

Gambling and Problem Gambling in South Africa

A National Study 2003



National Centre for
the Study of Gambling



National
Gambling Board
of South Africa

SOUTH AFRICAN
SARGT
RESPONSIBLE GAMBLING TRUST



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For and on behalf of
The National Responsible
Gambling Programme

N A T I O N A L



Responsible Gambling

P R O G R A M M E



Introduction

This is the second major research report on gambling and problem gambling behaviour in South Africa prepared by the National Centre for the Study of Gambling at the University of Cape Town on behalf of the National Responsible Gambling Programme. The research for the first report was conducted in 2001 and for the present report the evidence was gathered two years later in 2003. Thus the present report, in addition to giving a reasonably comprehensive insight into how South Africans currently perceive and participate in gambling, will be of particular interest in that it enables us to see to what extent and in what ways gambling behaviour has changed since the early days after the first casinos were opened and the national lottery started operations.

The principal findings of this research were reported to the Department of Trade and Industry and to Parliament's portfolio committee on trade and industry between July and September 2003 during the public hearings on the National Gambling Bill.

With respect to participation in gambling activities, we reported that:

- * Gambling overall has grown: the number of people who never gamble was 25.6% and is now 20.1%.
- * The principal gambling activities in South Africa are the lottery, slots, scratch-cards and the horses in that order.
- * Growth has come principally from the lottery: the number of people who play the lottery regularly was 67.6% and is now 72.3%.
- * The number of people who play slots has grown somewhat overall (28.9% to 31.1%) but the number who play slots regularly has declined (19.2% to 14.1%).
- * Scratch-cards are up both in overall and regular participation (20.8% to 23.7% overall and 12% to 15% regular).
- * All other gambling activities have declined in the face of the new competition.

With respect to expenditure on gambling by different groups we reported that:

- * All income groups tend to play the lottery, including the poorest. Fairly poor people tend to play the horses and more affluent people tend to play the slots.
- * Conversely, when poor people play the slots and horses they spend a very high proportion of their income doing so, whereas they spend only modestly on the lottery.

With respect to problem gambling we reported that:

- * In 2001, 221 out of 5 800 respondents answered seven or more of the 20 Gamblers Anonymous questions affirmatively. In 2003 the number was 270



out of 5 816. These numbers constitute 3.8% and 4.6% respectively of the sample, 1.1% and 1.3% of the population as a whole and 5.3% and 6.1% of regular gamblers.

- * There are probably now 550 000 people who gamble too much to the point where it is causing serious problems to themselves and those close to them and who would benefit from education and/or counselling.
- * In 2001 there were 35 problem gamblers who only played the lottery. In 2003 there were 87.
- * In 2001 there were 186 problem gamblers who played something other than the lottery regularly whether or not they also played the lottery. In 2003 this number was 187.
- * Of problem gamblers in 2001, 84% played something other than the lottery and 16% played the lottery only. In 2003 67.5% of problem gamblers regularly play something other than the lottery, while 32.5% only play the lottery.
- * Of the 270 problem gamblers in 2003
 - 21 members of the group revealed expenditure on roulette, the average monthly spend being R782
 - 123 members of the group revealed expenditure on slots, the average monthly spend being R644
 - 251 members of the group revealed expenditure on the lottery, the average monthly spend being R80.

These numbers show that there has been no significant increase in problem gambling between 2001 and 2003 other than a small increase amongst those who only play the lottery. We attribute this mainly to the fact that the accessibility of machine gambling, especially to poor people in terms of both location and price, has clearly declined since the very extensive illegal casino industry has been almost entirely replaced by the 31 legal casinos which have been opened since 1996.

When we analysed the problem gambling sample by income and race we found that the distributions were fairly flat and did not provide evidence for the view that the poor are especially irresponsible when it comes to spending their money on gambling, nor for the view that black people are especially likely to exhibit gambling problems. (Exactly 5% of black respondents were identified as problem gamblers as opposed to 6.2% of coloured respondents, 3.4% of whites and 4.5% of Indians.)

All these results suggest that levels of problem gambling in South Africa remain broadly in line with those found in other jurisdictions where the availability of commercial gambling is similar. It should again be stressed, however, that all



numbers relating to the prevalence of problem gambling should be interpreted with great caution. The reasons for this are discussed more fully in the theoretical section of this report and relate mainly to the relative crudeness of the instruments used to measure problem gambling, the fact that respondents - especially problem gamblers - often do not tell the truth about their gambling, and the general difficulties with the reliability of surveys. All we can say with certainty is that when we have done the same things as we did in 2001 and very similar things to what is done in other jurisdictions, we have got broadly similar results.

Given their fundamental importance, we again discuss in this report, as we did in 2001, the principal theoretical issues relating to studying problem gambling, paying special attention to problems of definition and measurement. In future, however, in line with current best practice amongst scholars who study gambling around the world, we shall be seeking to refine our understanding of problem gambling in South Africa mainly by focussing on the specific behaviours of different types of gambler and by trying to understand better how the behaviour of the minority of problem gamblers differs from that of the majority who gamble for pleasure without running into problems.

Meanwhile it is important to remind ourselves of the importance of the question: "What do we want information about the prevalence of problem gambling for?" It remains regrettably true in all jurisdictions that the purposes for which most people want the information are political: they seek to harness problem gambling numbers to arguments about whether the availability of gambling should be increased or decreased by law, and to attacks on, or defences of, whatever current government policy happens to be. Very often this is to abuse the numbers.

People think that if the numbers can be made to sound large enough this will strengthen the case for restricting gambling. But really with gambling we know what the relevant facts are: that, as with alcohol, a few people get into very serious trouble from excessive indulgence and most people don't. The argument about whether gambling should be more or less readily available is therefore really about adjudicating between conflicting values. On the one hand there are the principles of liberty which state that adults should be allowed to decide for themselves how they will spend their own time and money in pursuit of pleasure, and that the state should not interfere with commercial transactions entered into between willing buyers and willing sellers except to eliminate the use of force and fraud by either party. On the other hand, there are the principles of compassion, democracy and equality.

Thus, nobody wants to see people ruining their lives and that of their families needlessly. In many communities, the majority does not want commercial gambling operations to be available at all and almost all communities want to place some limits on the availability of commercial gambling. Moreover, in a society like ours,



it is important that gambling not become a way of further enriching rich people (even rich black people) while exacerbating the problems of poverty.

These arguments engage people's moral and religious passions. They also engage substantial material interests. After all, on their outcome depends the size of the profits which commercial gambling companies will make and of the gambling tax revenues which will accrue to governments. They are entirely legitimate arguments which to a large degree depend on answers to questions about proportionality, viz. to what extent should the freedom of the majority be curbed to limit harm to a minority? On the whole, we believe that South Africa's National Gambling Acts of 1996 and 2004 achieve an appropriate balance between these competing claims. They display both sensitivity and common sense. But these are issues in which the results of surveys such as those reported on here properly have only a small role to play.

A much more fruitful use of surveys such as this one is to guide treatment and prevention programmes and to underpin further and more practically focussed research. At present, in many jurisdictions, especially in the Commonwealth, there is much discussion of specific strategies to discourage people from playing less. These range from requiring that gambling machines be re-engineered so as to encourage or compel players to take a break, to requiring casinos to close for specified periods.

So far the evidence seems to be that all such measures serve to irritate non-problem gamblers while having no impact on the incidence of problem gambling. A potentially more fruitful strategy, which the expansion of technology will facilitate, may be to require players to pre-set their own limits.

All of this requires research which is much more specific in its focus and which is designed, not to strengthen the case for or against greater restrictions on gamblers, but to yield more effective strategies for preventing them from getting into trouble in the first place and for enabling them to regain control of their lives if they lose it. To this end we have designed a comprehensive research programme to be undertaken over the next three years. In addition to continuing to monitor prevalence and international best practice in the areas of treatment and prevention, we shall also be investigating:

- * The differences between healthy gamblers and problem gamblers and the reasons why most people gamble harmlessly but a minority do not;
- * The role of false belief and inadequate understanding of how gambling works in provoking and sustaining excessive gambling;
- * The roles of impulsiveness, convenience and availability in the emergence of problem gambling and the implications of this for regulation and public policy;
- * The possible vulnerability of particular communities within South Africa, with special reference to the role of poverty; and



- * The psychology of different forms of gambling and the implications of this for reducing problem gambling in different sectors of the industry.

Like ours, the international research agenda in respect of problem gambling is moving on from prevalence studies to trying to learn more about the causes of problem gambling so as to be better able to prevent and treat it. We hope to contribute substantially to this international work and we therefore, hope that by the time we next report on gambling and problem gambling in South Africa, we shall also be able to report more authoritatively on what are the best strategies for addressing the problems of excessive and compulsive gambling.



PREFACE

This report owes much to many people, including:

- Chris Fisser, Tibbs Majake and their colleagues on the National Gambling Board, who have worked resolutely to secure the public interest in respect of all aspects of the legislation of gambling.
- The members of the Responsible Gaming South Africa (RGSA), who represent the interests of the industry that originally pioneered this programme. Besides providing material support they have offered many invaluable insights into the nature of the gambling business and its customers while remaining scrupulous in not seeking to influence the outcome of the research.
- Our colleagues in the NRGF, Kerry Capstick-Dale and Dr Rodger Meyer, who are responsible for public education and for treatment respectively.
- Charlene Davids and Arthur Mzozoyana of Roots Research, who were responsible for the complex task of arranging for the administration of the survey in a multiplicity of languages in all nine provinces.
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There are countless others in academia, the regulatory community and the industry with whom over the years we have had countless profitable discussions.

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He holds degrees from the Universities of Oxford and of London in Modern Languages and in Philosophy respectively. Since 1995 he has raised public and private sector funding in South Africa for research into all aspects of the gaming industry and has led the research work of a team of 27 national and international academics. He then founded and directed The National Centre for the Study of Gambling at the University of Cape Town. As well as researching the potential costs and benefits of casinos in both national and regional contexts, he has also been responsible for researching and reporting to the South African National Gambling Board on slot routes (1998) and on Internet gaming (1999). He has done other policy work for national government and, also, provincial gambling boards.



Dr Graham Barr is a professor in the department of Statistical Sciences and Economics at UCT. He holds a BA and BSc with majors in Mathematics, Statistics and Economics with six class medals and distinctions in all majors, a first class Honours degree in Mathematical Statistics, a Masters degree in Econometrics and a PhD, all from UCT. His research is in the areas of quantitative analysis, econometrics and forecasting and he has published sixty articles in these fields in international and local journals. He has consulted widely in the public and private sectors in the area of quantitative analysis and economic model building.

Graham was a member of the national academic team set up in 1995, and the forerunner of the National Centre for the Study of Gambling, which studied the optimal number and location of casinos in post-apartheid South Africa. He constructed computer models of optimal casino locations and related casino profitability as a basis for determining the optimal number of casinos in each province and their expected profitability.



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Section One: Executive Summary

A. Summary of Theoretical Discussion

This research follows the study carried out and reported on by the National Responsible Gambling Programme (NRGP) in 2001.

1. The research was carried out by a market research company (Roots Research) among 5 816 adults with easy access to the new forms of legal gambling, namely urban casinos and the national lottery and with some knowledge of their household expenditure.
2. The research sought to establish the current position and how it has changed since 2001 with respect to:
 - 2.1 how familiar South Africans are with different forms of gambling, how much they participate in them and what their attitudes are towards gambling
 - 2.2 the prevalence of problem and pathological/addictive gambling in South Africa
3. Gambling was defined as staking something valuable in the hope of winning a prize where the outcome is unknown to the participants. Investing on the stock market was excluded but playing the lottery, bingo and charity “jackpots” in newspapers were included as well as fafi, scratch cards, casino games and betting on horses and other sporting events.
4. Whether gambling is accounted a vice or a recreation depends on moral judgements which vary in different cultures, at different points in history and among different individuals. It is not a function of the relative dangerousness or safeness of gambling compared with other activities which some people indulge in excessively and, thereby, harm themselves and others.
5. Recreational gambling, which is benign from the point of view of the gambler, provides at least the following pleasures:
 - * of playing games
 - * of fantasising about winning large sums of money
 - * of feeling artificially endangered
 - * of being in a stimulating environment



6. Gambling behaviour should be accounted “problematic” when gamblers are:
- * gambling excessively and thereby causing significant harm to themselves and to others
 - * failing to control this excessive behaviour by themselves and without assistance

Problem gambling behaviour may or may not be a symptom of incipient pathological gambling. It may or may not constitute or be part of a personality disorder. In particular, it may result from ignorance, inexperience or lack of financial management skills.

“Pathological gambling” should be used as a synonym for “addictive gambling” and should be used for gamblers who display, in relation to gambling, the same kinds of behaviour as do other addicts in relation to the activity to which they are addicted. This means That, in addition to gambling excessively and uncontrollably, they are:

- * obsessed with gambling and think about it for much of the time when they are not gambling
 - * use gambling as a means not of enhancing the pleasure in their life but of escaping the pain
 - * experience a unique but delusional sense of well-being when they gamble
7. There are severe methodological difficulties about attempts to measure the incidence of problem gambling, most of which apply to all studies of this kind but some of which are peculiar to, or apply with especial force in South Africa. Consequently, all figures for prevalence should be treated only as rough estimates.
8. Rough estimates are adequate for the purposes of:
- * informing debate about public policy in respect of gambling
 - * assisting in the work of educators, trainers, counsellors and treatment professionals who deal with problem gambling, to give an idea of the scope and character of the problem they are addressing
9. Dividing respondents into addictive and problem gamblers may be helpful for the purpose of developing:
- * coherent strategies for dealing with all sufferers from addiction, including gambling addicts



- * public education programmes, training programmes for industry professionals, and counselling and treatment programmes, all intended to minimise the incidence of, and harm caused by problem gambling
10. Instruments for measuring problem gambling invite respondents to identify themselves as having or not having particular symptoms of problematic behaviour. These symptoms vary in their severity and in the degree to which they manifest with people not identified as having a problem. All cut-off points are therefore to some extent arbitrary. This report gives the results of using the Gamblers Anonymous 20 Questions (GA), using seven or more affirmatives to identify problem gamblers, in accordance with the standard uses of this test. However, it also supplies details of answers to each question as well as the full range of affirmative answers for the GA questions.
 11. Results of the 20-question test developed by Johns Hopkins School of Medicine and used by Alcoholics Anonymous (AA) are also given so as to enable a comparison between problem gambling and problem drinking in the sample.
 12. Using results from self-identified “full-blown” addicts in GA or the NRGP treatment programme, the report proposes that 14 or more affirmatives on GA is a reasonable point at which to identify addictive or pathological gamblers.
 13. The report notes that in addition to the benefit which accrues to consumers and suppliers of gambling services from easier access to commercial gambling, the main test of whether legalisation and liberalisation of gambling laws have been beneficial in South Africa will be whether overall, the flow of benefits have been from richer to poorer, rather than vice versa.



B. Summary of Sample Data and Principal Empirical Finding

1. The Sample

The population of South Africa is composed of some 40 million people. Of these, 18 million live in formal housing in urban areas of whom 12 million are aged 18 or over. 4 million live in informal urban dwellings of whom 2.25 million are aged 18 or over. 12 million live in rural areas of whom 9.75 million are aged 18 or over. We surveyed 5 816 South Africans over the age of eighteen.

Those without easy access to commercial gambling were excluded, i.e. those living in rural areas and in informal settlements and those under the age of eighteen. (It would, in any case, have been prohibitively expensive to survey these groups.) The survey also excluded those with no knowledge of household disposable income. The surveys were conducted province by province and the number of respondents per province was as follows:

Gauteng, Western Cape, KZN¹ – 1 000 each;
Eastern Cape – 700;
Free State – 500;
Northern Cape, North West, Northern Province and Mpumalanga – 400 each.

The distribution of respondents by race was as follows:

black – 3 106;
white – 1 765;
coloured – 769;
asian – 176.

The ratio of black to non-black among the urban adult population is approximately 6:5.

The sample, though obviously not representative of the country as a whole, was adjudged sufficiently representative for the purposes of the research project. This was twofold: first, to inform debate about public policy in respect of gambling amongst policy-makers, regulators, industry professionals, the media and the general public; second, to assist the work of educators and treatment professionals concerned with minimising the incidence of, and harm caused by problem gambling in South Africa.

For these purposes it is enough to have a rough picture of gambling behaviour in South Africa and a rough estimate of how many South Africans were gambling excessively and of what social and economic factors make for vulnerability to problem gambling. Studies of gambling behaviour world-wide also have a necessarily



high degree of approximateness in the numbers they report (though they do not always make this plain).

2. Participation

Of the 5816 respondents in the 2003 survey the participation profile was as follows:

- 76.3% had played the lottery;
- 31.1% “ slots;
- 23.7% “ scratch-cards;
- 10.5% “ newspaper jackpots;
- 10.5% “ horses and
- <10% “ had participated in the remaining gambling activities, namely Fafi, Bingo, Dice, Roulette, Cards and Sport betting.

In respect to these activities amongst the 5 800, 2001 survey respondents:

- 69.5% had played the lottery;
- 28.9% “ slots;
- 20.8% “ scratch-cards;
- 12.8% “ newspaper jackpots; and
- <10% “ had gambled on the remaining activities listed.

3. Regularity of play

Of the 5 816 surveyed in the 2003 survey:

- 20.1% never gamble
- 4.3.% gamble occasionally, i.e. less than once a month
- 41.4% gamble regularly i.e. once a month or more, ONLY on the lottery,; and
- 34.3% gamble regularly (once a month or more) on some activity other than the lottery whether or not they also gamble on the lottery.

These compare with the following statistics for the 5 800 surveyed in the 2001 sample

- 25.6% never gamble
- 2.2.% gamble occasionally, i.e. less than once a month
- 34.6% only gamble regularly on the lottery, i.e. once a month or more; and
- 37.5% gamble regularly (once a month or more) on some activity other than the lottery whether or not they also gamble on the lottery.



Of the 5 816 surveyed in the 2003 survey the following gaming profiles were revealed:

- 72.3% play the lottery regularly (mostly once a week)
- 14.1% play slots regularly
- 15.0% play scratch-cards regularly
- 5.7% bet on horses regularly
- 5.6% play fafi regularly
- 3.3% do newspaper jackpots regularly
- 2.2% bet regularly on sports
- 2.0% play dice regularly
- 1.4% play table games regularly

These compare with the following statistics for the 5 800 surveyed in the 2001 sample

- 67.6% play the lottery regularly (mostly once a week)
- 19.2% play slots regularly
- 12.0% play scratch-cards regularly
- 9.5% do newspaper jackpots regularly
- 7.8% bet on horses regularly
- 4.9% play table games regularly
- 4.5% play fafi regularly
- 2.8% bet regularly on sports and
- 1.7% play dice regularly.

