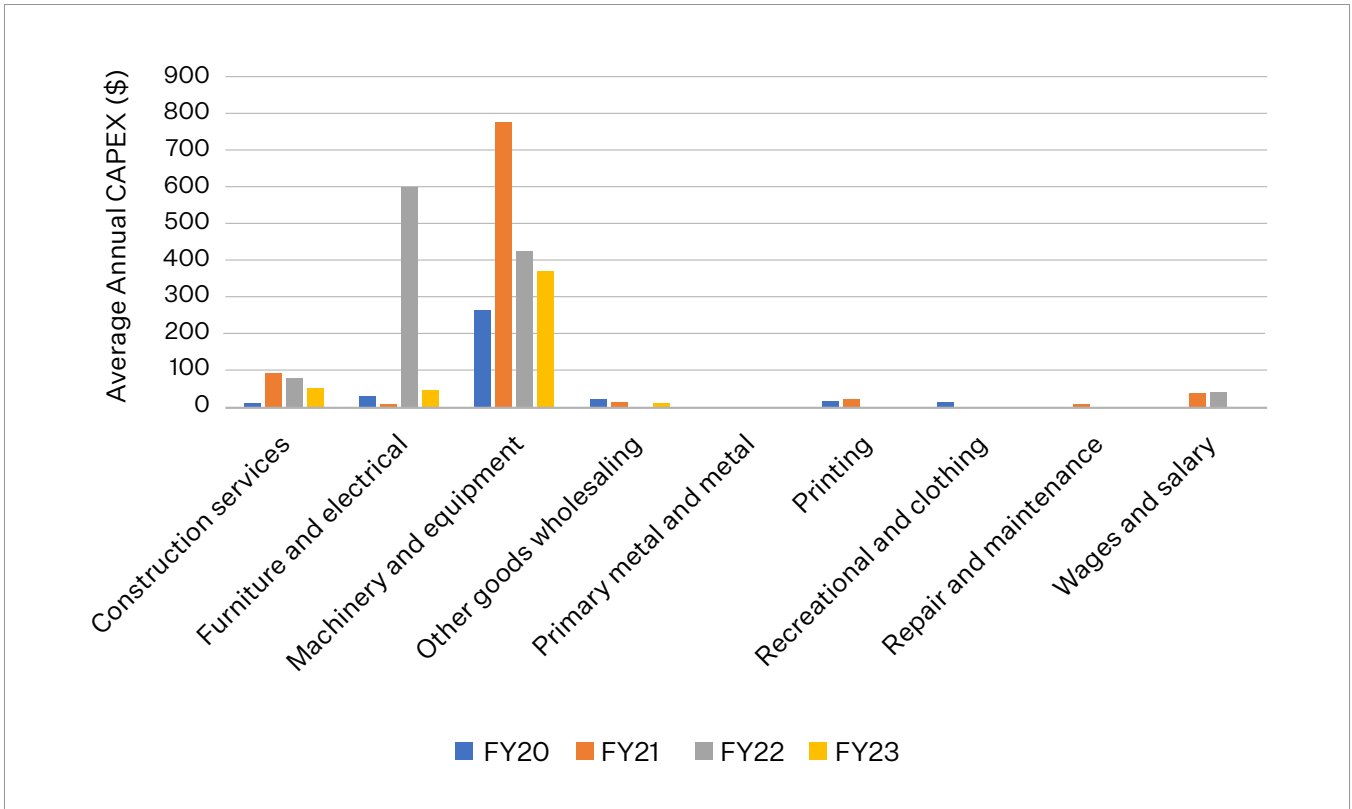
Of this \$3.36 million, 41% was spent in Queenstown, 4% in the rest of Otago, and 54% elsewhere (including some overseas). The largest categories of expenditure in Queenstown, not including charitable disbursements, were on rates (7%), lease costs (22%) and the grocery, liquor, and tobacco product wholesaling sector (14%). The latter sector is largely associated with the Casino's food and beverage activities. Of the expenditure outside Queenstown, the largest (>10%) sector of expenditure is payments to government, including the problem gambling levy, which comprises 24% of total spending. Expenditure on grocery, liquor, and tobacco product wholesaling sector outside of Queenstown is also 14% of total expenditure.

We spoke to major suppliers¹⁸ in Queenstown in the food and beverage wholesaling sector and media/printing sector about the contribution of the Casino. For these entities the Casino was regarded as a medium-sized account which was important but not critical to their business.

In addition, the Casino has an annual capital expenditure budget (Figure 4.1). This capital expenditure over the last four years includes maintenance on the Casino and its equipment, and an occasional upgrade of the facilities. From 2020 to 2023 capital expenditure averaged \$0.73 million per annum, with \$0.015 million (2%) in Queenstown and \$0.6 million elsewhere in New Zealand. A small amount of this expenditure in Queenstown is on construction services but most is in the furniture, electrical, and hardware retailing sector. The largest expenditure items over the last four years have been for machinery and gaming equipment, much of which is purchased from overseas.

¹⁸ Four clients with >\$15,000 annual purchases by the Casino. Some other smaller suppliers were also interviewed.

Figure 4.1: Capital expenditure profile, Queenstown Casino 2020 to 2023



4.2 EMPLOYMENT

As at the end of FY23 the Casino had a payroll of 53 (4X FTE) (Table 4.1), which is a decrease from pre-Covid staffing levels of 71 (FY20). The total expenditure on salaries and wages, superannuation, life insurance, medical benefits, training, ACC levies, meals, welfare assistance, and other staff expenses has averaged \$3.77 million over the FY20 to FY23 period.

Table 4.1: Staff numbers and FTE, Queenstown Casino

Year	Staff numbers	FTE
FY20	71	32.63
FY21	57	43.62
FY22	48	37.42
FY23	53	43
Average FY20 to 23	57	39 ¹⁹

The median earnings from the staff survey at the Casino is in the \$45-\$60,000 category (see Table 4.2), which is similar to the median earnings for Otago (\$52,000 in FY21). The average earnings of \$81,000²⁰ for the Casino is higher than the average earnings for Otago of \$65,000.²¹ The Casino management reports that staff earnings are higher now due to an increase in the April 2023 wage negotiations.

¹⁹ The number of FTEs reported here differs from the 45 used in the modelling. For the modelling we used the average expenditure on wages and salaries for the four-year period, divided by the average of the wages and salaries per FTE for the FY21 to FY23 period. The FTEs reported by the casino in FY20 seem too low to be realistic for a representation of the long-term future performance of the casino, as they result in an expenditure of \$125,000 on wages and salaries per FTE.

²⁰ Note that because of an increasing headcount through the year not all employees were employed for the whole year. Queenstown Casino analysed the wages and salaries per FTE worked for the last four months of FY23 which resulted in a figure of \$70,800. We have used \$81,000 of HHI per FTE in this analysis because we have included some other wages and salary items.

²¹ StatsNZ Infoshare LEED data, Otago region, mean earnings all categories, Q2 of 2022.

Table 4.2: Employees by income category, Queenstown Casino (source: Staff Survey, 2023)

Income band	Number of Queenstown Casino employees	Proportion of Queenstown Casino employees
\$15,001 to \$30,000	3	11%
\$30,001 to \$45,000	3	11%
\$45,001 to \$60,000	9	32%
\$60,001 to \$75,000	1	4%
\$75,001 to \$100,000	4	14%
\$100,001 to \$150,000	1	4%
Over \$150,001	0	0%
Prefer not to say	7	25%
Total	28	100%

All staff interviewed for this project spoke well of the Casino as an employer, (although this should not be taken as an unbiased response because of the potential for both selection and response bias in the survey responses). However, the employment profile in the higher income brackets has been very stable: 84% of employees with incomes above \$30,000 who responded to the survey had been employed at the casino for more than three years.

4.3 GAMBLING TRUST DISTRIBUTIONS & SPONSORSHIPS

4.3.1 THE CASINO CHARITABLE TRUST

Established in accordance with Queenstown Casinos Limited’s casino venue licence, the SkyCity Queenstown Casino Community Trust (the Casino Trust) has distributed over **\$2.37 million** to more than **680** charitable organisations, both large and small, that have undertaken community assistance and development work in the Queenstown Lakes District. Analysis of the donations received shows that the Trust disburses an average of \$144,000 per financial year, and of this 94% is to organisations located in Queenstown Lakes, and the remainder to elsewhere in New Zealand as part of SkyCity group national Community Trust initiatives.²²

Table 4.3: Charitable donations by location from Sky City Queenstown Casino Community Trust

Year	Queenstown (\$000 disbursed)	Elsewhere (\$000 disbursed)	Total (\$000 disbursed)
2020	\$114	\$13	\$127
2021	\$115	\$0	\$115
2022	\$166	\$12	\$178
2023	\$147	\$10	\$157
Average	\$138	\$6	\$144
Proportion	94%	6%	100%

In 2019, the Casino Trust’s Board undertook a review which found that they were in a strong position to have a greater impact with its funding. The Casino Trust adjusted its strategic priorities. Trustees were appointed to deliver a funding framework which has now been adopted with the aim to support communities to realise their potential.

Table 4.4: Trust Funding Recipients, FY23

Organisation	Total allocated	Applicant primary town/city
Whakatipu Youth Trust	\$17,480.00	Queenstown
Kahu Youth Trust	\$20,480.00	Wānaka
Head Light Trust	\$25,000.00	Queenstown
Alpine Community Development Trust operating as Community Networks/LINK	\$30,000.00	Wānaka

²² Every year before 2014 less than \$100k was distributed annually.

Casino Trust Round 2

Organisation name	Total Allocated	Applicant Primary Town/City
RockFormation Charitable Trust	\$2,249.00	Queenstown
Queenstown Harvest Community Gardens	\$3,000.00	Queenstown
Miharo Murihiku Trust	\$10,000.00	Southland
Kiwi Kit Community Trust	\$20,000.00	Arrowtown
Mint Charitable Trust	\$28,367.00	Wānaka

Table 4.5: Trust Funding Recipients, FY22

Grant Round	Organisation	Decision	Total allocated	Applicant primary town/city
FY22 SQCT Open round	Mint Charitable Trust	Approved	\$28,600.00	Wānaka
FY22 SQCT Open round	Te Kakano Aotearoa Trust	Approved	\$5,000.00	Wānaka
FY22 SQCT Open round	Arasan NZ Foundation Trust	Approved	\$3,000.00	Dunedin
FY22 SQCT Open round	The Kiwi Kit Community Trust	Approved	\$15,000.00	Arrowtown
FY22 SQCT Open round	Citizens Advice Bureau Queenstown	Approved	\$4,200.00	Queenstown
FY22 SQCT Open round	Queenstown Lakes Baby Box Charitable Trust	Approved	\$5,200.00	Queenstown
FY22 SQCT Open round	Queenstown Harvest Gardens	Approved	\$4,000.00	Queenstown
FY22 SQCT Open round	Te Atamira Whakatipu Community Trust	Approved	\$9,200.00	Queenstown
FY22 SQCT Open round	Snow Sports NZ Inc	Approved	\$3,000.00	Wānaka
FY22 SQCT Closed round	Happiness House Trust	Approved	\$24,250.00	Queenstown
FY22 SQCT Closed round	Alpine Community Development Trust operating as Community Networks Wanaka	Approved	\$30,000.00	Wānaka
FY22 SQCT Closed round	Kahu Youth Trust	Approved	\$25,000.00	Wānaka
FY22 SQCT Closed round	Whakatipu Youth Trust	Approved	\$13,000.00	Queenstown
FY22 SQCT Closed round	VOYCE Whakarongo Mai	Approved	\$8,550.00	Christchurch

When interviewed for this impact assessment, the Chair of the Casino Trust noted that the Casino Trust's priorities had shifted to a greater emphasis on mental health and on the impact of grants. This means fewer grants are made but they are more substantial.²³

The Casino Trust does not fund any:

- building projects;
- business or investment capital;
- core health-related services;
- costs related to fundraising activities and organisations;
- individuals;
- loan and endowment funds;
- loans to retire debt;
- mainstream sport and recreational activities;
- mainstream education providers that deliver core education-pre-school, primary, intermediate, secondary and tertiary;
- operating costs (unless they are part of broader project being considered);
- overseas travel for individuals or groups;
- projects that are the responsibility of local Government;
- projects where the benefits are outside of the Queenstown Lakes District;
- retrospective activities;
- scholarships or sponsorships;
- travel costs (unless they are part of broader project being considered).

While the criteria for funding are clear, the focus of the Trust is on building relationships with the organisations receiving grants. The Trust is trying to focus funding on the areas of greatest needs in the Queenstown Lakes District.

The Chair of the Casino Trust described the Casino as “fantastic” to deal with and noted that the Casino provided the Trust “a huge amount of support” that went beyond funding. For instance, the relationships the Casino has locally “are critical” to the functioning of the Casino Trust. Also, the Casino works with applicants to ensure they produce a high quality application, which “makes our job [at the Trust] much easier”. The Casino does all the administration and paperwork for the Trust.

²³ The Covid-19 pandemic played a role in this change of focus, and especially the emphasis on youth mental health.

Similarly, the grant recipients consulted for this impact assessment highly value the support they receive from the Casino Trust. These recipients are reliant on external funding sources to support their initiatives. These funds are crucial for programme development, implementation, and expansion, allowing them to reach a broader audience and offer more comprehensive services. They provide opportunities for youth, including skill-building, learning, and personal development to enhance self-esteem, confidence, and overall wellbeing.

The grants received from the Casino Trust have enabled these organisations to develop programmes and services that address specific community needs. As the case studies below demonstrate, the grants enabled:

- **Kahu Youth Trust** to introduce a project focused on youth wellness and mental health, including sessions with psychologists and workbooks;
- **Te Kakano Aotearoa Trust** to launch the “Educate for Nature” programme to educate children about native habitat restoration; and
- **Whakatipu Youth Trust** to expand its services to include clinical support for youth with more intense needs.

The recipients expressed gratitude for the Casino Trust grants that have helped them establish and expand their programmes. And they also acknowledge that without this funding, they might struggle to secure alternative financial support, which could affect the sustainability and scope of their initiatives.

This does not mean that these grant recipients do not have mixed feelings about receiving funding from gambling activities. The recipients consulted for this project made these comments about the conflict.

- They could see the positive impact the funding has on their organisations and the community. In some instances, the grants may help with work that may counter potential negative impacts of gambling in the longer term.
- They highlighted the positive contributions of the Casino to the community. The Casino and its Trust support various community groups while also providing entertainment and recreational activities.
- The organisations have positive experiences in their interactions with the Trust's grant team.
- The Casino's support can extend beyond funding, as they also provide opportunities for media exposure, helping the organisations raise their profiles and engage with the local community.

4.3.1.A GRANT CASE STUDY 1: KAHU YOUTH TRUST²⁴

The Kahu Youth Trust engages with Upper Clutha youth by involving them in fun, productive, learning activities and programmes so they can connect to the wider community and continue to expand life skills, increase self-esteem, and build confidence. They run drop-in sessions, regular term-time and school holiday programmes, and work with youth one-on-one when they need support.

A representative from Kahu Youth interviewed for this assessment noted that one of the Casino Trust members was at their AGM and mentioned that grants were available for community groups like theirs. As a result, they made an application.

Kahu Youth was appreciative of the experienced perspective the Casino Trust's grant team gave to their application.

They didn't undercut us—as a charity you're always trying to stretch every dollar—they saw the size and complexity of this project and they said, “hey you need more”—it was amazing, and much needed.

The representative explained that Kahu Youth had needed funding to implement a new project that aimed to further support youth wellness and mental health through education and tools.

Funding a psychologist to build workbooks and run sessions with our youth—our youth workers attended these as well—so there was a wonderful outcome that also up-skilled our youth workers in the process.

When asked what they would have done without the grant, the Kahu Youth representative indicated they didn't think additional support would have been developed.

If we didn't have this funding, we wouldn't have been able to put the programme together as well... or not at all.

²⁴ The Kahu Youth Trust received \$25,000 in grants in FY22 and \$20,480 in FY23.

When asked how they felt about using funding from gambling sources, the representative was conflicted. But on reflection, they found comfort in the fact that the gambling activities are well managed.

It's a hard question... we could be helping the problem from funds that are part of the problem... gambling activities seem to be more acceptable like Lotto and SkyCity, I think as long as its managed appropriately it's ok.

And when asked if Kahu Youth saw impacts of gambling harm in their work they acknowledged that their youth didn't raise gambling harm as a particular issue they faced, but this didn't mean it wasn't there.

Being on the ground we haven't seen any real issues of gambling impact our young people... but I'm not saying it doesn't happen.

With the introduction of a hypothetical scenario—closing the Casino, the Kahu Youth representative could see a likely negative impact on their community work due to reduced funding.

If they were to close, and the funding dried up, it would have a big impact on our community. It would take money away from our community and where we need it. So, it would have a negative impact on our community in that respect.

4.3.1.B CASE STUDY 2: WHAKATIPU YOUTH TRUST²⁵

Whakatipu Youth Trust is a not-for-profit organisation that works alongside young people aged 10 to 24 to ensure rangitahi have the skills, self-worth, wellbeing, resilience, and support they need to reach their full potential. They provide mild to moderate mental health services such as counselling, and social work. Whakatipu Youth provides youth mentoring, group programmes, school holiday activities and other positive youth development opportunities throughout the Queenstown Lakes District.

Their relationship with the Casino Trust grants team spanned several years through the application process, and the subsequent support is described as vital.

I would suggest it is vital, it's fundamental, that contribution helps us so much and has allowed us to strengthen what we're doing, providing deeper and broader support in the one-to-one space with rangatahi.

In the past their services were only mentoring oriented but more recently, with the help of the grants, they have developed into clinical support, something that Whakatipu Youth believes is vital for youth with more intense needs.

We now do more in the clinical space, helping with more intense needs—this helps us do that. It's a more client-based way now.

Previously it would've been unsafe to handle the complexity without the extra expertise. Now we have the resources and clinical experts so we can do more.

Without the funding, the Whakatipu Youth representative believes the scope and quality of their services would be diminished and this would be to the detriment of the wellbeing of the youth in the area.

It would be a scramble to find the equivalent elsewhere, we could run it, but we'd probably have to peel back the current reach and potentially alter the kind of engagement we have. We wouldn't be able to get out and about as much with the clients.

²⁵ The Whakatipu Youth Trust received \$13,000 in grants in 2022 and \$17,480 in 2023.

When asked about how they felt regarding the funding coming from gambling, there was a slight tension but this was resolved with further reflection.

It's a bit of a funny one actually, it does feel like a conflict. We're educating our rangatahi about things like addiction, on the other hand we're receiving from that. I don't know where to put that actually... hopefully it enables us to do the early prevention work, so they don't get to be the people that end up playing the slots or whatever...so we can break the cycle.

Ultimately, the Whakatipu Youth representative saw some risk of harm associated with the Casino's core business, but for the wider community it tended to play a positive role with entertainment, hospitality, and community funding.

There's a negative side with the impact on community with gambling but there's also a recreational side and their funding is used to help lots of groups in the community. It has its place, there's a great restaurant and entertainment with the comedy night and sponsoring community entertainment. It does contribute on many different levels to our community in a positive way.

4.3.1.C CASE STUDY 3: TE KAKANO AOTEAROA TRUST

Te Kakano Aotearoa Trust is a community-based plant nursery in Wānaka. They have a mission to inspire community native habitat restoration through propagation, education, and hands-on participation. They aim to support communities in fostering healthy lands and waterways while creating a stronger link between the environment and humanity.

In 2022 they launched a programme called “Educate for Nature” where they work with local children, to go further with their mission.

The Te Kakano Aotearoa representative explained they had heard, that the Casino had grants available so applied. They knew, given it was a new programme, that finding the funding through other means could be challenging.

Without [the] Casino funding we would have needed to go to local businesses for sponsorship—but this is difficult—especially because the programme was new. We didn’t have evidence for how successful the programme would be which makes it harder to sell-in to local businesses.

Now they know the programme is working well, and have established relationships with schools, it has been easier to secure local business sponsorship for the following year.

Te Kakano Aotearoa described their experience with the Casino Trust as a positive one.

Our experience with the Casino was easy and straight forward. They’re not very demanding, we’re an organisation with limited resources, so it’s great.

In addition, their Casino contacts also helped them build awareness locally through a local media channel.

They contacted us to write an article for the magazine for the council, this was great as helped us build our profile.

