Section 2: Gaming Participation Summary Information

Data presented in this section include information on both participants and respondents[3]. People were asked which gaming activities they had done in the 12 months prior to being surveyed, how often they played, the reasons for their participation or non-participation, their beliefs about different gaming activities and their expenditure levels.

2.1 Types of gaming activities played

In Question One and Question Eleven of the questionnaire[4], respondents were given showcards listing a variety of gaming activities (17 in all) and they were asked to select all of the activities they had participated in during the past 12 months. The participation data presented in Table 2.1 compare the results from the previous surveys in this series (1985, 1990 and 1995) with the 1998 Values Study (Perry and Webster, 1999) and the results from the 1991 and 1999 surveys conducted by Dr. Max Abbott et al.

Despite differing methodologies and other obstacles to direct comparison between the three sets of surveys, the results presented in Table 2.1 show a remarkably consistent picture of the trends in people's participation in gaming in New Zealand.

The vast majority of respondents who had participated in any gaming activity had played Lotto - 75% of the population reported playing Lotto at least once in the 12 months prior to being surveyed. However, the proportion of people playing this activity seems to be in decline, a view that is backed by public statements of the Lotteries Commission. The rate of decline for Lotto appears to be relatively gradual particularly when compared to the change in Instant Kiwi/scratch ticket participation levels.

For the first time in this series of surveys, participation levels for Instant Kiwi/scratch tickets dropped below 50% of respondents. This probably occurred between 1996 and 1997 when there was a relatively substantial decrease in official sales. Other than new forms of gaming, the only activities to show increased participation levels between the 1995 and 2000 surveys were casinos and sports-betting.

Despite the continuing increase in the number of gaming activities available to the public, the proportion of people who have not done any activities in the past 12 months appears to be increasing, although it is still below the 1985 level. This may be because there were far fewer gaming activities readily available to the public in 1985.

[3] Respondents refers to all 1,500 people who answered the survey whereas participants refers to the number of people who played that activity

[4] Refer to questionnaire in Appendix B

Table 2.1: Gaming activities done by respondents in the last 12 months - 1985, 1990, 1991, 1995, 1998, 1999 and 2000

Response option	1985 %	1990 %	1991[a] %	1995 %	1998[b] %	1999[c] %	2000 %
Bought a Lotto ticket	3[d]	78	78	80	78	73	75
Bought ticket in N.Z. raffle/lottery	71	62	57	67	N/A	48	67
Bought an Instant Kiwi/scratch ticket	N/A	66	51	58	49	36	48
Made bets with friends	19	23	16	30	N/A	17	24
Bought a TeleBingo ticket	N/A	N/A	N/A	N/A	27	17	20
Played gaming machine (not at a casino)	N/A	28	16	24	26	14	18
Bet money on a horse or dog race	25	23	15	23	20	18	17
Casino[e]	N/A	N/A	N/A	5	17	N/A	16
Played a gaming machine at a casino	N/A	N/A	N/A	N/A	N/A	11	14
Played a Table game etc at a casino	N/A	N/A	N/A	N/A	N/A	5	6
Attended a "casino" evening-fundraising	8	9	2	10	N/A	N/A	10
Bought an overseas raffle/lottery ticket	N/A	N/A	N/A	N/A	N/A	N/A	10
Bet money on sporting event at TAB	N/A	N/A	N/A	1[f]	8	5	8
Bought a Daily Keno ticket	N/A	N/A	N/A	11[g]	5	3	6
Played card games for money	10	12	5	9	N/A	3	5
Played housie for money	8	5	3	6	N/A	3	4
Played 0900 games	N/A	N/A	N/A	4	6	3	3
Played dice games	3	4	1	3	N/A	<1	2
Internet-based betting	N/A	N/A	N/A	N/A	N/A	<1	1[h]
None - haven't taken part in any activity	15	10	10	10	12	14	13
Number of respondents:	1,500	1,200	4,053	1,200	1,201	6,452	1,500
Survey mode:	Face to face	Face to face	Phone survey	Face to face	Postal survey	Phone survey	Face to face

[a] *Records activity only in last 6 months, from 1991 Abbott survey*
[b] *Records gaming activity in the last 12 months, from 1998 Values Study*
[c] *Records activity only in last 6 months, from 1999 Abbott survey*
[d] *Lotto was unavailable in New Zealand in 1985, so these tickets would have been bought overseas*
[e] *"Casino" includes all respondents who played Table games and/or gaming machines at a casino*
[f] *Sports-betting was not available in New Zealand, this was asked about bets placed with an Australian betting agency*
[g] *Daily Keno had been operating for about 3 months at the time of this survey*
[h] *Questions on Internet-betting were asked later in the 2000 survey*
[N/A] *Not asked*
Multiple response
Showcard

2.2 Further analysis of gaming activities played

Sex

Table 2.2 shows the proportion of males and females who did not play any gaming activities. The proportion of females who did not play any activities has remained steady since 1990 while the proportion of males who did not play any activities increased between 1995 and 2000, to the extent that there were less males playing gaming activities than females for the first time in this survey series.

Table 2.2: Proportion of respondents who did not play any gaming activities, by sex - 1985, 1990, 1995 and 2000

Year	Male	Female	Total
1985 (n=1,500)	13	17	15
1990 (n=1,200)	8	11	10
1995 (n=1,200)	8	11	10
2000 (n=1,500)	15	11	13

Compared to males, females were more likely to have done the following activities at least once in the 12 months prior to being surveyed:

- Lotto (80% of females compared to 70% of males)
- Instant Kiwi or other scratchies (53%; 43%)
- TeleBingo (23%; 16%)

Males were more likely to have placed bets on sporting events (12% compared to 5% of females) and made bets with friends (26%; 21%). Males were also slightly more likely to have:

- Done no gaming activities (15% of females; 11% of males)
- Placed bets on table games at a casino (7%; 5%)
- Played card games for money (7%; 4%)
- Played dice games for money (3%; <1%)

Age

People in the oldest age groups were the most likely to have played TeleBingo in the 12 months prior to being surveyed (24% compared to 18% of those under the age of 55 years). People under the age of 25 years were more likely to have:

- Done no gaming activities (18% aged 15-24 years compared to 11% aged 25 years and over)
- Played card games for money (11%; 4%)
- Played dice games for money (5%; 1%)

However, they were less likely to have played Lotto (60%; 79%), bought a New Zealand-based raffle ticket (54%; 70%), or bought an overseas raffle or lottery ticket (6%; 11%). However, together with those aged between 25-34 years, the under 25 year olds were more likely to have played gaming machines (26% compared to 16% of those aged 35 years and over) and Instant Kiwi (54%; 44%).

Ethnicity

Māori were most likely to have participated at least once in gaming activities in the last 12 months, while Pacific peoples were the least likely to have participated (9% of Māori had not done any gaming activities, compared to 18% of Pacific peoples and 14% of the General population[5]). Māori were also the most likely and Pacific peoples the least likely to have tried the following activities:

- Lotto (82% of Māori, compared to 68% of Pacific peoples and 75% of the General population)
- Instant Kiwi or other scratchies (56%; 36%; 48%)
- Non-casino gaming machines (28%; 11%; 18%)

Māori were also more likely than the rest of the population to have played TeleBingo (32% compared to 19% of the rest of the population).

[5] General population refers to the remaining respondents who did not indicate they belonged to the Māori or Pacific peoples ethnic groups. For further explanation refer to the methodology section.