4. Other leisure activities

For the 2003 survey, these figures compare with the following statistics for movies, restaurants and sports events:

- Movie goers:
 - never - 44.2%
 - occasional - 24.2%
 - regular - 30.2%
- Restaurant visitors:
 - never - 27.1%
 - occasional - 19.9%
 - regular - 51.8%
- Sports events attenders:
 - never - 48.0%
 - occasional - 26.2%
 - regular - 23.8%



The comparable numbers for the 2001 survey are

- Movie goers:
 - never - 47.6%
 - occasional - 23.8%
 - regular - 26.9%
- Restaurant visitors:
 - never - 28.5%
 - occasional - 18.2%
 - regular - 52.4%
- Sports events attenders:
 - never - 48.9%
 - occasional - 21.8%
 - regular - 27.7%

Also for the 2003 survey:

- 36.3% of the sample drank alcohol regularly, 9.97% drank occasionally and 53.73% never drank.; (whereas in the 2001 survey, 2 893 (48.7%) people never drink (alcohol); 681 (23.5%) drink occasionally; 2 226 (38.4%) drink regularly)
- 26.9% of the sample smoked daily, 2.7% smoked occasionally and 70.4% never smoked.;

5. Key Demographics of Regular Gamblers

- 44.3% of whites play the lottery alone on a regular basis, as do 42.5% of blacks, 31.2% of coloureds and 36.9% of blacks. However, 26.5% of whites are regular players of games other than the lottery, as are 34.4% of blacks, 47.5% of coloureds and 52.3% of indians
- 22.3% of whites have never gambled, whereas 20.4% of blacks, 16.5% of coloureds and 7.4% of indians, have never gambled.
- 91.5% of the sample lived in either a brick house or flat, 2.5% lived in hostels or a back room, 5.4% in shacks or squatter camps and 0.6% in traditional (mud huts) housing. Of those who lived in brick houses 41.5% were regular (lottery only) players and 34.6% were regular (non-lottery) players and 19.7% had never played. These percentages were similar for flat dwellers and for those in shacks or settlements. However, in the hostel or back-room category 46.5% were regular (non-lottery) players, 40.3% were regular (lottery only) players and a low 9.0% had never played.
- Regular lottery only players are spread evenly across the disposable income groups. For example, 35.7% of those with disposable income of less than R800 per month are regular lottery (only) players and 43.1% of those with a disposable income of more than R12 000, fall into this category. In the regular (other)



category, the highest percentage of players are in the R4000-R6000 disposable income group at 39.2%. 28.0% of those with disposable incomes of less than R800 per month are regular (other) players and 30.0% of those with disposable incomes in excess of R12 000 are regular (other) players. 31.9% of those with disposable incomes of less than R800 per month have never gambled, whereas lower percentages of the wealthier group fall into this category; for example, only 13.7% of those with disposable incomes between R8 000 and R12 000 have never gambled.

6. Income and spending profiles of the 3 main gambling types

6.1 **The regular lottery player** are evenly spread against all demographic criteria except to some extent that of the very poor. Even for the those with less than R800 of disposable income a high 58.3% were regular lottery players. This percentage then rises to between 70% and 80% of those with disposable incomes in excess of R1 400 per month. The average expenditure on lottery tickets across income categories is low in absolute terms at R33.40 a month for those with disposable incomes of less than R800 and then rises steadily to R126.00 for those with disposable incomes in excess of R12 000. However, in relative terms the expenditure on lottery tickets represents 8.4% of monthly disposable income for those with disposable incomes of less than R800 and drops to 0.8% for those with disposable incomes in excess of R12 000.

One concludes that the lottery is played on a regular basis by a very large percentage of people across a broad demographic profile. A large proportion of the poor, therefore, are spending a significant portion of their disposable income on the lottery.

6.2 **The regular slot player** is generally situated in the middle to high disposable income group rather than in the lower disposable income groups. For example, of regular slot players, only 4.5% are in the less than R800 disposable income group, 9.9% are in the R1 400 – R2 500 group but 23% are in the R8000 – R12 000 group. Monthly expenditure on slot play by regular slot players rises with disposable income, but slower than disposable income rises. Thus, for example, the average monthly expenditure on slots is R124 in the less than R800 group, constituting a very large 31% of (mid-point) income, whereas average monthly expenditure on slots averages R1 006 in the R12 000 group, but comprises a much lower 6.7% of mid-point disposable income.



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One concludes that regular slot players comprise a small proportion of the poor and a much larger proportion of the middle and upper income groups. However, the spend is proportionately very large for those poor people who do play and proportionately much lower for the more wealthy group fall into this category, for example, only 13.7% of the R8 000 – R12 000 group have never gambled.

6.3 The profile of **the regular horse player** is somewhere in-between the profile of the regular slot and the regular lottery player. Gambling on horse racing is fairly evenly spread across the various demographic profiles but is favoured by the lower middle class. Hence, although only 3.2% of those with a disposable income of less than R800 bet regularly on the horses and 4.4% of those with disposable incomes in excess of R12 000 bet regularly on the horses, 7.2% of those with disposable incomes in the R2 500 –R4 000 category bet regularly on the horses. Expenditure is high in this disposable income group in a relative sense, comprising 7.2% of monthly expenditure on average.

7. Beliefs about Gambling

When people are asked about their attitudes towards gambling in South Africa, 2 491 (42.8%) had a positive or very positive attitude towards gambling whereas 1 258 (21.6%) had a negative or very negative attitude towards gambling, the remainder being neutral.

This compares with the following 2001 statistics: namely that 3 352 (57.7%) believed that gambling should not be banned as against 1 185 (20.4%) who favoured banning, the remainder being neutral

8. Problem Gambling.

8.1 Some international statistics

Some numbers derived from international studies of problem gambling may, when treated with appropriate caution, provide context for understanding the South African numbers. Amongst these are:

* Some US studies conducted when the legalisation of gambling outside the resorts of Nevada and Atlantic City was in its early stages.

Place and Date in sample	% of Gamblers in sample	Problem Gamblers
New York (1988)	92%	4.2%
Maryland (1988)	89%	3.9%
Massachussets (1989)	90%	4.4%
Iowa (1989)	84%	1.7%
California (1990)	89%	4.1%



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* Similar figures for Canada at an early stage of the development of commercial gambling there are:

Place and Date	Gamblers	Problem Gamblers
Quebec (1989)	88%	3.8%
New Brunswick (1992)	87%	4.5%
Nova Scotia (1993)	80%	4.7%
Alberta (1994)	93%	5.4%
Saskatchewan (1993)	87%	4.0%

* A 1991 study in New Zealand three years after the introduction of slot machine gambling reported 95 % of the New Zealand population to be gamblers and 6.9% to be problem gamblers

* An early (1991) Australian study is exceptionally honest in reporting on methodological difficulties. Its results using SOGS were clearly erratic since there were more respondents who scored 5 or more affirmatives when asked if they had had problems over the last six months than when they were asked if they had ever had these problems. It also excluded lottery-only players who showed up as problem gamblers when it discovered that these were spending very small amounts on gambling. Nevertheless the researchers offered a figure of 1.16% of the total population as being problem gamblers.

* The SOGS figure for South Africa reported on here (1.4% of the total population of 40m suggesting about 5.5 thousand problem gamblers in the country as a whole) compares with the following most recent estimates from the developed world as quoted in the UK Gambling Review Report (Budd et al: 2001):

Country	Population (Approx)	SOGS Prevalence %	No. of Problem Gamblers (estimated)
USA	280 m	1.1%	3000 000
Canada	31 m	1.6%	500 000
Australia	18 m	2.3%	430 000
New Zealand	2.8m	1.3%	36 000
Sweden	9 m	0.6%	54 000
UK	50 m	0.8%	370 000

* The incidence of lottery-only players in South Africa who exhibit problems, though only 15.83% of all problem gamblers, is at 1.74% of all lottery-only players, much higher than the comparable figure for the UK (0.1%).



8.2 South African numbers

- * 270 (4.6%) scored 7 or more, the number used as a cut-off to identify those who should consider getting help. This is 1.3% of the total population but 6.1% of regular gamblers. This suggests that preventative and treatment services should be targeting some 550 000 people in South Africa.
- * This compares with 221 (3.8%) who scored 7 or more in 2001. This is 1.1% of the total population but 5.29% of regular gamblers. This suggests that preventative and treatment services should be targeting some 500 000 people in South Africa.
- * Of the 270 problem gamblers, 87 or 32% only played the lottery, 67% regularly gambled on something other than the lottery although most of these also gambled on the lottery (250 of all problem gamblers were regular lottery players). These numbers compare with 35 out of 221 problem gamblers identified in the 2001 survey as lottery only (15.8%) and 150 (71.9%) of the 221 problem gamblers identified as regular (other) gamblers.

8.3 Profile of the problem gambling group of 270

Of the 270 problem group –

- * 250 (92.6%) are regular lottery players of which 87 (32%) only play the lottery
- * 91 are regular slot players
- * 64 are regular scratch players
- * 42 play the horses regularly

Of the 250 lottery players who are problem gamblers –

- * 131 (52.4%) play more than once a week
- * 92 (34.1%) play weekly
- * 87 (34.7%) are regular slot players as well
- * 61 (24.3%) are regular scratch players as well

- * 21 members of the problem gambling group revealed expenditure on roulette, the average monthly spend being R782
- * 123 members of the problem gambling group revealed expenditure on slots, the average monthly spend being R644
- * 251 members of the problem gambling group revealed expenditure on the lottery, the average monthly spend being R80



Problem gamblers are spread evenly across the different income groups

- * 3.4% of whites were problem gamblers, 5.0% of blacks, 6.2% of coloureds, 4.5% of Indians.

The playing venue for the 117 problem regular slot players was casinos in 95.7% of cases, with informal casinos comprising the typical venue in only two cases (1.7%), sportsclubs in two cases and pubs in one case.

Fridges & TVs

Of the whole sample, 89.5% have both a fridge and TV and 85.6% of the problem gambling sample have both a fridge and TV. Problem gamblers seem to be fairly representative from an income point of view of the general sample.

- * For regular lottery players, 90.3% have both have both a fridge and TV and 86.8% of the problem regular lottery players have both.
- * For regular slot players, 95.1% have both have both a fridge and TV and 95.6% of the problem regular slot players have both
- * For regular horse players, 87.3% have both have both a fridge and TV and 85.7% of the problem regular horse players have both

The results are consistent and mutually reinforcing, the profile of the slot player is somewhat wealthier than the lottery player who is somewhat wealthier than the horse player and these results are consistent across the whole sample and for problem gamblers.

- * The incidence of problem gambling is similar to the incidence of problem drinking, though there are fewer regular drinkers than regular gamblers and amongst regular drinkers the incidence of problem drinking is 9.4% as against about 6% for regular gamblers. (There is, however, no national responsible drinking programme).
- * Though this is overall a less alarming picture than some will have expected, it should be borne in mind that problem gambling is a condition which develops over a fairly long period of time. This means that the incidence of problem gambling is likely to grow over the coming years as people who have started gambling in the past two or three years develop the problem behaviours which may be expected to show up in future surveys. It is hoped, however, that preventative measures will be successful in inhibiting this growth.



Section Two: Theoretical Considerations

1. Background

This report presents the principal findings of research carried out by the National Centre for the Study of Gambling at the University of Cape Town on behalf of the South African National Responsible Gaming Programme between 1 May 2002 and 30 June 2003. It follows the study carried out and reported on in 2001.

The research reported on here, therefore, had the following objectives:

- to estimate changes in public familiarity with, attitudes towards, and participation in different forms of gambling in South Africa
- to estimate changes in the prevalence of problem gambling in South Africa and to identify any groups at special risk
- to provide further baseline data against which it would be possible to measure the impact of the extensive legalisation of gambling in South Africa on a biannual basis

2. Sample selection and administration of questionnaire

Surveys were administered by the Cape Town market research company, Roots Research, to 5 816 people drawn from South Africa's nine provinces. This number was what initial funding permitted. It is intended that in future the sample will run to 9 000 respondents. The division of the sample by province was as follows, listed in the order in which the data was gathered:

KwaZulu-Natal = 1 000 respondents

Eastern Cape = 700

Free State = 500

Northern Cape = 400

Mpumalanga = 400

Northern Province = 400

North West Province = 400

Western Cape = 1 000

Gauteng = 1 000

The sample was not intended to be representative of the population as a whole, since a large proportion of the population living in rural areas have no access to commercial gambling. The sample therefore excludes the rural population. It also excludes under-18s, who may not gamble legally and who constitute approximately 40% of the South African population. Finally, because we wished to ascertain what



households believed themselves to be spending on gambling, we excluded those with no knowledge of household expenditures. In a country which is as heterogeneous as South Africa in terms of wealth and income, geography and language, culture and ethnicity, any sample (or at least any sample which can be surveyed affordably) will be distorted from some points of view. Nevertheless, the sample in each province broadly reflects the racial demographics of the urban population, i.e. of the population likely to have at least easy access to a sales point for lottery tickets.

The further division of this population into “small town” and “metropolitan” also reflects approximately the division between those who have easy access to the lottery only and those who have access to a casino as well. It seems plausible to think, on a priori grounds as well as on the basis of what casino companies and the national lottery company report, that the important racial demographic difference for the purpose of understanding the customers of commercial gambling operations is between urban black adults in formal housing and adults in formal urban housing who are not black. Out of a total South African population of 40 million there are 6.5 million in the first category and 5.4 million in the second category. The combined figure constitutes approximately half the adult population. In our sample of 5 800 there are 3 133 respondents who are black and 2 667 who are other than black.

The questionnaire was translated into all main South African languages and administered to respondents in the language of their choice by interviewers fluent in the relevant language. The 20 questions from Gamblers Anonymous and from Alcoholics Anonymous were administered by asking respondents to fill out a card and place it (anonymously) in a box which was already partially filled. Respondents were also assured that the information was being sought for research purposes only.

3. Objectives of the survey

The survey sought to ascertain information about both moderate recreational gambling which is harmless and about excessive gambling which causes harm to gamblers and those close to them.

In relation to gambling behaviour in general we were concerned to answer the following questions:

- How familiar are South Africans with different forms of gambling?
- To what extent do South Africans approve or disapprove of the legalisation of gambling?
- How well do they understand how commercial gambling works?
- How many South Africans currently participate in different forms of gambling, what are their demographic characteristics and how does participation in gambling compare with participation in other recreational activities (both those which have a well-recognised potential to become addictive and those which do not)?



With respect to gambling, which causes personal and/or social problems, we wished to find out:

- What proportion of those who gamble are causing significant harm to themselves and others?
- What are their typical characteristics?

We knew in advance that the vast majority of South Africans, like the majority of the rest of the human race, either don't gamble at all or, if they do, treat gambling in the same way that they treat other leisure pursuits such as playing golf, drinking with friends or watching television. A minority who gamble (like a minority of those who play golf, drink alcohol or watch television) spend an excessive amount of money or time on these activities to the point where it impacts negatively on their lives and on the lives of those around them. But how many people are there in each of these categories as a proportion of the population as a whole and what determines who falls into which category?

These were general questions on which we sought information without any preconception as to what we might find. We did, however, also start with some general hypotheses which we hoped this survey and follow-up surveys would confirm or refute. The most important of these were:

- The legalisation of gambling will increase the amount of gambling in South Africa. This hypothesis, to be tested by comparing the before and after situations in South Africa, is less obvious than appears at first sight. This is because in South Africa gambling was mainly legalised in order to eradicate a huge illegal casino industry estimated to have operated over 100 000 slot machines in almost every town in South Africa. This compares with 24 000 machines located at 22 legal casinos at the time of writing. The assumption nevertheless is that when gambling becomes legal many people who would otherwise not gamble begin to do so. It is also true that national lotteries expand the market for gambling generally and not just for their own big prize games.
- The growth of gambling in South Africa will increase the incidence of problem gambling somewhat but not proportionately. Gambling in some form is always available to people and in South Africa it has been easy and legal for a long time to bet on horses. Moreover, problem gambling usually takes a fairly long time to develop to the point where it is recognisable. Consequently we expected that South Africa would already have significant numbers of problem gamblers - as suggested by the Western Cape Study which found 2.6% of the adult population scoring seven or more affirmative answers on the Gamblers Anonymous screen. On the other hand we expected that some new gamblers who may be expected to become problem gamblers are still in the early stages of their gambling careers when problems will not yet have clearly surfaced.



- We expected, on the basis of international experience, that the increase in problem gamblers would be mainly among players of slot machines and that players of the weekly big prize online lotto game would not exhibit problems. If this were so, it could be explained by the fact that slot machines offer so-called "hard" gambling where the rapidity of the play encourages the wagering of high stakes. By contrast people are expected to spend only a small amount of money buying lottery tickets once or twice a week.
- We expected that South Africans gamblers would exhibit higher rates of problem gambling than gamblers in wealthier countries. We expected this because in a country where there is a large population of poor people (and no social security or welfare state) it is obviously easier for people to get into trouble through gambling. Also, widespread legal gambling is a novelty in South Africa and prior to the establishment of the NRGF there had been very little public education about gambling. In addition, there is a substantial section of the population who are not only poor but also under-educated. These constitute further reasons for expecting that, at present, more people will get into trouble with gambling through ignorance than in North America, Oceania and Europe.

We are now in a position to report on these hypotheses. Thus:

- Gambling in South Africa has increased but modestly and mainly through the lottery, which is the least harmful form of gambling.
- Problem gambling has increased less than we expected.
- As expected, slot players are more likely to exhibit problems than other types of gambler, although there are proportionately more problem lottery players than in xxx
- Xxxx for problem gambling are not significantly larger than in comparable jurisdictions and poor people are not more irresponsible than rich people.

4. Analysis of key concepts (1)

4.1 Gambling

In our view one of the weaknesses of much writing about gambling is lack of precision in the definition of terms and lack of rigour in the analysis of concepts, particularly in relation to "problem" gambling. We wish, therefore, to set out as clearly as possible how we understand the terms we employ and why we use them as we do.

We have followed the standard definition of gambling as an activity where:

- two or more parties place at risk something of value (the stakes)
- in the hope of winning something of greater value (the prize)
- where the outcome depends on the outcome of events which are unknown to the participants at the time of the bet (the result).



This definition covers all forms of gambling, whether undertaken privately or offered commercially. Our interest is principally in commercial gambling where a company offers to take bets as a for-profit business. It might be argued by some that since commercial gambling operations typically depend on mathematical facts which ensure that the company cannot lose in the long run, these companies are not in fact gambling because they are not in fact taking risks, but this view neglects the commercial realities of the gambling business, not least which the investment risk profile of the industry.

Three other questions about what is and what is not “gambling” seem to us more serious.

The first is whether people buying and selling shares are gambling. We argue that normally they are not. Some people do indeed use the securities exchange as a medium for gambling and literally choose their share purchases by using a pin. However, the securities exchange is first and foremost an instrument for investment which enables people to participate in the creation of wealth. Also, investing in the securities exchange is not a zero sum game in which one person’s winnings are another’s losses. On the whole attempts to assimilate investing on the securities exchange to gambling are intended either to discredit the business of buying and selling shares or to make commercial gambling more respectable.