Te Kakano Aotearoa knew they could have promoted their programme to the Casino staff too, but because it was tailored to children they felt it wasn’t appropriate to get their involvement in that way.

The Te Kakano Aotearoa representative expressed gratitude toward the Casino Trust for its help in getting their programme operational, and on behalf of many other charities they know need the support.

We are really grateful for the support because we may not have been able to establish the programme without it

And

A lot of people get money from the fund so if the casino was to close a lot of charities would lose financial support..., they'd have to try and find it someplace else, and it's not easy to get money.

4.3.2 THE CASINO'S SPONSORSHIPS

In addition, the Casino contributes another \$44,000 per annum to organisations directly as sponsorship. For the four years before this assessment the Casino distributed an average of \$44,500 in sponsorships (with the bulk of this, \$42,000, in cash, and the rest in-kind contributions). This has been increasing over the period of study and the dollar figures reported in the case studies below are the current (FY23) sponsorships.

For several of the recipients the sponsorship extends beyond the funding and includes promotion of the entities, and assistance through media and charity events.



4.3.2.A SPONSORSHIP CASE STUDY 1: WINTER PRIDE FESTIVAL

The partnership between Winter Pride festival and the Casino is described as fundamental to the festival's success, offering financial support, advocacy, and community engagement. The partnership's impact extends beyond financial contributions, influencing the festival's inclusiveness, community advocacy, and the region's social and economic fabric. A representative of the festival said of the Casino's sponsorship:

It's absolutely fundamental, it's critical to our model. We're 95% funded by our sponsors and our guests. So we bring in more than \$15 million a year into the economy but without their support, particularly over the last three years with Covid, they were one of our largest cash sponsors, we could have become bankrupt.... So it's that critical.

The Winter Pride Festival organisers have a strong and substantial partnership with the Casino. The partnership spans multiple businesses, including Winter Pride, Pride Pledge, and the New Zealand Rainbow Excellence Awards. The partnership started with a Winter Pride Festival pre-runner about 10 years ago, but with the current organisers it is entering its sixth year. The sponsorship has been renewed regularly, covering three-year terms—described as a rarity in festival partnerships—which enables greater financial security.

The Casino supports Winter Pride in various ways. They are a platinum sponsor, contributing around \$25,000 annually. This is in cash (\$15,000) as well as value-in-kind. They offer a conference room for Winter Pride's logistics hub and office for 12 days, free of charge. The Casino hosts five or six key events for Winter Pride, providing bar tabs and infrastructure, such as audio and sound gear, for these events.

The partnership is financially attractive to both parties, as the high-impact events yield a clear return on investment for the Casino, likened to their New Year's Eve events in terms of value. But it is not solely about the money, as the festival organisers believe the Casino's contributions are aligned with creating an authentic and inclusive atmosphere for the festival. Their support extends beyond financial contributions to advocacy and engagement. They actively use their influence to promote Winter Pride, and advocate for the festival within the local business community. Their role is pivotal in counteracting prejudice and promoting inclusivity in the small regional community.

It's a very authentic, genuine partnership that we enjoy... They're very much at the front and centre of Winter Pride... it's as much a staff and community engagement opportunity as much as it as a commercial partnership.

While Winter Pride collaborates with organisations outside of Queenstown for specific needs that can't be met locally, it aims to invest in local businesses to maintain the strong local connection. The festival's local expenses are approximately 50% of its total, contributing to the local economy and helping to maintain a social licence to operate.

We spend 50% of our expenses in Queenstown—we know that because of the work we did to ensure we were eligible for Covid funding. We've always had a strong commitment to invest in the local market, but partly that comes back to our social licence to operate.

Given the Winter Pride overall budgeted expenses (including spending value in-kind) is over \$700,000, this indicates a substantial addition to the local economy.

They have no ethical concerns about funding received from the Casino as they see it as not fundamentally different from other sponsors, as most commercial entities have ethical considerations.

They have never seen any evidence of gambling-related harm associated with the Casino's support—with the festival organisers being clear that they have not received any feedback regarding gambling harm from patrons or guests.

We've never experienced any issues with any of our patrons or guests, never had any negative feedback [regarding gambling harm]...

They see Winter Pride as playing a vital role in the local community, both economically (it is estimated to bring in \$15 million dollars annually) and socially. The activities contribute to local inclusiveness and advocacy for the Rainbow community.

They expressed that sponsorship partnerships specifically targeting the Rainbow community are limited and often underfunded. If the Casino were to close, they think Winter Pride would struggle to secure substantial support and venue options due to the scarcity of other willing and suitable partners.

There's research around philanthropy and the spend that goes into Rainbow communities' funding and for Rainbow communities it is significantly underrepresented. So, there's not a big sponsorship pie for Rainbow sponsorship.

They believe the festival's absence, if the sponsorship wasn't available, would create a large void in the annual spend in the area, as well as the Rainbow community's Australasian events calendar. It would also reduce the opportunity to build social cohesion with the more diverse elements of the local community.

4.3.2.B SPONSORSHIP CASE STUDY 2: SKYCITY STAMPEDE

The conversation with a Queenstown Stampede ice hockey team representative highlighted the importance of the Casino's sponsorship in supporting the team's operations, community engagement, and youth development efforts. The sponsorship extends beyond financial support and includes marketing assistance, branding guidance, and a sense of professionalism. Replacing such sponsorship would be challenging, given its significance in a unique community like Queenstown. The representative explained that the team's sponsorship from the Casino includes cash sponsorship and contra benefits. The team receives an annual cash amount, which is part of a three-year contract, totaling \$15,000 per year. Contra benefits include using facilities like the Casino's restaurant for fundraising events, such as an annual quiz night.

So every player fills a table, in that way they've got their family, their friends, their coworkers there. It's quite a community event for the team.

The representative explained that the Casino's sponsorship has elevated the team's professionalism and helped establish it as a community-focused organisation. The team values the relationship with the Casino and appreciates the support provided in various areas, including rebranding.

There was a real significant step up for us to have a corporate sponsor of this magnitude and it's not just the dollars it's the size of the organisation... we have marketing people available to us, and the rest. It's always been in their best interest for us to be successful, but they really took us on board and helped us move up in a level of professionalism.

They feel replacing the sponsorship from the Casino, given its significance, would be challenging, as there are limited opportunities for naming sponsors in the league. They are one of two teams in the national league of six teams that has this level of sponsorship.

The team's annual expenditure is around \$150,000, which includes various costs such as federation fees, event fees, travel expenses, and uniforms. When possible they spend locally, but this isn't always possible as the team needs to travel and their equipment often can't be sourced locally.

They explained that a core part of the team and club is its engagement with the community. The Casino-based quiz night serves as a community event, involving players, families, friends, and coworkers. They involve local businesses, often where club members work, to create the silent auctions. Games were described as a very popular entertainment option among locals and visitors alike.

A good deal of people buy tickets to games, people from Queenstown and Australia, you know, they're coming for a ski holiday and they're going to the ice hockey for fun... So it's a really good environment, it goes for three hours and they have a bar and everyone yells and screams and sings and has a great time.

Additional issues raised included the challenges Queenstown faces related to the high cost of living, housing, and the transient nature of its population. This means families often find it hard to settle in the area, making it challenging to build lasting community connections. The Sky City Stampede club environment was described as a place that supports these relationships. This included positive impacts from youth development programmes.

The discussion touched upon responsible gambling, with consideration given to the Casino's association with the team. There was no awareness of any gambling harm associated with the sponsorship.

4.3.2.C SPONSORSHIP CASE STUDY 3: QUEENSTOWN TRAILS

Queenstown Trails is a not-for-profit organisation that builds and develops bike trails in the region. A representative explained that these are considered a vital community asset, serving both local residents and tourists. They believe the trails contribute significantly to the region's economic impact, attracting bikers and walkers. The evidence point cited used data from a mountain biking study:

Data from a report that assessed the contribution of biking to the Queenstown-Lakes economy conducted by Benje Patterson in 2022 found that the average bike visitor stays 3.4 nights and spends \$262 per day, compared to 2.6 nights and \$248 per day across all visitors. Total spend by visitors who bike while staying in Queenstown-Lakes was \$157.6 million in 2021, with \$101.6 million of this being from bike visitors whose main purpose of visiting was to bike.

In addition, Queenstown Trails are involved in conservation efforts and align with other charities to achieve these conservation outcomes.

The organisation's current focus also includes connecting suburban trails and expanding biking infrastructure to serve both transportation and recreational needs, such as helping students bike to school.

We're like the veins of the community because people use them from a commercial point of view—like a tour operator, a bike operator... But also for recreation locally and for schools and for daily commuting.

Queenstown Trails receive funding from various sources, including central and local government, individual philanthropic contributions, corporate sponsorships, and donations from trail users. Licence fees paid by commercial operators on the trails go to the council.

The organisation has what they call a major sponsorship relationship with the Casino, which provides \$10,000 annually over a three-year term, totalling \$30,000. The Casino is acknowledged on the organisation's website, social media, and press releases. They currently have two other similar-scale corporate sponsors.

They don't get much above the line sort of acknowledgement on the trail because we're not like Times Square. It's about being at one with nature and in the natural surroundings, the trails aren't the place for having banners and billboards around. They just get that acknowledgement through our social media and through our website.

This funding contributes to major rebuilds and new trails as determined by Queenstown Trails. The work is put out to commercial tender and it was described that in most cases local businesses get the work. Maintenance is funded and managed by the council.

Our projects can range from, say, a realignment and a couple of bridges for a trail that might be \$50,000. But then we'll have a big new project for up to \$3,000,000.

They see the Casino's sponsorship as a way to help build a social licence for the Casino and a means to highlight community support.

The Queenstown Trails team has not been made aware of any evidence of gambling harm associated with the Casino's sponsorship. The Casino's sponsorship has not raised concerns within the organisation or its stakeholders.

The interviewee acknowledged that if the Casino's licence were not renewed, it could impact the community's perception of the Casino as a supporter and also make funding some of their programmes a lot more difficult—but not an insurmountable challenge.

They felt the potential effects of not renewing the Casino's licence might impact the region's tourism and entertainment offerings, but they couldn't see any likely direct effect on Queenstown's trail usage.

4.3.3 WIDER IMPACTS ON QUEENSTOWN ECONOMY

As noted above, the majority (~80.5%) of visitors to the Casino are from out of town. The Casino product mix includes on-site entertainment in the form of gambling, restaurant and bar, and while this entertainment/restaurant/bar combination has become more common in Queenstown it is still clearly seen by some patrons as a worthwhile addition to the offering in the town. While Class 4 gambling exists at other locations, this is confined to electronic machine gambling and occurs in pub/sports bar type venues. The patron survey results indicate that most (87% of the database respondents and 66% of the intercept respondents) were satisfied or very satisfied with the Casino facilities. Casino staff reported that the restaurant is very popular with locals as it offers a lower-price lunch in the central town than other restaurants. The staff note that a couple of informal groups use the restaurant as a regular meeting place.

Relatively few patrons visited the Casino solely for gambling—12% of the database survey and 15% of the intercept. Only a small proportion (3% of the database and 11% of the intercept) are not involved in gaming at all. This suggests that the mix of activities at the Casino is an important part of its appeal to customers.

Of the respondents who visited the Casino, 19% of the residents surveyed would have stayed home had they not gone to the Casino (Table 4.4), and 11% of the non-residents would have stayed in their accommodation if the Casino weren't there. These results suggests that the Casino has qualities that 10–20% of respondents could not find elsewhere in Queenstown, either for gaming or entertainment.

Table 4.4: Alternative activities for visitors to the Casino (intercept survey only).

Alternative activity	Resident	Non-resident
Different gaming	4%	5%
SCQ other activity	5%	3%
Other bar/restaurant	37%	49%
Movie/play/concert	5%	5%
Shopping	2%	3%
Other commercial	9%	9%
Non-commercial	7%	7%
Stayed home/accommodation	19%	11%
Something else	6%	4%
Out of Queenstown	6%	5%
Total	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 that the Casino worked well in the neighbourhood, and while not a major attraction was part of the revitalisation of the precinct.

Tourism and the Casino

Because the patron database survey was significantly different from the intercept survey in terms of the reported importance of the Casino in decisions to visit Queenstown, we have used only the intercept survey. We consider that the intercept survey was less likely to exhibit bias as a sample of the patrons who visited the Casino. The database survey is likely to have been influenced by the Covid-19 period when gamblers were unable to travel overseas for gambling, and the Casino was an alternative for gambling-based tourism.²⁶

The intercept survey data indicates that 80.5% of patrons are from outside the Queenstown Lakes District, with 1% from elsewhere in Otago, 37% from elsewhere in New Zealand, and 42% from overseas. It is possible that tourism patterns have not fully recovered post-Covid, but there is no way of testing this.

The 194 respondents to the intercept survey who did not live in Queenstown were asked whether they would have come to Queenstown or whether their stay in Queenstown would have been shorter in the absence of the Casino. Of these, 8% said that they would have come to Queenstown for a shorter time if the Casino was not there. The average decline in stay for that 8% was 1.25 nights.

As a sensitivity test we used the higher proportion of reduced stay length from the patron database survey, substituting these figures for the members in the intercept survey. Combining the intercept and database survey results in this way results in 11% of visitors staying less time, and an average of 1.27 fewer nights. We consider that the difference between these two results is not likely to be significant.

Therefore it seems likely that the Casino is not a major tourist draw overall for visitors into Queenstown, but does increase the variety of tourism offerings. For most out-of-town patrons the Casino is visited incidentally in the course of travel to the town and appears to play little or no role in their travel decisions. The survey responses indicated there were relatively few visitors to Queenstown whose visit length would be affected by the absence of the Casino.

²⁶ This would explain the response to the database survey that 50% of non-resident members would stay fewer nights in the absence of the Casino, with an average of 1.54 fewer nights per visitor, which is substantially higher than the intercept survey.

We estimate the impact of the Casino on tourism by multiplying the impact on visitor nights by the average spend per night. The intercept survey did not ask respondents about their average daily spend. However, relevant visitor expenditure surveys for various events at the Forsyth Barr Stadium²⁷ in Dunedin suggest that the average visitor to the city spends about \$350²⁸ per night on items other than event tickets. This value is considerably higher than the 2022 International Visitor Survey average of \$310²⁹ per night. A figure of \$300 per visitor-night equivalent is used for this analysis, which is considered conservative, given that the accommodation for 71% of the Casino visitor who would have stayed less time in the absence of the Casino was a hotel, motel or Air BnB. In contrast, only 57% of the Forsyth Barr respondents and 50% of the International Visitor Survey respondents stayed in this type of accommodation, while 43% and 51% respectively stayed in cheaper accommodation which cost perhaps 20% as much.³⁰

We used the FY23 data of 91,323 Casino visits³¹ and an assumed 1.5 visits to the Casino per trip (from the Christchurch Casino impact study). We also deducted half of the complimentary Queenstown-based food and beverages expenditure provided by the Casino to patrons from the tourism visitor spend, on the assumption that those who receive complimentaries are more likely to be those who responded that they would not come to Queenstown in the absence of the Casino.³² Using these assumptions the total tourism spend associated with the Casino is \$1.3 million per year. Using the breakdown of regional tourism expenditure in the 2012 SNZ Domestic Travel Survey Tables³³ indicates a total tourism-related impact arising from the Casino of 10.9 FTE jobs and \$0.91 million per year of added value, and \$0.53 million per year of additional household income.³⁴

²⁷ Butcher Partners Ltd has estimated the economic impacts of more than a dozen events at the Forsyth Barr stadium in recent years.

²⁸ 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).

²⁹ Source: International Visitor Survey. Spend by industry divided by total nights given in itinerary breakdown

³⁰ The 20% estimate comes from analysis of the Forsyth Barr data. The International Visitor Survey did not supply data which enabled this comparison to be made.

³¹ Because this is likely to be closer to a post-Covid patronage and matches the intercept survey period more closely than previous years.

³² Complimentaries are generally offered to higher spending patrons, likely indicating patrons more focused on gambling than lower spending patrons.

³³ <https://nzdotstat.stats.govt.nz/wbos/Index.aspx?DataSetCode=TABLECODE7579>

³⁴ The impact is significantly affected by the visitor spending mix – i.e. the proportion of visitor spending which 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 tourism impact using the MBIE expenditure would be \$1.0 million in expenditure, 2.1 FTE, \$0.5 million VA, and \$0.3 million HHI. Data from economic impact analyses of events at Forsyth Barr Stadium would give higher economic impacts.

Table 4.5: Casino recorded patronage and spend for FY20 to FY23

Visits	2020	2021	2022	2023
Carded patrons	15,990	20,740	15,760	16,455
Uncarded patrons	52,065	66,048	54,468	74,868
Total	68,055	86,788	70,228	91,323
Carded %	23%	24%	22%	18%
Uncarded %	77%	76%	78%	82%

Actual win	2020	2021	2022	2023
Carded	\$3,074,602	\$3,750,672	\$2,927,733	\$3,146,597
Uncarded	\$5,394,959	\$6,841,979	\$6,060,424	\$7,433,476
Total	\$8,469,561	\$10,592,651	\$8,988,157	\$10,580,073

Analysis of the survey responses shows that all of the reduction in tourism visitor nights came from visitors outside Otago. Only three patrons in the intercept survey were from Otago not Queenstown Lakes District, and none of these three would have stayed less time if the Casino had not been there. Hence the direct economic impacts of tourism arising from the Casino from the Otago perspective are estimated to be 100% of the above figures, and the slightly higher economic multipliers mean that the net impact is at 11.8 FTE jobs, \$1.01 million per year of added value, and \$0.59 million per year of additional household income.

Casino neighbourhood

The Casino is on the top floor of a complex in the middle of Queenstown centre. Businesses in the immediate environs of the Casino were surveyed for their opinions of the Casino. There were 50 respondents, which were predominantly retail (66%) with some hospitality (16%) and a variety of other businesses (Table 4.6). About half were standalone businesses, with the remainder being part of larger businesses in Queenstown (12%) and New Zealand (35%). Only one was an international company.

Only one business (2%) indicated that the Casino was a factor in their choice of location (brings in customers), and only eight respondents (16%) “agree” that closure of the Casino would have a major impact on their business, with most being “neutral” or “disagreeing” that closure would have a major impact. A greater proportion (60%) agreed that the closure of the Casino would have some impact on the economy in that location or in Queenstown more widely (36%). About half (52%) considered that if the Casino closed some other entertainment attractions would readily replace it, but only 10% of respondents considered the town would be better off without the Casino.

The Casino’s landlord considers the Casino to be a key tenant, and the Stratton House complex of which it is a tenant benefits considerably from the flow of patrons up through the building to the Casino. The survey indicates that for individual businesses, the Casino is not generally considered to have a major impact on their operation, but is considered to be of some benefit to the neighbourhood and town in general.

Table 4.6: Business types in neighbourhood business survey, Queenstown

Business type	Number of responses	Proportion of responses
Accommodation	1	2%
Retail	33	66%
Hospitality	8	16%
Arts/entertainment	3	6%
Real estate	3	6%
Other	2	4%
Total	50	100%

4.4 QUALITATIVE INSIGHTS INTO OTHER BUSINESS BENEFITS OF THE CASINO

The discussion above identified the benefits that accrue to Queenstown as a result 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.

As noted above, the Casino adds to the appeal of Queenstown as a tourist destination. As the representative from Destination Queenstown told us, while the Casino may not be a primary reason people visit Queenstown, it adds value to the overall tourism offering, providing entertainment and a cosmopolitan element.

This representative also noted that the Casino is viewed as a responsible employer, offering training and potential career development for staff. They talked about the Casino's General Manager's role on the Destination Queenstown Board and adding value to the business community in that way. He was described as a valuable contributor—a high calibre, active board member which was appreciated.

This representative was clear about in views about the Casino, noting:

| *I would support their relicensing.*

Section 5

Beneficial Social Impacts

5.1 ENTERTAINMENT BENEFITS

The most obvious benefit of having the Casino in Queenstown is that it provides a significant entertainment option for residents in Queenstown and Otago, and for visitors to Queenstown.