Both Māori and Pacific peoples were more likely than the General population to have tried:

- Daily Keno (13% of Māori and 22% Pacific peoples, compared to 4% of the General population)
- Sports-betting (11%; 17%; 7%)
- Housie (9%; 11%; 2%)

Pacific peoples were more likely than the rest of the population to have played dice games for money (7% compared to 2% of the rest of the population) and attended a "casino evening" (21%; 9%).

Location

People living in the South Island were more likely to have done at least one gaming activity in the 12 months prior to being surveyed compared to the rest of the country (88% compared to 83%). They were also more likely to have played a (non-casino) gaming machine (22%; 17%). However, they were less likely to have bought a New Zealand-based raffle ticket (62%; 69%) and to have played Lotto (72%; 76%).

People from the lower half of the North Island were more likely to have made bets with friends for money (31% compared to 21% of the rest of the country) and to have played Instant Kiwi (56%; 46%). People from the upper half of the North Island were more likely to have attended a "casino evening" (13% compared to 8% of the rest of the country).

Household Income[6]

Compared to people from low-income households, those from high income households were most likely have done the following activities at least once:

- Made bets with friends (35% compared to 19% of those from households with incomes under $60,000)
- Bought New Zealand-based raffle tickets (73%; 68%)
- Attended a "casino evening" (15%; 9%)
- Played gaming machines at a casino (19%; 13%)
- Played table games at a casino (9%; 5%)
- Placed bets on a horse or dog race (22%; 15%)
- Placed bets on sporting events (11%; 8%)

However, those from households with an income of under $30,000 were more likely to have played housie (6% compared to 3% of respondents from households with an income of over $30,000) and to have played TeleBingo (26%; 16%).

[6] Percentages may not reflect the percentages for the total population due to non-responses to the household income question

Occupation

Blue-collar workers were most likely to have participated in gaming activities, while students were the least likely (93% of blue-collar workers, 77% of students compared to 87% of people in the other occupational groups). Similarly, blue-collar workers were most likely to have bought a Lotto ticket and students the least likely (82%; 51%; 79%). Blue-collar and white-collar workers were the most likely to have:

- Made bets with friends for money (31% compared to 15% of other occupations)
- Played a gaming machine at a casino (18%; 9%)
- Placed a bet on a sporting event (11%; 5%)

Together with retired people they were more likely to have placed a bet on a horse or dog race (25% compared to 9% of other occupations).

Blue-collar workers and unemployed people were most likely to have bought an Instant Kiwi ticket at least once in the 12 months prior to being surveyed (52% compared to 46% of other occupations). The unemployed, together with homemakers were most likely to have played Daily Keno (12% compared to 5% of other occupations). The unemployed were also the most likely to have played TeleBingo (30% compared to 19% of other occupations) and housie (10%; 3%). Students were most likely to have played non-casino gaming machines at least once in the 12 months prior to being surveyed (27% compared to 17% of respondents in other occupations).

Highest Qualification

People who had a tertiary qualification were less likely to play TeleBingo (15% compared to 23% of those who had no tertiary qualification) and housie (1%; 5%) compared to those who did not have a tertiary qualification.

University graduates were less likely to have played gaming activities than people with other qualifications (82% compared to 87% of people with other qualifications). They were also less likely to have played Lotto (67%; 76%) and to have played Instant Kiwi (36%; 49%). However, university graduates were more likely to have done the following gaming activities:

- Bought a New Zealand-based raffle ticket (68% of university graduates compared to 58% of participants with other qualifications)
- Played a gaming machine at a casino (19%; 14%)
- Played a table game at a casino (13%; 6%)

2.3 Number of gaming activities

Table 2.3 provides a breakdown of the actual number of gaming activities a person had done at least once in the 12 months prior to being surveyed, out of the 17 gaming activities asked about (Question One and Question Eleven). Most respondents (51%) had participated in two to four gaming activities in the 12 months prior to being surveyed and a further 13% of respondents had done no gaming activities (Table 2.3).

To enable comparison with previous surveys the number of gaming activities have been sorted into four groups, those who have done:

- None of the gaming activities
- 1 to 3 activities
- 4 to 6 activities
- 7 or more activities

For the remainder of the report, the top category has been divided into two groups, those who have done between seven to nine gaming activities and those who have done ten or more.

Table 2.3: Q11+Q1, Total number of gaming activities done by respondents in the last 12 months

Response option	%
None - Haven't participated in any activity	13
One	10
Two	20
Three	19
Four	12
Five	9
Six	6
Seven	4
Eight	3
Nine	2
Ten	1
Eleven	<1
Twelve	<1
Fourteen	<1

Respondents in 2000 participated in more gaming activities than previously, especially compared to 1985 (Figure 2.1). However, in recent years there have been increases in the proportion of people who had done no gaming activities and in the proportion of people who had done 7 or more gaming activities (Figure 2.1 and Table 2.4). The increases in the proportion of people in the top category have been boosted by an increase in the actual number of gaming activities available since 1985. In the 1985 survey respondents chose from a list of 10 possible activities, compared to 17 activities in 2000.

Figure 2.1: Number of gaming activities participated in by <u>respondents</u> over a 12 month period - 1985, 1990, 1995 and 2000