Another suggestion, less frequently made perhaps because it does not plausibly serve either of these aims, is that buying insurance is a form of gambling. The difference here, however, is that both parties to the transaction desire the same result, e.g. that the client will not die prematurely. The purpose of the transaction is to enable the client to purchase not the hope of winning but a measure of peace of mind in the face of (remotely) possible disaster.

Finally, one should consider whether certain types of professional gambler are really gambling. The first-rate poker player who plays only with people of far less expertise comes close to being in the position of casino owners who knows that in the long run they are bound to win. For most purposes it makes better sense to understand such people as practising a profession or plying a trade rather than as gambling.

The small number of professional gamblers to be found in South Africa are not identified in this survey and we exclude on principle those who treat the buying shares or insurance as a form of gambling. We do, however, include some forms of gambling which may not be thought of as gambling by those who participate in them. In particular, we include playing the lottery, scratch cards, fafi and newspaper charity “jackpot” competitions. The full list of the gambling activities we surveyed is:



- newspaper jackpots
- scratch cards
- fafi
- the lottery
- bingo
- dice
- roulette
- card games
- slot machines
- horse racing and
- other sports betting

4.2 Vice and Recreation

Gambling used to be treated as a vice to be discouraged if it could not be eradicated by legal and religious sanction. Nowadays, given the widespread legalisation of gambling globally, those in the commercial gambling business make the point that gambling has become, in effect, a branch of the entertainment business.

To what extent is gambling similar to, and different from other activities which used to be thought to be vices, which are usually prohibited to the young and which some people in most societies think should be prohibited to adults too? Vices were traditionally understood as forms of wickedness which did damage not to others but to the (immortal) soul of those who engaged in them. As such, the concept of vice is originally dependent on a religious concept of the soul. But in secular culture the idea of vice retains the sense of being something which you should not engage in because of the harm you will do to yourself rather than to others.

When people were more accepting of the idea that government has an obligation to ensure that its citizens live virtuously - and in particular to facilitate the saving of immortal souls - it seemed natural that government should ban vices even although this meant creating a category of victimless crime. More recently people have come to accept either that it is impractical for government to ban vices or that the project of using government for the enforcement of morals is itself morally illegitimate.

These activities include smoking tobacco and drinking alcohol. The use and sale of other psychotropic drugs, ranging from cannabis and ecstasy, to cocaine and heroin continue to be proscribed in South Africa as they are elsewhere. Trade in pornographic material has been considerably liberalised since 1994 and is now in line with what is permitted in most developed countries. All these activities used to be collectively designated “vices” and as such disapproved of even when indulged in moderation. Most of them – the partial exception is moderate drinking - continue to be viewed by not only the more puritanical adherents of major religions but also by large numbers of people who on secular grounds think it would be better if people did not participate in these activities. Historically, most



of these activities (although not smoking) have been treated by governments as vices in contexts where it was widely accepted that a major function of government is “the removal of wickedness and vice.” It should be remembered, however, that going to the theatre has also often been treated as a vice, with actors being regarded as engaged in an essentially immoral profession and the provision of theatrical entertainment being vigorously circumscribed by laws.

This shows that perceptions of what is a vice change substantially as societies change, whether vice is perceived as defiance of the will of God, or simply as a form of self-damaging behaviour which the law should at least discourage if not prohibit. It also shows that societies are typically inconsistent in their attitude to different alleged vices and what government should do about them.

Naturally those who work in the gaming industry do not wish to be thought of as being in a similar line of business to purveyors of drugs or pornography or even of alcohol and tobacco. They wish to be seen as participants in the leisure or entertainment industry and they believe that, just as going to the theatre was once, but is no longer considered to be depraved, so going to a betting shop, visiting a casino or buying a lottery ticket should now be treated as a normal part of the pursuit of fun. Clearly, as our survey shows, in South Africa, as in Europe and Australia, though less so in the USA, the dominant view is that gambling is not immoral but simply a form of entertainment which gives people significant pleasure and, like all other forms of enjoyment, does no harm provided it is not engaged in to excess.

It is worth asking at this point what exactly is the entertainment which purveyors of commercial gambling services are selling. A number of distinct forms of pleasure need to be distinguished here.

Thus there is:

- **The pleasure of playing games**
Slot machines and table games primarily offer the enjoyment associated with playing other games which do not offer the chance of winning money: pinball, patience, solitaire, computer games.
- **The pleasure of fantasising about being rich**
The lottery offers the clearest example of this form of pleasure. People buy a ticket (or plan to buy a ticket) and spend the rest of the week daydreaming and discussing with friends and family what they will do with the money when they win. Big jackpot machines, premium bonds, accumulator bets and pools also offer fuel for this kind of fantasy, where for a small stake, players have the remote chance of winning a huge prize.
- **The pleasure of being intoxicated with fear and hope**
This is the aspect of gambling which is analogous to riding roller coasters or



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bungee-jumping and presumably involves an adrenaline rush. On a roller coaster the fear is of dying and the hope is to survive. But participants know that the risks are not for real and that they are, therefore, taking part in a simulation. The pleasure to be derived in this way from gambling requires that the stakes be high from the point of view of the gambler and the chances of both winning and losing be real.

- **The pleasures of escape**

Race-courses, bingo halls, betting shops and casinos all offer places where people can escape from loneliness, boredom, stress and even the strain of having to take life and money seriously the whole time. They offer escape from these things into places which are congenial, convivial, stimulating and even glamorous.

Obviously, the immoderate pursuit of any of these pleasures may be damaging to the well-being of the individual but, in general, the provision of these forms of pleasure may be reasonably accounted a part of the entertainment industry and deserving to be treated as such. Nevertheless, there is no doubt that many aspects of the regulation of gambling hark back to days when it was felt that gambling was a vice and much legislation world-wide continues to reflect the view that gambling is an unsavoury activity which should be discouraged and which needs to be tightly controlled because of its historic association with criminals who make huge profits from the supply of forbidden pleasures. Casinos, in particular, also offer a wide variety of attractive, non-gaming leisure and entertainment options.

This is clearly what explains the exceptionally rigorous probity investigations which governments require for the purveyors of gambling services and the high degree of consumer protection against fraud and exploitation which government insists on supplying to the customers of gambling companies. Governments, including the South African government, do not treat either other financial service industries or other entertainment industries in this way.

Whether there are good reasons for singling out the gaming industry as needing exceptional measures to keep it crime-free is a question beyond the scope of the research reported on here. On the other hand, there is widespread and clearly accurate agreement that gambling has the potential to be very damaging for some of those who engage in it. What is crucial to our purposes is the question of whether there are good reasons for singling out the gaming industry for special government regulation to minimise its dangerousness. Gambling clearly can be a dangerous activity for some people. The question is whether it is no more dangerous than other activities which are not singled out for special regulation or whether it is more like activities which are believed to be so peculiarly dangerous that they are severely circumscribed by law or banned. What you think about how the law should treat the gaming industry will depend to some extent on whether you think gambling is more like going to the theatre or more like ingesting cocaine.

Moreover, apart from its general importance for public policy debates, the issue of whether gambling is a vice or a harmless recreation is of particular importance



for the present study because there is a danger that what has happened elsewhere - notably in the USA - will happen in South Africa. This is that people who want gambling banned because they view it as a vice, will seek to accomplish their end by persuading people that the legalisation of gambling creates another substantial problem of addiction.

More generally, people who disapprove of gambling on moral, religious, political and/or aesthetic grounds will look for inflated measures of the harm which “problem gambling” allegedly does to individual gamblers and to others in order to render more plausible their prior anti-gambling convictions. The converse problem is better-known, namely those that argue that gambling is almost entirely a harmless entertainment with virtually no social costs (and substantial social benefits) especially when compared to other forms of self-indulgence. At all events, people have strong and conflicting views, based on anterior interests, about what the statistics relating to the dangers of gambling ought to show.

In order to expose the fallaciousness of arguments on both sides about the dangers of gambling based on ideological prejudice or self-interest (or both) it is helpful to compare gambling both with other alleged vices and with other recreational activities which people may engage in excessively and, thereby, do damage to themselves and those close to them. In particular we need to be clear about how gambling resembles and differs from:

- other recreational activities which may be colloquially described as an addiction for some people who indulge in them excessively and even obsessively
- normal and typically necessary activities which can become addictive for some people activities which produce a sense of well-being which for most people is life-enhancing but for some is addictive and destructive

addictive activities where the motive for indulgence is to avoid the distress which comes from interrupting the habit of indulgence

5. Analysis of key concepts (2)

5.1 Addiction and Problem Gambling

This brings us to the concepts of gambling addiction and problem gambling. In general, gambling may fall into any of the above four categories. Thus:

- All activities that people enjoy have the propensity to lure them into spending so much time and money indulging themselves that they damage their own vital interests and those of the people dependent on them financially or emotionally. An inordinate enthusiasm for any leisure activity - from playing



bridge or golf to going to church or engaging in local politics - can result in one (or more) members of a family doing palpable damage to themselves and to others. Gambling also has this propensity.

- Activities like eating, shopping, working and making love are paradigmatic of normal activities which, however, some people engage in, in a morbid way. It makes sense to talk of foodaholics, shopaholics, workaholics and sexaholics to capture the analogy between the behaviour of people who engage in these activities excessively, obsessively and compulsively and the way in which the behaviour of alcoholics differs from that of normal drinkers. Some gamblers clearly gamble in this excessive, compulsive way although neither drinking alcohol nor gambling, however, are normal - let alone necessary - in the way that these other activities are.
- In fact, for this reason the activity which gambling is most similar to is, indeed, drinking alcohol. Most people drink harmlessly, for the pleasure it affords them and as an enhancement of conviviality. Some drink very self-destructively either occasionally or regularly. Some others, without being classifiable as addicted or dependent, drink more than is prudent.

However, alcohol is a mind-altering drug which, like other drugs, offers easy and reliable access to a more or less intense sense of well-being. All such psychotropic drugs, including alcohol, are likely to be addictive in the sense that some people find it difficult to resist over-indulgence in them even when they know that their indulgence is doing them harm. Most people, at least with alcohol, however, do not become addicted. Alcohol also differs from other stimulating drugs which yield a "high" in that many people drink without wanting to get drunk whereas the principal point of taking most drugs is to get "high". The mixture of hope and danger which gambling offers means that gambling as a form of risk-taking can produce a "high" and become addictive in the (paradigmatic) way that other drugs can.

In extreme cases gambling, like drug-taking, becomes not only the most important activity in people's lives but an all-consuming and very self-destructive obsession. Excessive gambling, however, even if it has a physiological base, does not seem to generate as much or the same kind of physical dependency as taking psychotropic drugs. Moreover, people who gamble excessively do not characteristically start fights or kill people on the roads.

- Activities are addictive in another sense if they are habit-forming and have the consequence that interrupting the habit produces a degree of physical and/or mental distress. Cigarette smoking is highly and almost universally addictive in this sense. Repetitive forms of play on machines - whether for money or points - have something of this character. With smoking, however, the vast majority of consumers experience withdrawal when they cannot smoke regularly and indeed, since most smoking is an unconscious activity, the principal reason why



people smoke most cigarettes is to avoid the sense of something missing which they experience when they are not smoking.

Furthermore, there is no way of smoking safely, whereas repetitive gambling is not physically harmful and, like doing a lot of crosswords or playing a lot of solitaire, patience, computer games or pinball is only harmful to people who cannot afford the time or the money or both. For people with enough money and too much time on their hands repetitive gambling, like watching lots of soap operas, may be a reasonably effective antidote to boredom and loneliness.

In terms of the dangers of physical damage, excessive gambling would seem to score very low in comparison with over-eating, drinking or taking drugs to excess and smoking (too many) cigarettes. However, excessive gambling has one characteristic in terms of which it is far more dangerous than these other activities. This is that the substance which excessive gamblers abuse is money and it is possible to spend unlimited amounts of money on gambling in a very short time.

This means that:

- excessive gambling is uniquely dangerous because it threatens people's financial health;
- excessive gambling is an activity to which poor people are especially vulnerable simply because they are poor.

An important consequence of this for defining problem gambling is that we will not be concerned only with people who have something which can plausibly be accounted a physical and/or mental disease. Problem gamblers, especially if they are poor, may owe their troubles to ignorance or inexperience of how gambling works rather than to some form of incapacity or to mere weakness of will.

Colloquially or by analogy, as the above examples show, almost any activity can be intelligibly described as addictive in at least one sense of the term for at least some of the people who engage in it. When used by psychologists, doctors, philosophers, economists and other social scientists the term "addiction" is highly contested reflecting different views about, for example, whether addiction has a physiological basis or whether addictive behaviour is or is not rational. A further difficulty is whether addiction is a matter of degree. If we think of addicts as people with essentially faulty wiring, we are likely to think of addiction as a condition which you either have or do not have. On the other hand we may think of addictive behaviour as being on a continuum ranging from the somewhat or occasionally excessive to the ruinously and permanently uncontrolled.

We are disposed to follow the view here, elaborated by Max Abbott, that disordered gambling is a continuum of varying degrees of loss of control which reaches a brink after which the gambler falls into a condition of total uncontrollability. However, for our purposes, in categorising our respondents, we distinguish between gamblers



who are full-blown addicts, i.e. who behave towards gambling as alcoholics do towards alcohol and drug addicts towards their drug of choice, and those who have a less severe problem, whether or not they have a condition which resembles a disease and whether or not they are likely to develop into full-blown addicts.

In particular, we define all problem gamblers, whether addicted or not, as people who:

- spend so much money and/or time gambling that they do significant damage to themselves in areas of their lives which are important to them, notably their personal relationships, their work, their sense of security or self-respect find it difficult to control their gambling without assistance

In addition to meeting these criteria, gambling addicts exhibit other characteristics common to other addicts but not to non-addicts. Most notably:

- they will be obsessed with gambling and think about it for much of the time when they are not gambling, including first thing in the morning
- they will be using gambling not as a means of enhancing the pleasure in their lives but as a means of escaping pain, they will feel an intense but delusional sense of well-being which nothing else, apart from indulging in their addiction affords them, and for which they will sacrifice almost everything else

It is clearly plausible to describe gamblers who exhibit all these symptoms as having some form of “pathological” condition or some kind of behavioural or psychological disorder characterised by acting in a way which is both obsessive and compulsive. It may be debatable how similar addictive, compulsive, pathological gambling is to other behaviours termed “addictive”, “compulsive” and “pathological”.

But for our purposes it seems useful to separate out gamblers to whom these adjectives clearly and plausibly apply from others who, although getting into trouble because of excessive gambling, cannot clearly or plausibly be described as “pathological,” i.e. as having something like a disease. These latter are usefully called “problem gamblers” which carries no implication that they have a medical or quasi-medical condition, nor that their problems are all of the same kind, severity or causal origin. Instead the term “problem gambler” focuses only on the fact that gambling, for whatever reason, is causing significant difficulties for the problem gambler and/or for others.

Many other characteristics which are very commonly found in addicts are fairly commonly found in problem gamblers and much less commonly found in gamblers who have no problems. Importantly, addicts share the tendency to deny the truth about their behaviour, not only with problem gamblers but also with non-problem gamblers who believe that gambling is not very respectable. Similarly, both addicts and problem gamblers, but also some non-problem gamblers, are prone to the dangerously false belief that they can manipulate or defy the laws of physics and mathematics.



In distinguishing between problem gamblers and “addictive,” “compulsive” or “pathological” gambling (and treating these terms as equivalent) we are broadly following international research trends, pioneered by Howard Shaffer and his colleagues, which speak of different “levels” of gambling behaviour. However, what we mean by “addiction,” is behaviour which is strictly comparable to what is observed in the better-known cases of alcohol and drug addiction, while among problem gamblers we include not only those who are “sub-clinical” or at risk of developing a medical or quasi-medical condition, but also those who may be gambling too much through ignorance or lack of good money management skills.

6. Measuring problem gambling

The business of measuring problem gambling is notoriously fraught with a multiplicity of methodological difficulties, some of which are exceptionally acute in the South African context.

Among the general problems are the facts that:

- in surveys, people are often reluctant to tell the truth to strangers about their gambling and drinking habits. (Addictive gamblers in recovery often claim that they would have lied about their gambling had they been surveyed when they were still gambling.)
people vary greatly in the extent to which their answers are influenced by their attitude to the interviewer. Some answers are distorted by the respondent’s desire to please the interviewer; others by resentment of a perceived intrusion into the respondent’s privacy
- people with problems of any kind, including addiction problems, are more likely to elude being caught in a sample
- addicts have a strong tendency to deceive themselves about their behaviour and to deny the existence of their problem or its severity
- people often have very inaccurate notions of how much money they spend and on what
- there is no internationally agreed survey instrument for testing for problem gambling
- all the instruments available consist of a battery of questions which assign an arbitrary score above which people are accounted “problem gamblers”
- the items on the individual tests pick out symptoms of very different orders of severity ranging from “have you felt remorse after gambling?” to “have you ever contemplated suicide because of gambling?”
- some of the items may identify behaviour which is abnormal in some cultures but not in others, or much more likely to affect the poor than the rich. Borrowing money to gamble may fall into both these categories
- most items pick out significantly more people who score below the cut-off point and are therefore not accounted problem gamblers, than those who score above the cut-off point
- all surveys depend on the competence and honesty of the people who administer



the questionnaires, which is likely to vary

- human beings have a substantial capacity for believing logically incompatible things simultaneously.

Given what has been described as the general state of chaos (Shaffer) in respect of research into problem gambling, it is tempting to think that all the numbers are worthless and serve only to keep the research community in research grants, conferences and journal publications. Such scepticism, although not wholly baseless, is misplaced. What is remarkable, given the methodological difficulties and other practical constraints on conducting research into problem gambling, is how consistent and credible most of the results are.

What has been much less satisfactory has been the lack of thoughtfulness concerning what these findings can properly be used for. Too much of the debate has been crudely focused on the question of whether particular societies have too much legal gambling or not, whether the law should be liberalised or made more restrictive, or simply whether gambling is or is not a bad thing. It is assumed that if the number of people who are gambling excessively in a society is relatively high, it follows automatically that government should a) be clamping down on legal gambling opportunities, and b) spending more money on social services (and research) for problem gamblers and (perhaps) c) taxing the industry more highly.

To establish any of these far from self-evident propositions would require us to have good grounds for believing that:

- as a matter of empirical fact clamping down on legal gambling opportunities would, in fact, lead to a reduction in problem gambling
- the provision of publicly funded social services will, in fact, give good value for money, given other claims on the public purse
- the curtailing of the freedom of the many to engage in harmless entertainment, is justified to prevent a hapless or reckless few from doing damage to themselves and
- that quite a strong, paternalist and anti-liberal thesis about the legitimate role of government, is morally defensible.