- For residents, the Casino contributes to Queenstown's status as a thriving and fun city.
- For international visitors, the Casino contributes to Queenstown's status as being number 1 in Lonely Planet's list of the nine best places to visit in New Zealand.³⁵ Queenstown is New Zealand's second most often visited destination by international travellers (after Auckland) with just over a million international visitors in 2019.³⁶

For residents, the presence of the Casino is part of the suite of entertainment options that make Queenstown a vibrant and fun city. The most recent data on resident sentiment, the Queenstown Lakes District Council's *2022 Quality of Life Survey Report*, shows that 77% of residents rate their overall quality of life as good (47%) or extremely good (30%). A large proportion of the accompanying comments show that residents say they love living in the district but are struggling with the cost of living. When asked to list the top positive impacts associated with tourism in the Queenstown Lakes District, 39% of residents mentioned a range of hospitality bars, cafes, restaurants, and nightlife as a primary benefits.

In the Queenstown community survey completed for this CIR³⁷ 55% of residents said they had been to the Casino (with these split roughly into half saying they gambled while there and half who said they did other things while there) (Table 5.1).

³⁵ <https://www.lonelyplanet.com/articles/best-places-to-visit-in-new-zealand>

³⁶ <https://www.statista.com/statistics/687393/new-zealand-international-visitors-by-region/>

³⁷ With a total sample of N=206

Table 5.1: Community engagement with the Casino

I have been to the Casino and have gambled	26%
I have been to the Casino but didn't do any gambling	29%
I have never been to the Casino	45%
Total	100%

In that same community survey, 51% of the respondents said that visiting the Casino had given them “pleasure and fun”.³⁸ Queenstown residents were also likely to agree that “for most people, a visit to the Casino is a fun night out with family and friends” (66%) and “SkyCity Queenstown Casino is an important part of the city’s entertainment offering” (44%).

Changing focus from residents to Casino patrons, in the combined patrons survey³⁹ completed for this CIR, 34% of survey participants came from Queenstown or elsewhere in Otago (Table 5.2).⁴⁰

Table 5.2: Where patrons reside

Queenstown	26%	Total 34%
Elsewhere in Otago	8%	
Elsewhere in New Zealand	36%	
International	30%	
Net	100%	

³⁸ 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.

³⁹ With a total sample size of 344 patrons, split between 241 from the intercept survey and 103 from the email database survey.

⁴⁰ This compares to visitor data collected by the Casino which shows 35% of originate from Queenstown or elsewhere in Otago. The Casino data differs from the patron survey in that it shows more visitors from elsewhere in New Zealand and fewer international visitors. This is because we surveyed patrons on the database overseas and Covid-19 restrictions still impacted international visitor numbers during the study period.

The same patrons survey shows a high level of satisfaction with the Casino, with 72% 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

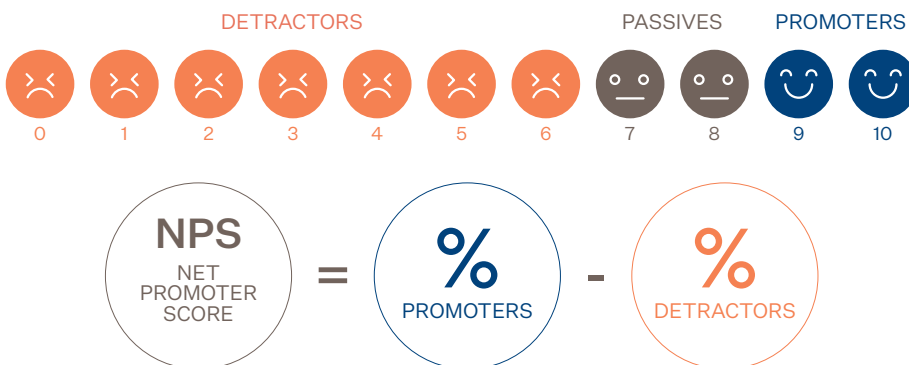
Very satisfied	27%	Total 72%
Satisfied	45%	
Neutral	16%	
Dissatisfied	8%	
Very dissatisfied	3%	

To measure how well their experience matched their expectations, the Casino patrons surveyed were asked:

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

This question is a variation of the Net Promoter Score⁴¹ developed by the Harvard Business School and is an internationally recognised method for summing up 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”.⁴² By subtracting the percentage of detractors from the percentage of promoters a “net” promoter score can be calculated (Figure 5.1).

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



⁴¹ Net Promoter Score™ Satmetrix

⁴² Scores of 7 or 8 are considered neutral.

The net promoter approach results in scores that run from -100 to +100 and scores in the middle of this distribution (i.e., around zero) are typical. The overall score given by the Casino patrons surveyed was -3%. This result is because while 27.3% of all patrons scored the Casino as a 9 or 10 out of 10, 30.8% scored it between 0 and 6 out of 10. Subtracting the first from the second gives a net score of -3.49%, which rounds to -3%. Note in the net promoter score design the 41.9% of patrons who rated the Casino a 7 or 8 out of 10 are not counted toward the final score.

The result of -3% masks some interesting patterns among this group of patrons.⁴³

The first is that more than half the patrons surveyed rated their likelihood to recommend as an 8, 9, or 10. The second is that a small number of respondents had a particularly negative experience at the Casino – with 5% rating their likelihood to recommend at zero.

THE JOY OF GAMBLING

While assessing the impact of the Casino it is important not to understate the benefits that accrue from the pleasure that some people experience while gambling. 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 reasonable.⁴⁴

There is no doubt that gambling can be harmless entertainment that people enjoy. The 2018 *Health and Lifestyles Survey* shows that 67.2 percent of New Zealanders had participated in some form of legal gambling in the previous 12 months.⁴⁵ Contrary to how it may appear from a non-gambler's perspective, gamblers do not necessarily anticipate they will make money from gambling. Parke (2015) states:

Players mostly realise that they are paying for a leisure experience. They are not expecting to be paid, except for a small minority, who are going to earn an income as a professional gambler.⁴⁶

⁴³ This is the combined score from both patron surveys. The intercept patrons (N=241) gave a score of -15 while the database survey of patrons (N=103) resulted in +23.

⁴⁴ All Basham P, Luik J. *The Social Benefits of Gambling*. *Economic Affairs*. 2011;31(1):9-13.

⁴⁵ Cited in True, J. and Cheer, M. (2023) *Gaming Machine Gambling Statistics and Research Paper: Information for Territorial Authorities*, True Legal, Hamilton, Updated April 2023.

⁴⁶ Parke, J. (2015). *Gambling, leisure and pleasure: Exploring psychosocial need satisfaction in gambling*. Presentation at the KPMG eGaming summit. <https://assets.kpmg/content/dam/kpmg/pdf/2016/07/im-summit-report-2015.pdf>.

This entertainment benefit also applies to the many domestic and international tourists who visit Queenstown each year. While not seen as a primary driver of visitation, a number of the people interviewed for this CIR note that it plays a role in the mix of attractions on offer in Queenstown. For instance, the representative from Destination Queenstown said:

I don't think that people travel to Queenstown for the Casino, but I think it adds value and a cosmopolitan offering when they're here. It does add value to the tourism offer.

Similarly, the Chair of the Casino Trust talked about how there is “an expectation” that a tourist destination like Queenstown would offer adult entertainment like a casino.

This expectation is also reflected in the national survey conducted for this assessment. We asked residents across New Zealand how acceptable they thought it was that a range of locations offered a range of attractions. Respondents were much more likely to find it acceptable that Queenstown has a casino than Dunedin or Hamilton (Table 5.4). Note that casinos were the only attraction that showed this dispersion of acceptability scores.⁴⁷

Table 5.4: Scores for acceptability that locations have a casino

Location	
Queenstown	46%
Christchurch	43%
Dunedin	39%
Hamilton	39%

⁴⁷ The research also asked about nightclubs in CBD, strip clubs, and ‘pokies in bars’.

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 residents.⁴⁸ In the case of the Casino, there seems little of either impact (gambling harm or crime) that can be directly attributed to its operation.

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 whānau. In 1999 the Australian Productivity Commission estimated that seven people are adversely affected to varying degrees by the behaviour of a person with a severe gambling problem.⁴⁹

As noted in the previous section, gambling is a common activity for between 70 and 80 percent of New Zealanders. For most of these there is little risk of harm. Jarrod True and Martin Cheer (2023) argue that New Zealand has a very low rate of people with gambling problems by international standards.⁵⁰

True and Cheer (2023) also show that while Queenstown accounts for approximately 0.3% of New Zealand's population, it only accounts for 0.2% of new problem gambling cases and 0.17% of all cases of people who seek help for problem gambling. In this regard, Queenstown, despite having a casino, seems to be *less* likely to have people with gambling problems seeking help than other centres in New Zealand.⁵¹

How much of the problem gambling in Queenstown can be attributed to the the Casino is uncertain but it may be in the order of just two or three presentations to problem gambling counselling services. This is because, according to Ministry of Health data, nationally the casino sector accounts for approximately 20% of all presentations to problem gambling services. In the FY21 there were a total of 4,762 presentations to these services (including 2,311 new presentations). Of this total eight were in the Queenstown Lakes District. If the 20% figure for casinos is correct, this means fewer than two people being assisted in Queenstown are attributable to the Casino. If we add in those from Central Otago (three new presentations, five clients in total in FY21) this might mean three of the clients in the Queenstown Lakes District are related to casino gambling.

⁴⁸ 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>

⁴⁹ Productivity Commission (1999) *Australia's Gambling Industries*, Summary, Report No. 10, AusInfo, Canberra

⁵⁰ True, J. and Cheer, M. (2023) *Gaming Machine Gambling Statistics and Research Paper: Information for Territorial Authorities*, True Legal, Hamilton, Updated April 2023.

⁵¹ The corollary of this being if the Casino was creating a significant extra problem gambling issue in Queenstown, the city would be above the national averages for new cases and total cases of help-seeking.

Data from the Problem Gambling Foundation stakeholders interviewed for this CIR puts the total at 36 clients over four years (from 1 January 2019 to 31 December 2022), or an annual average of nine. But these data include all presentations across Queenstown Lakes District, Central Otago District, Clutha District and Southland District.⁵²

The research is clear that problem gambling is most commonly associated with electronic gaming machines (EGMs). The Department of Internal Affairs notes that approximately two in five regular gamblers on EGMs experience problems with gambling.⁵³

The Casino is licensed for 86 EGMs, and there are another 65 EGMs in Class 4 locations across Queenstown Lakes District with an additional 107 in Central Otago and 69 in the Clutha District. This means the Casino accounts for:

- 57% of the total EGMs in the Queenstown Lakes District;
- 33% of the EGMs in the combined Queenstown Lakes and Central Otago Districts; and
- 26% of the EGMs in the combined Queenstown Lakes, Central Otago, and Clutha Districts (note all EGM numbers are for June 2023 and *exclude* Wharf Casino which has not operated since 2020).

Yet the quantum of gambling harm that can be attributed to the Casino’s EGMs is uncertain because the casino environment has stricter qualifying criteria and a much more intensive Host Responsibility Policy than other non-casino gambling venues.

In terms of qualifying criteria, to enter the Casino a patron must be 20 years old or older, and proof of age can be requested. The Casino is clear that it provides a “world-class environment” and requires “a neat and tidy standard of dress at all times”. The Casino takes these obligations very seriously and for the year ending June 2023 more than 5,500 people were denied entry (Table 6.1).

Table 6.1: Denial of entry to the Casino for FY23

Reason	N
Underage	2645
Intoxicated	2628
Dress code	269
Total	5542

⁵² The Problem Gambling Foundation stakeholders consulted for this CIR were clear that it does not provide counselling services in Queenstown and their comments for this CIR related to “casinos in general rather than Queenstown Casino specifically”.

⁵³ “About problem gambling”. Department of Internal Affairs, <https://www.dia.govt.nz>

Once patrons are inside, the Casino takes host responsibility very seriously. This is outlined in its Host Responsibility Programme,⁵⁴ which it describes as representing a “New Zealand, and international, standard in harm prevention and minimisation for New Zealand and internationally”. The Programme contains a wide range of initiatives designed to ensure guests enjoy a safe and responsible gaming environment.

- All staff are trained in the responsible service of alcohol, so intoxicated patrons are excluded from entering the premises, and alcohol consumption is monitored and controlled.
- All staff are trained in problem gambling awareness and the responsible provision of gambling, including taking all practicable steps to ensure that anyone under 20 is not allowed in the gaming areas.
- The Casino provides information about problem gambling and support for customers including helpline numbers.
- Self-identified exclusion is offered for those wishing to control their gambling.
- The Casino works closely with customers with gambling problems and their family members/whānau, and with problem gambling providers, to provide:
 - » information about problem gambling and support for customers, including helpline numbers;
 - » potential exclusion from the Casino; and
 - » taking all practicable steps to ensure children are not left unattended.
- The Casino promotes acceptable behaviour, so that any person who is intoxicated, abusive, or threatening to staff or customers, causing conflict, or otherwise unpleasant, may be escorted from the premises.
- Limits are set on the time customers are able to be onsite within the casino (not necessarily gaming) and the time customers can play without taking a break.
- Casino staff regularly check in and interact with customers to ensure they are gaming responsibly, playing within their means, and taking breaks.

In accordance with the Programme, the Casino has various resources available to customers, including the brochures *Responsible gaming?*, *Self-exclusion at SkyCity*, *Take a break from the game*, and *Your guide to setting playing limits on Gaming Machine*. These are available in a range of languages to suit the Casino’s customer base.

⁵⁴ SkyCity Queenstown and SkyCity Wharf Host Responsibility Programme (2023)


Figure 6.1: Host responsibility publications

Your guide to setting playing limits on Gaming Machines


How to set your limits

1. Insert your Premier Rewards card into any Gaming Machine.
2. Touch the 'Set Limits' icon on the screen.
3. Tap in your 4-digit PIN NUMBER and select ENTER.
4. The 'SET LIMITS' window will appear.
5. Set your playing limit by DAY, WEEK and/or MONTH by touching the applicable icon(s).
6. Set your playing limit by TIME and/or SPEND by touching the 'TIME LIMIT - HOURS' and/or 'SPEND LIMIT - DOLLARS' icon(s).
7. Enter a dollar value and/or length of time as applicable.
8. Touch 'Yes' to confirm these limits.
9. A confirmation screen will appear and the 'SET LIMITS' icon will change to 'CHECK LIMITS'.
10. Your limits have been successfully set.


Warnings



A message will appear on the screen when you are approaching your set limits.



A message will appear on the screen when you have reached your limits.



Your 'CHECK LIMITS' icon will change to 'LIMIT REACHED' when you have reached your set limits.

Take a break from the game

We take our responsibilities as a host very seriously, and each of our properties has a robust Host Responsibility Programme in place. Our commitment in this space reflects our international operations with the highest standards applied to safeguard each of our communities.

R20 GAME RESPONSIBLY



Please don't be offended if our staff remind you to take a break. SkyCity recommends all our customers have regular breaks during their casino visits.

We may remind a customer to stop gaming and take a 30-minute break for a meal or refreshments. We may also remind a customer to stop gaming for a six-hour period to allow adequate rest before deciding if they wish to return.

SkyCity staff may ask a customer to leave the gaming areas if there are concerns that their breaks have been insufficient during their visit. In those circumstances our staff will explain everything that customer needs to know.

We hope you continue to enjoy your entertainment experience with us. Please ask any staff member if you would like further information or assistance while you're here, or alternatively if you have any concerns that your gambling might be problematic

call the Gambling Helping 0800 654 655 or text 8006

(free and confidential 24 hours)

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RESPONSIBLE GAMING

Casino gaming is a fun entertainment activity that is responsibly enjoyed by most people. However, for some people gaming can cause harm.

The key to responsible gaming is to stay in control and remember it's just entertainment.

Responsible Gaming Tips

Treat gaming as entertainment. The odds of any gaming product mean that over a period of time, the casino - not the player - comes out ahead.

Set a budget and stick to it. Do not borrow money or use money intended for everyday expenses.

Set a time limit and stick to it.

Accept losses as the cost of entertainment - don't 'chase' them. All gaming products are based on odds and the outcome of the game can't be controlled.

Balance gaming with other entertainment activities.

Gaming Machines

Gaming Machines are designed to provide entertainment, not make players money. You might sometimes have a win, but over time the odds will favour the casino.

What has happened in previous games makes no difference to the game you are playing.

It doesn't matter if:

- You play a machine straight after someone has had a big win
- You play a machine that hasn't had a big payout for a long time
- You play at certain times of the day or night
- You play on certain days of the week
- You press the buttons a certain way.

The machine decides whether you win or lose. The player has no control over it.

A FOCUS ON SELF-IDENTIFIED EXCLUSION

Self-identified exclusion involves a customer meeting with SkyCity to impose a self-exclusion for a period of 3, 6, 9, 12 or 24 months. At this meeting the customer is encouraged to nominate a support person (such as a family member) and select a counselling service. They are then photographed and issued an exclusion order which prohibits them from the gaming areas of all SkyCity operated premises in New Zealand.

Once the self-exclusion period ends, re-entry criteria are strict and re-entry is at SkyCity's discretion. This means SkyCity being sure that the customer's gambling behaviour is under control before granting re-entry. Those not meeting the re-entry conditions cannot apply to enter the SkyCity gaming areas, even if their self-exclusion period has ended.

Although this process is voluntary, once the exclusion order is issued it cannot be cancelled. It will remain in force for the period the customer has nominated and until they meet the re-entry conditions.

A FOCUS ON GAMBLING LIMITATION

SkyCity also has a voluntary pre-commitment system in place for gaming machines. This enables customers to set limits on how much they spend or how long they play. This system also signals when customers are approaching their set limits and again when their set limits are reached.

For regulatory and security reasons, SkyCity operates a number of surveillance and facial recognition cameras throughout its New Zealand venues. While facial recognition cameras are only active in and immediately around the gaming floor and at ATMs, surveillance cameras monitor and record activity both on and around the premises. SkyCity retains surveillance and facial recognition footage to supply to its regulators and/or government agencies where required and/or permitted by law⁵⁵.

FACIAL RECOGNITION AT NEW ZEALAND SKYCITY CASINOS

The facial recognition system at SkyCity's Casinos, which was designed by the New Zealand company Torutek, can recognise faces even if individuals try to disguise themselves with such devices as sunglasses and hats. The technology works via cameras which record visitors' faces when they enter the casino and, using a special algorithm, compares those images to faces in a database. SkyCity Queenstown Casino's Host Responsibility Stakeholders' Meeting Minutes from July 2022 note that facial recognition is working well to identify banned patrons. An increase in exclusions after the introduction of the software reflects a high success rate of identifying breaches of self-exclusion.

A number of the stakeholders consulted for this assessment noted that problem gambling and antisocial behaviour is easier to manage in Queenstown than other casinos because of its size and because there are limited entry and exit points. This means "there are more opportunities for a tight host responsibility approach".

The Casino's Host Responsibility Programme is highly regarded by stakeholders. For instance, DIA conducts 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 report⁵⁶ commended the Casino for their use of logbooks and their monitoring of patrons.

⁵⁵ If not required for compliance with any legislation or regulation, footage captured by the surveillance and facial recognition cameras is deleted within a reasonable timeframe after collection.

⁵⁶ Department of Internal Affairs (2017) *Sector report: Gaming machine mystery shopper exercise results*, Department of Internal Affairs, Wellington, June 2017

In addition, that DIA mystery shopping 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].

This is reiterated by a representative of the Salvation Army's Oasis Centre For Problem Gambling, who noted that the Casino's host responsibility was "very robust" and that the size of the Casino means staff have more visibility of any potential problems.⁵⁷

The licensing inspector we spoke with highlighted the Casino's regular engagement with stakeholders, its measures to address problem gambling, and a possible interplay between tourism and gambling concerns. They also acknowledge the efforts taken to ensure responsible gambling management.

The Casino organises six-monthly stakeholder meetings to engage with different members of the community. This forum is used to update the community on procedures, problem gambling instances, and measures taken to address them.

SkyCity also runs its own regular mystery shopping exercises to ensure ongoing compliance with the host responsibility policy.

6.1.2 QUALITATIVE INSIGHTS INTO GAMBLING HARM

None of the stakeholders consulted for this assessment had specific concerns about gambling harm directly attributable to the operation of the Casino. The prevailing attitude among those stakeholders is captured well by the Chair of the Casino Trust, who did not believe problem gambling was a big issue in Queenstown (it didn't come up in the Casino Trust's needs assessment), and there is an expectation that a tourist town like Queenstown offered adult entertainment like a casino.