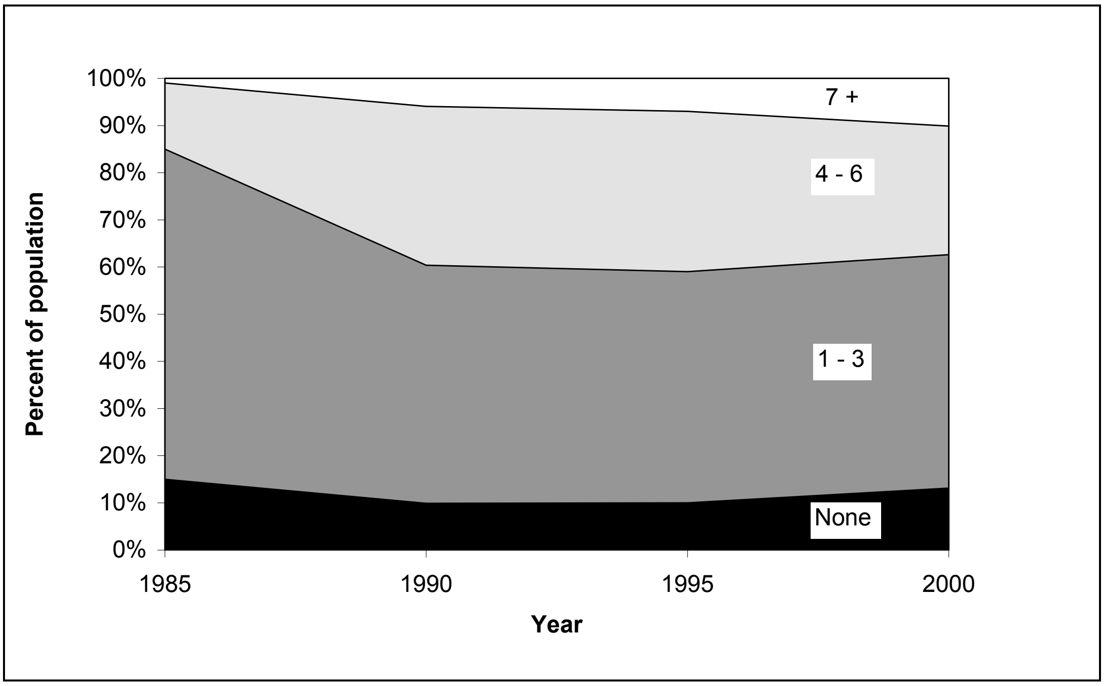


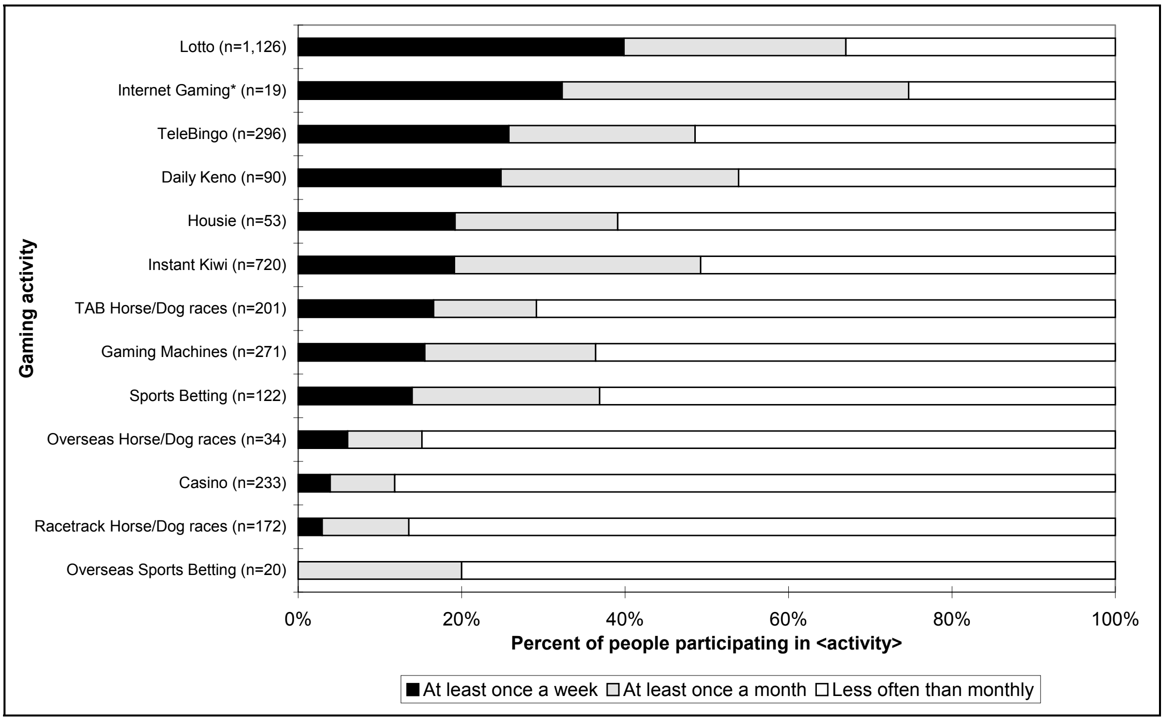
Table 2.4: Number of gaming activities participated in by <u>respondents</u> over a 12 month period - 1985, 1990, 1995 and 2000

Number of activities	1985 (n=1,500) %	1990 (n=1,500) %	1995 (n=1,500) %	2000 (n=1,500) %
None	15	10	10	13
1 - 3	70	51	49	49
4 - 6	14	34	34	27
7+	1	6	7	10

2.4 Frequency of playing gaming activities

Figure 2.2 shows how often participants in a particular gaming activity reported playing the activity. A higher proportion of Lotto participants played Lotto frequently (at least once a week). However, a higher proportion of participants played Internet-based[7] gaming on a monthly[8] or weekly basis compared to Lotto. Other than Internet-based gaming, Lotteries Commission run activities were the only activities that were played frequently by more than a quarter of participants.

Figure 2.2: Frequency of participation in gaming activities by participants



* *Includes 11 people who did not spend any money*

Table 2.5 shows the frequency with which people played various gaming activities. Since its introduction, the majority of respondents played Lotto at least weekly (30%) or monthly (20%), though this proportion has declined since 1995 (down from 55% in 1995 to 50% in 2000). In 2000, only one of the gaming activities listed in Table 2.5 was played by more than half of respondents - Lotto.

More details about the frequency of participation in different gaming activities may be found in Section 3.

[7] Caution is needed due to the small numbers participating in Internet gaming (n=19), and because this figure includes people who did not actually place money on bets

[8] "Monthly" or "at least once a month" refers to people who play not as often as once a week but at least once a month

Table 2.5: Frequency of participation in gaming activities by respondents - 1985, 1990, 1995 and 2000

Response option	At least once a week				At least once a month [a]				Less often than monthly				Not played activity at all			
	1985	1990	1995	2000	1985	1990	1995	2000	1985	1990	1995	2000	1985	1990	1995	2000
Lotto	N/A	35	35	30	N/A	21	20	20	N/A	23	25	25	N/A	22	20	25
Instant Kiwi	N/A	14	10	9	N/A	26	21	14	N/A	23	27	24	N/A	37	42	52
TeleBingo	N/A	N/A	N/A	5	N/A	N/A	N/A	4	N/A	N/A	N/A	10	N/A	N/A	N/A	80
Gaming machines (not in a casino)	N/A	5	3	3	N/A	8	6	4	N/A	16	15	11	N/A	72	76	82
Casino	N/A	N/A	<1	1	N/A	N/A	<1	1	N/A	N/A	5	14	N/A	N/A	95	84
TAB horse/dog races [b]	5	4	3	2	4	3	4	2	10	13	12	9	81	80	81	87
Sports-betting[c]	N/A	N/A	N/A	1	N/A	N/A	N/A	2	N/A	N/A	N/A	5	N/A	N/A	N/A	92
Daily Keno	N/A	N/A	2	1	N/A	N/A	2	2	N/A	N/A	6	3	N/A	N/A	89	94
Housie	2	2	2	1	1	1	1	1	4	2	3	2	92	95	94	96

[a] *"Monthly" or "at least once a month" refers to people who play not as often as once a week but at least once a month*
[b] *Excludes bets placed on-course/track-side*
[c] *Excludes bets placed on a sporting-event through an overseas betting organisation*
Proportions may not add up to 100% due to rounding

2.5 Reasons why people have or have not played gaming activities

People who reported participating in a gaming activity were asked to identify their reasons for playing from options provided on a showcard. Participants were able to select as many options as they wanted, and their responses are presented in Table 2.6. The predominant reason for involvement in all forms of gaming other than raffles and casinos, is to win prizes or money. The 2000 survey did not inquire about the reasons why people buy raffle tickets as previous surveys have firmly established that the purchase of raffle tickets is linked to support for worthy causes. Table 2.6 demonstrates that casinos are largely seen as a form of entertainment for patrons (58% of participants). A sizeable proportion did attend casinos to win prizes/money (45%), but this was the only activity in 2000 for which the majority of participants did not cite winning prizes/money as a reason for participation.

Participants often bet on horse and dog racing, sporting events, gaming machines, and housie for the following reasons: "entertainment" and "for excitement or as a challenge". Participants in these activities were also more likely to play these activities "to be with people/get out of the house", with the exception of sports-betting. Relatively few people cite "entertainment" as a factor in their decision to purchase Lotteries

Commission products (other than TeleBingo). This is perhaps because most of these activities are non-continuous forms of gaming. Non-continuous forms of gaming are gaming activities with a delay between purchase or up-take and the final outcome or result.