These issues are of universal relevance, but they are particularly acute in South Africa where:

- there used to be a huge illegal industry, which is probably where many of the problem gamblers we are identifying today, first acquired their addiction
- the claims on the public purse by the homeless, the illiterate, those suffering from TB and AIDS, the victims of violent crime, those addicted to illegal drugs etc, are far more compelling than the claims of problem gamblers
- it would rightly be regarded as morally abhorrent to say in South Africa that poor people, and especially poor black people, can't be trusted to behave



responsibly and must therefore have their pleasures prescribed and proscribed to them by government

In South Africa as elsewhere, we wouldn't necessarily know what to do about problem gambling, if it turned out that 20% or 30% of regular gamblers gamble too much. We don't, after all, know what to do about smoking where almost everyone who smokes, smokes too much. Still less do we know what to do if the number of problem gamblers is under 10%. On the other hand, we would not be justified in ignoring the problem even if it turned out that the right number is only 1% of the gambling population, if there was indeed something effective we could do to reduce the incidence of this kind of human distress.

What everyone concerned with these numbers, therefore, needs to ask themselves is: "What do we want these numbers for?" "What is the purpose of the research?" "How can it be of practical usefulness other than as a morally obnoxious weapon in a propaganda battle?"

Our view has been that these numbers should assist in two areas:

- To give politicians, regulators, the industry, and the general public, an idea of the size and the character of the problem to be addressed, so that sensible decisions can be made about what to do about it. Obviously, it will make a real difference to such decision-making how widespread the problem is, how serious it is in comparison with other social problems, and who is mainly affected by it. But for these purposes only rough numbers are needed.
- To give those involved in counselling and treating problem gamblers, and those involved in educational and training strategies of a preventative nature, an idea of how large their potential clientele is and how it is composed. Again only rough numbers are needed.

In particular, by trying to identify what we call "full-blown" addicts, we are mindful that this might suggest that the problem of gambling addiction be treated within a coherent public policy for dealing with the problem of addiction, generally. In identifying those about whom we know no more than that they seem to be gambling in a way which is significantly damaging to themselves and those close to them - whether through ignorance, fecklessness, incipient mental illness, or mild personality disorder - we have in mind the need of a public education programme, a programme of training for those who work in the industry, strategies for alerting people to the possibility of their having a problem and of the availability of help, and a programme of counselling and treatment for those who seek it.

Since we sought no more than rough numbers, we were not particularly concerned with which instrument we used. All questionnaires, in fact, offer a scattershot of symptoms which problem gamblers may be expected to exhibit with greater frequency than those who have no problem. Many of the questions are very similar



across different instruments. All of them omit a larger number of tell-tale symptoms than they capture. In particular, they omit most of what will be readily listed by any group of industry professionals with long experience of observing gambling behaviour in betting shops, casinos and lottery outlets. What they show is, that if you score at or above the designated cut-off point for identifying problem gamblers, your gambling is probably making your home life unhappy and damaging important personal relations, causing you significant financial problems, perhaps undermining your effectiveness at work in various ways, and causing yourself various forms of emotional distress. This seems a reasonable description of someone for whom gambling has become more of a problem than a pleasure.

In fact, in this second survey we administered only the Gamblers Anonymous 20 Questions. For purposes of analysis, we have so far used the GA 20 Questions with a cut-off of seven or more affirmatives (more than one-third). The GA 20 Questions gave us 270 problem gamblers out of a sample of 5 816.

A 1998 Spanish study found that the GA 20 Questions was effective in distinguishing individuals known to be problem gamblers from those known not to be and found it compared well with SOGS. (Ursua and Uribebarrea: JGS, Spring 1998.) We have some reasons for preferring the GA 20 Questions, on the grounds that it relies less on borrowing behaviour, which may be culture-specific. More importantly, it makes it easier to compare results with those from the 20 Questions used by Alcoholics Anonymous, which we also administered.

In addition to testing our sample, we had also administered the GA, SOGA and DSMIV instruments to people in either the NRGP treatment programme or in Gamblers Anonymous: They scored, as expected, more than double the number of affirmative answers in comparison with those identified as problem gamblers.

There were some difficulties which were specific to South Africa and which we have attempted to overcome. These include:

- the need to administer the questionnaire in five different languages (out of eleven official ones)
- the fact that, as a developing country, South Africa has an inordinately large number of people who are transitional between urban and rural, as well as an abnormally large population of young people
- the fact that a representative sample across, race, religion, region, language and socio-economic position, would have been impossibly large and complex
- the fact that gambling is administered by nine different provincial authorities, which have different histories in respect of gambling, and whose legal gambling industries are at different stages of development

These considerations should be noted as further reasons for not treating the numbers given here as more than estimates. They remain, however, estimates which we



believe will be helpful to those who shape public policy on gambling and to others, including responsible industry professionals, who are trying to reduce the incidence of, and damage caused by, problem gambling.

Finally, we have presented some numbers which are intended to put the findings of the present research into gambling in South Africa into some international perspective. However, some cautions need to be noted in respect of this exercise. These include the facts that:

- the South Oaks Gambling Screen which is the principal instrument used for making these comparisons, is not always used in the same way or in the same form
- there are clearly cultural differences in what constitutes “problematic” behaviour: borrowing from family for all purposes is common among poor people, whereas the possession of a credit card is not
- there are clearly differences which make developing countries relevantly dissimilar from developed ones: developing populations tend to have a very large number of minors
- studies for different countries do not always take into account regional variations in the availability of commercial gambling which are crucial in South Africa
- the most important number for problem gambling is probably that which gives the proportion of regular gamblers in the population. Studies do not all use the same definition of regular gambler
- the numbers for populations as a whole may be distorted, by not taking account of regional variations in the availability of gambling
- different studies were conducted at different stages of the development of commercial gambling in the countries concerned
- different studies were also carried out at different stages in the development of problem gambling research, a discipline which is still reasonably described as being at the pioneering stage

In conclusion then, we offer numbers which are no more than estimates, but we believe they are estimates which will serve the purposes for which they were intended. These were to inform debate about public policy concerning gambling in South Africa and to assist the work of those, including counsellors, educators and responsible industry professionals, who are trying to promote healthy, recreational gambling in South Africa and to reduce the incidence of and damage caused by excessive gambling.

7. Costs and benefits of legalising gambling in South Africa

Although the present research does not seek to throw any light on the question of what benefits the legalising of gambling in South Africa may have brought, it is important, in the interest of providing perspective to the problem gambling



numbers, to say something about both alleged costs, other than the negative impact of excessive gambling and alleged benefits of legalising gambling in South Africa.

Among other undesirable consequences, which may be thought to ensue from the liberalisation of gambling law, the most important are:

- moral degeneration
- increase in crime, and
- economic damage to other (allegedly more desirable or deserving) businesses.

It is impossible to comment yet on whether the introduction of extensive new legal gambling opportunities in South Africa has led to South Africans become idler, more irresponsible, greedier or spiritually more coarse, or whether, on the contrary it has led to their becoming braver, more spontaneous, more tolerant and more fun-loving.

It may be possible, at some future date, to form an estimate based on something other than prejudice and self-interest of the effect on people's character of being exposed to extensive gambling opportunities and being encouraged thereby to experiment with gambling. It should be noted, however, that even if we had evidence now that, for example, the existence of lotteries in some way makes people morally worse, this would not tell us by itself that in a free and democratic society lotteries should be outlawed. We would also need to demonstrate that lotteries are a source of substantial harm to people who are entitled to be protected by law from that harm.

In respect of crime, a regulated industry, one which is tightly controlled and administered, is much less vulnerable to criminal activity, to the extent that illegal gambling has been replaced by legal gambling operated by reputable companies who have undergone rigorous probity investigation. There is no evidence yet available of whether people are committing crimes such as fraud, robbery and theft to fund gambling in a way similar to that in which they commit such crimes to buy drugs. If it turns out that this is happening, then this will be, by definition, a function of problem gambling.

If there is damage to other industries as a consequence of legal gambling, this is likely to be because people spend less on other leisure pursuits such as going to restaurants; on other luxuries such as buying fashionable clothing; and on acquiring or replacing consumer durables such as cars or kitchen equipment. The money being spent on gambling must, as a matter of logic, be money which is not being either saved or spent on other goods and services. So the legalisation of gambling will have had some adverse effect on what would have been the current situation of some other businesses. But this is, of course, true of any new industry which competes for consumer expenditure and it is not normally thought of as being the



business of government to protect existing businesses from competition from new businesses which consumers might otherwise prefer to patronise.

Be that as it may, the major economic effect in terms of displacement of extending legal gambling in South Africa has been on other gambling industries and most substantially on the old illegal industry, and while gambling has taken a share of disposable income away from other businesses, the most significant negative impacts on disposable income since 1994 have come from the increased expenditure which middle income earners have had to pay for education, health care, security and transport.

On the other hand, contrary to what was originally expected by some, gambling - outside of certain rural resorts - has not contributed to an increase in foreign earnings through tourism. People do not decide to come to South Africa so that they can enjoy the gambling. (It is, however, true that provinces which did not previously have legal casinos are now seeing their residents gambling within their borders rather than travelling to other provinces to gamble.)

It is, of course, also true as a matter of logical necessity, that consumers of gambling services are spending their money in a way which will, in their estimation, furnish them with greater satisfaction than would spending it in any other way. If more gambling opportunities become available, those who choose to avail themselves of the opportunities may be said to be better off in the sense of being able to consume more of what they want. This does not mean they will live happier or more fulfilling lives in some objective sense; only that to the extent that they turn out to be right about what they will most enjoy, then the more choice they have the greater will be their enjoyment.

More choice and/or cheaper goods and services (more “consumer surplus” and “wealth” in society as the economists jargon has it) may result in greater happiness for a greater number of people to the extent that people succeed in using their money to buy happiness.

It may also be a sound presumption to think that the best way of maximising satisfaction in the sense of contentment, is to maximise their opportunities for satisfying the preferences they currently have, i.e. to let them choose what they get. More profoundly, it may be desirable on moral grounds to treat people as if they are the best judges of their own real interests, even if often they are not. Not to do so is to fail to respect them as autonomous moral agents and to arrogate to a paternalist government the right to treat them as children. In other words, it may be a good thing to maximise the choices people have over how to conduct their own lives, including whether or not to gamble, in the interests of promoting liberty rather than happiness.



Apart from this, aside from cross-subsidising new tourism infrastructure, the real benefit which legalised gambling confers on society, is the possibility of raising relatively unresented taxes, that is funds for causes deemed to be in the general public interest. This is fully perspicuous in the case of lotteries where the avowed purpose is to raise money for good causes. But all taxation is supposed to be justified on the grounds that it is necessary to fund good causes which would not otherwise be funded - such as defence against foreign aggression and the maintenance of law and order. With the additional revenues which accrue to government from gambling, therefore, the crucial question is how well is the additional revenue spent in the public interest. In South Africa it is too early to tell in the case of the lottery which has been, perhaps culpably, late in actually distributing the 28% of the proceeds of lottery sales earmarked for good causes. The casinos have in the main been required to fund non-gambling infrastructure, such as conference centres and “must-see” attractions designed to increase South Africa’s earnings from tourism.

The more general point that needs to be made, very forcibly in South Africa and to a lesser extent in more developed countries with extensive social security, is that whether gambling has been a good thing from a public policy point of view, will depend crucially on whether and how far the flow of funds generated by legalised gambling has been from richer to poorer or from poorer to richer. If any policy in South Africa, including the legalisation of gambling, has made the poor not better off but worse off, it must be accounted a failure in both the government’s own terms and, arguably, in absolute terms as well.

This needs to be carefully researched, but there is some reason to think that, because South Africa set up its gambling industry with these redistributive objectives clearly in view, the result will turn out to be more positive from this point of view than in countries where the liberalisation of gambling law has been primarily driven by a less qualified commitment to market forces.

At all events, the most indisputable benefit of the recent legalisation of gambling in South Africa has been the benefits of exchanging an unregulated and untaxed illegal industry for a thoroughly regulated and substantially taxed legal one.



Section Three: Empirical Data

In this summary we present the main tabulated results. In each section we address an important empirical question, and then list the question(s) that addressed that question in the questionnaire. This is then followed by tables of statistical results detailing the empirical response to that question. For comparative purposes, each such table is accompanied by one illustrating the results of the 2001 survey.

* Note that a total of 5 816 people were sampled nationally with a demographic profile that mimicked that subsection of the South African population that has access to gambling venues (including lottery outlets)

Questions addressed

1. What are the present recreational habits of people of the national sample in respect of three types of leisure activity with which gambling may be expected to compete – going to movies, restaurants and live sporting events?

Relevant question on questionnaire:

Q6: Approximately how often do you:



Table 1.1 - Counts of respondents who partake in competing leisure events (2001)

	Movies at cinemas	%	Restaurants	%	Sports events	%
More than once a week	61	1.1	114	2.0	142	2.4
Once a week	180	3.1	409	7.1	464	8.0
Once every 2 weeks	326	5.6	717	12.4	309	5.3
Once a month	996	17.2	1797	31.0	694	12.0
Regular	1563	26.9	3037	52.4	1609	27.7
Twice a year	639	11.0	569	9.8	478	8.2
Once a year	315	5.4	205	3.5	365	6.3
Less often than once a year	424	7.3	282	4.9	419	7.2
Occasional	1378	23.8	1056	18.2	1262	21.8
Never	2762	47.6	1654	28.5	2834	48.9
Don't know	97	1.7	53	0.9	95	1.6
Total	5800	100.0	5800	100.0	5800	100.0

Table 1.2 - Counts of respondents who partake in competing leisure events (2003)

	Movies at cinemas	%	Restaurants	%	Sports events	%
More than once a week	69	1.2	141	2.4	132	2.3
Once a week	239	4.1	369	6.3	365	6.3
Once every 2 weeks	365	6.3	744	12.8	294	5.1
Once a month	1084	18.6	1761	30.3	593	10.2
Regular	1757	30.2	3015	51.8	1384	23.8
Twice a year	677	11.6	605	10.4	557	9.6
Once a year	333	5.7	226	3.9	452	7.8
Less often than once a year	396	6.8	324	5.6	516	8.9
Occasional	1406	24.2	1155	19.9	1525	26.2
Never	2569	44.2	1576	27.1	2791	48.0
Don't know	84	1.4	70	1.2	116	2.0
Total	5816	100	5816	100	5816	100



2. What forms of gambling are people familiar with? What forms of gambling do people participate in? What proportion of the sample never gamble, occasionally gamble and regularly gamble?

Relevant questions on questionnaire:

Q7: Which of the following activities do you know of or have you heard of?

Q8: Thinking carefully, which of the following activities have you ever participated in?

Q9: How often do you engage in the following activities?

Empirical response

Table 2.1 below summarises the division between “never” gamble, “occasionally” gamble (less frequently than once a month) and gamble “regularly” (once a month or more frequently).

Table 2.2 gives more detail, and for the range of gambling games considered, gives the numbers of people playing each of the games according to the classifications “aware of”, “never played” or “play regularly”. xxxxxxx

Table 2.1.1 (2001) Summary: National (2001)

At least one game regularly but not only Lottery	2177	37.5%
Regular on Lottery only	2007	34.6%
Occasional game player (regular at none)	129	2.2%
Never play	1487	25.6%
Total	5800	100.0%

Table 2.1.2 (2002) Summary: National (2003)

At least one game regularly but not only Lottery	1993	34.3%
Regular on Lottery only	2408	41.4%
Occasional game player (regular at none)	248	4.3%
Never plays	1167	20.1%
Total	5816	100.0%

Table 2.2.1 – National gaming activity (2001)

Type of Game	Aware of	Aware of %	Participated	Participated %	>Weekly	Weekly	Monthly	Regulars	Regular %	Non-Regular (Less than monthly)	Never	Never %	Total
Jackpots	3417	58.9	720	12.4	10	140	399	549	9.5	120	5131	88.5	5800
Scratch	4865	83.9	1207	20.8	27	267	400	694	12.0	252	4854	83.7	5800
Fafi	2653	45.7	293	5.1	150	69	42	261	4.5	35	5504	94.9	5800
Lottery	5636	97.2	4029	69.5	26	3373	524	3923	67.6	64	1813	31.3	5800
Bingo	1961	33.8	154	2.7	2	15	70	87	1.5	56	5657	97.5	5800
Dice	2837	48.9	155	2.7	24	29	48	101	1.7	41	5658	97.6	5800
Roulette	1906	32.9	139	2.4	1	6	79	86	1.5	44	5670	97.8	5800
Cards	3072	53.0	316	5.4	16	35	148	199	3.4	86	5515	95.1	5800
Slots	4666	80.4	1678	28.9	12	140	964	1116	19.2	454	4230	72.9	5800
Horses	4505	77.7	626	10.8	67	202	182	451	7.8	131	5218	90.0	5800
Sports	2822	48.7	224	3.9	7	44	114	165	2.8	48	5587	96.3	5800

Table 2.2.2 – National gaming activity (2003)

Type of Game	Aware of	Aware of %	Participated	Participated %	>Weekly	Weekly	Monthly	Regulars	Regular %	Non-Regular (Less than monthly)	Never	Never %	Total
Jackpots	3231	55.6	593	10.2	9	27	158	194	3.3	332	5290	91.0	5816
Scratch	4823	82.9	1381	23.7	74	279	518	871	15.0	398	4547	78.2	5816
Fafi	2878	49.5	434	7.5	174	60	92	326	5.6	72	5418	93.2	5816
Lottery	5729	98.5	4439	76.3	1563	1870	774	4207	72.3	167	1442	24.8	5816
Bingo	2175	37.4	200	3.4	7	11	40	58	1.0	109	5649	97.1	5816
Dice	3186	54.8	221	3.8	39	24	55	118	2.0	80	5618	96.6	5816
Roulette	2247	38.6	184	3.2	4	13	67	84	1.4	88	5644	97.0	5816
Cards	3334	57.3	334	5.7	42	35	109	186	3.2	124	5506	94.7	5816
Slots	4758	81.8	1806	31.1	35	79	706	820	14.1	909	4087	70.3	5816
Horses	4633	79.7	610	10.5	62	106	162	330	5.7	256	5230	89.9	5816
Sports	3140	54.0	273	4.7	6	30	91	127	2.2	124	5565	95.7	5816



Table 2.3.1 - A detailed breakdown of the frequency of gaming activity (2003)

Game	F R E Q U E N C Y											P L A Y		
	> Weekly	Weekly	bi-weekly	monthly	bi-monthly	annually	< annually	No response	Don't know					
Jackpots	9	27	26	132	155	84	93	5223	67	5816				
Scratch	74	279	177	341	156	78	164	4435	112	5816				
Fafi	174	60	44	48	8	9	55	5382	36	5816				
Lottery	1563	1870	366	408	73	20	74	1377	65	5816				
Bingo	7	11	7	33	37	28	44	5616	33	5816				
Dice	39	24	16	39	18	15	47	5595	23	5816				
Roulette	4	13	14	53	34	22	32	5632	12	5816				
Cards	42	35	24	85	52	19	53	5482	24	5816				
Slots	35	79	121	585	415	205	289	4010	77	5816				
Horses	62	106	49	113	69	93	94	5206	24	5816				
Sports	6	30	17	74	49	26	49	5543	22	5816				

Thus, of the 5 816 respondents surveyed, the percentages who were familiar with, participated in and were regular players of the different games can be listed as follows:



3 Demographic and socio-economic characteristics of the sample

Q3: What is the demographic profile of four broad different gambling groups (according to playing frequency) in the 2003 sample?