Rather than identify specific concerns with the operation of the Casino in particular, a number of the stakeholders consulted for this CIR expressed concerns either with casinos in general or the gaming industry as a whole.

For instance, the representatives from the Problem Gambling Foundation noted that the Casino contributed to the wider ecosystem of gambling harm by making gambling appear glamorous in its advertising. One of these representatives said:

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

⁵⁷ SkyCity Queenstown Host Responsibility Stakeholders Meeting Minutes, Wednesday 20 July 2022.

A worry was expressed that the visibility of the Casino and its advertising made gambling appear “normal”.⁵⁸

The Problem Gambling Foundation representatives also noted that long hours of play and continuous play are key areas of concern. Tolerance to gambling-related harm is heightened within a casino setting as long hours of play and continuous play are normalised and encourage spending.

A representative from the local Rūnanga⁵⁹ noted that while Ngāi Tahu is not opposed to gambling they choose not to invest in that sector. This representative noted that gambling harm is a complex issue with a number of systemic causes, which stretch far beyond the casino environment. But the representative saw a link to the Casino in a need to focus more of the proceeds of gambling within the local area for harm minimisation efforts. Concerns were raised regarding funds being allocated nationally rather than being reinvested in local communities.

Given the Casino’s regulated status, rūnanga we spoke with believe this requires greater attention to their community impact, suggesting that casinos in general should be more accountable to local councils for better outcomes.

They need to remember they are there to generate income for their communities—if you look at old argument for the gambling act—that’s why they were there.

They expressed the desire to see the Casino’s contribution to the community extend beyond tourism and entertainment, addressing the big local issues such as lack of accommodation, environmental degradation and people’s health. It was indicated that if the Casino invested in areas that decrease societal risk factors, like housing, it would make a meaningful impact.

They were critical of a narrow, sector-specific approach to harm minimisation, and advocated for a broader cultural perspective and collaboration across sectors to address complex issues.

Similarly, Queenstown Lakes District Council's Chief Licensing Inspector noted:

I think we’ve got more of a drinking problem than a gambling problem in the community.

This representative acknowledged that the Casino works to identify and restrict gambling for those who may have a gambling problem, such as through limiting the length and frequency of visits, time spent at machines/tables, ATM withdrawals, as well as using facial recognition.

⁵⁸ This may express the Problem Gambling Foundation’s attitude to casino advertising in general but it is important to note that the Queenstown Casino does no external advertising. The Casino does, however, advertise to promote its partners or sponsorships (i.e., it does not directly advertise SkyCity or the Casino’s business). There are brochures around Queenstown throughout hotels and other businesses and on occasion, the Casino advertises through local print media when hosting events, such as comedy evenings.

⁵⁹ The Chair of Te Rūnanga o Ōtākou

From the Council's perspective, problem gambling numbers are relatively low given the population, number of EGMs, and the presence of the Casino.

The representative from the local police consulted for this CIR⁶⁰ acknowledged that they rarely interact with the Casino. From their perspective, problem gambling harm is more often observed in the context of online gambling with cards purchased for that purpose noted as present in locations inspected for other harm-related activity.

When we go to other places doing search warrants, we deal with people with substance abuse problems—that's where we're finding evidence of the problems with online gambling. They go to service stations, buying cards over the counter, to go away and gamble online—that's where we see more harm down here, rather than coming directly from the Casino. Not saying it doesn't come out of there—we just don't see it as much.

They acknowledge that gambling harm might exist in the community but it might not be reported to the police and may be directed to other agencies. They recognised that the visitors to Queenstown may experience family harm, with alcohol, drugs, and possibly some gambling as contributing factors. However, it was described that when they report on top-ranking factors related to family harm, substance abuse behaviours take precedence and gambling harm is not prevalent.

This police representative described the Casino as well-managed, implementing systems and processes to reduce risk, including exclusion measures.

They seem to have a lot of systems and processes in place to reduce risk.

⁶⁰ An Alcohol and Family Harm Prevention Officer from the Queenstown police

Conversations with Health New Zealand Te Whatu Ora⁶¹ revealed that they do not have data at a regional level to be able to speak meaningfully about rates of gambling harm specific to the Queenstown area. They have some information on treatment provider use, but this again is not the full picture of potential harm in the area.

For problem gambling we don't have data at regional level. We only know numbers that seek help from treatment providers. These have been steady over time, approximately 20 per year. This is relatively low service use. This could mean there's not harms, or people aren't accessing services. We only know the number of people seeking help so it's not the full picture.

In terms of national prevalence, they shared data to show around 2.9% of New Zealand adults experienced low-risk gambling, while 1.6% exhibited moderate-risk and problem gambling combined in 2020. These figures indicate that approximately 4.5% of adults (around 184,000 people) faced some level of gambling harm within the past year. They also explained that different populations are impacted at varying rates, with Māori, Pacific peoples, Asian communities, those on lower incomes, and young people being particularly affected. While there are measures in place to address gambling harm, challenges like stigma, lack of awareness, and limited service use persist.

They also explained that the strategy emphasises harm minimisation in casinos and venues, with a focus on host responsibility programmes and policies to identify people with gambling problems.

They recognise that the continuous form of gambling at a casino is more likely to cause harm:

The nature of casino gambling, it's a continuous form of gambling. Meaning you can make a bet then "reinvest" your winnings immediately—there's no down-time like a lottery. The continuous forms of gambling are the modes that are riskier and more likely to cause harm as a whole.

However, in contrast they also acknowledged that casinos are easier to manage from a legislative perspective because there are fewer of them, when compared to pubs and clubs.

I think casinos are a bit easier to manage because there's fewer venues compared to pubs and clubs—where it's a lot harder to get a view on harm minimisation in practice.

⁶¹ Representatives from the Mental Health and Addiction Strategy and Policy Unit

6.2 GAMBLING HARM AND AT-RISK POPULATIONS

6.2.1 WHY AT-RISK POPULATIONS MATTER

The previous section 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 incomes.⁶²

The Problem Gambling Foundation representatives consulted for this review expressed this concern, noting that “gambling harm is an equity issue” and that this harm “disproportionately impacts Māori, Pacific Peoples, [and] Asian peoples”. The representatives also referred to the Ministry of Health’s *Strategy to Prevent and Minimise Gambling Harm 2022/23 to 2024/25*, which identifies these groups as bearing a burden of harm that greatly outweighs that being experienced by other groups.

6.2.2 IMPACTS ON MĀORI RESIDENTS

One longitudinal study by the Ministry of Health found that Māori and Pacific adults are five to eight times more likely to become people with gambling problems than other New Zealanders.⁶³

In 2018, 4.6% of the population in the Queenstown urban area identified as Māori (Table 6.2). There are seven Ngāi Tahu councils (rūnaka) with ancestral links to Tāhuna (Queenstown) but there is no marae currently serving members of Queenstown and Wānaka’s Māori community.

Table 6.2: Population by ethnicity (2018 census)

	Queenstown urban area	Otago	New Zealand
European	71.2%	86.9%	70.2%
Māori	4.6%	8.7%	16.5%
Asian	17.8%	7.1%	15.1%
Pacific peoples	1.2%	2.7%	8.1%

⁶² Ministry of Health. 2022. *Strategy to Prevent and Minimise Gambling Harm 2022/23 to 2024/25*. Wellington: Ministry of Health

⁶³ Cited in Te Ao - Māori News *Gambling harm to Māori and Pasifika part of Health Ministry review* Sunday 5 September 2021

Perhaps because Māori are underrepresented in the Queenstown urban area, Māori constituted fewer than 3% of the those in the patron survey completed for this social impact assessment (Table 6.3).

Table 6.3: Casino patrons by ethnicity

Māori and Pacific peoples	2.9%
Pākehā/NZ European	56.2%
Asian	17.5%
Indian and sub-continent	3.3%
Other (please specify)	20.5%
NET	100%

Casino staff report low levels of at-risk gambling activity by Māori, having excluded just three Māori patrons in the year to June 2023.

Table 6.4: Casino exclusions by ethnicity (N)

Chinese	7
Korean	1
Indian	3
NZ Caucasian	14
Māori/ Pacific Islander	3
Australian	0
UK English	1
European	2
North/South American	0
South East Asian	4
Other	3

Given the comparatively small number of Māori living in the Queenstown urban area, and the small numbers using the Casino, it is hard to substantiate an argument that the Casino is creating a disproportionate gambling harm impact on Māori.

6.2.3 IMPACTS ON ASIAN RESIDENTS

In 2018 17.8% of the population in the Queenstown urban area identified as Asian (Table 6.6).⁶⁴

Table 6.5: Population by ethnicity (2018 census)

	Queenstown urban area	Otago	New Zealand
European	71.2%	86.9%	70.2%
Māori	4.5%	8.7%	16.5%
Asian	17.8%	7.1%	15.1%
Pacific peoples	1.2%	2.7%	8.1%

Similarly, Asian patrons account of 17.5% of the Casino patrons (Table 6.6).

Table 6.6: Casino patrons by ethnicity

Māori and Pacific peoples	2.9%
Pākehā/NZ European	56.2%
Asian	17.5%
Indian and sub-continent	3.3%
Other (please specify)	20.5%
NET	100%

However, Casino staff report low levels of at-risk gambling activity by Asian patrons, excluding 12 patrons in the year to June 2023 (Table 6.7).

⁶⁴ For the Queenstown Lakes District, the percentage identifying as Asian has grown from 4.8% in 2006 to 10% in 2018, reflecting a rapid growth in this community in recent years.

Table 6.7: Casino exclusions by ethnicity (N)

Chinese	7
Korean	1
South East Asian	4
Indian	3
NZ Caucasian	14
Maori/ Pacific Islander	3
Australian	0
UK English	1
European	2
North/ South American	0
South East Asian	4
Other	3

According to Asian Family Services' *New Zealand Asian Responsible Gambling Report 2021*, 74.7% of Asians report having gambled in some way in the past 12 months. Despite this, a representative from Asian Family Services⁶⁵ said they had no referrals from the Casino that they could recall.

This representative noted that their research shows that loneliness is the second most common risk factor for Asian gambling (behind lack of financial budgeting or planning). Given this, and because the Casino is open late and is a safe environment, it might attract both Asian residents and, in particular, international students from Asia.

However, representatives closer to Queenstown believed the concerns were unsubstantiated. The international student representative from the University of Otago's International Students' Association⁶⁶ did not think this was a serious problem because most international students from Asia were too young to visit the Casino. They said:

*You'll find that most of the Asian students here are quite young so going into the Casino is quite an intimidating experience as well.*⁶⁷

⁶⁵ The Deputy Director and Public Health Lead at Asian Family Services

⁶⁶ 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.

⁶⁷ It is worth reiterating the R20 age limit in casinos against R18 in pubs and clubs, meaning it is easier for younger gamblers to go to these establishments, likely unmonitored.

This representative was clear:

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

The representative from Asian Family Services wanted to be clear that the organisation is not anti-gambling but about creating settings where Asian people “feel safe and still able to enjoy [gambling]”.

6.2.4 IMPACTS ON OLDER RESIDENTS

In 2022, 11% of the Queenstown Lakes District residents were aged 65 and over, compared to a national average of 16%.⁶⁸ A number of the stakeholders consulted for this assessment wondered about the impact of the Casino on this older resident group.

It is certainly the case that customers of the Casino skew older than the population. In the patrons survey conducted for this assessment, 25% were over 60 compared to 16% of the population (and 20% of the over-20s population, the population eligible to enter the Casino) (Table 6.8).

Table 6.8: Patron age distribution⁶⁹

	Patrons	Population	Eligible population
20-39	57%	40%	50%
40-59	18%	25%	31%
60+	25%	16%	20%
NET	100%	100%	100%

Despite this over-representation among Casino patrons, the data show that older residents are much less likely to be excluded from the Casino than other patrons (Table 6.9).

⁶⁸ <https://ecoprofile.infometrics.co.nz/Queenstown-Lakes%20District/Population/AgeComposition>

⁶⁹ These figures are different to the total population statistics quoted in the introductory text because this table only shows the share of the over 20 population in Queenstown.

Table 6.9: Exclusions by age, FY23)

Age bracket	N	%
20-29	10	27%
30-39	14	38%
40-49	8	22%
50-59	3	8%
60-69	2	5%
70+	1	3%

When asked about older residents in particular (and at-risk populations in general), a representative from the Casino was clear:

Irrespective of age or ethnicity, affordability—we treat all customers the same in following the host responsibility programme. It could be said with older customers, we do talk to them more, just to see how they are going, make sure they are all good. We do know the older customers well, so generally know their personal circumstances as well.

The sensible conclusion from this is that while a number of stakeholders worry that older residents in Queenstown might be at more risk of gambling, 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 issues with problem gambling among older residents in Otago. They said:

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

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

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

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 Casino 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.

6.2.5 IMPACTS ON INTERNATIONAL VISITORS

It is possible that gambling harm is occurring among international visitors to the Casino that is missed elsewhere in this impact assessment. This is because there is no international sharing of exclusion data. This means the Casino cannot know whether an international visitor has been excluded from a casino in their home country⁷¹.

The Queenstown Lakes District Council representative consulted for this CIR noted that the high tourist numbers in the area might affect the identification of people with gambling problems, especially due to their short stays.

Given the high number of tourists in town there may be problem gamblers amongst those groups—but given their short stay they might be missed in the local understanding of problem gambling.

Similarly, it is possible that there may be some gambling harm among young transient workers in Queenstown. The exclusion data shows a slightly higher skew for those aged 20 to 39. It is possible that if harm is experienced by this group, they would not be captured in the region's harms-related data.

When these two potential problems were raised with SkyCity, they made the point that while international exclusions could not be enforced locally, their host responsibility programme was still active for anyone in the Casino. This means that international visitors and transient workers are subject to the same rules about continuous play, cash withdrawals, and alcohol consumption.

⁷¹ With the exception of other casinos owned by SkyCity, such as SkyCity Adelaide.

6.3 ANTISOCIAL BEHAVIOUR

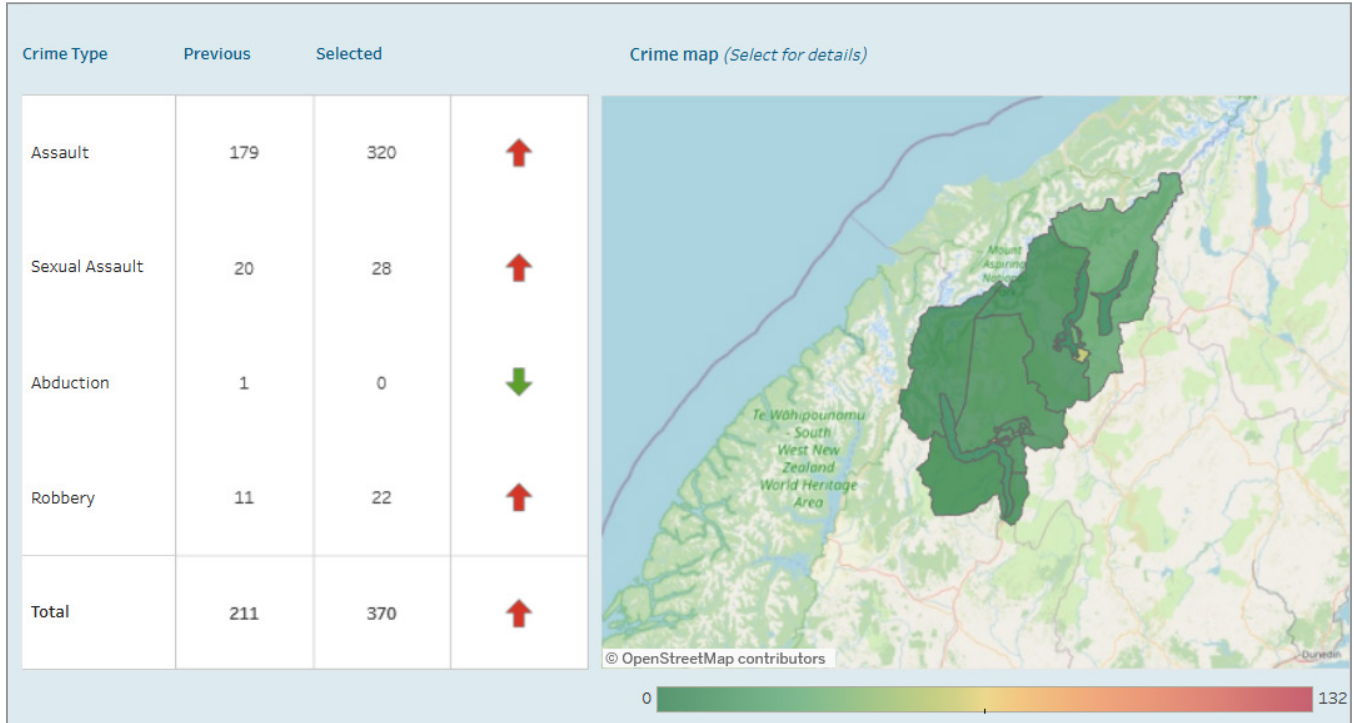
The second most common adverse effect associated with casino operations is crime. As with gambling harm, despite these concerns there seems very little crime or antisocial behaviour that can be directly attributed to the operation of the Casino.

6.3.1 QUANTITATIVE ASSESSMENT OF ANTISOCIAL BEHAVIOUR

The New Zealand Crime and Victims Survey collects information about New Zealanders’ experience of crime. This survey has run every year from 2018, and asks a nationally representative sample of 8,000 New Zealanders about their experiences with crime. The latest data from this survey (conducted in June 2022) shows that the Otago region as a whole remains one of the safest places in New Zealand.⁷²

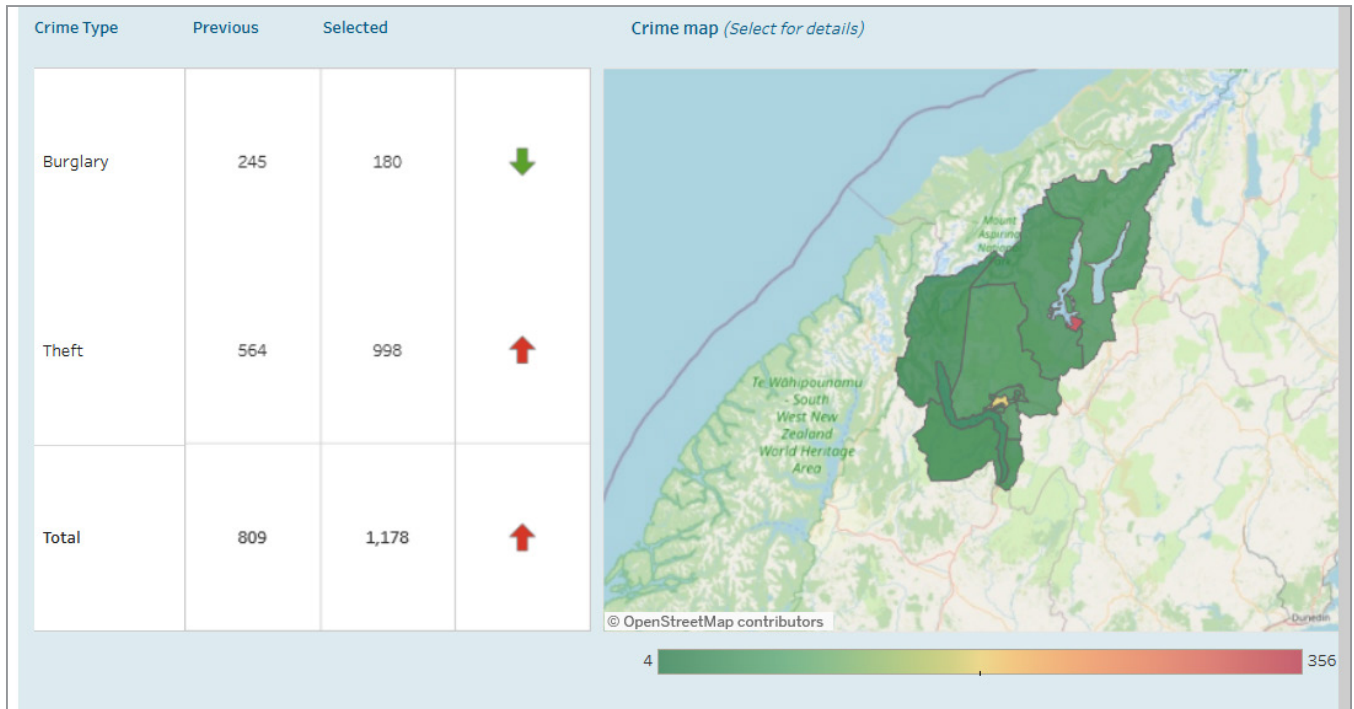
Despite this, recorded crime is going up in Queenstown. Police data shows increases in both property crimes and violent crimes (Figures 6.3 and 6.4).