Table 2.6: Q11, Reasons why participants have done <activity> in the last 12 months

Response option	Lotto %	Daily Keno %	Instant Kiwi & other scratchies %	TeleBingo %	Housie %	Horse/Dog Races %	Sports Betting %	Non-casino Gaming Machines %	Casinos %
To win prizes/money	82	73	75	70	50	58	65	57	45
For excitement/or a challenge	11	10	21	19	36	38	46	30	32
To support worthy causes	9	2	4	3	15	<1	<1	3	<1
Out of curiosity	4	15	8	7	6	3	3	11	15
To oblige or please other people	3	-	3	2	4	4	2	3	7
As a gift for another person	21	6	16	4	3	<1	<1	-	<1
As an interest/or a hobby	3	6	3	6	11	12	12	6	2
To be with people/ get out of the house	<1	-	<1	<1	16	10	-	8	13
As entertainment	12	15	17	36	37	40	35	48	58
Others	<1	-	2	<1	-	4	1	2	1
Don't know	<1	-	<1	-	-	-	-	-	-

Multiple response
Showcard

Housie is distinct from other gaming activities. In the 1985, 1990, and 1995 surveys a considerable proportion of participants in housie said they did so "to be with others or to get out of the house" compared to participants in other gaming activities. However, between 1995 and 2000 the proportion of people selecting this option has halved (Table 2.7), although it was still a significant factor among housie players.

Table 2.7: Reasons why participants have done <activity> in the last 12 months 1985, 1990, 1995 and 2000

Response option	Lotto			Instant Kiwi			Daily Keno		Horses/Dogs				Housie				Gaming machines (not in a casino)		
	1990	1995	2000	1990	1995	2000	1995	2000	1985	1990	1995	2000	1985	1990	1995	2000	1990	1995	2000
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
To win prizes/ money	83	81	82	75	67	75	64	73	66	52	46	58	39	50	47	50	49	46	57
For excitement/or a challenge	21	14	11	24	19	21	12	10	43	61	43	38	28	33	24	36	50	33	30
To support worthy causes	8	7	9	3	2	4	2	2	N/A	1	1	<1	19	22	19	15	4	4	3
Out of curiosity	9	4	4	18	9	8	30	15	N/A	7	4	3	N/A	3	1	6	21	11	11
To oblige or please other people	3	4	3	2	3	3	1	-	N/A	4	3	4	9	4	6	4	1	2	3
As a gift for another person	13	15	21	8	12	16	2	6	N/A	0	<1	<1	N/A	N/A	0	3	0	1	-
As an interest/or a hobby	11	3	3	7	3	3	4	6	36	22	11	12	N/A	13	9	11	8	2	6
To be with people/ get out of the house	N/A	<1	<1	N/A	<1	<1	0	-	3[a]	14	10	10	[b]	45	34	16	4	2	8
As entertainment	N/A	13	12	N/A	14	17	7	15	N/A	N/A	40	40	N/A	N/A	29	37	N/A	48	48
Others	2	1	<1	3	1	2	0	-	5	4	1	4	5	2	3	-	7	2	2
Don't know	N/A	N/A	<1	N/A	N/A	<1	N/A	-	N/A	N/A	N/A	-	N/A	N/A	N/A	-	N/A	N/A	-

[a] In the 1985 survey 'to be with people/get out of the house' was not an option but 'special occasion/special day out' was mentioned spontaneously by 3% of respondents

[b] "To be with people/get out of the house" was presented as two options in the 1985 survey: "To get out of the house" - mentioned by 33% of respondents and "To be with people/to have a good time" - mentioned by 39% of respondents

Multiple response
Showcard

Reasons for not playing

For each of the gaming activities in listed in Table 2.1, those who had not played those activities were asked to choose from the list provided, the reasons for why they had not played. In each case, the majority of non-participants did not play because they were "not interested". The next most common response, given by between 17% and 33% of non-participants, was that the activity was "a waste of time/money".

Nearly a third of those who had not played Lotto had not played due to moral or religious reasons, though for all other activities objections on these grounds ranged only between 9% and 15% of <u>respondents</u>. This variation is largely due to the relatively small proportion of people who had not played Lotto and a relatively consistent number of people who were opposed to all activities on moral or religious grounds.

Table 2.8: Q13a-j, Reasons why <u>respondents</u> have <u>not</u> done <activity> in the last 12 months

Response option	Bought a Lotto ticket (n=374) %	Bought a Daily Keno ticket (n=1,410) %	Bought an Instant Kiwi ticket (n=780) %	Bought a TeleBingo ticket (n=1,204) %	Played Housie (n=1,447) %	Bet on a horse or dog race (n=1,253) %	Bet on a sporting event (n=1,374) %	Played a gaming machine (n=1,229) %	Played a casino gaming machine (n=1,290) %	Played a casino table game (n=1,406) %
Not interested	51	71	67	71	72	69	73	68	61	60
Waste of time, money	33	18	24	20	17	22	20	24	22	20
Moral or religious reasons	31	10	15	11	9	12	11	11	11	11
Chances of winning aren't very good	13	7	10	7	4	6	5	6	6	5
Too expensive	8	5	5	5	4	6	6	7	8	8
I'm not lucky at things like that	4	3	3	3	2	3	3	3	3	3
Don't know anything about this activity	<1	9	2	8	6	5	5	2	2	6
Not available/no opportunity/access	<1	1	1	1	8	3	3	9	17	16
Too young	1	<1	<1	<1	<1	<1	<1	<1	1	1
Too busy	-	<1	<1	<1	<1	<1	<1	<1	<1	<1
Haven't got around to it	-	<1	<1	<1	<1	<1	<1	<1	<1	<1
Don't like atmosphere/environment	-	-	-	-	<1	-	-	<1	<1	<1
Can't afford it/other priorities	-	<1	<1	<1	<1	<1	<1	<1	<1	<1
Others	<1	<1	<1	<1	<1	<1	<1	<1	<1	<1
Don't know	-	<1	-	<1	<1	<1	<1	-	-	-

Multiple response
Showcard

Table 2.8 (*continued*): Q3a-g, Reasons why respondents have not done <activity> in the last 12 months

Response option	Played cards for money (n=1,423) %	Played dice games (n=1,471) %	Gone to a casino evening (n=1,346) %	Made bets with friends (n=1,145) %	Taken part in 0900 telephone games (n=1,453) %	Bought any raffle or lottery tickets* (n=473) %
Not interested	66	67	56	65	63	56
Waste of time, money	28	24	22	23	29	30
Moral or religious reasons	11	10	9	11	9	18
Chances of winning aren't very good	8	7	5	6	7	8
Too expensive	13	9	9	7	14	10
I'm not lucky at things like that	6	4	4	5	3	5
Don't know anything about this activity	5	9	4	3	5	3
Not available/no opportunity/access	8	8	21	10	2	4
Too young	-	-	1	-	-	-
Too busy	<1	<1	1	<1	<1	<1
Haven't got around to it	<1	<1	<1	<1	<1	<1
Don't like atmosphere/environment	-	-	<1	<1	-	-
Can't afford it/other priorities	<1	<1	<1	-	<1	-
Others	<1	<1	<1	<1	<1	<1
Don't know	-	<1	<1	<1	-	<1

** The two raffle/lottery response options in Table 2.1 have been combined*
Multiple response
Showcard

For casino table games and gaming machines (both in a casino and to a lesser extent outside of a casino), a lack of access or opportunity prevented some non-participants from trying these activities (Table 2.8). Fewer than 10% of non-participants across all types of activities were restricted from trying a gaming activity due to a lack of knowledge. For the majority of non-participants they did not play because they did not want to, for one reason or another. There were relatively few people who did not play but might have wanted to, with the partial exception in the case of casino-based gaming activities.