Using Q9 in the modified 2003 questionnaire, we split the sample into four mutually exclusive groups:

- * Those who are regular players (at least one game but not lottery-only) players (1 993).
- * Those who are regular lottery players (2 408).
- * Those who are occasional players (248).
- * Those who never play (1 167).

Relevant questions on Questionnaire:

1 GENDER:

Male	7-1
Female	-2

3 Please tell me into which age category you fall. You need only tell me the corresponding letter of your age group.

A.	Under 18 years	10-1
B.	18 - 24 years	-2
C.	25 - 29 years	-3
D.	30 - 34 years	-4
E.	35 - 39 years	-5
F.	40 - 49 years	-6
G.	50+ years	-7

15 MONTHLY DISPOSABLE INCOME:

1.	Up to R499 per month	78-1
2.	R500 - R799 per month	-2
3.	R800 - R1 399 per month	-3
4.	R1 400 - R2 499 per month	-4
5.	R2 500 - R3 999 per month	-5
6.	R4 000 - R5 999 per month	-6
7.	R6 000 - R7 999 per month	-7
8.	R8 000 - R9 999 per month	-8
9.	R10 000 - R11 999 per month	-9
10.	R12 000+ per month	-10
11.	Don't know	-55
12.	Refused	-66



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29 LIFE CYCLE:

Can you please tell me which of the following best describes you?

Single, living with parents	118-1
Single, living outside the family home	-2
Single with small children under the age of six	-3
Single with school-going children	-4
Single with independent children	-5
Married without children	-6
Married with small children under the age of six	-7
Married with school-going children	-8
Married with independent children	-9
Sole survivor/widowed	-10
Divorced	-11

30 EDUCATION:

Can you please tell me which level of education you have attained?

No formal education	119-1
Some primary school	-2
Primary school completed	-3
Some high school	-4
High school completed	-5
Some university education	-6
University education completed	-7
Other post-matric qualifications	-8

31 Which of the following best describes your working status? You work...

Full time	120-1	Student	-5
Part-time (away from home)	-2	Unemployed – looking for work	-6
Part-time (from home)	-3	Unemployed – not looking for work	-7
Retired	-4	Housewife	-8

37 LEVEL OF URBANISATION Interviewer please record:

Small urban	199-1
Metropolitan	-2

38 TYPE OF DWELLING Interviewer please record:

Formal		Informal	
Brick house or part of a brick house	147-1	Shack - backyard	-6
Flat/maisonette/townhouse	-2	Shack – squatter camp	-7
Hostel	-3	Other informal dwelling	-8
Outbuilding/garage/back room	-4	(please specify)	
Other formal dwelling (please specify)	-5		



Below, two tables are given for each demographic or socio-economic characteristic examined. The first contains percentages relative to Row Totals and the second contains percentages relative to Column Totals.

The row totals percentage table allows one to interpret the breakdown according to the “regular”, “regular (lottery only)”, “occasionally gambled”, and “never gambled” group classification. Hence, for example, in the table gender rows (table 3.1a below) which includes row totals percentages, we can see that:

- * In the “gambled regularly” (at least one game, not lottery only) group, we have a fairly even split (51.6%:48.4%) between male and female.
- * Below, two tables are given for each demographic or socio-economic characteristic examined. The first contains percentages relative to Row Totals and the second contains percentages relative to column totals.

The row totals percentage table allows one to interpret the breakdown according to the “regular”, “regular (lottery only)”, “occasionally gambled”, and “never gambled” group classification. Hence, for example, in the table gender rows (table 3.1a below) which includes row totals percentages, we can see that:

- * In the “gambled regularly” (at least one game, not lottery only) group, we have a fairly even split (51.6%:48.4%) between male and female.
- * In the “gambled regularly (lottery only)” group, we have a 47.1%:52.9% split between male and female.
- * In the “occasional” (at least one game) group, we have a 40.3%:59.7% split between male and female.
- * In the “never gambled” group, we have a 41.5%:58.5% split between male and female respondents.

The table with row percentages is interpreted as follows. “Condition upon” or fix a certain row characteristic, for example, “never” having gambled. There are 1 167 people in this group and 41.5% are male and 58.5% are female. One can then run through the row categories which represent levels of participation and determine the percentage male versus female breakdown.

By contrast, the column totals percentage table allows one to interpret the percentages in the table when conditioning upon the “male” or “female” characteristic. Thus for the male group of 2746, 37.4% were regular (non-lottery) and 41.3% were regular (lottery only).

Thus, if one wanted to answer a question about the non-gamblers category, such as: “are most non-gamblers women?”, one would consult the gender rows table. This would tell you that of the entire sample of 5 816 (comprising 2 746 males and 3 070 females), 1 167 people never gamble. Of these, 1 167 people, 484 (41.5%) are male and 683 (58.5%) are female. The answer, therefore is, yes, most non-gamblers (in the sample) are women (58.5% in fact). The sample is, of course,



stratified to approximately represent the demographic characteristics of the population. In the case of gender, the split is about 52:48, female to male. Hence, one could infer, on the basis of the sample, that most non-gamblers were female.

If one wanted an answer to the question: “are most women non-gamblers?”, one would, in contrast, consult the gender columns table. This would inform you that of the totality of 3 070 women in the sample, 683 (22.2%) never gamble, 965 (31.4%) are regular (non-lottery) players and 1 274 (41.5%) are regular (non-lottery) players. Thus, most women are involved regularly in some form of gambling and clearly the majority are not non-gamblers.

Table 3.1.a (2003) – Gender Rows (Percentages are percentage of Row Totals)

Counts & %	Gender		Total
	Male	Female	
Levels of Participation			
Regular (non-lottery)	1028	965	1993
%	51.6%	48.4%	100.0%
Regular (lottery only)	1134	1274	2408
%	47.1%	52.9%	100.0%
Occasional	100	148	248
%	40.3%	59.7%	100.0%
Never	484	683	1167
%	41.5%	58.5%	100.0%
Total	2746	3070	5816
%	47.2%	52.8%	100.0%

Table 3.1.b (2003) - Gender Columns (Percentages are percentage of Column Totals)

Counts & %	Gender		Total
	Male	Female	
Levels of Participation			
Regular (non-lottery)	1028	965	1993
%	37.4%	31.4%	34.3%
Regular (lottery only)	1134	1274	2408
%	41.3%	41.5%	41.4%
Occasional	100	148	248
%	3.6%	4.8%	4.3%
Never	484	683	1167
%	17.6%	22.2%	20.1%
Total	2746	3070	5816
%	100.0%	100.0%	100.0%

Comparing 2003 with the previous responses of 2001

The demographic structure of the 2002/2003 sample is, as expected, very similar to the previous 2001 sample, with proportions in each of the samples reflecting the demographic characteristics of the population at large. The proportions involved in gaming reflect the trend of fairly stable levels of gaming activity in general except for a marked increase in the levels of regular lottery play.



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It can be seen that the number of regular (non-lottery) players actually dropped from 37.5% of the sample in 2001 to 34.3% of the sample in 2003. But, more than compensating for this was a sharp increase in regular (lottery-only) players from 34.6% to 41.4% of the respective samples. Those who have never gambled dropped from 25.6% to 20.1% as clearly a greater percentage of the population becomes in regular lottery playing, but not, it must be noted in more conventional forms of gambling activity.

Table 3.2.a (2001) Gender Rows (Percentages are percentage of Row Totals)

Counts	Gender		Total
	Male	Female	
Levels of Participation			
Regular (non-lottery)	1110	1067	2177
%	51.0%	49.0%	100.0%
Regular (lottery only)	980	1027	2007
%	48.8%	51.2%	100.0%
Occasional	50	79	129
%	38.8%	61.2%	100.0%
Never	630	857	1487
%	42.4%	57.6%	100.0%
Total	2770	3030	5800
%	47.8%	52.2%	100.0%

Table 3.2.b (2001) Gender Columns (Percentages are percentage of Column Totals)

Counts & %	Gender		Total
	Male	Female	
Levels of Participation			
Regular (non-lottery)	1110	1067	2177
%	40.1%	35.2%	37.5%
Regular (lottery only)	980	1027	2007
%	35.4%	33.9%	34.6%
Occasional	50	79	129
%	1.8%	2.6%	2.2%
Never	630	857	1487
%	22.7%	28.3%	25.6%
Total	2770	3030	5800
%	100.0%	100.0%	100.0%

The actual gender breakdown does not differ much across the two samples. Males dominate slightly in the non-lottery forms of gambling. Hence 51.0% of the regular (non-lottery only) group are male in 2001 and 51.6% in that group are male in 2003. For the lottery only group, 48.8% are men in 2001 dropping slightly to 47.1% in 2003, indicating a slight proportional increase in the number of women who are Lottery only players.

100.0%							
Total	622	884	951	1064	1286	993	5800
%	10.7%	15.2%	16.4%	18.3%	22.2%	17.1%	100.0%



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Table 3.3.a (2003) - Age Rows

Counts & %	Age						Total
	18-24	25-29	30-34	35-39	40-49	50+	
Levels of Participation							
Regular (non-lottery)	258	311	319	356	403	346	1993
%	12.9%	15.6%	16.0%	17.9%	20.2%	17.4%	100.0%
Regular (lottery only)	287	372	423	441	520	365	2408
%	11.9%	15.4%	17.6%	18.3%	21.6%	15.2%	100.0%
Occasional	39	35	31	40	60	43	248
%	15.7%	14.1%	12.5%	16.1%	24.2%	17.3%	100.0%
Never	166	167	168	201	204	261	1167
%	14.2%	14.3%	14.4%	17.2%	17.5%	22.4%	100.0%
Total	750	885	941	1038	1187	1015	5816
%	12.9%	15.2%	16.2%	17.8%	20.4%	17.5%	100.0%

Table 3.3.b (2003)- Age Columns

Counts & %	Age						Total
	18-24	25-29	30-34	35-39	40-49	50+	
Levels of Participation							
Regular (non-lottery)	258	311	319	356	403	346	1993
%	34.4%	35.1%	33.9%	34.3%	34.0%	34.1%	34.3%
Regular (lottery only)	287	372	423	441	520	365	2408
%	38.3%	42.0%	45.0%	42.5%	43.8%	36.0%	41.4%
Occasional	39	35	31	40	60	43	248
%	5.2%	4.0%	3.3%	3.9%	5.1%	4.2%	4.3%
Never	166	167	168	201	204	261	1167
%	22.1%	18.9%	17.9%	19.4%	17.2%	25.7%	20.1%
Total	750	885	941	1038	1187	1015	5816
%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

3.3.c (2001) - Age Rows

Counts & %	Age						Total
	18-24	25-29	30-34	35-39	40-49	50+	
Levels of Participation							
Regular (non-lottery)	208	319	361	428	509	352	2177
%	9.6%	14.7%	16.6%	19.7%	23.4%	16.2%	100.0%
Regular (lottery only)	236	333	349	341	463	285	2007
%	11.8%	16.6%	17.4%	17.0%	23.1%	14.2%	100.0%
Occasional	14	22	18	19	27	29	129
%	10.9%	17.1%	14.0%	14.7%	20.9%	22.5%	100.0%
Never	164	210	223	276	287	327	1487
%	11.0%	14.1%	15.0%	18.6%	19.3%	22.0%	100.0%
Total	622	884	951	1064	1286	993	5800
%	10.7%	15.2%	16.4%	18.3%	22.2%	17.1%	100.0%



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Table 3.3.d (2001)- Age Columns

Counts & %	Age						Total
Levels of Participation	18-24	25-29	30-34	35-39	40-49	50+	
Regular (non-lottery)	208	319	361	428	509	352	2177
%	33.4%	36.1%	38.0%	40.2%	39.6%	35.4%	37.5%
Regular (lottery only)	236	333	349	341	463	285	2007
%	37.9%	37.7%	36.7%	32.0%	36.0%	28.7%	34.6%
Occasional	14	22	18	19	27	29	129
%	2.3%	2.5%	1.9%	1.8%	2.1%	2.9%	2.2%
Never	164	210	223	276	287	327	1487
%	26.4%	23.8%	23.4%	25.9%	22.3%	32.9%	25.6%
Total	622	884	951	1064	1286	993	5800
%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 3.4.a (2003) - Education Rows

Counts	Education Level								Total
Levels of Participation	None	Part Primary	Primary	Part High	High	Part University	University	Other Post Matric	
Regular (non-lottery)	21	76	131	566	737	136	101	225	1993
%	1.1%	3.8%	6.6%	28.4%	37.0%	6.8%	5.1%	11.3%	100.0%
Regular (lottery only)	12	73	140	647	1001	116	112	307	2408
%	0.5%	3.0%	5.8%	26.9%	41.6%	4.8%	4.7%	12.7%	100.0%
Occasional	2	11	11	50	92	14	18	50	248
%	0.8%	4.4%	4.4%	20.2%	37.1%	5.6%	7.3%	20.2%	100.0%
Never	34	81	100	322	431	57	60	82	1167
%	2.9%	6.9%	8.6%	27.6%	36.9%	4.9%	5.1%	7.0%	100.0%
Total	69	241	382	1585	2261	323	291	664	5816
%	1.2%	4.1%	6.6%	27.3%	38.9%	5.6%	5.0%	11.4%	100.0%

Table 3.4.b (2003) - Education Columns

Counts	Education Level								Total
Levels of Participation	None	Part Primary	Primary	Part High	High	Part University	University	Other Post Matric	
Regular (non-lottery)	21	76	131	566	737	136	101	225	1993
%	30.4%	31.5%	34.3%	35.7%	32.6%	42.1%	34.7%	33.9%	34.3%
Regular (lottery only)	12	73	140	647	1001	116	112	307	2408
%	17.4%	30.3%	36.6%	40.8%	44.3%	35.9%	38.5%	46.2%	41.4%
Occasional	2	11	11	50	92	14	18	50	248
%	2.9%	4.6%	2.9%	3.2%	4.1%	4.3%	6.2%	7.5%	4.3%
Never	34	81	100	322	431	57	60	82	1167
%	49.3%	33.6%	26.2%	20.3%	19.1%	17.6%	20.6%	12.3%	20.1%
Total	69	241	382	1585	2261	323	291	664	5816
%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%



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Table 3.4.c (2001) - Education Rows

Counts Levels of Participation	Education Level								Total
	None	Part Primary	Primary	Part High	High	Part University	University	Other Post Matric	
Regular (non-lottery)	22	55	139	581	804	144	144	288	2177
%	1.0%	2.5%	6.4%	26.7%	36.9%	6.6%	6.6%	13.2%	100.0%
Regular (lottery only)	21	102	146	530	787	85	100	236	2007
%	1.0%	5.1%	7.3%	26.4%	39.2%	4.2%	5.0%	11.8%	100.0%
Occasional	1	8	11	34	39	5	10	21	129
%	0.8%	6.2%	8.5%	26.4%	30.2%	3.9%	7.8%	16.3%	100.0%
Never	48	110	147	406	492	86	78	120	1487
%	3.2%	7.4%	9.9%	27.3%	33.1%	5.8%	5.2%	8.1%	100.0%
Total	92	275	443	1551	2122	320	332	665	5800
%	1.6%	4.7%	7.6%	26.7%	36.6%	5.5%	5.7%	11.5%	100.0%

Table 3.4.d (2001) - Education Columns

Counts Levels of Participation	Education Level								Total
	None	Part Primary	Primary	Part High	High	Part University	University	Other Post Matric	
Regular (non-lottery)	22	55	139	581	804	144	144	288	2177
%	23.9%	20.0%	31.4%	37.5%	37.9%	45.0%	43.4%	43.3%	37.5%
Regular (lottery only)	21	102	146	530	787	85	100	236	2007
%	22.8%	37.1%	33.0%	34.2%	37.1%	26.6%	30.1%	35.5%	34.6%
Occasional	1	8	11	34	39	5	10	21	129
%	1.1%	2.9%	2.5%	2.2%	1.8%	1.6%	3.0%	3.2%	2.2%
Never	48	110	147	406	492	86	78	120	1487
%	52.2%	40.0%	33.2%	26.2%	23.2%	26.9%	23.5%	18.0%	25.6%
Total	92	275	443	1551	2122	320	332	665	5800
%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 3.5.a (2003)- Race Rows

Counts Levels of Participation	RACE				Total
	White	Black	Coloured	Asian	
Regular (non-lottery)	467	1069	365	92	1993
%	23.4%	53.6%	18.3%	4.6%	100.0%
Regular (lottery only)	782	1321	240	65	2408
%	32.5%	54.9%	10.0%	2.7%	100.0%
Occasional	123	82	37	6	248
%	49.6%	33.1%	14.9%	2.4%	100.0%
Never	393	634	127	13	1167
%	33.7%	54.3%	10.9%	1.1%	100.0%
Total	1765	3106	769	176	5816
%	30.3%	53.4%	13.2%	3.0%	100.0%



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Table 3.5.b (2003)- Race Columns

Counts	RACE				
Levels of Participation	White	Black	Coloured	Asian	Total
Regular (non-lottery)	467	1069	365	92	1993
%	26.5%	34.4%	47.5%	52.3%	34.3%
Regular (lottery only)	782	1321	240	65	2408
%	44.3%	42.5%	31.2%	36.9%	41.4%
Occasional	123	82	37	6	248
%	7.0%	2.6%	4.8%	3.4%	4.3%
Never	393	634	127	13	1167
%	22.3%	20.4%	16.5%	7.4%	20.1%
Total	1765	3106	769	176	5816
%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 3.5.c (2001)- Race Rows

Counts	RACE				
Levels of Participation	White	Black	Coloured	Asian	Total
Regular (non-lottery)	642	1146	317	72	2177
%	29.49%	52.64%	14.56%	3.31%	100.00%
Regular (lottery only)	595	1099	253	60	2007
%	29.65%	54.76%	12.61%	2.99%	100.00%
Occasional	67	51	7	4	129
%	51.94%	39.53%	5.43%	3.10%	100.00%
Never	429	837	181	40	1487
%	28.85%	56.29%	12.17%	2.69%	100.00%
Total	1733	3133	758	176	5800
%	29.88%	54.02%	13.07%	3.03%	100.00%