Figure 6.3: Recorded violent crime in Queenstown Lakes District, August 2022 to July 2023



⁷² 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 6.4: Recorded property crime in Queenstown Lakes District, August 2022 to July 2023



This said, almost none of this crime is likely attributable to the operation of the Casino. In the year to June 2023 just three patrons were asked to leave the Casino for antisocial behaviour (Table 6.10).

Table 6.10: Patrons asked to leave Casino, April 2021 to June 2022

Reason for Exit	Number
Behaviour	3
Responsible service of alcohol	28
Previously denied	22

It is certainly the case that the (albeit small number) of immediate residential neighbours of the Casino did not report any problems with antisocial behaviour in the neighbourhood. They were much more likely to identify noise from buses, trucks, and other road traffic (21%) or smells in the neighbourhood (13%) than they were to identify antisocial behaviour (4%) or neighbourhood crime (4%) as a local concern.

When asked directly if these immediate neighbours noticed having the Casino as a neighbour, 96% said they rarely or never notice.

Table 6.11: Neighbourhood views

As a neighbour, how much do you notice having the Casino as a neighbour?	%
I never notice the operation of the Casino	46%
I rarely notice the operations of the Casino	50%
I sometimes notice the operations of the Casino	4%
I often notice the operations of the Casino	0%
I always notice the operation of the Casino	0%

Moving the focus a little wider, the Queenstown Visitor Survey (which tracks the views of domestic visitors to Queenstown)⁷³ shows that visitors to Queenstown have low levels of concerns about antisocial behaviour.

Table 6.12: Domestic visitors' perceptions

	Agree⁷⁴
I feel safe in Queenstown	92%
I don't feel concerned about antisocial behaviour in Queenstown	81%

⁷³ https://assets.simpleviewinc.com/simpleview/image/upload/v1/clients/queenstownnz/Queenstown_Visitor_Experience_Q1_FY21_22_f04ffd2b-b235-42e3-ac83-af32bc1f654e.pdf

⁷⁴ This is the cumulative total for those who ranked their agreement as 8, 9, or 10 out of 10 (on a 0 to 10 point scale).

6.3.2 QUALITATIVE INSIGHTS INTO ANTI-SOCIAL BEHAVIOUR

The qualitative data collected for this impact assessment demonstrates that local stakeholders have few concerns about antisocial behaviour in Queenstown being exacerbated by the Casino. The representative from Queenstown Lakes District Council was clear that the Council has not seen significant issues with alcohol consumption at the Casino—something they attributed to good security management and the fact that the Casino actively manages disruptive behaviour to ensure a positive gaming environment.

The representative from the local police consulted for this CIR⁷⁵ acknowledged that they rarely interact with the Casino. They thought this was because the Casino is diligent in complying with alcohol-related obligations, resulting in very few police calls for service.

We don't have any issues with sale and supply of alcohol act, as SkyCity generally are all over their obligations legally.

They are aware that other locations have seen casinos used as places of refuge for people experiencing family harm but this is not observed in Queenstown.

We know other location have seen casinos used as places of refuge, because they run 24/7. But this is not something experienced in Queenstown, we have no evidence of it.

⁷⁵ An Alcohol and Family Harm Prevention Officer from the Queenstown police

6.4 MONEY LAUNDERING

The Casino 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:

- completion of a risk assessment;
- development of an an AML/CFT programme that includes procedures to detect, deter, manage, and mitigate money laundering and the financing of terrorism;
- ensure completion of customer due diligence processes including identification and verification of identity; and
- undertake suspicious activity reporting, auditing and annual reporting systems and processes.

While SkyCity's Financial Crime team is based in Auckland, some AML functions are delivered by front-line staff at the Casino.

Section 59 audits of the AML programme are undertaken in line with legislation every two to three years.⁷⁶ DIA also audits the AML programme and processes every two years. Within these audits, Queenstown is assessed. The risks of money laundering and terrorism financing are assessed at each site, allowing SkyCity to consider particular nuances, such as size of the casino and the effectiveness of certain types of controls.

The purpose of these audits is to test the design and operational effectiveness of the controls. Queenstown has not been singled out for specific remediation but SkyCity's Financial Crime team has enhanced processes in response to audit findings over time. These enhancements include changes in policies which affect Queenstown i.e. refusal of third-party transactions.

There are regular meetings between the Financial Crime team and operational managers in Queenstown allowing the sharing of processes and issues. In addition separate audits, such as cash handling and Cage audits cover certain elements of the AML process.

None of the stakeholders consulted for this impact assessment expressed any concerns relating to money laundering and the operation of the Casino.

⁷⁶ Section 59B of the Anti-Money Laundering and Countering Financing of Terrorism Amendment Act 2017 (2017 No 35).

Section 7

Effects of No Renewal

7.1 ECONOMIC CONSEQUENCES

7.1.1 WITH VS. WITHOUT SCENARIOS

We used the data collected to assess the impact if the Casino were to close. This section compares two scenarios:

- the modelled impact of the Casino on the Queenstown 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).

7.1.2 WITH CASINO SCENARIO

For the purposes of estimating the economic impacts of the Casino, Casino Budgets over the period FY20 to FY23 were reviewed. The impact of Covid-19 is not particularly obvious in the revenue of the Casino, with FY20 revenue being \$8.8 million with four to five months of Covid-19 impact, while FY21 which had numerous shorter lockdowns had revenue of \$10.9 million (Table 7.1).⁷⁷ Patronage numbers are also seemingly less affected by Covid-19 numbers than might have been expected. The Casino management reports that increased domestic tourism and Auckland gamblers unable to visit overseas destinations were responsible for this outcome. 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 FY21. Profit appears to be higher in the fully Covid-affected FY21, which is a result of increased revenue over FY20 with lower expenses and labour costs.

Table 7.1: Casino key financial measures, FY20 to FY23⁷⁸

Item	FY20	FY21	FY22	FY23	Average
Revenue (\$m)	\$8.80	\$10.87	\$9.01	\$10.88	\$9.89
Labour (\$m)	-\$4.20	-\$3.62	-\$3.42	-\$3.84	-\$3.77
Expenses (\$m)	-\$7.39	-\$7.04	-\$6.46	-\$7.16	-\$7.01
Depreciation and non-trading items (\$m)	-\$1.32	-\$1.21	-\$1.26	-\$1.35	-\$1.28
Taxation (\$m)	\$2.94	\$1.21	\$0.67	\$1.20	\$1.51
Profit (EBIT, \$m)	\$0.81	\$3.36	\$2.06	\$3.07	\$2.33

⁷⁷ These figures differ from the financial statement revenues, which net-off various payments and complimentarys and include provisions for bonus points and jackpots. The figures include government wage subsidies.

⁷⁸ Note that these differ from the financial statement figures, which include provisions for complimentarys.

Flow-on impacts of casino expenditure

Discussions were held with both Casino suppliers and Casino accounting staff to categorise Casino expenses by industry group⁷⁹ and geographic source. For the purpose of assessing economic impacts, the source was split between Queenstown Lakes District, 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 source region, which gave 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 shown in the Casino accounts, but also items such as cleaning items, fuel) 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 which were invoiced by a company located in one geographic source but supplied by a branch in another source (e.g. rubbish collection) were coded as part purchases in both geographic source areas.

The expenditure within Queenstown, broken down by industry, was incorporated into a Queenstown Lakes District Council economic model developed for this project,⁸⁰ and a similar process was carried out for expenditure within Otago (including Queenstown) for an Otago economic model. This enabled calculation of the total economic impact on the Queenstown Lakes District and the wider region.

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 to equalise expenditure in both the With Casino and Without Casino scenarios, and ensures that 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 \$10.16 million per annum, but of this some \$0.27 million is paid back to households as complimentary, so the total expenditure by patrons (equal to the displaced expenditure in the without Casino scenario) is only \$9.89 million.⁸¹

⁷⁹ Accounting codes are quite different from the industry groups used in the economic model.

⁸⁰ 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 SNZ in December 2021, and is for FY20. 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.

⁸¹ The \$0.27 million repaid to households is attributed to operating surplus in the I-O table modelling.

Gross impacts of With Casino scenario

The Casino directly generates 45 FTE jobs, \$3.63 million of earned gross household income⁸² and \$6.9 million of value added. The latter figure includes wages and salaries, profit, interest, depreciation, and taxes—including gaming taxes.

Once indirect effects are taken into account, the Casino generates total impacts in Queenstown of:

- 60 FTE jobs;
- \$4.50 million of earned gross household income; and
- \$9.17 million of value added.

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

- 65 FTE jobs;
- \$4.84 million of earned gross household income; and
- \$9.78 million of value added.

Table 7.2: Direct and flow-on impacts in Queenstown Lakes from the Casino

Indicator	Direct operations	Queenstown (including flow-on) Operations	Queenstown (including flow-on) CAPEX	Total Queenstown (including flow-on)
Employment (FTEs)	45	60	0.15	60
Value added (\$m)	\$6.90	\$9.17	\$0.01	\$9.18
Gross household income (\$m)	\$3.63	\$4.49	\$0.01	\$4.50

Table 7.3: 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)	45	65	0.39	66
Value added (\$m)	\$6.90	\$9.78	\$0.04	\$9.82
Gross household income (\$m)	\$3.63	\$4.84	\$0.02	\$4.86

⁸² Excluding income from dividends.

Queenstown Lakes District is a relatively small area compared with other locations where casinos operate and there are no other main centres nearby. Alexandra and Cromwell are the nearest services centres relatively small amounts of expenditure appear to be directed to those centres. Because of this, the economic multipliers for individual industries are only slightly larger for Otago than for Queenstown Lakes. This results in the differences between the Queenstown Lakes and Otago impacts being comparatively small. 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 Queenstown Lakes impacts.

Comparisons of gross impact

The direct employment impact of the Casino estimated on turnover (net of incentive payments back to players) of around \$9.89 million is equivalent to 4.7 jobs/\$million, which is considerably higher than the national average for gambling of 1.8 jobs/\$million.⁸³ The Casino's total impact of 6.15 jobs/\$million is also higher than the national average in spite of Queenstown 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 which players might otherwise undertake.

⁸³ Data from SNZ New Zealand Input-Output Study 2019–20 combined with Infometrics employment statistics by industry and region.

WITHOUT CASINO SCENARIO

It is our view that input-output models give the most useful view of the impacts at a territorial local authority and regional level, provided that trade diversion effects are taken into account. The Without Casino scenario does this by assessing the impact of the spending that the Casino patrons would be likely to undertake in the absence of the Casino.

This calculation of diverted spending is shown in Table 7.4 and estimates that \$1.81 million per annum would still be spent by Queenstown residents in Queenstown in the absence of the Casino, and \$7.62 million by visitors, giving a total of \$9.43 million in continued expenditure in Queenstown 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 revenue⁸⁴ 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 Queenstown to these impacts. These calculations are shown in more detail in Table 13 of Appendix 3. The summary outcomes give an estimated total of 81 FTEs of employment retained in the Queenstown Lakes District, \$6.36 million value added, and \$3.96 million in household income in the absence of the Casino.

The landlord (Trojan Holdings Ltd) considers that the most likely alternative use for the space currently occupied by the Casino would be premium apartments for short-term visitor stays. Converting to office space is not considered likely to be successful because of the high vacancy rate for office space with the move to working from home. They consider it unlikely that a similar business would utilise the space. The development of the space into apartments would require significant capital input from the landlord and would need to be considered in more detail to understand the feasibility of such a development.⁸⁵

⁸⁴ Net of cash prizes given by the Casino back to consumers, which the Casino treats as expenditure.

⁸⁵ Jonathon Douglas, Trojan Holdings Ltd, personal communication, 15/9/23.

Table 7.4: Spending transferred in the absence of the Casino

Percentages in columns 2 and 3 are derived from those shown in Table 4.4, but adjusted for differences in spending between carded members and non-members.

Alternative activity without gaming (all responses)	Impacts in Queenstown		Spend transfer		
	Residents	Visitors	Residents	Visitors	Total (\$m)
Different gaming	4.6%	5.0%	\$0.09	\$0.40	\$0.49
SCQ other activity	6.8%	3.8%	\$0.13	\$0.30	\$0.43
Other bar/restaurant	35.2%	51.5%	\$0.68	\$4.10	\$4.78
Movie/play/concert	4.8%	5.0%	\$0.09	\$0.40	\$0.49
Shopping	2.5%	3.2%	\$0.05	\$0.25	\$0.11
Other commercial	10.1%	8.9%	\$0.19	\$0.71	\$0.91
Non-commercial	9.2%	6.7%	\$0.18	\$0.54	\$0.72
Stayed home/accommodation (resident)	20.6%		\$0.40	\$-	\$0.40
Stayed at home or in accommodation (non-resident)		11.5%	\$-	\$0.92	\$0.92
Imported goods			\$-		\$0.20
Out-of town spending	6.1%	4.3%	\$0.12	\$0.34	\$0.46
Total sample	100%	100%	\$1.93	\$7.96	\$9.89
Total in Queenstown			\$1.81	\$7.62	\$9.43

The total net impacts for Queenstown Lakes are shown in Table 7.5.⁸⁶ This adds the gross impacts of the Casino expenditure together with the tourism generation impacts associated with visitors to the town. The trade diversion impacts, which are the likely impacts of continued expenditure in Queenstown in the absence of the Casino, are subtracted from the previous two items. The net impact is an estimated -10 FTEs in employment, \$3.73 million per annum in value added, and \$1.07 million per annum in household income.

⁸⁶ The calculation of the flow-on impacts from trade diversion is shown in Appendix 3.

Table 7.5: Comparison of With vs Without scenarios for Queenstown

(see Table 13 in Appendix 3 for breakdown of Trade Diversion Impacts)

Item	Employment (FTE)	Value Added (\$million/annum)	Household Income (\$million/annum)
Trade diversion impacts	-81	-\$6.36	-\$3.96
Tourism generation impacts (see below)	10.9	\$0.91	\$0.53
Casino gross impacts (from Casino impact model)	60	\$9.18	\$4.50
Net impacts of Casino⁸⁷	-10	\$3.73	\$1.07

⁸⁷ Total may not add up to items above because of rounding differences.

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.

- 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, then consumers will not come to the Casino, and if there is no producer surplus then producers will not continue to operate the Casino.

Gambling is a form of entertainment that is undertaken by approximately 70% of the population, with Lotto as the most popular of these (Thimasarn-Anwar et al, 2018). It is assumed that this 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 in the intercept survey, 78% said they wouldn't gamble in Queenstown if the Casino were not present (Table 7.3) and 91% said they wouldn't gamble at a casino elsewhere in NZ (Table 7.4). However, we note that in the intercept survey almost 80% of respondents said that they 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.

About 5% of respondents would have gambled elsewhere in Queenstown if the Casino were not available. We are unable to determine whether the gambling spend transferred inside Queenstown represents an increase or decrease in producer surplus. Of those gambling in Queenstown, 7% would do it online, and less than 1% would transfer their spending to outside of Queenstown. This transfer of spending to other locations represents a definite loss of producer surplus to the Queenstown economy, and in the case of the online gambling, potentially also a loss to the New Zealand economy. Although the magnitude of this producer surplus loss is unknown, it is likely to be small. The estimate of real gross disposable national income (RGDNI) 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 its 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 7.3: Alternative gambling options, Casino patrons intercept survey responses⁸⁸

Alternative gambling location	Number of responses	Proportion of responses
At a club	5	2%
At a pub	43	18%
At the races	9	4%
Online betting	16	7%
Buy some/more lotto tickets	11	5%
Other (please specify)	3	1%
I wouldn't gamble	187	78%
Total	241	100%

Table 7.4: Alternative Casino gambling options, Casino patrons intercept survey responses⁸⁹

Alternative gambling location	Number of responses	Proportion of responses
Christchurch	10	4%
Hamilton	4	2%
Auckland	10	4%
In Australia	7	3%
Other (please specify)	3	1%
I wouldn't gamble	220	91%
Total	241	100%

⁸⁸ Respondents were able to choose more than one option of alternative gambling so the totals of numbers and proportions will not add to 100%. The "I wouldn't gamble" responses were only single responses (i.e., no other gambling options were chosen) which means that the proportion of responses to this question is a true representation of the proportion who would not gamble.

⁸⁹ Only the "I wouldn't gamble" option is a true representation of the proportion who would not gamble. Respondents could select more than one of the other options so the sum of the number of responses and proportion of responses will not equal the Total column.

Tax effects of the Casino

There are \$4.0 million per year in taxes and levies directly associated with the Casino's operations. These include PAYE (\$0.7m), GST (\$1.3m), income tax (\$1.5m), casino duty, DIA levy and other levies (\$0.4m)(Table 7.5).

Table 7.5: Taxes and levies paid by the Casino

Tax or levy	FY20	FY21	FY22	FY23	Average
PAYE	\$838	\$564	\$625	\$663	\$672
GST	\$2,168	\$1,202	\$762	\$1,221	\$1,338
Income tax	\$2,937	\$1,212	\$674	\$1,198	\$1,505
Casino duty	\$63	\$59	\$50	\$95	\$67
DIA levy	\$290	\$276	\$304	\$304	\$294
Problem gambling levy	\$63	\$59	\$50	\$95	\$67
Other licences and levies	\$30	\$47	\$40	\$42	\$40
Total	\$6,358	\$3,373	\$2,465	\$3,576	\$3,983

Some of these taxes and levies will be replaced by transferred spending and changes in taxes for the alternative places where spending could occur. If the Casino were to close, these would be the impacts on taxes and levies.

- a) Almost all of the casino duty and DIA levy would be lost, since 80–90% 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 (total household income / total FTE ratio of \$76,000/FTE in the With Casino scenario vs \$49,000/FTE in the Without Casino scenario), and
 - b. household income would be \$1.07 million lower without the Casino, as shown in Table 7.2, which at an average New Zealand tax rate (OECD, 2022) of 19.4% is equal to \$0.21 million.

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

National effects

As noted above, we have not undertaken a CGE model of the Casino 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 the Casino with the estimated national \$70 million real gross national disposable income (RGNDI) effects from the Christchurch Casino.

Queenstown Casino is about 10%–16% of the size of Christchurch Casino (10% by FTEs, 16% by total revenue, 14% by patrons). A direct scaling would give an estimated \$7–\$11 million in RGNDI for Queenstown Casino. However, 30% of the visitors to Queenstown Casino were from overseas versus about 4% of the visitors to Christchurch Casino. We think therefore that the likely impacts of Queenstown Casino on RGNDI will be several million dollars higher because of significantly less diversion of spending from other locations within New Zealand.

Summary of economic impacts of Casino closure

The Casino contributes to the Queenstown economy in a number of ways (Table 7.6). It currently (end FY2023) employs 53 people (45 FTE). The Casino spends \$3.36 million per annum in operational expenses with suppliers,⁹⁰ of which 41% is spent in Queenstown, and an additional \$0.73 million per annum on capital items, of which \$0.15 (2%) million is spent in Queenstown. The Trust associated with the Casino distributes about \$0.14 million per annum to charities, and the Casino distributes a further \$0.04 million per annum in sponsorships. All of the sponsorship, and 94% of the charity distributions, are to organisations in the Queenstown and Wānaka area.

Table 7.6: Direct impacts of the Casino Queenstown, FY20 to FY23

Item	Total	Queenstown based
Employment (FTE)	46.5	100%
Operational spending (\$m)	\$4.86	66%
Capital spending	\$0.73	2%
Gambling trust distribution	\$0.14	94%
Sponsorship	\$0.04	100%
Tourism (proportion of patrons who are visitors)	80%	

When the expenditure, employment, and other activities of the Casino are included in a model of the Queenstown and Otago economies, the Casino generates a total of 60 FTEs, \$9.18 million in value added, and \$4.50 million in household income.