Table 2.9 shows that reasons for non-participation were similar to previous years.

Table 2.9: Reasons why respondents have not done <activity> in the last 12 months 1985, 1990, 1995 and 2000

Response option	Lotto			Instant Kiwi			Daily Keno		Horses/Dogs				Housie				Gaming machines			Casino Gaming Machines
	1990 %	1995 %	2000 %	1990 %	1995 %	2000 %	1995 %	2000 %	1985 %	1990 %	1995 %	2000 %	1985 %	1990 %	1995 %	2000 %	1990 %	1995 %	2000 %	2000 %
Not interested	56	43	51	57	57	67	58	71	63	69	67	69	71	75	72	72	64	62	68	61
Waste of time, money	26	25	33	27	25	24	16	18	19	19	18	22	14	15	15	17	22	22	24	22
Moral or religious reasons	23	26	31	17	14	15	7	10	8	8	9	12	6	7	6	9	9	8	11	11
Chances of winning aren't very good	18	17	13	13	12	10	5	7	6	5	5	6	2	3	3	4	6	6	6	6
Too expensive	10	10	8	8	7	5	6	5	8	7	5	6	4	4	2	4	6	4	7	8
I'm not lucky at things like that	2	9	4	4	4	3	2	3	4	4	3	3	2	2	1	2	2	2	3	3
Don't know anything about this activity	3	<1	<1	2	1	2	23	9	6	6	5	5	4	4	5	6	3	4	2	2
Not available/no opportunity/access	1	0	<1	1	1	1	1	1	2	3	2	3	5	7	7	8	12	7	9	17
Others	3	6	2	4	4	2	3	2	5	4	2	2	7	4	2	2	3	2	2	3

Multiple response
Showcard

2.6 Beliefs about gaming activities

One theory about why people gamble is because they occasionally win and these wins keeps them motivated to continue playing or to play again on later occasions. The occasional wins act as "intermittent reinforcement", and may act to disguise players' perceptions about whether they are winning overall or not. To test this, participants were asked whether they felt overall, they had won, lost, or broken even playing that activity[9].

This information is purely participants' perceptions. No attempt has been made to say whether their perceptions are accurate or reflect the chances of winning at these activities. However, it is clear that for gaming activities to be successful, overall players lose money.

Virtually everybody who played an activity felt they knew how well (or not) they did playing that activity (Table 2.10). Few of the participants who played a Lotteries Commission-run game (i.e. Lotto, Daily Keno, TeleBingo and Instant Kiwi) felt they had won money overall. However, nearly one-in-three of the people who played Instant Kiwi and one-in-five Daily Keno players felt they had broken even.

People who placed a bet on a sporting event were the most likely to feel they had won money overall (29% -Table 2.10). However, housie players were the most likely to say they had won money or broken even (63%) overall, followed by those placing bets on horse and/or dog races (49%) and sporting events (45%).

Table 2.10: Whether participants have won or lost money overall playing gaming activities in the last 12 months

Activity	Won money overall	Broken even	Lost money overall	Don't know
Lotto	5	9	86	<1
Daily Keno	7	20	72	<1
TeleBingo	11	11	78	-
Instant Kiwi & other scratchies	11	30	58	1
Non-casino gaming machines	17	25	58	<1
Horse/dog races	20	29	51	<1
Casino gaming machines	24	17	58	-
Housie	28	35	37	-
Sports-betting	29	16	56	-

To further test their beliefs about their gaming activities and whether they felt they could influence their chances of winning, participants were asked if they used any special skill or system to improve their chances of winning in a particular activity. The majority of participants did not use any system or skill to improve their chances of winning. Daily Keno was the activity in which the highest proportion of participants felt they used a system, followed by Lotto and non-casino gaming machines (Table 2.11).

[9] This question was only asked for the activities listed in Table 2.10

Table 2.11: Do participants use a system or special skills to improve their chances of winning at a gaming activity[a]

	Yes %	No %	Don't know/Don't know of any such system %
Daily Keno (n=90)	16	84	<1
Lotto (n=1,126)	9	91	<1
Non-casino gaming machines [b] (n=271)	8	92	1
Gaming machines [c] (n=387)	6	93	1
Instant Kiwi (n=720)	2	97	1
Casino gaming machines [d] (n=116)	2	97	1
TeleBingo (n=296)	<1	99	1
Housie (n=53)	0	100	<1

[a] *This question was not asked of sports-betting and horse and/or dog racing participants*
[b] *Gaming machine participants were only asked this question once. If they had also played gaming machines in a casino they skipped this particular question*
[c] *Includes participants who played gaming machines at a casino and participants who had played a gaming machine outside of a casino*
[d] *Excludes participants who had also played a gaming machine outside of a casino*

There was a marked difference between participants who only played gaming machines in a casino and those who played gaming machines outside of a casino[10] (8% of non-casino based gaming machines participants compared to 2% of casino-based gaming machine participants felt they used a system). Housie players were the only group to not mention having a special skill or system to improve their chances of winning.

Further details about participants' winnings and systems or special skills are given in the relevant sub-sections within Section 3 for each particular gaming activity.

2.7 Reported expenditure on gaming activities

Information gathered on the self-reported spending patterns of participants in Lotto, Instant Kiwi, Daily Keno, TeleBingo, gaming machines (both inside and outside of casinos), sports-betting, horse and/or dog racing, housie, and casinos were compiled to provide an estimate of annual spending on these gaming activities. **These data are extrapolated from respondent estimates of amounts spent and the frequency of their participation in the activities listed. Therefore, it should be noted that this information provides an indication of trends only**. These data do not contain any information on people's expenditure on any other gaming activities (e.g. raffles, 0900 telephone games). Respondents who had not spent any money on gaming activities refers to respondents who had reported not spending any money on the gaming activities mentioned in Table 2.15.

The 1995 data on the estimated average annual reported expenditure excludes an outlier of $87,360 (or $95,616 in 2000 dollars) while the 2000 annual expenditure excludes an outlier of $130,748.

[10] This group includes some who played gaming machines both inside and outside of a casino

Between 1990 and 1995 there was an increase in the amount reported spent on gaming activities, with higher proportions of people reporting spending more than $400 annually on gaming activities (Table 2.12). Since 1995, there has been only a slight increase in the proportion of people that reported spending over $1,000, but there has been a large increase in the proportion of people who reported not spending any money on gaming activities.