Table 3.5.d (2001)- Race Columns

Counts	RACE				
Levels of Participation	White	Black	Coloured	Asian	Total
Regular (non-lottery)	642	1146	317	72	2177
%	37.05%	36.58%	41.82%	40.91%	37.53%
Regular (lottery only)	595	1099	253	60	2007
%	34.33%	35.08%	33.38%	34.09%	34.60%
Occasional	67	51	7	4	129
%	3.87%	1.63%	0.92%	2.27%	2.22%
Never	429	837	181	40	1487
%	24.75%	26.72%	23.88%	22.73%	25.64%
Total	1733	3133	758	176	5800
%	100.00%	100.00%	100.00%	100.00%	100.00%



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Table 3.6.a (2003) - Urban Rows

Counts	Small Urban	Metro	Total
Levels of Participation			
Regular (non-lottery)	420	1573	1993
%	21.1%	78.9%	100.0%
Regular (lottery only)	659	1749	2408
%	27.4%	72.6%	100.0%
Occasional	59	189	248
%	23.8%	76.2%	100.0%
Never	535	632	1167
%	45.8%	54.2%	100.0%
Total	1673	4143	5816
%	28.8%	71.2%	100.0%

Table 3.6.b (2003)- Urban Columns

Counts	Small Urban	Metro	Total
Levels of Participation			
Regular (non-lottery)	420	1573	1993
%	25.1%	38.0%	34.3%
Regular (lottery only)	659	1749	2408
%	39.4%	42.2%	41.4%
Occasional	59	189	248
%	3.5%	4.6%	4.3%
Never	535	632	1167
%	32.0%	15.3%	20.1%
Total	1673	4143	5816
%	100.0%	100.0%	100.0%

Table 3.6.c (2001) - Urban Rows

Counts	Small Urban	Metro	Total
Levels of Participation			
Regular (non-lottery)	613	1564	2177
%	28.2%	71.8%	100.0%
Regular (lottery only)	842	1165	2007
%	42.0%	58.0%	100.0%
Occasional	39	90	129
%	30.2%	69.8%	100.0%
Never	672	815	1487
%	45.2%	54.8%	100.0%
Total	2166	3634	5800
%	37.3%	62.7%	100.0%



Table 3.6.d (2001)- Urban Columns

Counts	Small Urban	Metro	Total
Levels of Participation			
Regular (non-lottery)	613	1564	2177
%	28.3%	43.0%	37.5%
Regular (lottery only)	842	1165	2007
%	38.9%	32.1%	34.6%
Occasional	39	90	129
%	1.8%	2.5%	2.2%
Never	672	815	1487
%	31.0%	22.4%	25.6%
Total	2166	3634	5800
%	100.0%	100.0%	100.0%

Table 3.7.a (2003)- Types of dwelling

Counts	Types of dwelling					
	Brick-house	Flat	Hostel back-room	Shack squatter	Traditional	Total
Regular (non-lottery)	1630	196	67	91	9	1993
%	34.6%	31.8%	46.5%	28.9%	26.5%	34.3%
Regular (lottery only)	1955	261	58	123	11	2408
%	41.5%	42.4%	40.3%	39.0%	32.4%	41.4%
Occasional	197	32	6	12	1	248
%	4.2%	5.2%	4.2%	3.8%	2.9%	4.3%
Never	925	127	13	89	13	1167
%	19.7%	20.6%	9.0%	28.3%	38.2%	20.1%
Total	4707	616	144	315	34	5816
%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 3.7.b (2003)- Types of dwelling

Counts	Types of dwelling					
	Brick-house	Flat	Hostel back-room	Shack squatter	Traditional	Total
Regular (non-lottery)	1630	196	67	91	9	1993
%	81.8%	9.8%	3.4%	4.6%	0.5%	100.0%
Regular (lottery only)	1955	261	58	123	11	2408
%	81.2%	10.8%	2.4%	5.1%	0.5%	100.0%
Occasional	197	32	6	12	1	248
%	79.4%	12.9%	2.4%	4.8%	0.4%	100.0%
Never	925	127	13	89	13	1167
%	79.3%	10.9%	1.1%	7.6%	1.1%	100.0%
Total	4707	616	144	315	34	5816
%	80.9%	10.6%	2.5%	5.4%	0.6%	100.0%

Table 3.8.a (2003)– Life Cycle Counts

	Single, living with parents	Single, living outside the family home	Single with small children under the age of six	Single with school-going children	Single with independent children	Married without children	Married with small children under the age of six	Married with school-going children	Married with independent children	Sole survivor/widowed	Divorced	Total
Regular (non-lottery)	417	212	55	124	29	118	156	512	199	94	77	1993
%	20.9%	10.6%	2.8%	6.2%	1.5%	5.9%	7.8%	25.7%	10.0%	4.7%	3.9%	100.0%
Regular (lottery only)	529	231	89	176	44	142	228	536	237	104	92	2408
%	22.0%	9.6%	3.7%	7.3%	1.8%	5.9%	9.5%	22.3%	9.8%	4.3%	3.8%	100.0%
Occasional	58	22	5	16	3	8	24	59	27	17	9	248
%	23.4%	8.9%	2.0%	6.5%	1.2%	3.2%	9.7%	23.8%	10.9%	6.9%	3.6%	100.0%
Never	276	103	30	48	16	77	99	275	135	82	26	1167
%	23.7%	8.8%	2.6%	4.1%	1.4%	6.6%	8.5%	23.6%	11.6%	7.0%	2.2%	100.0%
Total	1280	568	179	364	92	345	507	1382	598	297	204	5816
%	22.0%	9.8%	3.1%	6.3%	1.6%	5.9%	8.7%	23.8%	10.3%	5.1%	3.5%	100.0%

Table 3.8.b (2003)– Life Cycle Counts

	Single, living with parents	Single, living outside the family home	Single with small children under the age of six	Single with school-going children	Single with independent children	Married without children	Married with small children under the age of six	Married with school-going children	Married with independent children	Sole survivor/widowed	Divorced	Total
Regular (non-lottery)	417	212	55	124	29	118	156	512	199	94	77	1993
%	32.6%	37.3%	30.7%	34.1%	31.5%	34.2%	30.8%	37.0%	33.3%	31.6%	37.7%	34.3%
Regular (lottery only)	529	231	89	176	44	142	228	536	237	104	92	2408
%	41.3%	40.7%	49.7%	48.4%	47.8%	41.2%	45.0%	38.8%	39.6%	35.0%	45.1%	41.4%
Occasional	58	22	5	16	3	8	24	59	27	17	9	248
%	4.5%	3.9%	2.8%	4.4%	3.3%	2.3%	4.7%	4.3%	4.5%	5.7%	4.4%	4.3%
Never	276	103	30	48	16	77	99	275	135	82	26	1167
%	21.6%	18.1%	16.8%	13.2%	17.4%	22.3%	19.5%	19.9%	22.6%	27.6%	12.7%	20.1%
Total	1280	568	179	364	92	345	507	1382	598	297	204	5816
%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%





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Table 3.9.a (2003)– Status of Work

Counts	Work status								Total
	Full-time	Part-time (away from home)	Part-time (from home)	Retired	Student	Unemployed - looking for work	Unemployed - not looking for work	Housewife	
Regular (non-lottery)	1020	173	113	122	106	254	33	172	1993
%	51.2%	8.7%	5.7%	6.1%	5.3%	12.7%	1.7%	8.6%	100.0%
Regular (lottery only)	1184	186	99	139	121	399	43	237	2408
%	49.2%	7.7%	4.1%	5.8%	5.0%	16.6%	1.8%	9.8%	100.0%
Occasional	131	16	11	15	15	28	4	28	248
%	52.8%	6.5%	4.4%	6.0%	6.0%	11.3%	1.6%	11.3%	100.0%
Never	430	73	55	115	85	227	19	163	1167
%	36.8%	6.3%	4.7%	9.9%	7.3%	19.5%	1.6%	14.0%	100.0%
Total	2765	448	278	391	327	908	99	600	5816
%	47.5%	7.7%	4.8%	6.7%	5.6%	15.6%	1.7%	10.3%	100.0%

Table 3.9.b (2003)– Status of Work

Counts	Work status								Total
	Full-time	Part-time (away from home)	Part-time (from home)	Retired	Student	Unemployed - looking for work	Unemployed - not looking for work	Housewife	
Regular (non-lottery)	1020	173	113	122	106	254	33	172	1993
%	36.9%	38.6%	40.6%	31.2%	32.4%	28.0%	33.3%	28.7%	34.3%
Regular (lottery only)	1184	186	99	139	121	399	43	237	2408
%	42.8%	41.5%	35.6%	35.5%	37.0%	43.9%	43.4%	39.5%	41.4%
Occasional	131	16	11	15	15	28	4	28	248
%	4.7%	3.6%	4.0%	3.8%	4.6%	3.1%	4.0%	4.7%	4.3%
Never	430	73	55	115	85	227	19	163	1167
%	15.6%	16.3%	19.8%	29.4%	26.0%	25.0%	19.2%	27.2%	20.1%
Total	2765	448	278	391	327	908	99	600	5816
%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 3.10.a (2003) - Disposable Income-Rows

Counts	Disposable Income Levels										Total
	up to R799	R800- R1399	R1400- R2499	R2500- R3999	R4000- R59996	R6000- R7999	R8000- R11999	R12000+	Don't know	Refuse	
Regular (non-lottery)	106	205	291	361	264	174	203	144	97	148	1993
%	5.3%	10.3%	14.6%	18.1%	13.2%	8.7%	10.2%	7.2%	4.9%	7.4%	100.0%
Regular (lottery only)	135	289	362	390	273	174	240	207	113	225	2408
%	5.6%	12.0%	15.0%	16.2%	11.3%	7.2%	10.0%	8.6%	4.7%	9.3%	100.0%
Occasional	17	21	22	44	31	21	22	37	14	19	248
%	6.9%	8.5%	8.9%	17.7%	12.5%	8.5%	8.9%	14.9%	5.6%	7.7%	100.0%
Never	121	171	182	134	106	79	74	92	83	125	1167
%	10.4%	14.7%	15.6%	11.5%	9.1%	6.8%	6.3%	7.9%	7.1%	10.7%	100.0%
Total	379	686	857	929	674	448	539	480	307	517	5816
%	6.5%	11.8%	14.7%	16.0%	11.6%	7.7%	9.3%	8.3%	5.3%	8.9%	100.0%

Table 3.10.b (2003) - Disposable Income-Columns

Counts	Disposable Income Levels										Total
	up to R799	R800- R1399	R1400- R2499	R2500- R3999	R4000- R59996	R6000- R7999	R8000- R11999	R12000+	Don't know	Refuse	
Regular (non-lottery)	106	205	291	361	264	174	203	144	97	148	1993
%	28.0%	29.9%	34.0%	38.9%	39.2%	38.8%	37.7%	30.0%	31.6%	28.6%	34.3%
Regular (lottery only)	135	289	362	390	273	174	240	207	113	225	2408
%	35.6%	42.1%	42.2%	42.0%	40.5%	38.8%	44.5%	43.1%	36.8%	43.5%	41.4%
Occasional	17	21	22	44	31	21	22	37	14	19	248
%	4.5%	3.1%	2.6%	4.7%	4.6%	4.7%	4.1%	7.7%	4.6%	3.7%	4.3%
Never	121	171	182	134	106	79	74	92	83	125	1167
%	31.9%	24.9%	21.2%	14.4%	15.7%	17.6%	13.7%	19.2%	27.0%	24.2%	20.1%
Total	379	686	857	929	674	448	539	480	307	517	5816
%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%





Table 3.10.c (2001) - Disposable Income-Rows
Counts

Counts	Disposable Income Levels										Total
	up to R799	R800- R1399	R1400- R2499	R2500- R3999	R4000- R59996	R6000- R7999	R8000- R11999	R12000+	Don't know	Refuse	
Regular (non-lottery)	152	225	316	399	327	172	217	123	56	190	2177
%	7%	10%	15%	18%	15%	8%	10%	6%	3%	9%	100%
Regular (lottery only)	189	298	363	283	251	137	167	100	33	186	2007
%	9%	15%	18%	14%	13%	7%	8%	5%	2%	9%	100%
Occasional	11	16	13	16	20	14	14	11	2	12	129
%	9%	12%	10%	12%	16%	11%	11%	9%	2%	9%	100%
Never	185	258	278	213	134	66	91	41	33	188	1487
%	12%	17%	19%	14%	9%	4%	6%	3%	2%	13%	100%
Total	537	797	970	911	732	389	489	275	124	576	5800
%	9%	14%	17%	16%	13%	7%	8%	5%	2%	10%	100%

Table 3.10.d (2001)- Disposable Income-Columns
Counts

Counts	Disposable Income Levels										Total
	up to R799	R800- R1399	R1400- R2499	R2500- R3999	R4000- R59996	R6000- R7999	R8000- R11999	R12000+	Don't know	Refuse	
Regular (non-lottery)	152	225	316	399	327	172	217	123	56	190	2177
%	28%	28%	33%	44%	45%	44%	44%	45%	45%	33%	38%
Regular (lottery only)	189	298	363	283	251	137	167	100	33	186	2007
%	35%	37%	37%	31%	34%	35%	34%	36%	27%	32%	35%
Occasional	11	16	13	16	20	14	14	11	2	12	129
%	2%	2%	1%	2%	3%	4%	3%	4%	2%	2%	2%
Never	185	258	278	213	134	66	91	41	33	188	1487
%	34%	32%	29%	23%	18%	17%	19%	15%	27%	33%	26%
Total	537	797	970	911	732	389	489	275	124	576	5800
%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%



Table 3.7.1 Disposable Income Levels for Lottery, Slots and Horses Regulars

Counts	Disposable Income Levels											Total
	up to R799	R800- R1399	R1400- R2499	R2500- R3999	R4000- R5999	R6000- R7999	R8000- R11999	R12000+	Don't know	Refuse	Total	
Lottery												
Regular	221	457	626	721	519	335	433	341	197	357	4207	
%	58.3%	66.6%	73.0%	77.6%	77.0%	74.8%	80.3%	71.0%	64.2%	69.1%	72.3%	
Total	379	686	857	929	674	448	539	480	307	517	5816	
%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Slots												
Regular	17	37	85	137	121	88	124	100	34	77	820	
%	4.5%	5.4%	9.9%	14.7%	18.0%	19.6%	23.0%	20.8%	11.1%	14.9%	14.1%	
Total	379	686	857	929	674	448	539	480	307	517	5816	
%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Horses												
Regular	12	38	62	67	44	27	27	21	14	18	330	
%	3.2%	5.5%	7.2%	7.2%	6.5%	6.0%	5.0%	4.4%	4.6%	3.5%	5.7%	
Total	379	686	857	929	674	448	539	480	307	517	5816	
%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Conclusions: There is an even income distribution for lottery regulars. 73% (626) of the 857 in the sample who are in the R1400-R2499 per month are regular lottery players, whereas 71% of the 480 in the R12000+ per month bracket are regular lottery players. For slots, a different picture emerges, as they are played primarily by the wealthier (R4000/m + group). Horses have a tendency to be played by the poorer groups.

Table 3.7.2
Counts

Disposable Income Levels

	up to R799	R800- R1399	R1400- R2499	R2500- R3999	R4000- R5999%	R6000- R7999	R8000- R11999	R12000+	Don't know	Refuse	Total
Regular other	106	205	291	361	264	174	203	144	97	148	1993
%	28.0%	29.9%	34.0%	38.9%	39.2%	38.8%	37.7%	30.0%	31.6%	28.6%	34.3%
Regular Lottery only	135	289	362	390	273	174	240	207	113	225	2408
%	35.6%	42.1%	42.2%	42.0%	40.5%	38.8%	44.5%	43.1%	36.8%	43.5%	41.4%
Occasional	17	21	22	44	31	21	22	37	14	19	248
%	4.5%	3.1%	2.6%	4.7%	4.6%	4.7%	4.1%	7.7%	4.6%	3.7%	4.3%
Never	121	171	182	134	106	79	74	92	83	125	1167
%	31.9%	24.9%	21.2%	14.4%	15.7%	17.6%	13.7%	19.2%	27.0%	24.2%	20.1%
Total	379	686	857	929	674	448	539	480	307	517	5816
%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 3.8: Income Distribution of regular players with average amounts spent - lottery

	Disposable Income Levels										
Counts	up to R799	R800- R1399	R1400- R2499	R2500- R3999	R4000- R5999%	R6000- R7999	R8000- R11999	R12000+	Don't know	Refuse	Total
Lottery Regular	221	457	626	721	519	335	433	341	197	357	4207
% of sample	58.3%	66.6%	73.0%	77.6%	77.0%	74.8%	80.3%	71.0%	64.2%	69.1%	72.3%
Average Monthly Spend	33.4	43.4	57.7	62.7	79.1	88.6	98.0	126.0	51.7	81.3	72.2
Spend as % of Income (mid-point)	8.4%	3.9%	3.0%	1.9%	1.6%	1.3%	1.0%	0.8%			
Total	379	686	857	929	674	448	539	480	307	517	5816
%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Average Monthly Spend	19.5	28.9	42.1	48.7	61.0	66.3	78.8	89.7	33.2	56.2	52.3

Avery large proportion of people in each income group play the lottery regularly, averaging about 70%. The average monthly spend is low, in the range R30-R60, but for the lower income group this is a significant amount of money for that group. Even in the top income groups the average monthly spend is in the range R100-R126, not proportionately high for that group.

3.9: Income Distribution of Regular players with average amounts spent - slots

Counts Type	Disposable Income Levels										Total
	up to R799	R800- R1399	R1400- R2499	R2500- R3999	R4000- R59996	R6000- R7999	R8000- R11999	R12000+	Don't know	Refuse	
Slots Regular	17	37	85	137	121	88	124	100	34	77	
% of sample	4.5%	9.9%	14.7%	18.0%	19.6%	23.0%	20.8%	11.1%	14.9%	14.1%	
Average Monthly Spend	124.1	198.0	260.1	378.2	479.1	522.5	1006.6	158.1	785.8	460.4	
Spend as % of Income (mid-point)	31.0%	10.2%	8.0%	7.6%	6.8%	5.2%	6.7%				
Total	379	686	929	674	448	539	480	307	517	5816	
%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Average Monthly Spend	6.4	5.8	40.1	70.6	97.0	125.9	216.8	19.5	121.1	67.5	

The average number of regular slot players is about 14%, with the largest percentages being in the higher income groups. In the lower income groups (below R2 500 per month), the percentages of regular players is below 10% in each category, which should be compared with the 60-70% who are regular lottery players. However the monthly spend of those who play is very high, peaking at over R1 000 for the top income group but being in the R100-R200 range for lower income groups – compared with about R100 for the top income lottery group and R30-R60 for the lower income lottery groups.