When these gross impacts of the Casino expenditure are aggregated with the tourism generation impacts associated with visitors to Queenstown, and the likely impacts of continued expenditure in Queenstown in the absence of the Casino are subtracted from the previous two items, the net impact of the Casino is an estimated **-10 FTEs in employment, \$3.73 million per annum in value added, and \$1.07 million per annum in household income** (Table 7.7).

⁹⁰ Some of the operational spending is transferred to Sky City in Auckland for various support services.

This combination of a decline in employment and a rise in household income is unusual and occurs because the wages paid by the Casino are substantially higher than in the sectors to which spending would otherwise transfer. The decline in employment suggests that in the absence of the Casino more people would need to be employed to service the alternative spending generated in the Queenstown Lakes District. The negative employment impact is also due in part to the tourism impacts being relatively small, because the Casino is not the prime attraction for many of its out-of-district patrons.

We consider that in the labour constrained market currently being experienced by employers, the ability to generate higher GDP and household income per employee is at worst neutral and generally positive for the economy. If the Casino were not present the need for, and shortage of, workers in other sectors would increase, as the current Casino spending transfers to them.

Table 7.7: Comparison of With vs Without scenarios for Queenstown

Item	Employment (FTE)	Value added (\$million/annum)	Household income (\$million/annum)
Trade diversion impacts	-80.8	-\$6.36	-\$3.96
Tourism generation impacts (see below)	10.9	\$0.91	\$0.53
Casino gross impacts (from Casino impact model)	60.0	\$9.18	\$4.50
Net impacts of Casino ⁹¹	-10	\$3.73	\$1.07

In the context of the wider Queenstown Lakes District employment of 30,000 jobs and GDP of nearly \$3.6 billion per annum, both the direct and net impact of the Casino are a small fraction of the town's economy. This generally tallies with the information from stakeholders and the neighbourhood survey: that the Casino is valued but is not a major player in the city economy and few businesses are highly reliant on it.

⁹¹ Totals may not add up due to rounding differences

A relatively low impact in the Queenstown Lakes District context is not unexpected given the small size of the Casino and its location within a strong tourism centre. This should not be seen as discounting the Casino's value. The analysis has indicated the following key points.

- The Casino is a source of employment that appears to be more highly paid than is typical for other hospitality type businesses. Its closure would cause disruption to employees and it seems likely that any replacement employment would be at a lower salary if they stayed in Queenstown. For employees with a specialised skill set, such as dealers, the potential alternative employment would be outside of Queenstown at a casino elsewhere in NZ or overseas.
- The Casino provides an entertainment option in Queenstown, and its removal would decrease the range of options available as the alternative use of the space is likely to be accommodation.
- 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 \$3.98 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 Queenstown Casino to generate more than \$7–\$11 million in RGDNI per annum.

7.2 SOCIAL CONSEQUENCES

This social impact assessment has demonstrated that the Casino confers entertainment benefits to its users, and contributes to Queenstown’s status as a tourist town.

In addition to this, the Casino 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 Queenstown through the 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 economies.⁹²

In the community study that accompanies this social impact assessment, we asked residents directly if they thought “Queenstown would be better off with or without the Casino”. Only 21% of respondents thought it would be better off without, while more than a quarter of residents (26%) thought Queenstown was a better place for having the Casino. The majority were either not sure or neutral (note that 45% of these respondents had never been to the Casino).

Table 7.7 Community attitudes toward the Casino (N=206)

Queenstown would be a much better place without a casino	8%	21%
Queenstown would be somewhat better place without a casino	13%	
I’m not sure, or am neutral about the Casino	53%	53%
Queenstown is a somewhat better place with a casino	21%	26%
Queenstown is a much better place with a casino	5%	
NET	100%	

⁹² 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

Table 7.8 Community Engagement with the Casino (N=206)

I have never been to the Casino	45%
I have been to the Casino but didn't do any gambling	29%
I have been to the Casino and have gambled	26%
Total	100%

Similarly, the small number of neighbouring residents were largely positive about the role of the Casino in Queenstown:

Table 7.9: Neighbouring residents' attitudes toward the Casino (N=24)

How much do you agree or disagree with these statements about the Casino in general	Net agree
The Casino is an important part of Queenstown's business community	50%
I think the Casino is an important part of Queenstown's entertainment landscape	63%

While the community survey prompted residents for their opinion about the operation of the Casino, the social listening exercise⁹³ completed as part of this social impact assessment showed very low levels of community concern on social media channels about the Casino. Where the Casino is mentioned, it is typically positive and related to tourism in the region. There were also positive posts where people describe their winnings, on YouTube and in groups like Facebook's "Smart Pokies".

- The most prominent news story relating to the Casino over the last year was the *NZ Herald* story about difficulties replacing staff.⁹⁴ The response to this was mixed, with some suggesting the Casino could do more to attract service workers to the region.
- Mentions of the SkyCity Stampede were also present, with the team generating a consistent level of interest online.

⁹³ 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.

⁹⁴ This distinctly lower level of discussion from opinion leaders means that discussion is more likely to be diverse and wide-ranging and less likely to focus on specific topics, news stories or events.

There is also the unique nature of Queenstown and the extent to which people expect a destination like Queenstown to have a casino. In the nationwide survey of New Zealand residents completed for this assessment, 13% said they had visited the Casino while in Queenstown. This was almost the same proportion doing a wine tour (14%) and is more than those who cited playing golf (8%) or mountain biking (8%).⁹⁵

Table 7.10: Nationwide attitudes toward casinos in different locations (N=380)

How much do you agree or disagree that a casino is appropriate in these locations?	Net Agree
Queenstown	46%
Christchurch	43%
Dunedin	39%
Hamilton	39%

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

As for gambling harm, there is no doubt that gambling-related harm is a real and continuing issue in New Zealand. However, this social impact assessment concludes that the quantum of gambling harm directly attributable to the Casino is likely to be small. Moreover, it is reasonable to assume that this harm could *increase* in a scenario of no-renewal if gamblers migrate to forms of less-regulated gambling—whether Class 4 venues (where there is lower oversight and a greater risk of continuous play) or online gambling.

The 2019 New South Wales Gambling Survey found that the problem gambling rate among internet gamblers was twice as high as gamblers who gambled in physical venues. This report stated:

Internet gamblers were more likely than non-internet gamblers to be moderate-risk and problem (18% compared with 5%). Problem gambling prevalence among internet gamblers was twice as high (4% compared with 2% of non-internet gamblers). Similarly, internet gamblers were more than three times more likely to be in the moderate-risk category (14% compared with 4% of non-internet gamblers).⁹⁶

⁹⁵ In contrast, 35% rode the luge and 33% went on a boat cruise (e.g., TSS Earnslaw).[†]

⁹⁶ <https://www.gamblinglaw.co.nz/download/NSW-Gambling-Survey-2019.pdf>

The social listening found that 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 lockdowns in the UK. The research builds on other evidence, including the YouGov Covid-19 tracker study, which found that regular gamblers turned to new online options during lockdowns.⁹⁷

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 harm.⁹⁸

⁹⁷ 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

⁹⁸ Ministry of Health. 2022. *Strategy to Prevent and Minimise Gambling Harm 2022/23 to 2024/25*. Wellington: Ministry of Health.

Section 8

Appendix One: Assessment Design

8.1 ECONOMIC IMPACT DESIGN

Economic effects

“Effects” can refer to either economic impacts, or economic costs and benefits, or both. The initial ex ante assessments of New Zealand casinos in the 1990s generally focused on the economic impacts⁹⁹ of casinos using Input-Output (I-O) models, and this approach is also taken by the vast majority of the studies identified in a literature review by the Christchurch Casino study¹⁰⁰. The more comprehensive studies take into account 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 away from these areas and towards casinos. Studies may also take into account the effects of the Casino on tourism, and the associated economic impacts.

This report uses I-O models to estimate the Queenstown and Otago economic impacts of the Queenstown Casino on employment, household income and Value Added¹⁰¹, 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 takes into account the re-allocation of resource amongst 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 employment¹⁰², which is of major interest at the city and regional level. Because the Queenstown Casino 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 Queenstown Casino impacts would be too small relative to the margins of error of the CGE model, and therefore the CGE model would not be sensitive enough to adequately resolve the changes associated with the With and Without scenarios for the Queenstown Casino.

⁹⁹ 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)

¹⁰⁰ Morgan (2016). Literature Review of the Social Impacts of Casinos and Butcher, 2017. Addendum - Economic Impacts of Casinos

¹⁰¹ Value added is calculated by summing profit before tax, interest and depreciation (EBITDA) and wages & salaries

¹⁰² 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 Queenstown Casino associated with increased consumer choice in entertainment and the social vitality of the town, with these increasing the attractiveness of the town 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 Queenstown'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.

Issues to consider in economic assessment and study 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) use 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) use existing data held by local authority or tourism organisations on the extent and importance of visits to the casino by tourists; and
- 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 taken into account 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 TLA and regional level.
- **Measurement approach:** This study uses appropriate input - output models for quantitative assessment of effects. The results take into account both 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 also 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 four year average data when modelling casino operations. The period modelled is 2019/2020 to 2022/23. This period was significantly impacted by the Covid 19 pandemic, and even as late as 2023 levels of international tourism were not back to pre-pandemic levels. Hence the results are potentially affected by the initial and on-going impacts of the pandemic and possibly understate the long term economic impacts of the casino.
- **Geographic focus:** The study looks at the TLA 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.

Method for estimating economic impacts

Queenstown Lakes District (QLDC) and Otago region economic impacts have been estimated using appropriate TLA and regional input-output models. The models have been modified by including a Queenstown Casino industry, the input structure of which was developed using actual Casino expenditure data averaged over a four year period. While input-output models have their limitations, assuming as they do that there is spare capacity in the economy and that the Casino has not “squeezed out” other businesses by making labour and capital scarce, the alternative is to use general equilibrium models which have their own limitations, particularly at a TLA and regional level. It is our view that input-output models give the most useful view of the impacts at a TLA and regional level, provided that trade diversion effects are taken into account. At the national level, the balance of modelling limitations shifts, and it is felt that the most appropriate approach is to use Computable General Equilibrium (CGE) modelling. However, because of the small scale of the Queenstown Casino, 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 Queenstown Casino’s size relative to the Christchurch casino and its associated national impacts (Section 7.1). Detail of the development of the Input - Output models is given in Section 7.1. This report is based on:

- i. the actual financial operating data of the Casino over the four years to June 2023;
- ii. Detailed analysis of the Casino’s “Vendor Breakdown” records to determine where the Casino suppliers are located;
- iii. A survey of 103 Casino carded member from the database and 241 patrons through an in person intercept survey to find out how they think the Casino affected their activity and spending decisions and, if they were visitors to Queenstown, their travel decisions; and
- iv. A survey of casino staff on where they reside and their income and expenditure patterns.

Section 3.2 describes the QLDC economy as background for a description of the effects.

Section 4 contains 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 community trust distributions. It also describes the effects of the Casino at a wider economy level. This includes comments on the impacts of the Casino on adjacent businesses, benefits of a wider choice to consumers.

Section 7.1 describes the modelling of the interactions between the SkyCity Queenstown Casino and the wider economy, and estimates the impact of the scenarios with and without the casino operating. It also contains a description of the ways in which the Casino might affect consumer and producer surplus and describes 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. This section also describes the national impacts of the Queenstown Casino through a comparison with the estimated national effects of the Christchurch Casino.

8.2 SOCIAL IMPACT DESIGN

8.2.1 DESIGN PRINCIPLES

When compiling this approach to the social impact assessment of SkyCity Queenstown Casino, Research First referenced both 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, the design has been informed by the following emerging best practice principles in regard to assessing the social impacts of gambling¹⁰³:

- **Comprehensively Assess all Potential Social Impacts:** This principle ensures that all of the 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. This framework will form a central part of Research First’s assessment of SkyCity Queenstown Casino (see 3.0 below for an overview of this framework).
- **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 that 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. This can be within a location before and after the development of a casino or it can be with a location where there is no casino. The purpose of this counterfactual comparison is to enable assessments to legitimately assess the ‘effect size’ of the casino’s impact¹⁰⁴.
- **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.

¹⁰³ Research First notes that that the CIR provides assessment of the operation of the casino and not solely about the impact of gambling. SkyCity Queenstown Casino provides services independent of gambling and these will be included in this Social Impact Assessment.

¹⁰⁴ 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.

Beyond these principles, the design outlined here follows 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. This means the social impact assessment of SkyCity Queenstown Casino will involve multiple data sources and data collection methods.

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 are able to complement the restrictions of another. In particular:

- Quantitative research involves data collected from a large number of 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 SkyCity Queenstown Casino Social Impact Assessment also combined 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 of the research team. This includes official government statistics, research conducted by others, media reports, etc.

The principles outlined in this section have shaped the impact assessment design summarised in the next section and then discussed in more detail throughout this document.

8.2.2 ASSESSMENT OVERVIEW

The International Association for Impact Assessment (IAIA) defines 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 interventions¹⁰⁵.

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 NZ 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 a SIA though they have the same basic content (Burdge and Vanclay, 1995). The outlined provided here is consistent with those principles.

Similarly, SIA makes use of a range of tools or techniques for prediction and estimation of effects, and typically utilises a 'mixed methods' approach for data gathering and analysis. A mix of methods is used to increase validity and broaden impact coverage. This commitment to mixed methods and multiple audiences is also incorporated into Research First's proposed design for SkyCity Queenstown Casino.

¹⁰⁵ <https://www.iaia.org/wiki-details.php?ID=23>

8.2.2.A ASSESSMENT DESIGN

The CIR is the most 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, Research First initially planned a five-part assessment design:

1	Secondary Source Review
2	Key Stakeholder Interviews
3	Focus Groups with Special Interest Groups
4	Patron, Staff, and Neighbourhood Surveys
5	Analysis and Reporting

This design was sequential – it started with a review of the secondary sources before interviewing key stakeholders. From here it expanded to focus groups with special interest groups, before engaging with patrons, staff, and the local community through separate surveys.

As noted in Section 2, the research instruments in this social assessment made use of the impact framework developed by Anielski and Braatan (2008) to ensure the broadest range of impacts are included. The assessment was also designed to ensure that it captured the views of the community by location, age, gender, ethnicity, and socio-economic group.

Figure 3.1 Casino impact framework (Anielski and Braatan (2008))

SOCIAL IMPACTS (i.e., impacts that are primarily non-monetary in their nature)	
Problem Gambling	Changes in the prevalence of problem gambling and the main indices potentially associated with problem gambling (i.e., personal bankruptcy rates, divorce rates, suicide rates, treatment numbers). There are also monetary costs associated with changes in problem gambling that should be tabulated (and included in the Economic Impact section). Specifically, these are the amount of money spent on a) treatment and prevention; b) policing, prosecution, incarceration, and probation for gambling-related crime; c) child welfare involvement for gambling-related family problems; and d) unemployment and welfare payments and lost productivity because of gambling-related work problems.
Crime	Change in the rate of crime and gambling-related crime. This would also include any observed decreases in illegal gambling with the introduction of a legalized form.
Employment	The number of full and part time jobs that are directly or indirectly created as a result of gambling introduction and the percentage of the general workforce that this represents.
Socioeconomic Inequality	Evidence that the introduction of gambling has a differential financial impact on people of different socioeconomic levels (e.g., potentially making it more or less 'regressive').
Leisure Activity	Changes in the pattern of leisure behaviour associated with gambling introduction.
Public Attitudes	Change in public attitudes associated with gambling introduction. This could include changed attitudes about gambling (e.g., perceived benefits/harms), or changed attitudes about government or the role of government for allowing/providing gambling, etc.
Quality of Life/ Public Health/Social Capital/Values	Change in the general quality of life, state of public health, societal interconnectedness, societal values, and related indices. These indices are often difficult to measure and also difficult to attribute to the introduction of gambling. Nonetheless, they are relevant impacts if they exist, and if they can be captured.

Research First notes that the Anielski and Braatan framework (above) focuses on the **negative** impacts of a casino's operation. The current Social Impact Assessment acknowledges that there also potentially positive social impacts as well, and these will be included in the Assessment.

PROJECT LEAD

The person leading this project for Research First was Carl Davidson, Research First's Chief Social Scientist¹⁰⁶. Carl is a Fellow of the Research Association and in 2023 he was named as one of the Global Insight 250 winners, an award celebrating worldwide pioneers, leaders and innovators in market research, data-driven marketing and insights of New Zealand (RANZ).

He is the author or editor of ten books about evidence-based learning, with a number of these now the standard textbooks used to teach research skills and critical thinking in New Zealand universities. He is also a regular contributor to *Stuff*, where he writes about 'the social science of everyday phenomena', and he teaches in the University of Canterbury's MBA programme. Reflecting his standing in the New Zealand research community, between 2010 and 2012 Carl was made the Chief Commissioner of the Families Commission and tasked with turning it into a world-class centre for research on families.

In 2013 he was also appointed to the Government's Expert Advisory Group on Information Sharing for the Action Plan for Vulnerable Children, and in 2017 he was elected to the Board of the Canterbury Employers Chamber of Commerce. He is also an Adjunct Senior Fellow at the University of Canterbury's Business School.

As Project Lead for the SkyCity Queenstown Casino Social Impact Assessment, Carl was responsible for the design, execution, and reporting of the research.

RESEARCH ADVISORY GROUP

To provide ongoing oversight of the research process, Research First established a Research Oversight Group of experts in social impact assessment and community engagement. This Research Oversight Group provided ongoing oversight of the data collection process, as well as input into a mid-point review and a post-data collection sensemaking workshop. This Oversight Group helped ensure the research team's approach and methods remained fit for purpose.

¹⁰⁶ <https://www.linkedin.com/in/carldavidsonnz/>

8.2.3 SECONDARY SOURCE ANALYSIS

The first data collection step in the assessment process was a secondary source review to:

- Outline the community context SkyCity Queenstown Casino operates within.
- Summarise what has been said about SkyCity Queenstown in printed and electronic media.
- Identify what the casino operator already knows 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.
- Identify what the casino operator knows about its current staff as well as historical trends and patterns in staffing.
- Identify what the casino knows about its suppliers.
- Identify what the casino knows about organisations and groups that receive any kind of support from the casino, and
- Identify the nature of the relationships that the casino has with various social agencies including problem gambling addiction services, other social service agencies in the city, etc.

This stage involved literature review and sentiment analysis components.

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

This stage also involved talking to a small number of key informants expert in the socio-demography of Queenstown and the surrounding region.

A key output of this stage was the identification of the communities of interest to be engaged in the focus group component.

8.2.4 KEY STAKEHOLDER INTERVIEWS

The second stage of this Social Impact Assessment involved key informant interviews with relevant stakeholders. These stakeholders included:

- The Gambling Commission;
- Queensland Lakes District Council;
- The Salvation Army Oasis;
- Problem Gambling Foundation;
- Relevant iwi/rūnanga representatives;
- Queenstown and Otago tourism agencies;
- Department of Internal Affairs;
- Ministry of Health, and
- Local police representatives.

These stakeholders were chosen to ensure the 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, and
- Management performance and compliance, regulation etc,

This engagement was done using in-depth interviews. These interviews lasted between 40 minutes and an hour in length and were 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, which also helped facilitate engagement, build rapport, and minimise the burden on participants.

8.2.5 PRIORITY AUDIENCE FOCUS GROUPS

Stage three involved consulting with priority audiences to ensure their voices are heard in the social impact assessment process. Research First proposed to do this by running a series of focus groups with priority groups such as:

- Inner city residents / neighbours of the Casino;
- Maori residents;
- Pasifika residents;
- Indian residents; and
- Chinese residents.

These audiences were to be selected on the basis of the secondary source review (stage one), the stakeholder interviews (stage two) and in consultation with the Casino and the Research Advisory Group.

The focus group approach has been in use by social scientists for over 50 years and is a preferred method for understanding unstructured or complex social situations. It involves bringing a small group of people together (typically between six and 10 participants) under the leadership of a moderator or facilitator, to discuss a particular issue or topic. The researcher/facilitator puts questions to the group, perhaps supported by audio-visual aids or stimuli, and through the ensuing discussion the interactions and interdependencies of issues can be identified and explored.

The hallmark of focus groups is the explicit use of the group interaction to produce data and insights that would be less accessible without the interaction found in a group. The focused discussion is usually recorded or videotaped for later analysis. Such groups are capable of providing rich and detailed information on attitudes, perceptions and beliefs which are often difficult to explore in structured surveys.