Table 2.12: Amount spent annually on all gaming activities by respondents - 1990, 1995 and 2000 [a]

	1990 (n=1,200) %	1995 (n=1,200) %	2000 (n=1,500) %
Nil	10	10	17
$1 - $100	35	35	31
$101- $200	14	12	10
$201 - $300	10	10	11
$301 - $400	8	7	6
$401 - $500	4	5	3
$501 - $700	6	8	8
$701 - $1,000	2	5	4
$1,001+	8	9	10
Don't know	-	-	<1

[a] Some of the activities used in the calculation of total expenditure differ between surveys. Expenditure on raffles was dropped in 2000 and spending on new activities has been added as they have been introduced into New Zealand

Percentages may not add up to 100% due to rounding

Table 2.13 shows the estimated average amount reported spent on gaming activities annually by respondents. The amount reported spent in 1995 includes both the average (mean) amount reported spent in 1995 dollar amounts[11] and an adjusted amount in 2000 dollar amounts or inflation adjusted terms[12]. This adjustment allows for a direct comparison in the reported spending of respondents between 1995 and 2000.

The overall average amount reported spent on gaming decreased between 1990 and 2000 in inflation adjusted terms ($531 in 1990 compared to $470 in 2000). There was only a slight increase in the proportion of people that reported spending over $1,000 on gaming activities annually and a large increase in the proportion of people who did not spend anything (10% of respondents in 1990 compared to 17% of respondents in 2000[13]).

[11] Refers to the actual amount of money in the year mentioned otherwise referred to as the "face-value" or alternately as "nominal value"

[12] The dollar amounts have been adjusted using the Consumers Price Index (CPI) into the equivalent purchasing power of these dollar amounts in equivalent 2000 dollars, otherwise referred to as in "real terms" or "inflation adjusted terms"

[13] This includes people who did not play any gaming activities (13% in 2000) as data on people's spending on gaming activities were only collected on the activities listed in Table 2.15

Table 2.13: Total average amount spent annually on gaming activities by respondents - 1990, 1995 and 2000

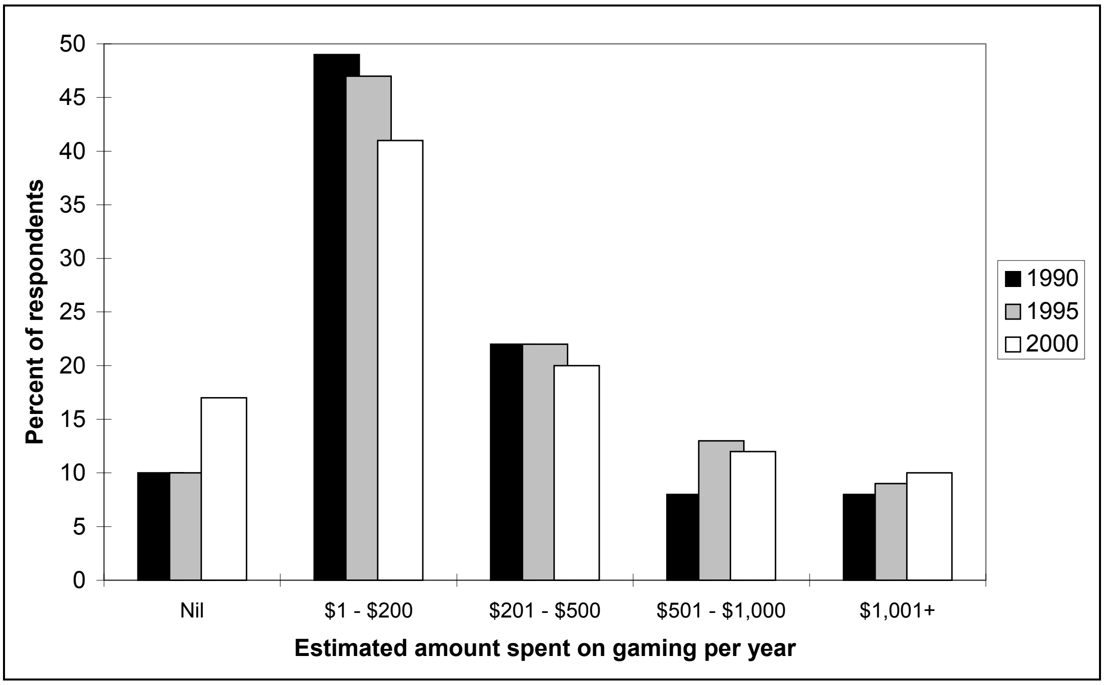
Year	Average amount spent	Average (in 2000 $'s)
1990 (n=1,200)	$446	$531
1995 (n=1,200)	$413	$444
2000 (n=1,500)	$470	$470

The decrease in the average amount reported spent occurred due to a reduction in the average amount reported spent by people that had done fewer than seven gaming activities, who represent the majority of respondents (76% of respondents). However, there was an increase in the average reported spending amongst the 24% of respondents who played seven or more gaming activities, in spite of reduced spending by respondents who had played fewer gaming activities between 1995 and 2000 (Table 2.14).

Table 2.14: Average amount spent annually on gaming activities, by number of activities respondents participated in - 1995, 2000

	Number of gaming activities participated in				
	None	1-3	4-6	7-9	10+
1995 mean (in 1995 $'s)	$0	$206	$653	$1,121	$1,982
1995 mean (in 2000 $'s)	$0	$221	$702	$1,204	$2,129
2000 mean	$0	$184	$627	$1,643	$4,236

Figure 2.3: Estimated annual expenditure on gaming by respondents - 1990, 1995 and 2000



Participants reported spending the most amount of money at casinos on an average or typical visit ($48), compared to the average occasion for other gaming activities (Table 2.15). Horse and dog racing ($23) and housie ($18) also attracted large spending compared to the typical spend of people in other gaming activities.

Table 2.15: Average amount reported spent by participants on gaming activities in an average session

Response option	Average day	Average week	Average session
Lotto		$6.80	
Daily Keno	$5.40		
Instant Kiwi & other scratchies	$4.00		
TeleBingo		$4.90	
Housie			$18.20
Horse/dog races	$23.20		
Sports-betting	$12.60		
Non-casino gaming machines	$15.00		
Casinos	$48.20		
Internet-based betting	$14.40		

However, the average annual reported spending on horse and/or dog racing is considerably higher than the average annual reported spending of people who went to the casino, due to the relatively lower frequency with which people attended the casino (Table 2.16 compared to Table 2.15).

Table 2.16: Average annual amount reported spent on gaming activities by respondents and participants[a]

	Average annual amount reported spent by participants	Average annual amount reported spent by all respondents
Lotto	$200	$150
Horse race-TAB bets	$842	$113
Gaming machines not in a casino	$542	$98
Instant Kiwi	$97	$47
Casinos	$280	$44
Horse/dog races - racetrack	$258	$30
TeleBingo	$96	$19
Sporting events-TAB	$189	$15
Housie	$385	$14
Daily Keno	$173	$10
Horse race-overseas	$173	$4
Internet gaming	$182	$2
Sporting events-overseas	$31	<$1

[a] *Respondents refers to all 1,500 people who answered the survey whereas participants refers to the number of people who played that activity*

2.8 Further information on gaming expenditure

Sex

Figure 2.4 shows the changes over time in inflation adjusted terms of the spending on gaming activities by male and female respondents. There continues to be a marked contrast between males and females regarding the amount spent despite increases in female spending relative to male spending between 1995 and 2000. The amount males reported spending on gaming activities had steadily decreased between 1990 and 2000.