3.10: Income Distribution of Regular players with average amounts spent - horses

Counts Type	Disposable Income Levels										Total
	up to R799	R800- R1399	R1400- R2499	R2500- R3999	R4000- R59996	R6000- R7999	R8000- R11999	R12000+	Don't know	Refuse	
Horses Regular	12	62	67	44	27	27	21	14	18	330	
% of sample	3.2%	5.5%	7.2%	6.5%	6.0%	5.0%	4.4%	4.6%	3.5%	5.7%	
Average Monthly Spend	98.8	143.0	113.2	234.2	193.0	323.7	473.8	496.9	200.2	226.4	
Spend as % of Income (mid-point)	24.7%	13.0%	5.8%	7.2%	3.9%	4.6%	4.7%	3.3%			
Total	379	686	857	929	674	448	539	480	307	517	
%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Average Monthly Spend	3.2	8.0	8.2	17.0	12.8	19.9	24.2	22.5	4.5	7.3	

Participation in horses is fairly flat, at about 3-7%, peaking in the low to middle income groups. Expenditure in the lower income groups is about R100, moving up to R500 for the top income groups. Spending-wise, it lies between the lottery and slots



Demographics of Gambling: some conclusions

- * Regular (non-lottery) and regular (lottery-only) gamblers are fairly evenly divided by gender (51.0% of regular (non-lottery only) are men and 48.8% of lottery-only are men) but significantly more non-gamblers are women than men (58.5% = F; 41.5% = M).
- * Regular gamblers are similar in their propensity to gamble across age groups for both lottery-only regulars and other-than lottery regulars. The group with the highest propensity is the 40-49 age group.
- * Propensity never to gamble correlates significantly with absence of education: 49.3% of those with no education never gamble. That this reflects absence of disposable income is confirmed by the fact that 31.9% of those whose disposable income is under R799 p.m. and 24.9% of those whose disposable income is between R800 & R1400 p.m. never gamble.
- * Propensity to gamble regularly other than on the lottery rises from 28% of those with less than R800 p.m. to 39.2% of those with more than R 4 000 p.m. (and less than R6 000) and remains constant at that level for higher income groups. Propensity to gamble on the lottery only is constant across income groups at about 40%.
- * The propensity to gamble other than on the lottery is significantly higher amongst the metropolitan population than amongst the small urban population (38.0% as against 25.1%). Similarly the propensity to gamble regularly on the lottery is 39.4% of the small urban population being regular lottery players and 42.2% of the metropolitan population. This clearly reflects ease of access to the different forms of gambling.
- * 53.6% of regular other-than-the lottery gamblers are black; 23.4% are white; 18.3% are coloured; 4.6% are Asian.
- * 34.4% of blacks are regular other-than-the-lottery gamblers, as are 26.5% of whites; 47.5% of coloureds and 52.3% of Asians.
- * 54.9% of regular lottery-only players are black; 32.5% are white; 10.0% are coloured; 2.7% are Asian.
- * 42.5% of blacks are regular lottery-only gamblers, as are 44.3% of whites, 31.2% of coloureds and 36.9% of Asians.

2001 conclusions

- * All race groups play the lottery regularly approximately according to their numbers in the population.
- * Whites are about 8 times more likely to be roulette players than their numbers in the population would predict.
- * Only slightly fewer regular slot players are black (48.96%) than their numbers in the population would predict (54.02%).
- * Of the 1 488 people who regularly play slots in casinos, only just over a third (578 = 38.84%) are black but of the 103 people who play in "informal" casinos 70 (67.96%) are black.



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ALL RACE

Counts	RACE				
Levels of Participation	White	Black	Coloured	Asian	Total
Regular (non-lottery)	467	1069	365	92	1993
%	26.5%	34.4%	47.5%	52.3%	34.3%
Regular (lottery only)	782	1321	240	65	2408
%	44.3%	42.5%	31.2%	36.9%	41.4%
Occasional	123	82	37	6	248
%	7.0%	2.6%	4.8%	3.4%	4.3%
Never	393	634	127	13	1167
%	22.3%	20.4%	16.5%	7.4%	20.1%
Total	1765	3106	769	176	5816
%	100.0%	100.0%	100.0%	100.0%	100.0%

PROBLEM

Counts	RACE				
Levels of Participation	White	Black	Coloured	Asian	Total
Regular (non-lottery)	28	104	44	6	182
%	46.7%	67.5%	91.7%	75.0%	67.4%
Regular (lottery only)	32	49	4	2	87
%	53.3%	31.8%	8.3%	25.0%	32.2%
Total	60	154	48	8	270
%	100.0%	100.0%	100.0%	100.0%	100.0%

ALL RACE

Counts	RACE				
Levels of Participation	White	Black	Coloured	Asian	Total
Regular (non-lottery)	467	1069	365	92	1993
%	26.5%	34.4%	47.5%	52.3%	34.3%
Regular (lottery only)	782	1321	240	65	2408
%	44.3%	42.5%	31.2%	36.9%	41.4%
Occasional	123	82	37	6	248
%	7.0%	2.6%	4.8%	3.4%	4.3%
Never	393	634	127	13	1167
%	22.3%	20.4%	16.5%	7.4%	20.1%
Total	1765	3106	769	176	5816
%	100.0%	100.0%	100.0%	100.0%	100.0%

PROBLEM

Counts	RACE				
Levels of Participation	White	Black	Coloured	Asian	Total
Regular (non-lottery)	28	104	44	6	182
%	46.7%	67.5%	91.7%	75.0%	67.4%
Regular (lottery only)	32	49	4	2	87
%	53.3%	31.8%	8.3%	25.0%	32.2%
Total	60	154	48	8	270
%	100.0%	100.0%	100.0%	100.0%	100.0%



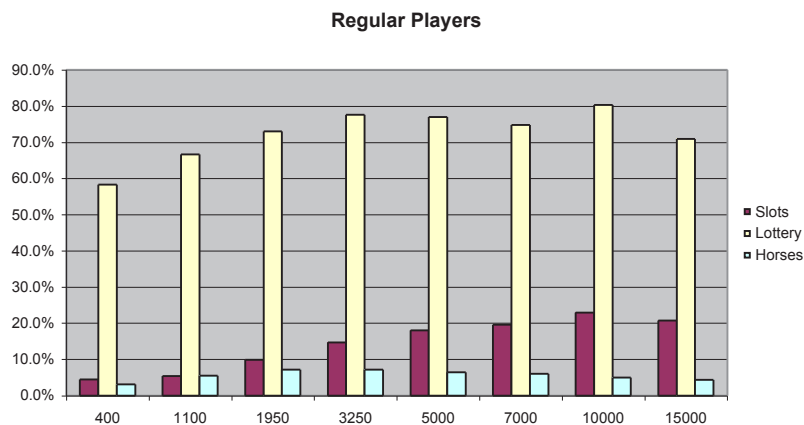
1 Never excluded

Counts Levels of Participation	Types of dwelling					
	Brick-house	Flat	Hostel back-room	Shack squatter	Traditional	Total
Regular (non-lottery)	1630	196	67	91	9	1993
%	34.6%	31.8%	46.5%	28.9%	26.5%	34.3%
Regular (lottery only)	1955	261	58	123	11	2408
%	41.5%	42.4%	40.3%	39.0%	32.4%	41.4%
Occasional	197	32	6	12	1	248
%	4.2%	5.2%	4.2%	3.8%	2.9%	4.3%
Never	925	127	13	89	13	1167
%	19.7%	20.6%	9.0%	28.3%	38.2%	20.1%
Total	4707	616	144	315	34	5816
%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Counts Levels of Participation	Types of dwelling					
	Brick-house	Flat	Hostel back-room	Shack squatter	Traditional	Total
Regular (non-lottery)	140	17	7	16	2	182
%	68.0%	56.7%	77.8%	69.6%	100.0%	67.4%
Regular (lottery only)	66	12	2	7	87	174
%	32.0%	40.0%	22.2%	30.4%	0.0%	32.2%
Total	206	30	9	23	2	270
%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

1 Never excluded

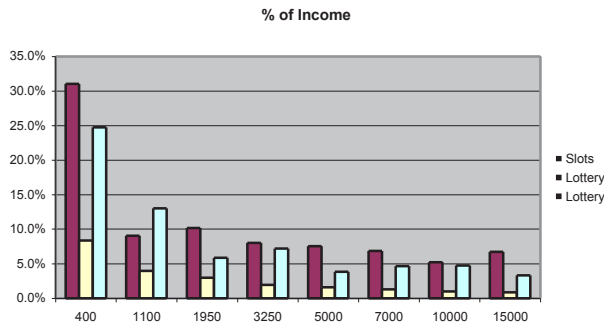
% regular players for the 3 main gaming categories



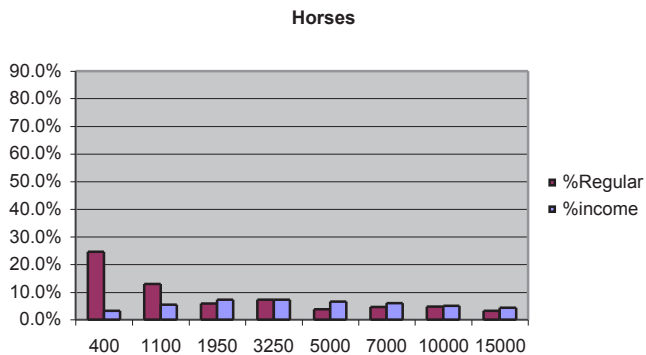
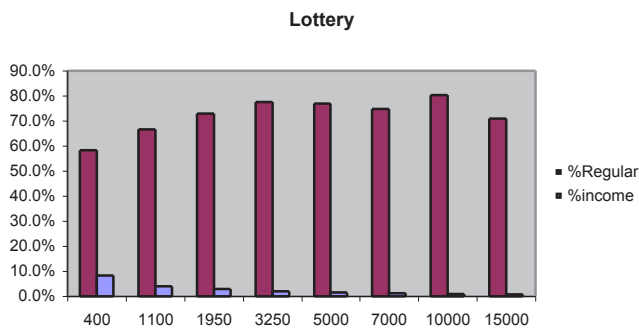
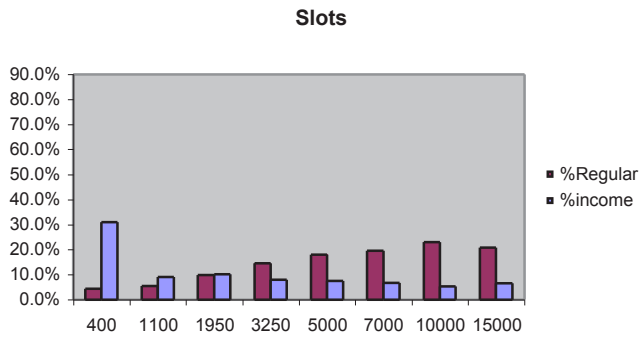


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% of the income spent for those who are regular players



% Regular and %Spent on same Grap





1 Never excluded

Counts Levels of Participation	Types of dwelling					
	Brick-house	Flat	Hostel back-room	Shack squatter	Traditional	Total
Regular (non-lottery)	1630	196	67	91	9	1993
%	34.6%	31.8%	46.5%	28.9%	26.5%	34.3%
Regular (lottery only)	1955	261	58	123	11	2408
%	41.5%	42.4%	40.3%	39.0%	32.4%	41.4%
Occasional	197	32	6	12	1	248
%	4.2%	5.2%	4.2%	3.8%	2.9%	4.3%
Never	925	127	13	89	13	1167
%	19.7%	20.6%	9.0%	28.3%	38.2%	20.1%
Total	4707	616	144	315	34	5816
%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Regular (non-lottery)	1630	196	67	91	9	1993
%	81.8%	9.8%	3.4%	4.6%	0.5%	100.0%
Regular (lottery only)	1955	261	58	123	11	2408
%	81.2%	10.8%	2.4%	5.1%	0.5%	100.0%
Occasional	197	32	6	12	1	248
%	79.4%	12.9%	2.4%	4.8%	0.4%	100.0%
Never	925	127	13	89	13	1167
%	79.3%	10.9%	1.1%	7.6%	1.1%	100.0%
Total	4707	616	144	315	34	5816
%	80.9%	10.6%	2.5%	5.4%	0.6%	100.0%



**Table 3.8.a (2003)– Life Cycle
Counts**

	Single, living with parents	Single, living outside the family home	Single with small children under the age of six	Single with school- going children	Single with independ- ent children	Married without children	Married with small children under the age of six	Married with school- going children	Married with independ- ent children	Sole survivor/wi- dowed	Divorced	Total
Regular (non-lottery)	417	212	55	124	29	118	156	512	199	94	77	1993
%	20.9%	10.6%	2.8%	6.2%	1.5%	5.9%	7.8%	25.7%	10.0%	4.7%	3.9%	100.0%
Regular (lottery only)	529	231	89	176	44	142	228	536	237	104	92	2408
%	22.0%	9.6%	3.7%	7.3%	1.8%	5.9%	9.5%	22.3%	9.8%	4.3%	3.8%	100.0%
Occasional	58	22	5	16	3	8	24	59	27	17	9	248
%	23.4%	8.9%	2.0%	6.5%	1.2%	3.2%	9.7%	23.8%	10.9%	6.9%	3.6%	100.0%
Never	276	103	30	48	16	77	99	275	135	82	26	1167
%	23.7%	8.8%	2.6%	4.1%	1.4%	6.6%	8.5%	23.6%	11.6%	7.0%	2.2%	100.0%
Total	1280	568	179	364	92	345	507	1382	598	297	204	5816
%	22.0%	9.8%	3.1%	6.3%	1.6%	5.9%	8.7%	23.8%	10.3%	5.1%	3.5%	100.0%

**Table 3.8.b (2003)– Life Cycle
Counts**

	Single, living with parents	Single, living outside the family home	Single with small children under the age of six	Single with school- going children	Single with independ- ent children	Married without children	Married with small children under the age of six	Married with school- going children	Married with independ- ent children	Sole survivor/wi- dowed	Divorced	Total
Regular (non-lottery)	417	212	55	124	29	118	156	512	199	94	77	1993
%	32.6%	37.3%	30.7%	34.1%	31.5%	34.2%	30.8%	37.0%	33.3%	31.6%	37.7%	34.3%
Regular (lottery only)	529	231	89	176	44	142	228	536	237	104	92	2408
%	41.3%	40.7%	49.7%	48.4%	47.8%	41.2%	45.0%	38.8%	39.6%	35.0%	45.1%	41.4%
Occasional	58	22	5	16	3	8	24	59	27	17	9	248
%	4.5%	3.9%	2.8%	4.4%	3.3%	2.3%	4.7%	4.3%	4.5%	5.7%	4.4%	4.3%
Never	276	103	30	48	16	77	99	275	135	82	26	1167
%	21.6%	18.1%	16.8%	13.2%	17.4%	22.3%	19.5%	19.9%	22.6%	27.6%	12.7%	20.1%
Total	1280	568	179	364	92	345	507	1382	598	297	204	5816
%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%



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Table 3.9.a (2003)– Status of Work

Counts	Work status								Total
	Full-time	Part-time (away from home)	Part-time (from home)	Retired	Student	Unemployed - looking for work	Unemployed - not looking for work	Housewife	
Regular (non-lottery)	1020	173	113	122	106	254	33	172	1993
%	51.2%	8.7%	5.7%	6.1%	5.3%	12.7%	1.7%	8.6%	100.0%
Regular (lottery only)	1184	186	99	139	121	399	43	237	2408
%	49.2%	7.7%	4.1%	5.8%	5.0%	16.6%	1.8%	9.8%	100.0%
Occasional	131	16	11	15	15	28	4	28	248
%	52.8%	6.5%	4.4%	6.0%	6.0%	11.3%	1.6%	11.3%	100.0%
Never	430	73	55	115	85	227	19	163	1167
%	36.8%	6.3%	4.7%	9.9%	7.3%	19.5%	1.6%	14.0%	100.0%
Total	2765	448	278	391	327	908	99	600	5816
%	47.5%	7.7%	4.8%	6.7%	5.6%	15.6%	1.7%	10.3%	100.0%

Table 3.9.b (2003)– Status of Work

Counts	Work status								Total
	Full-time	Part-time (away from home)	Part-time (from home)	Retired	Student	Unemployed - looking for work	Unemployed - not looking for work	Housewife	
Regular (non-lottery)	1020	173	113	122	106	254	33	172	1993
%	36.9%	38.6%	40.6%	31.2%	32.4%	28.0%	33.3%	28.7%	34.3%
Regular (lottery only)	1184	186	99	139	121	399	43	237	2408
%	42.8%	41.5%	35.6%	35.5%	37.0%	43.9%	43.4%	39.5%	41.4%
Occasional	131	16	11	15	15	28	4	28	248
%	4.7%	3.6%	4.0%	3.8%	4.6%	3.1%	4.0%	4.7%	4.3%
Never	430	73	55	115	85	227	19	163	1167
%	15.6%	16.3%	19.8%	29.4%	26.0%	25.0%	19.2%	27.2%	20.1%
Total	2765	448	278	391	327	908	99	600	5816
%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%



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Table 3.10.a (2003) - Disposable Income-Rows

Counts	Disposable Income Levels										Total
	up to R799	R800- R1399	R1400- R2499	R2500- R3999	R4000- R59996	R6000- R7999	R8000- R11999	R12000+	Don't know	Refuse	
Regular (non-lottery)	106	205	291	361	264	174	203	144	97	148	1993
%	5.3%	10.3%	14.6%	18.1%	13.2%	8.7%	10.2%	7.2%	4.9%	7.4%	100.0%
Regular (lottery only)	135	289	362	390	273	174	240	207	113	225	2408
%	5.6%	12.0%	15.0%	16.2%	11.3%	7.2%	10.0%	8.6%	4.7%	9.3%	100.0%
Occasional	17	21	22	44	31	21	22	37	14	19	248
%	6.9%	8.5%	8.9%	17.7%	12.5%	8.5%	8.9%	14.9%	5.6%	7.7%	100.0%
Never	121	171	182	134	106	79	74	92	83	125	1167
%	10.4%	14.7%	15.6%	11.5%	9.1%	6.8%	6.3%	7.9%	7.1%	10.7%	100.0%
Total	379	686	857	929	674	448	539	480	307	517	5816
%	6.5%	11.8%	14.7%	16.0%	11.6%	7.7%	9.3%	8.3%	5.3%	8.9%	100.0%