8.2.6 POPULATION SURVEYS

To ensure the social impact assessment had the quantitative data it needs to be robust, a critical component was a series of surveys with populations of interest. These populations included:

- Casino patrons;
- Casino staff;
- Community organisations receiving grants from SkyCity Queenstown Casino's Charitable Trust or receiving corporate sponsorships;
- Businesses operating in the vicinity of SkyCity Queenstown Casino; and
- Neighbouring residents¹⁰⁷.

The most cost-effective way to survey patrons, staff, organisations receiving support from the Casino, and businesses operating in the vicinity of SkyCity Queenstown Casino was through (separate) online surveys.

For patrons, staff, and organisations receiving support from SkyCity Queenstown Casino, the online surveys made use of customer databases supplied by SkyCity. Note that this is not a breach of the Privacy Act and that the Privacy Commissioner has clearly ruled that in projects like this:

- As Research First is acting on behalf of its client (i.e., SkyCity Queenstown Casino), sharing client contact details does not qualify as sharing information with a third party, and
- Information used by a client for statistical or research purposes is not seen as a breach of the Act as long as it is not published in a form that could "reasonably be expected to identify the individual concerned.

For these three surveys, the questionnaires were designed to maximise engagement and completion (which in practice means a survey designed to take a maximum of ten minutes).

The patron survey was also augmented with on-site surveying with visitors to gain an in-situ perspective. The interviews are semi-structured approach and are a short qualitative option. The method delivers more detail than is provided in a quantitative survey and has the ability to reach a bigger sample of people than the full in-depth interviews.

¹⁰⁷ The Social Impact Assessment does not include surveying businesses supplying goods and/or services to the casino on the assumption this will be covered in the Economic Impact Assessment, separately.

8.2.7 DATA ANALYSIS

8.2.7.A COMBINING INSIGHTS

The strength of mixed method research designs like this one is in the combination of insights from across the different methods. What researchers look for most in mixed method projects are the common themes across the 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.

To achieve this integration of insights from the multiple components of the project, Research First’s process includes a shared sensemaking workshop for the research team with the relevant SkyCity Queenstown Casino staff as well as those chosen to conduct the Economic Impact Assessment report (EIR.).

This process will enable the collaborative development of the key insights from the project, drawing on the experience and embodied knowledge of staff alongside the outcomes of the research. Research First runs these collaborative sensemaking workshops as face-to-face storyboarding sessions. As the name suggests, these sessions ensure a shared sense of what the research really means.

8.2.7.B 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 it is also highly ‘textured’. In practice, this means that qualitative data typically involves 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, ‘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.

8.2.7.C HOW TRUSTWORTHY ARE QUALITATIVE INSIGHTS?

The question of how trustworthy qualitative insights are is a question of methodology rather than method (that is, it concerns the philosophical assumptions that underpin the method). In sum this means that 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
<ul style="list-style-type: none"> • Credibility • Transferability • Dependability • Confirmability 	<ul style="list-style-type: none"> • Internal validity • External validity • Reliability • 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 participant’s eyes, the participants are the only ones who can legitimately judge the credibility of the results¹⁰⁸.
- **Transferability:** Transferability refers to the degree to which the results of qualitative research can be generalized 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 of 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, emphasizes 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 research approached the study.
- **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.

¹⁰⁸ 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.

8.2.7.D A CREDIBLE COUNTERFACTUAL

In Section 2 we outlined how The Canadian Consortium on Gambling Research believes a counterfactual condition is needed to provide meaningful comparisons of casino impacts. These can be longitudinal comparisons, between sites, or before-and-after comparisons. Such counterfactual comparisons provide the best way of assessing what would happen if there was no casino in operation. They therefore provide the best way to assess the potential social impacts of closure. This Social Impact Assessment proposes to address that counterfactual in three ways:

1. The weakest way to understand this counterfactual condition is to include questions about the potential impact of closure in all the primary research conducted for the Social Impact Assessment (i.e., stakeholder interviews, focus groups, population studies).
2. A more robust way to assess the potential impacts of closure will be to compare what happened during the temporary closure of the SkyCity Queenstown Casino due to the COVID-19 lockdowns. This will be less speculative than the first approach but will still be distorted by the fact that other gambling venues were also closed under Level 4 restrictions.
3. Perhaps the best guide to the counterfactual condition will be to draw on the evidence about what happened in Christchurch while that city's casino was closed due to earthquake damage. This is covered in the CIR completed by Baines and Butcher and draws on several months of data about what happened while other gambling venues remained open.

Section 9

Appendix Two: Gambling Trends

Most New Zealanders gamble at least occasionally. Estimates suggest that in 2020 69.3% (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%), followed by informal gambling such as playing cards with friends (35%), sports, dog- or horse-race betting provided by TAB NZ (10.9%), gaming machines at a pub or club (9.6%), gaming machines at casinos (4.0%), table games at casinos (2.5%) and online gambling on overseas websites (2.6%)¹⁰⁹.

In general, expenditure on gambling is declining. Table A1 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 gambling on Lotto that can be done online.

Table A1: 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

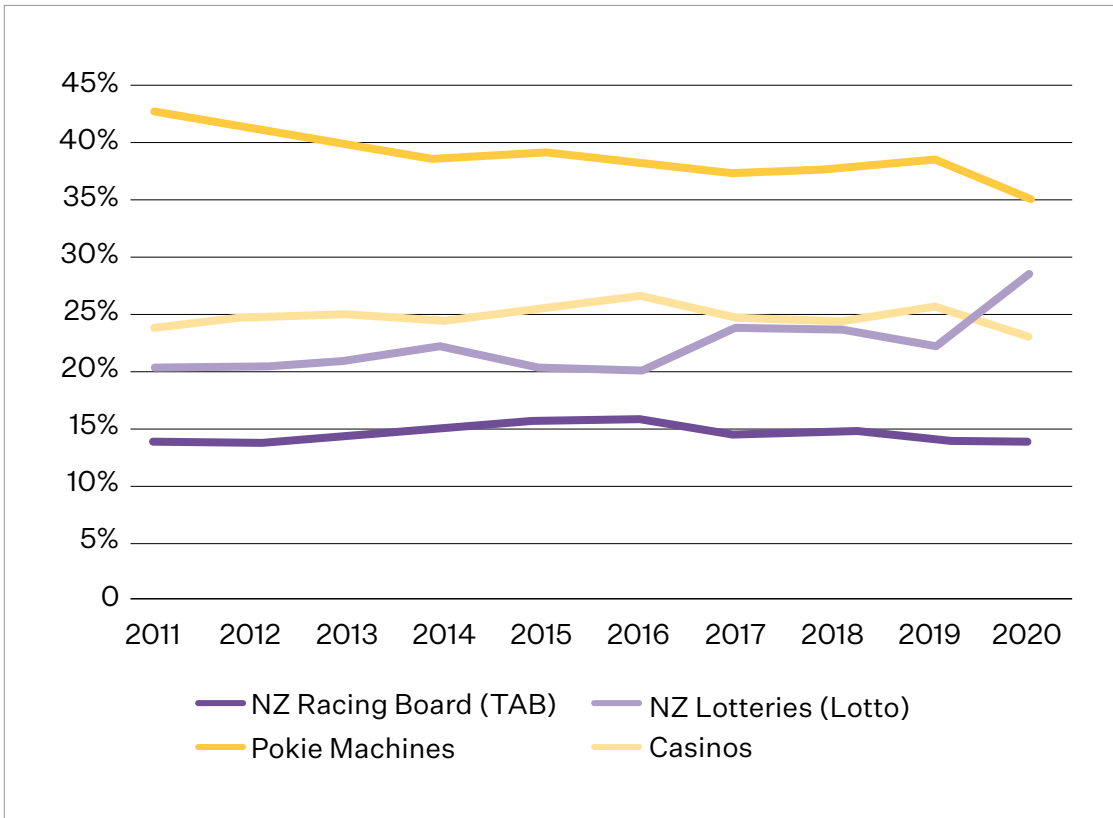
Figure A1 shows the proportion of gambling spend from the four main sources of gambling in New Zealand. Gambling losses through EGMs have gradually declined over the last 10 years, but they still make up the largest share of gambling losses in our country. The proportion of losses through casinos and the TAB have remained consistent over the last decade¹¹⁰.

¹⁰⁹ Ministry of Health. 2022. Strategy to Prevent and Minimise Gambling Harm

2022/23 to 2024/25. Wellington: Ministry of Health.

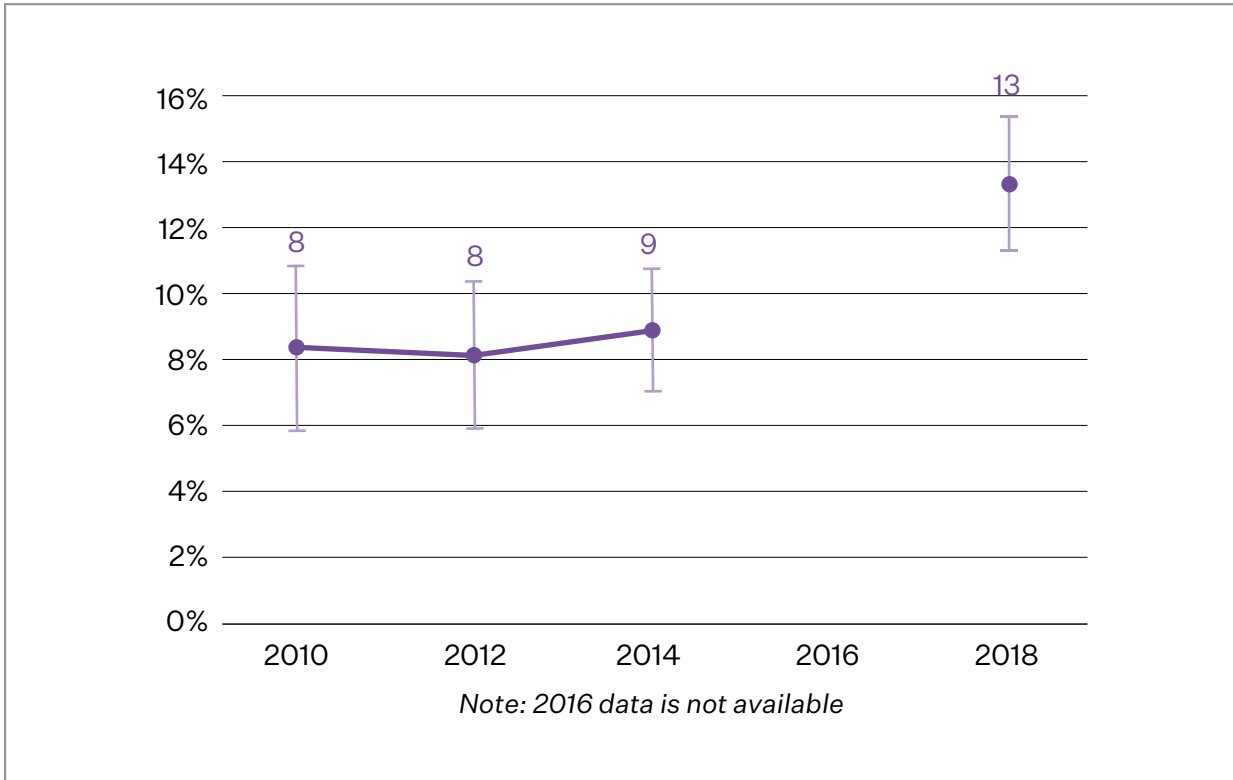
¹¹⁰ In Tanielu, R (2021) Just A Click Away: Online Gambling In Aotearoa, Salvation Army Social Policy Analysis and Parliamentary Unit, April 14, 2021

Figure A1: Proportion of Gambling Losses, 2011-2020 (Reproduced from Tanielu, 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 A2).

Figure A2: Increase in Online Gambling in NZ, 2014- (Reproduced from Tanielu, 2021).



Section 10

Appendix Three: Estimation Of Flow On Impacts From Trade Diversion

Table 13: Estimating flow on impacts from trade diversion in Without Casino scenario

Sector	Multipliers from Queenstown Tables			Total impact		
	Employment (FTE/million at 2019/20 prices)	Value Added	Household Income	Employment (FTE)	Value Added (\$million/annum)	Household Income (\$million/annum)
Gambling activities	4.3	0.88	0.3	0.38	\$0.35	\$0.15
Food and beverage services	12.2	0.81	0.54	1.61	\$0.24	\$0.23
Food and beverage services	12.2	0.81	0.54	8.28	\$3.32	\$2.58
Food and beverage services	12.2	0.81	0.54	-	\$0.00	\$0.00
Heritage and artistic activities	12.2	0.95	0.62	1.12	\$0.38	\$0.30
Retail trade (35 % gross margin) - Recreational, clothing, footwear, personal accessories	4.34	0.33	0.19	0.21	\$0.08	\$0.02
Sport and recreation services	10.2	0.78	0.55	1.98	\$0.56	\$0.50
Typical Queenstown consumption	3.13	0.45	0.16	0.56	\$0.24	\$0.11
Typical Queenstown consumption	3.13	0.45	0.16	1.24	\$0.00	\$0.06
Trade Diversion Impacts (FTE, \$million/annum)				-81*	-\$6.36	-\$3.96

*Adjusted down to average prices over the analysis period

Section 11

Appendix Four: Bibliography

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Section 12

Appendix Five: Instruments of data collection

2023
SKYCITY
QUEENSTOWN
SOCIAL IMPACT
QUESTIONNAIRE
GAMBLING HARM

February 2023



INTRODUCTION

SkyCity Queenstown Casino is applying for a renewal of its venue license. As part of this application process, SkyCity 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.



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

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.

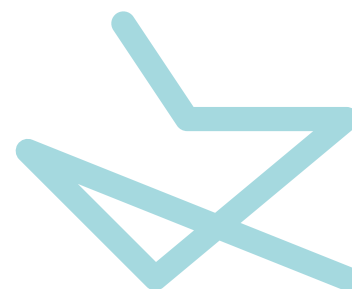
ABOUT YOU

1. To start with, can you tell me what your organisation does, and how long it has been doing it in Queenstown / Otago?
2. How does your work in Queenstown / Otago fit with the work your organisation does elsewhere in New Zealand (if applicable)?
3. How much autonomy does your office / staff in Queenstown / Otago have from the rest of your organisation?



ABOUT PROBLEM GAMBLING

4. How large is the problem gambling problem in Queenstown /Otago?
5. Are there particular groups in Queenstown who are more likely to experience problem gambling than others?
6. Have these groups changed over time?
7. Has the problem gambling problem in Queenstown / Otago changed over time?
8. What is the Casino's contribution to this problem gambling problem in Queenstown?
9. Tell me about the problem gambling you see or deal with at the Queenstown 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 Queenstown Casino do in terms of identifying and protecting at-risk gamblers?
13. Is there anything else you'd like to say about the Casino in Queenstown that we haven't covered?



2023
SKY CITY
QUEENSTOWN
**NEIGHBOURHOOD
BUSINESS**
QUESTIONNAIRE

Version 1.1, 21st March 2023



INTRODUCTION

SkyCity Queenstown Casino is planning to renew its casino venue licence. As a part of this renewal process, we are researching the social and economic effects of SkyCity Queenstown Casino on the communities of Queenstown and Otago. This research is required by the Gambling Commission and commissioned by SkyCity Queenstown 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 and your name and contact details will not be collected. We would be grateful for your participation in this research. You are entitled to withdraw from this research at any stage during the process of completing the survey if you choose to do so. However, once submitted your answers cannot be amended or withdrawn as they collected anonymously.

Only aggregated results will be published. For your information, we have included a link to our privacy policy (please click [here](#).)



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 Queenstown
<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 - 60%
<input type="radio"/>	61 - 80%
<input type="radio"/>	81 - 100%
<input type="radio"/>	Don't know



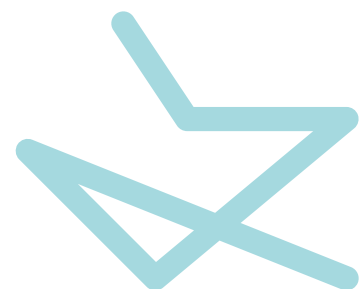
THE CASINO AND YOUR LOCATION

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 (Skip to Q10)

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 Queenstown's economy in this location	1	2	3	4	5	9
If the Casino closed it would have a major impact on business in Queenstown	1	2	3	4	5	9
If the Casino closed it would have some impact on business in Queenstown	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 Queenstown's business community	1	2	3	4	5	9
Queenstown 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?

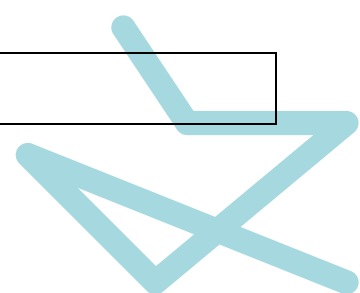
<input type="radio"/>	I'm answering for the whole business	<input type="radio"/>	No reduction or an increase in revenue
<input type="radio"/>	I'm answering for just this one location	<input type="radio"/>	1 - 10%
		<input type="radio"/>	11 - 20%
		<input type="radio"/>	21 - 40%
		<input type="radio"/>	41 - 60%
		<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	

14. Is there anything else you think we should know about the casino?

Nothing else to say



2023
SKY CITY
QUEENSTOWN
**NEIGHBOURHOOD
COMMUNITY
QUESTIONNAIRE**

Version 1.1, 21 March 2023



INTRODUCTION

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Only aggregated results will be published. For your information, we have included a link to our privacy policy (please click [here](#).)



1. ABOUT YOU

2. To start with, how do you feel about your neighbourhood? How would you rate living in your neighbourhood on a scale from 0 to 10 (where 0 is the worst and 10 is the best)?

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
0	1	2	3	4	5	6	7	8	9	10

This is the **worst**
place to live

This is the **best**
place to live

3. What is the number one reason for the score you gave

Don't know



2. WHAT ANNOYS YOU ABOUT LIVING HERE?

Now let's talk about those things that annoy you about living in your neighbourhood.

4. Thinking about what life has been like **over the last 12 months** in your neighbourhood, how much have the following bothered, disturbed, or annoyed you when you are at home?

	Not at all	Slightly	Moderately	Very	Extremely	Do not know
A lack of parks or green spaces nearby	1	2	3	4	5	9
Noise from cars, buses, trucks, or other road traffic	1	2	3	4	5	9
Smells from the neighbourhood/roads	1	2	3	4	5	9
Litter on the streets	1	2	3	4	5	9
Noise from neighbours or activities in the neighbourhood	1	2	3	4	5	9
Neighbourhood crime	1	2	3	4	5	9
Industries or businesses nearby	1	2	3	4	5	9
Antisocial behaviour	1	2	3	4	5	9

5. Are there any things that bother, disturb, or annoy you when you are at home not covered in the previous list?

<input type="radio"/>	Yes
<input type="radio"/>	No skip to Q7

6. What are those other things that bother, disturb, or annoy you when you are at home? List as many as you want

ONLY SHOW OPTIONS CHOSEN AT Q4 FOR (OPTIONS 2-5=SLIGHTLY, MODERATELY, VERY AND EXTREMELY)

7. Of all those things that bother, disturb, or annoy you when you are at home, which is the one that **annoys you the most**? Pick one of the options in Q4:

3. THE CASINO AND YOUR LOCATION

8. Did the existence of the Casino influence your choice of location?

<input type="checkbox"/>	Yes
<input type="checkbox"/>	No Skip to Q10

9. How or why did the Casino influence your choice of location?

10. As a neighbour, how much do you notice having the Casino as a neighbour?

- | | | | | |
|--|--|---|---|---|
| <input type="radio"/>
1 | <input type="radio"/>
2 | <input type="radio"/>
3 | <input type="radio"/>
4 | <input type="radio"/>
5 |
| I never notice
the operation of
the Casino | I rarely notice
the operations
of the Casino | I sometimes notice
the operations of
the Casino | I often notice
the operations
of the Casino | I always notice
the operation of
the Casino |

11. **Only ask of those who scored a 3 or higher in Q10:** What is it you notice about the Casino's operation?

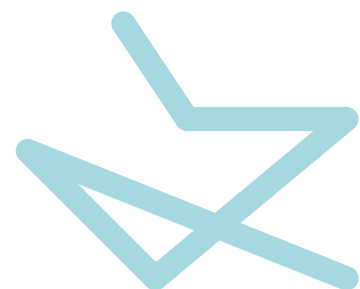
12. Which of these best captures your thoughts about having the Casino as a neighbour?