Figure 2.4: Average annual reported spending on gaming activities by respondents in inflation adjusted terms, by sex - 1990, 1995 and 2000

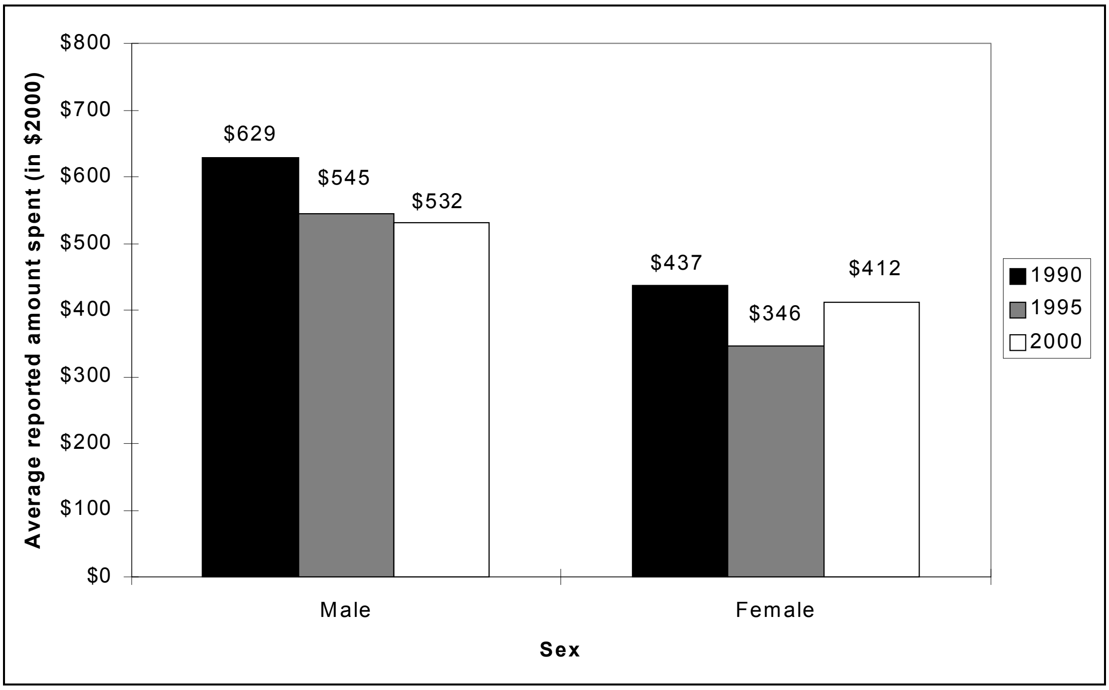


Table 2.17 shows the average amount male and female respondents reported spending on gaming activities in a 12 month period. The left-hand side of the Table shows the nominal dollar amounts reported for each of the years surveyed. The right-hand side of the Table displays the same information in inflation adjusted terms. The bottom half of the Table shows percentage change of the reported spending between surveys and the percentage change over the period covered (in this case from 1990 to 2000).

In nominal terms, there was an increase in the average amount reported being spent by females on gaming activities between 1990 and 2000 (12%). However, in inflation adjusted terms, there was an overall decrease for females (6%) during this period despite an increase in the reported amount spent between 1995 and 2000.

Table 2.17: Average annual reported spending by respondents on gaming activities, by sex - 1990, 1995 and 2000

	Actual/nominal dollar amounts			Amount in inflation adjusted terms in 2000 dollars		
	1990	**1995**	**2000**	**1990**	**1995**	**2000**
Male	$528	$507	$532	$629	$545	$532
Female	$367	$322	$412	$437	$346	$412

	1990-1995 %	**1995-2000 %**	**1990-2000 %**	**1990-1995 %**	**1995-2000 %**	**1990-2000 %**
Male	-4	5	<1	-13	-2	-15
Female	-12	28	12	-21	19	-6

Age

Respondents aged 65 years or older reported spending the least amount of money on gaming activities annually compared to other age groups throughout the 1990 to 2000 period. The reported spending on gaming activities increased during this period for most of the age groups (Table 2.19). However, spending declined in inflation adjusted terms over the period in the 15-24, the 35-44, and the 55-64 year age groups.

Figure 2.5: Average annual reported spending on gaming activities by respondents in inflation adjusted terms, by age group - 1990, 1995 and 2000

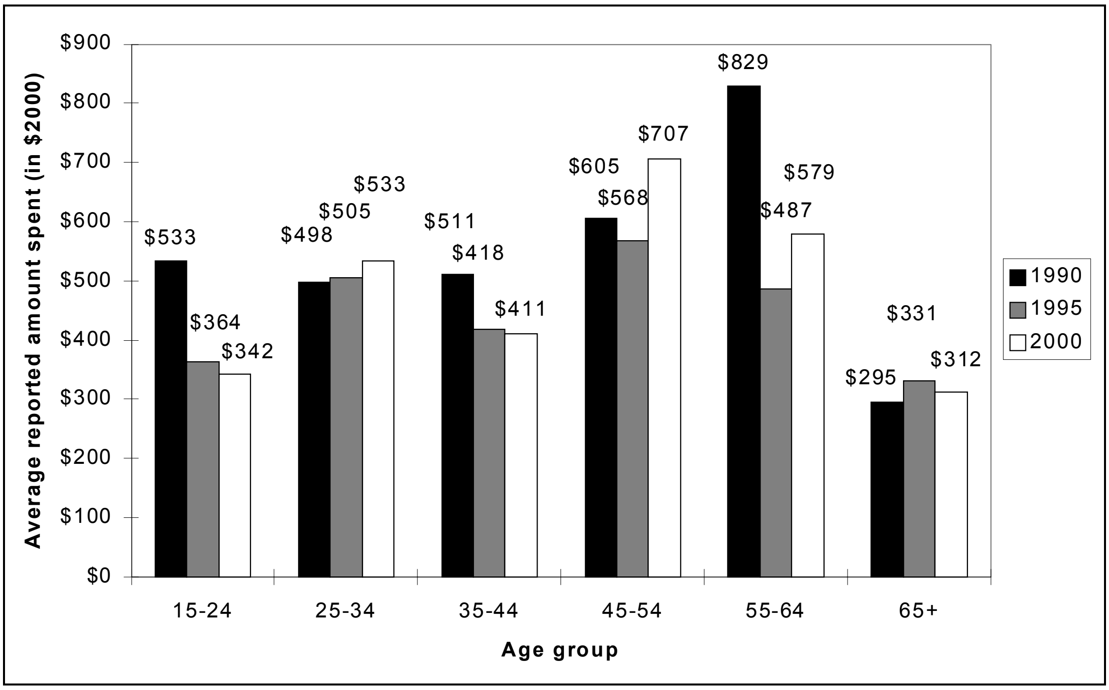


Table 2.18: Average annual reported spending by respondents on gaming activities, by age group - 1990, 1995 and 2000

	Actual/nominal dollar amounts			Amount in inflation adjusted terms in 2000 dollars		
	1990	**1995**	**2000**	**1990**	**1995**	**2000**
15-24	$448	$339	$342	$533	$364	$342
25-34	$418	$470	$533	$498	$505	$533
35-44	$429	$389	$411	$511	$418	$411
45-54	$508	$529	$707	$605	$568	$707
55-64	$696	$453	$579	$829	$487	$579
65+	$248	$308	$312	$295	$331	$312

	1990-1995 %	**1995-2000 %**	**1990-2000 %**	**1990-1995 %**	**1995-2000 %**	**1990-2000 %**
15-24	-24	1	-24	-32	-6	-36
25-34	12	13	28	1	6	7
35-44	-9	6	-4	-18	-2	-20
45-54	4	34	39	-6	24	17
55-64	-35	28	-17	-41	19	-30
65+	24	1	26	12	-6	6

Ethnicity

Pacific peoples reported spending the most on gaming activities in 2000 followed closely by Māori closely and then the General population (Table 2.19). However, Māori spending on gaming had decreased markedly since 1990. In inflation adjusted terms, the average reported spending by Māori appears to have halved while spending by the General population has decreased by 8%[14].