Table 3.10.b (2003) - Disposable Income-Columns

Counts	Disposable Income Levels										Total
	up to R799	R800- R1399	R1400- R2499	R2500- R3999	R4000- R59996	R6000- R7999	R8000- R11999	R12000+	Don't know	Refuse	
Regular (non-lottery)	106	205	291	361	264	174	203	144	97	148	1993
%	28.0%	29.9%	34.0%	38.9%	39.2%	38.8%	37.7%	30.0%	31.6%	28.6%	34.3%
Regular (lottery only)	135	289	362	390	273	174	240	207	113	225	2408
%	35.6%	42.1%	42.2%	42.0%	40.5%	38.8%	44.5%	43.1%	36.8%	43.5%	41.4%
Occasional	17	21	22	44	31	21	22	37	14	19	248
%	4.5%	3.1%	2.6%	4.7%	4.6%	4.7%	4.1%	7.7%	4.6%	3.7%	4.3%
Never	121	171	182	134	106	79	74	92	83	125	1167
%	31.9%	24.9%	21.2%	14.4%	15.7%	17.6%	13.7%	19.2%	27.0%	24.2%	20.1%
Total	379	686	857	929	674	448	539	480	307	517	5816
%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%



Table 3.10.c (2001) - Disposable Income-Rows
Counts
Disposable Income Levels

Counts	Disposable Income Levels										Total
	up to R799	R800- R1399	R1400- R2499	R2500- R3999	R4000- R59996	R6000- R7999	R8000- R11999	R12000+	Don't know	Refuse	
Regular (non-lottery)	152	225	316	399	327	172	217	123	56	190	2177
%	7%	10%	15%	18%	15%	8%	10%	6%	3%	9%	100%
Regular (lottery only)	189	298	363	283	251	137	167	100	33	186	2007
%	9%	15%	18%	14%	13%	7%	8%	5%	2%	9%	100%
Occasional	11	16	13	16	20	14	14	11	2	12	129
%	9%	12%	10%	12%	16%	11%	11%	9%	2%	9%	100%
Never	185	258	278	213	134	66	91	41	33	188	1487
%	12%	17%	19%	14%	9%	4%	6%	3%	2%	13%	100%
Total	537	797	970	911	732	389	489	275	124	576	5800
%	9%	14%	17%	16%	13%	7%	8%	5%	2%	10%	100%

Table 3.10.d (2001)- Disposable Income-Columns
Counts
Disposable Income Levels

Counts	Disposable Income Levels										Total
	up to R799	R800- R1399	R1400- R2499	R2500- R3999	R4000- R59996	R6000- R7999	R8000- R11999	R12000+	Don't know	Refuse	
Regular (non-lottery)	152	225	316	399	327	172	217	123	56	190	2177
%	28%	28%	33%	44%	45%	44%	44%	45%	45%	33%	38%
Regular (lottery only)	189	298	363	283	251	137	167	100	33	186	2007
%	35%	37%	37%	31%	34%	35%	34%	36%	27%	32%	35%
Occasional	11	16	13	16	20	14	14	11	2	12	129
%	2%	2%	1%	2%	3%	4%	3%	4%	2%	2%	2%
Never	185	258	278	213	134	66	91	41	33	188	1487
%	34%	32%	29%	23%	18%	17%	19%	15%	27%	33%	26%
Total	537	797	970	911	732	389	489	275	124	576	5800
%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%



Demographics of Gambling : some conclusions

- * Regular (non-lottery) and regular (lottery-only) gamblers are fairly evenly divided by gender (51.0% of regular (non-lottery only) are men and 48.8% of lottery-only are men) but significantly more non-gamblers are women than men (58.5% = F; 41.5% = M).
- * Regular gamblers are similar in their propensity to gamble across age groups for both lottery-only regulars and other-than lottery regulars. The group with the highest propensity is the 40-49 age group.
- * Propensity never to gamble correlates significantly with absence of education: 49.3% of those with no education never gamble. That this reflects absence of disposable income is confirmed by the fact that 31.9% of those whose disposable income is under R799 p.m. and 24.9% of those whose disposable income is between R800 & R1400 p.m. never gamble.
- * Propensity to gamble regularly other than on the lottery rises from 28% of those with less than R800 p.m. to 39.2% of those with more than R 4 000 p.m. (and less than R6 000) and remains constant at that level for higher income groups. Propensity to gamble on the lottery only is constant across income groups at about 40%.
- * The propensity to gamble other than on the lottery is significantly higher amongst the metropolitan population than amongst the small urban population (38.0% as against 25.1%). Similarly the propensity to gamble regularly on the lottery is 39.4% of the small urban population being regular lottery players and 42.2% of the metropolitan population. This clearly reflects ease of access to the different forms of gambling.
- * 53.6% of regular other-than-the lottery gamblers are black; 23.4% are white; 18.3% are coloured; 4.6% are Asian.
- * 34.4% of blacks are regular other-than-the-lottery gamblers, as are 26.5% of whites; 47.5% of coloureds and 52.3% of Asians.
- * 54.9% of regular lottery-only players are black; 32.5% are white; 10.0% are coloured; 2.7% are Asian.
- * 42.5% of blacks are regular lottery-only gamblers, as are 44.3% of whites, 31.2% of coloureds and 36.9% of Asians.

2001 conclusions

- * All race groups play the lottery regularly approximately according to their numbers in the population.
- * Whites are about 8 times more likely to be roulette players than their numbers in the population would predict.
- * Only slightly fewer regular slot players are black (48.96%) than their numbers in the population would predict (54.02%).
- * Of the 1 488 people who regularly play slots in casinos, only just over a third (578 = 38.84%) are black but of the 103 people who play in "informal" casinos 70 (67.96%) are black.



Table 4.1 – National (2001)- listing the frequency counts for AA 20 questions and GA 20 questions as well as the cumulatives, for those who had said they were either “daily” or “weekly” or “monthly” users of alcohol/ engagers of gambling

Total “Yes” responses	Count of “Yes” responses			Cumulative number of Yesses			
	Alcohol	Gambling		Alcohol	Alcohol (%)	Gambling	Gambling (%)
0	1417	2269	0 or more Y	2226	38.4	3720	64.1
1	203	355	1 or more Y	809	13.9	1451	25.0
2	160	292	2 or more Y	606	10.4	1096	18.9
3	98	237	3 or more Y	446	7.7	804	13.9
4	79	155	4 or more Y	348	6.0	567	9.8
5	74	117	5 or more Y	269	4.6	412	7.1
6	34	74	6 or more Y	195	3.4	295	5.1
7	34	63	7 or more Y	161	2.8	221	3.8
8	28	35	8 or more Y	127	2.2	158	2.7
9	19	32	9 or more Y	99	1.7	123	2.1
10	24	32	10 or more Y	80	1.4	91	1.6
11	14	14	11 or more Y	56	1.0	59	1.0
12	14	13	12 or more Y	42	0.7	45	0.8
13	9	10	13 or more Y	28	0.5	32	0.6
14	8	4	14 or more Y	19	0.3	22	0.4
15	4	6	15 or more Y	11	0.2	18	0.3
16	4	7	16 or more Y	7	0.1	12	0.2
17	1	4	17 or more Y	3	0.1	5	0.1
18	1	1	18 or more Y	2	0.0	1	0.0
19	0	0	19 or more Y	1	0.0	0	0.0
20	1	0	20 or more Y	1	0.0	0	0.0
Grand Total	2226	3720					

According to a GA cut-off point of 7 or more, the 2000/2001 analysis revealed the number of problem gamblers at 3.8%. Note that these results were obtained from a provincially-based survey that covered all nine provinces. The results for the Gauteng, KwaZulu-Natal and Western Cape survey are given below in Table 4.2



Table 4.2 – National (2003), listing the frequency counts for AA 20 questions and GA 20 questions as well as the cumulatives, for those who had said they were either “daily” or “weekly” or “monthly” users of alcohol/ engagers of gambling.

Total “Yes” responses	Count of “Yes” responses			Cumulative number of Yesses			
	Alcohol	Gambling		Alcohol	Alcohol (%)	Gambling	Gambling (%)
0	681	2805	0 or more Y	1214	40.3	4282	73.6
1	124	350	1 or more Y	533	17.7	1477	25.4
2	93	276	2 or more Y	409	13.6	1127	19.4
3	67	223	3 or more Y	316	10.5	851	14.6
4	62	154	4 or more Y	249	8.3	628	10.8
5	33	127	5 or more Y	187	6.2	474	8.1
6	36	77	6 or more Y	154	5.1	347	6.0
7	30	76	7 or more Y	118	3.9	270	4.6
8	19	62	8 or more Y	88	2.9	194	3.3
9	18	25	9 or more Y	69	2.3	132	2.3
10	12	25	10 or more Y	51	1.7	107	1.8
11	8	18	11 or more Y	39	1.3	82	1.4
12	11	12	12 or more Y	31	1.0	64	1.1
13	6	13	13 or more Y	20	0.7	52	0.9
14	4	13	14 or more Y	14	0.5	39	0.7
15	2	7	15 or more Y	10	0.3	26	0.4
16	4	9	16 or more Y	8	0.3	19	0.3
17	0	4	17 or more Y	4	0.1	10	0.2
18	3	3	18 or more Y	4	0.1	6	0.1
19	1	2	19 or more Y	1	0.0	3	0.1
20	0	1	20 or more Y	0	0.0	1	0.0
Grand Total	1214	4282					

According to a GA cut-off point of 7 or more, the 2000/2001 analysis revealed the number of problem gamblers at 3.8%. Note that these results were obtained from a provincially-based survey that covered all nine provinces. The results for the Gauteng, KwaZulu-Natal and Western Cape survey are given below in Table 4.2



The 2003 analysis gives a percentage count of 4.6% for a cut-off of 7 or more questions on GA.

4.3 Provincial breakdown of problem gamblers over the two surveys

Province	Percentage of problem gamblers (GA 7 or more) across provinces (each provincial sample close to 1000) and 99% confidence limit	
	2000/2001 survey	2003 survey
Gauteng	5.2% (±1.8%)	7.0% (±2.1%)
Western Cape	1.8% (±1.1%)	5.6% (±1.9%)
KwaZulu-Natal	5.5% (±1.9%)	8.0% (±2.2%)
Average over 3 provinces	4.2%(±0.9%)	6.8%(±1.2%)
Eastern Cape	7.29%(±2.5%)	4.14%(±1.9%)
Free State	1.00%(±1.1%)	2.00%(±1.6%)
Limpopo	6.75%(±3.2%)	0.50%(±0.9%)
Mpumalanga	1.00%(±1.3%)	0.00%(±0.4%)
Northern Cape	0.50%(±0.9%)	3.25%(±2.3%)
North West	1.75%(±1.7%)	2.50%(±2.0%)
All	3.81%(±0.6%)	4.64%(±0.7%)

A 99% confidence limit is given for each figure. (see discussion in the first section of this document). Note, importantly, that since the actual people included in the sample change from time-period to time-period, there is a large amount of sampling variation which is not encapsulated in this “error” term.

The test itself is not definitive. It is a rough attempt to estimate whether somebody is a problem gambler. As such, it is more useful comparatively to tell for example whether a fixed group of people are exhibiting increasing problem gambling behaviour over time than as a tool to determine absolutely whether someone is a problem gambler or not.

5. Profile of the 2003 270-member problem gambling group (as identified by GA)

We first consider the games played by the members of this group



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Table 5.1 – detailed breakdown of gaming activity for problem gambling group

	> Weekly	Weekly	bi-weekly	monthly	Regular	bi-monthly	annually	< annually	Negative response	DK	
Jackpots	2	4	2	8	16	11	2	3	236	2	270
Scratch	8	28	15	13	64	8	1	3	189	5	270
Fafi	16	6	9	5	36	0	1	2	229	2	270
Lottery	131	92	15	12	250	1	0	0	18	1	270
Bingo	0	0	0	2	2	3	0	0	263	2	270
Dice	17	3	0	5	25	1	1	2	237	4	270
Roulette	0	5	6	3	14	1	0	3	251	1	270
Cards	8	5	2	9	24	3	1	2	240	0	270
Slots	5	23	22	41	91	18	3	6	148	4	270
Horses	10	12	8	12	42	3	11	7	207	0	270
Sports	0	2	1	4	7	2	4	0	257	0	270

Table 5.2 – Summary Table of gaming activity of problem gambling group

Reg. other	182	67.4%
Reg. Lottery only	87	32.2%
Occasional	0	0.0%
Never	1	0.4%
	270	100.0%

(There is a funny data point that we could exclude (someone who was identified as a problem gambler but didn't reveal any gaming activity))

Comments

Thus we see that 250 of the 270 problem gamblers are regular lottery players and 91 are regular slot players. Of the 250 regular lottery players, 87 play only the lottery. Thus, 163 of the regular lottery players play something else. Looked at in another way, of the 182 regular other, only 19 do not play the lottery (10%).

An important point remains that 87 (32%) of the problem group are "lottery only" players, thus the majority of problem gamblers (as expected) are multi-game types (who almost all play the lottery as one of their games).

Table 5.1 – detailed breakdown of gaming activity for problem gambling group

	> Weekly	Weekly	bi-weekly	monthly	Regular	%	bi-monthly	annually	< annually	Negative response	DK	
Jackpots	2	4	2	8	16	6.4	10	2	3	218	2	251
Scratch	7	26	15	13	61	24.3	8	1	3	173	5	251
Fafi	14	6	9	5	34	13.5	0	0	2	213	2	251
Lottery	131	92	15	12	250	99.6	1	0	0	0	0	251
Bingo	0	0	0	2	2	0.8	3	0	0	244	2	251
Dice	13	2	0	5	20	8.0	1	1	2	224	3	251
Roulette	0	5	6	3	14	5.6	1	0	3	232	1	251
Cards	6	5	2	9	22	8.8	3	1	2	223	0	251
Slots	4	21	21	41	87	34.7	17	3	6	134	4	251
Horses	8	11	7	12	38	15.1	2	11	7	193	0	251
Sports	0	2	1	4	7	2.8	2	4	0	238	0	251

Thus, for example, of the 251 person lottery-playing subgroup, 87 are regular slot players and 61 are regular scratch players.



Expenditure within the problem gambling group

The average percentage expenditure on gaming out of PDI for the problem gaming group is 11.0%. The average percentage expenditure on gaming out of PDI for all is 5.1%. For those problem players who reveal positive expenditure, we compute the average annual spend for each game.

Table 5.4 Estimated annual spend on different games across the sample

Game	#Spending on game (problem group of 270)	% of group who spent on game	Average monthly spend on game per game-player in Rand	Average monthly spend per (270) problem gambler on game in Rand
Jackpots	35	13.0	106	14
Scratch	82	30.4	50	15
Fafi	42	15.6	81	13
Lottery	251	93.0	80	74
Bingo	9	3.3	17	1
Dice	34	12.6	155	20
Roulette	21	7.8	782	61
Cards	31	11.5	252	29
Slots	123	45.6	644	293
Horses	62	23.0	169	39
Sports	15	5.6	38	2

This table includes all those who revealed any expenditure over the year (a number here are thus not necessarily “regulars”).

We note that although 251 people in the problem group of 270 play the lottery, the average annual spend per lottery player is R960 each. However, for the 123 problem gamblers who revealed they spent some positive amount on slots, the average annual spend per player is R7 722. One can see that for the problem group, although the number playing slots is half that of the lottery, the amount spent is about eight times as much. Comparison with Table 3.0 indicates that the average amount spent on the lottery (per annum) by problem gamblers at R1 326 is only 30% more than that of all the lottery players in the sample, at R1 007. However the amount spent on slots (per annum) by those in the problem group is R7 722, more than three times (R3 308) the expenditure by slot players in the sample at large.

Table 5.6 Disposable Income levels of problem gamblers

Counts	Disposable Income Levels										Total
	up to R799	R800- R1399	R1400- R2499	R2500- R3999	R4000- R5999	R6000- R7999	R8000- R11999	R12000+	Don't know	Refuse	
Regular Lottery only	5	9	15	13	12	6	12	9	3	3	87
% of problem sample	29.4%	33.3%	34.9%	30.2%	35.3%	37.5%	38.7%	28.1%	25.0%	20.0%	32.2%
Regular at other	12	18	28	30	21	10	19	23	9	12	182
% of problem sample	70.6%	66.7%	65.1%	69.8%	61.8%	62.5%	61.3%	71.9%	75.0%	80.0%	67.4%
Total	17	27	43	43	34	16	31	32	12	15	270
%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: one respondent classified as a "problem gambler" according to GA answered that he/she had never gambled and was in the R4000-R5999 income category.

Comment: Pretty flat across the income groups.

Table 5.7: Racial composition of problem group

Race	Problem Gamblers	% in problem sample	Count across all sample	% across all sample	% problem in racial group
White	60	22.2	1765	30.3	3.4
Black	154	57.0	3106	53.4	5.0
Coloured	48	17.8	769	13.2	6.2
Indian	8	3.0	176	3.0	4.5
Grand Total	270	100.0	5816	100.0	4.6

Whites have a slightly lower tendency for problem gambling than their representation in the sample and Blacks and Coloureds slightly higher. Indians are similarly represented





The highest percentage problem group is Coloured (6.2% of the sample are problem gamblers), then Black (5.0%), then Indian(4.5%), then White(3.4%).

Table 5.8: Slot playing venue for 117 problem slot players who revealed some expenditure

Venue	Count	Percentage
Sports clubs	2	1.7
Casinos	112	95.7
Informal casinos	2	1.7
Pub/café	1	0.9
Internet	0	0.0
Total	117	100.0

As with the total sample there is very little evidence of Slot playing at informal casinos

6. Fridge & TV analysis

Table 6.1: According to the Regular other, Regular lottery only, Occasional, Never

	Whole sample			Problem Gambler		
	Have Both	Missing at least one	Total	Have Both	Missing at least one	Total
Regular other	1790	203	1993	154	28	182
%	89.8%	10.2%	100.0%	84.6%	15.4%	100.0%
Regular Lottery only	2167	241	2408	77	10	87
%	90.0%	10.0%	100.0%	88.5%	11.5%	100.0%
Occasional	226	22	248	0	0	0
%	91.1%	8.9%	100.0%	0%	0%	0%
Never	1023	144	1167	0	1	1
%	87.7%	12.3%	100.0%	0.0%	100.0%	100.0%
Total	5206	610	5816	231	39	270
%	89.5%	10.5%	100.0%	85.6%	14.4%	100.0%

Table 6.2: According to Regulars in categories Lottery, Slots, Horses

	Whole sample			Problem Gambler		
	Have Both	Missing at least one	Total	Have Both	Missing at least one	Total
Lottery Regular	3798	409	4207	217	33	250
%	90.3%	9.7%	100.0%	86.8%	13.2%	100.0%
Slot Regular	780	40	820	87	4	91
%	95.1%	4.9%	100.0%	95.6%	4.4%	100.0%
Horse Regular	288	42	330	36	6	42
%	87.3%	12.7%	100.0%	85.7%	14.3%	100.0%



7. Sentiments about the legalisation of gambling

Table 7.1: Question 26 - On a scale of 1 to 5 with 1=very positive and 5=very negative, please indicate how do you feel about the legalising of gambling in South Africa?

	Count	%
No response	93	1.6
Very positive	73	12.6
Positive	1664	28.6
Neither positive nor negative	2067	35.5
Negative	580	10.0
Very negative	678	11.7
Total	5816	100.0