- | | | | | |
|--|-----------------------------------|--|-----------------------------------|---|
| <input type="radio"/>
1 | <input type="radio"/>
2 | <input type="radio"/>
3 | <input type="radio"/>
4 | <input type="radio"/>
5 |
| I'd prefer not to
have the Casino
as a neighbour | | I'm neutral about
having the Casino
as a neighbour | | I like having the
Casino as a
neighbour |

13. **Only ask of those who scored a 1 or 2 in Q12:** Why would you prefer not to have the Casino as a neighbour?

4. THE CASINO AND YOU

14. How much do you agree or disagree with these statements about the Casino in general?	Strongly agree	Agree	Neither	Disagree	Strongly disagree	Do not know
The Casino is an important part of Queenstown's business community	1	2	3	4	5	9
Queenstown would be better off without a Casino	1	2	3	4	5	9
If the Casino closed it would have a major impact on business in Queenstown	1	2	3	4	5	9
If the Casino closed it would have some impact on business in Queenstown	1	2	3	4	5	9
If the Casino closed other entertainment attractions would readily take its place	1	2	3	4	5	9
I think the Casino is an important part of Queenstown's entertainment landscape	1	2	3	4	5	9



5. A BIT MORE ABOUT YOU

Which gender do you identify with?

<input type="radio"/>	Male
<input type="radio"/>	Female
<input type="radio"/>	Another
<input type="radio"/>	Prefer not to say

15. How old were you at your last birthday?

<input type="radio"/>	Under 20
<input type="radio"/>	20-39
<input type="radio"/>	40-59
<input type="radio"/>	60+
<input type="radio"/>	Prefer not to say

16. How do you usually describe (i.e., name) the suburb or neighbourhood you live in?

--

17. 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



18. 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

19. 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

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 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

That is it! Thank you for taking the time to fill in the survey.



2023 SKYCITY QUEENSTOWN **SOCIAL IMPACT** QUESTIONNAIRE [SUPPORT]

March 2023



INTRODUCTION

We are researching the social and economic effects of the SkyCity Queenstown Casino on the communities of Queenstown and Otago. This research is required by the Gambling Commission and commissioned by SkyCity Queenstown Casino Ltd.



Collecting primary data from those organisations receiving sponsorship or grants from the Casino (or its Community Trust) is a major part of understanding this impact, hence this interview.

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 a link to our privacy policy (please click [here](#).)

ABOUT YOU

1. To start with, can you tell me what your organisation does, and how long it has been doing it in Queenstown / Otago?
2. What is your relationship with the SkyCity Queenstown Casino (or its Trust)?



ABOUT THE SUPPORT YOU RECEIVE

3. How much support does your organisation get from the SkyCity Queenstown Casino (or its Trust)?
4. How long have you been receiving this support?
5. How important is that support to your organisation? What percentage of your annual budget is it?
6. If that funding was not available from the SkyCity Queenstown Casino (or its Trust), how easily could your organisation replace that funding?
7. How was the relationship with the Casino (or its Trust) established?
8. Is the funding you received tagged to particular uses or outcomes?
9. Do you get any support or assistance from the Casino outside of the funding contribution?
10. What has been your experience of dealing with the Casino (or its Trust)?
11. How do you / our organisation feel about accepting funding that has been raised from gambling activities?
12. Do you have any comments/observations regarding the on-going operation of the Casino, or what closure of the Casino might mean to the Queenstown community?



2023
SKYCITY
QUEENSTOWN
PATRON SURVEY
QUESTIONNAIRE
FOR CUSTOMERS ON
DATABASE

Version 1.3, March 15th 2023



INTRODUCTION

SkyCity Queenstown Casino is planning to renew its casino venue licence. As a part of this renewal process, we are researching the social and economic effects of SkyCity Queenstown Casino on the communities of Queenstown and Otago. This research is required by the Gambling Commission and commissioned by SkyCity Queenstown 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 Queenstown, 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 and your name and contact details will not be collected. We would be grateful for your participation in this research. You are entitled to withdraw from this research at any stage during the process of completing the survey if you choose to do so. However, once submitted your answers cannot be amended or withdrawn as they collected anonymously.

Only aggregated results will be published. For your information, we have included a link to our privacy policy (please click [here](#).)



ABOUT YOU

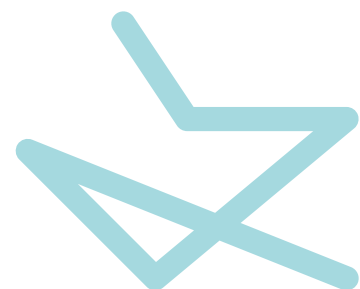
1. Where do you live?

<input type="radio"/>	Queenstown (<i>Skip to Q4</i>)
<input type="radio"/>	Elsewhere in Otago (<i>Skip to Q7</i>)
<input type="radio"/>	NZ (<i>Skip to Q7</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 Q7</i>)
<input type="radio"/>	More than a year (<i>Skip to Q7</i>)



IF YOU'RE A QUEENSTOWN RESIDENT

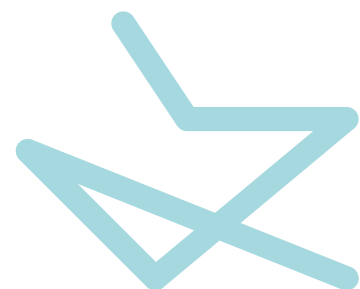
4. How often do you think you visit SkyCity Queenstown Casino on average?

<input type="radio"/>	Daily or more than once a week
<input type="radio"/>	About once a week
<input type="radio"/>	2-3 times a month
<input type="radio"/>	About once a month
<input type="radio"/>	Once every 2-3 months
<input type="radio"/>	2-3 times a year
<input type="radio"/>	About once per year
<input type="radio"/>	Less often than once a year
<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"/>	2-3 times a month
<input type="radio"/>	About once a month
<input type="radio"/>	Once every 2-3 months
<input type="radio"/>	2-3 times a year
<input type="radio"/>	About once per year
<input type="radio"/>	Less often than once a year
<input type="radio"/>	Don't know

Now skip to Q13



IF YOU'RE A VISITOR TO QUEENSTOWN

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

<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 did you stay in Queenstown **during your last visit** ?

<input type="radio"/>	One day only (<i>Zero nights</i>)
<input type="radio"/>	Multiple nights <div style="border: 1px solid black; padding: 2px; margin-top: 5px;"> <i>(Please state how many nights you stayed in Queenstown)</i> </div>

Q8a On that occasion (your last visit to Queenstown), would you have visited Queenstown at all if the SkyCity Casino was not here?

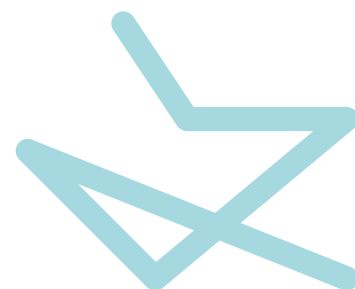
<input type="radio"/>	Yes
<input type="radio"/>	No (<i>Skip to Q11</i>)

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

<input type="radio"/>	Yes
<input type="radio"/>	No (<i>Skip to Q11</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"/>	One or more nights <div style="border: 1px solid black; padding: 2px; margin-top: 5px;"> <i>(Please state how many nights less)</i> </div>



IF YOU'RE A NEW ZEALAND RESIDENT

11. 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"/>	2-3 times a month
<input type="radio"/>	About once a month
<input type="radio"/>	Once every 2-3 months
<input type="radio"/>	2-3 times a year
<input type="radio"/>	About once per year
<input type="radio"/>	Less often than once a year
<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"/>	2-3 times a month
<input type="radio"/>	About once a month
<input type="radio"/>	Once every 2-3 months
<input type="radio"/>	2-3 times a year
<input type="radio"/>	About once per year
<input type="radio"/>	Less often than once a year
<input type="radio"/>	Don't know



ALL RESPONDENTS

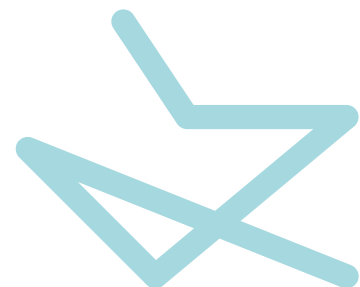
13. Which of the following activities are you typically involved with at the SkyCity Queenstown Casino?

1	Gaming only (<i>Skip to Q15</i>)
2	A mix of gaming and restaurants and other activities (<i>Skip to Q15</i>)
3	No gaming but restaurants and other activities

14. On your last visit to the casino, if you had not come to the SkyCity Queenstown Casino what would you have done instead? *Select all that apply.*

	In Queenstown	Outside of Queenstown	I wouldn't have visited
Gone to a bar / restaurant	1	2	9
Gone to a movie / play / concert	1	2	9
Gone shopping	1	2	9
Undertaken some other commercial activity <input type="text" value="(Please specify)"/>	1	2	9
Undertaken non-commercial activity	1	2	9
Stayed at home or in accommodation	1	2	9

Skip to Q26



15. When thinking about your last visit to the casino, if you had not come to the SkyCity Queenstown Casino what would you have done instead of gaming . Would you have	In Queenstown	Outside of Queenstown	I wouldn't have visited
Gone to a different place for gaming	1	2	9
Visited the SkyCity Casino for some other activity	1	2	9
Gone to another bar / restaurant	1	2	9
Gone to a movie / play / concert	1	2	9
Gone shopping	1	2	9
Undertaken some other commercial activity <input type="text" value="(Please specify)"/>	1	2	9
Undertaken non-commercial activity	1	2	9
Stayed at home or in accommodation	1	2	9
Something else <input type="text" value="(Please specify)"/>	1	2	9

Q26. On your last visit how satisfied were you with the SkyCity Queenstown Casino facilities?

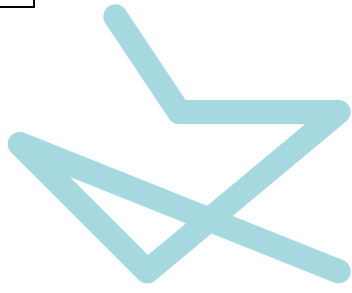
- 1** Very dissatisfied
 2 Dissatisfied
 3 Neutral
 4 Satisfied
 5 Very satisfied

Q27. Based on your last visit, how likely are you to recommend the SkyCity Queenstown Casino to your family, friends or colleagues?

Not at all likely										Extremely likely	
0	1	2	3	4	5	6	7	8	9	10	

Q28. Please tell us why you gave that score? *Verbatim*.

Don't know



IF YOU'RE GAMING

16. If the Casino in Queenstown were not here, would you be likely to gamble at **other places** in Queenstown? *Select all that apply.*

<input type="radio"/>	At a club
<input type="radio"/>	At a pub
<input type="radio"/>	At the races
<input type="radio"/>	Online betting
<input type="radio"/>	Buy some / more lotto tickets
<input type="radio"/>	Other
	<input type="text" value="(Please Specify)"/>
<input type="radio"/>	I wouldn't gamble

17. If the Casino in Queenstown were not here, would you be likely to gamble at **other casinos**? *Select all that apply.*

<input type="radio"/>	Dunedin
<input type="radio"/>	Christchurch
<input type="radio"/>	Hamilton
<input type="radio"/>	Auckland
<input type="radio"/>	In Australia
<input type="radio"/>	Other
	<input type="text" value="(Please Specify)"/>
<input type="radio"/>	I wouldn't gamble

18. Are you a member of SkyCity Premier Rewards programme?

<input type="radio"/>	Yes
<input type="radio"/>	No

19. Have you ever 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

20. Have you ever 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



21. Has gambling caused you any health problems, including stress or anxiety?

- 1** Never
 2 Rarely
 3 Sometimes
 4 Often
 5 Always

22. Has your gambling caused any financial problems for you or your household?

- 1** Never
 2 Rarely
 3 Sometimes
 4 Often
 5 Always

Do you need to talk to someone?

Only ask those who answered 4s or 5s to Q19 to Q22

Would you like a
helping hand?

Gambling Helpline
0800 654 655 or text 8006
(free and confidential 24 hours)

www.gamblinghelpline.co.nz

Other free problem gambling counselling services include:

Salvation Army Oasis Centre
03 477 9852

PGF Services
0800 664 262

Supporting Families
Wakatipu
03 441 4331

Gambling Debt Helpline
0800 654 658

Community Alcohol and
Drug Service
03 441 0010

Asian Family Services
0800 862 342

Maori Gambling Problem
Helpline
0800 654 656



A BIT MORE ABOUT YOU

23. What 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

24. Which age bracket are you in?

<input type="radio"/>	20-39
<input type="radio"/>	40-59
<input type="radio"/>	60+

25. 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
	Middle Eastern/Latin American/African
<input type="radio"/>	Other (please specify)
<input type="radio"/>	Prefer not to say



2023
SKYCITY
QUEENSTOWN
PATRON
INTERCEPT
SURVEY
QUESTIONNAIRE

Final version December 2022



INTRODUCTION

SkyCity Queenstown Casino is planning to renew its casino venue licence. As a part of this renewal process, we are researching the social and economic effects of SkyCity Queenstown Casino on the communities of Queenstown and Otago. This research is required by the Gambling Commission and commissioned by SkyCity Queenstown 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 Queenstown, we want to know how it affected the duration of your stay in the city, in Otago and in New Zealand.

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ABOUT YOU

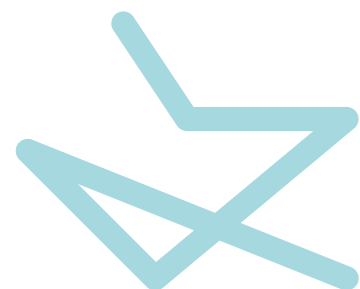
1. Where do you live?

<input type="radio"/>	Queenstown (<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 QUEENSTOWN RESIDENT

4. How often do you think you visit the SkyCity Queenstown Casino on average?

<input type="radio"/>	Daily or more than once a week
<input type="radio"/>	About once a week
<input type="radio"/>	2-3 times a month
<input type="radio"/>	About once a month
<input type="radio"/>	Once every 2-3 months
<input type="radio"/>	2-3 times a year
<input type="radio"/>	About once per year
<input type="radio"/>	Less often than once a year
<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"/>	2-3 times a month
<input type="radio"/>	About once a month
<input type="radio"/>	Once every 2-3 months
<input type="radio"/>	2-3 times a year
<input type="radio"/>	About once per year
<input type="radio"/>	Less often than once a year
<input type="radio"/>	Don't know

Now skip to Q13



IF YOU'RE A VISITOR TO QUEENSTOWN

6. What is the **primary** reason for your visit to Queenstown?

7. What kind of accommodation are you staying in while in Queenstown?

<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 Queenstown 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 Queenstown)</i>

9. Would you have stayed less time in Queenstown if the SkyCity 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>



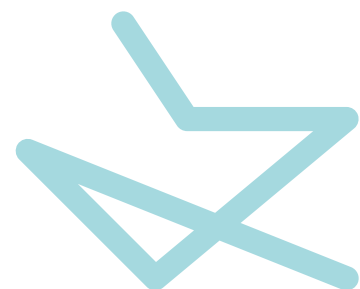
IF YOU'RE A NEW ZEALAND RESIDENT

11. 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"/>	2-3 times a month
<input type="radio"/>	About once a month
<input type="radio"/>	Once every 2-3 months
<input type="radio"/>	2-3 times a year
<input type="radio"/>	About once per year
<input type="radio"/>	Less often than once a year
<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"/>	2-3 times a month
<input type="radio"/>	About once a month
<input type="radio"/>	Once every 2-3 months
<input type="radio"/>	2-3 times a year
<input type="radio"/>	About once per year
<input type="radio"/>	Less often than once a year
<input type="radio"/>	Don't know



ALL RESPONDENTS

13. Which of the following activities do you expect to be involved with at the SkyCity Queenstown Casino today?

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

14. When thinking about this visit to the casino, if you had not come to the SkyCity Queenstown Casino today what would you have done instead? Select all that apply.	In Queenstown	Outside of Queenstown	I wouldn't have done this
Gone to a bar / restaurant	1	2	9
Gone to a movie / play / concert	1	2	9
Gone shopping	1	2	9
Undertaken some other commercial activity <input type="text" value="(Please specify)"/>	1	2	9
Undertaken non-commercial activity	1	2	9
Stayed at home or in accommodation	1	2	9

Skip to Q26



15. When thinking about this visit to the casino, if you had not come to the SkyCity Queenstown Casino today what would you have done instead of gaming ? Select all that apply.	In Queenstown	Outside of Queenstown	I wouldn't have done this
Gone to a different place for gaming	1	2	9
Visited the SkyCity Casino for some other activity	1	2	9
	1	2	9
Gone to another bar / restaurant	1	2	9
Gone to a movie / play / concert	1	2	9
Gone shopping	1	2	9
Undertaken some other commercial activity <input type="text" value="(Please specify)"/>	1	2	9
Undertaken non-commercial activity	1	2	9
Stayed at home or in accommodation	1	2	9
Something else <input type="text" value="(Please specify)"/>	1	2	9

Q26. Given its size, on your last visit how satisfied were you with the casino facilities?

- 1** Very dissatisfied
 2 Dissatisfied
 3 Neutral
 4 Satisfied
 5 Very satisfied

Q27. Based on your last visit, how likely are you to recommend the Grand Casino to your family, friends or colleagues?

Not at all likely						Extremely likely				
0	1	2	3	4	5	6	7	8	9	10

Q28. Please tell us why you gave that score? *Verbatim*.

Don't know



IF YOU'RE GAMING

16. If the SkyCity Casino in Queenstown were not here, would you be likely to gamble at **other places** in Queenstown? Select all that apply.

<input type="radio"/>	At a club
<input type="radio"/>	At a pub
<input type="radio"/>	At the races
<input type="radio"/>	Online betting
<input type="radio"/>	Buy some / more lotto tickets
<input type="radio"/>	Other
	<input type="text" value="(Please Specify)"/>
<input type="radio"/>	I wouldn't gamble

17. If the Casino in Queenstown were not here, would you be likely to gamble at **other casinos**? Select all that apply.

<input type="radio"/>	Dunedin
<input type="radio"/>	Christchurch
<input type="radio"/>	Hamilton
<input type="radio"/>	Auckland
<input type="radio"/>	In Australia
<input type="radio"/>	Other
	<input type="text" value="(Please Specify)"/>
<input type="radio"/>	I wouldn't gamble

18. Are you a member of the SkyCity Queenstown Premier Rewards programme?

<input type="radio"/>	Yes
<input type="radio"/>	No

19. Have you ever 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

20. Have you ever 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

21. Has gambling caused you any health problems, including stress or anxiety?

1 **2** **3** **4** **5**
 Never Rarely Sometimes Often Always

22. Has your gambling caused any financial problems for you or your household?

1 **2** **3** **4** **5**
 Never Rarely Sometimes Often Always

Do you need to talk to someone?

Only ask those who answered 4s or 5s to Q19 to Q22

Would you like a
helping hand?

Gambling Helpline
0800 654 655 or text 8006
(free and confidential 24 hours)

www.gamblinghelpline.co.nz

Other free problem gambling counselling services include:

Salvation Army Oasis Centre
03 477 9852

PGF Services
0800 664 262

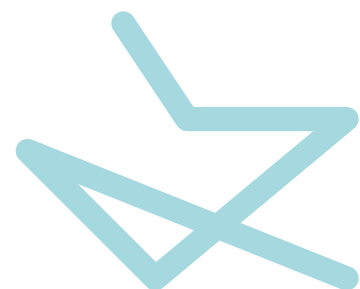
Supporting Families
Wakatipu
03 441 4331

Gambling Debt Helpline
0800 654 658

Community Alcohol and
Drug Service
03 441 0010

Asian Family Services
0800 862 342

Maori Gambling Problem
Helpline
0800 654 656



A BIT MORE ABOUT YOU

23. 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

24. Which age bracket are you in?

<input type="radio"/>	20-39
<input type="radio"/>	40-59
<input type="radio"/>	60+

25. 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





Research First Ltd
Level 1, 23 Carlyle Street
Sydenham, Christchurch 8023
New Zealand
0800 101 275
www.researchfirst.co.nz