Table 2.19: Average annual reported spending by respondents on gaming activities, by ethnic group - 1990, 1995 and 2000

	Actual/nominal dollar amounts			Amount in inflation adjusted terms in 2000 dollars		
	1990	**1995**	**2000**	**1990**	**1995**	**2000**
Māori	$912	$686	$538	$1,086	$737	$538
Pacific peoples	N/A	N/A	$684	N/A	N/A	$684
General	$407	$376	$446	$485	$404	$446

	1990-1995 %	**1995-2000 %**	**1990-2000 %**	**1990-1995 %**	**1995-2000 %**	**1990-2000 %**
Māori	-25	-22	-41	-32	-27	-50
Pacific peoples	N/A	N/A	N/A	N/A	N/A	N/A
General	-8	19	10	-17	10	-8

[14] Pacific peoples and the General population are combined in the 1990 and 1995 survey; therefore these data are not strictly comparable with the 2000 results. Caution is also necessary because of low numbers of Māori and Pacific peoples

Household Income

Respondents in higher income households typically reported spending more on gaming than respondents from lower income households in 2000. However, reported spending on gaming activities between 1990 and 2000 declined or only marginally increased in inflation adjusted terms (Figure 2.6 and Table 2.20).

Figure 2.6: Average annual reported spending on gaming activities by respondents in inflation adjusted terms, by household income - 1990, 1995 and 2000

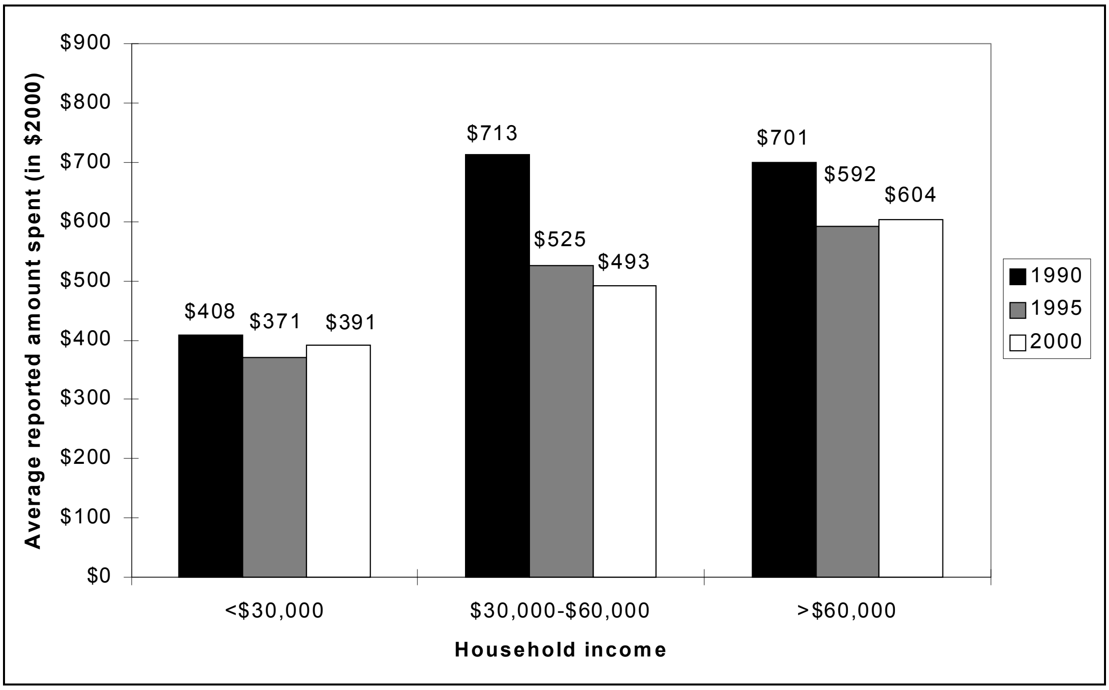


Table 2.20: Average annual reported spending by respondents on gaming activities, by household income - 1990, 1995 and 2000

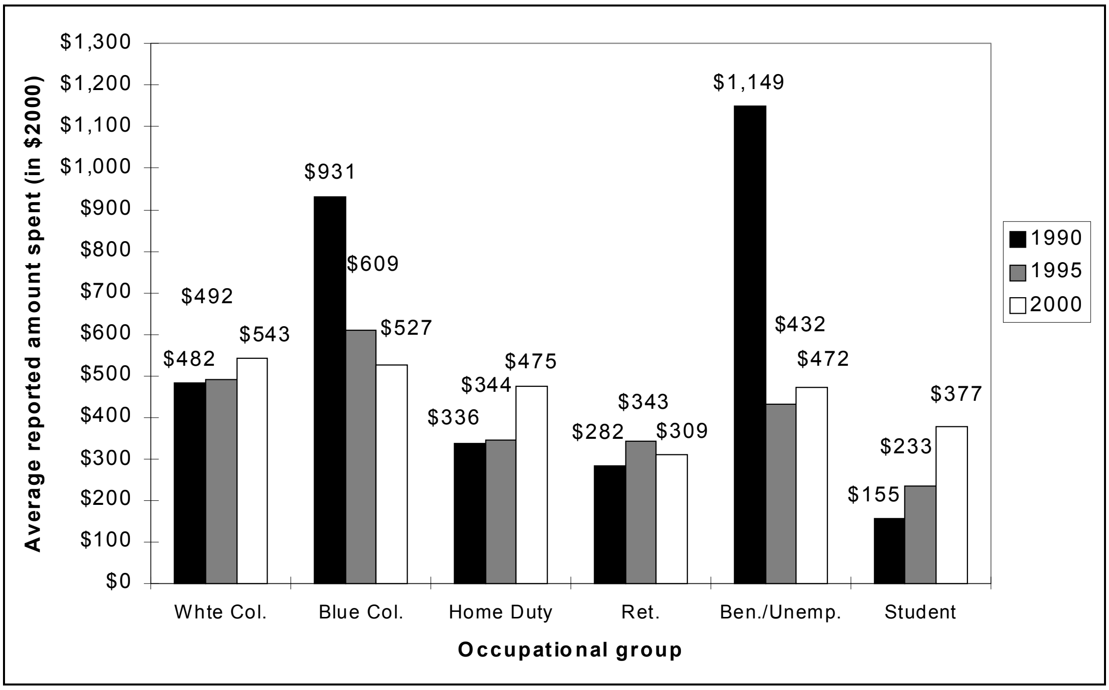
	Actual/nominal dollar amounts			Amount in inflation adjusted terms in 2000 dollars		
	1990	**1995**	**2000**	**1990**	**1995**	**2000**
<$30,000	$343	$345	$391	$408	$371	$391
$30,000-$60,000	$599	$489	$493	$713	$525	$493
>$60,000	$589	$551	$604	$701	$592	$604

	1990-1995 %	**1995-2000 %**	**1990-2000 %**	**1990-1995 %**	**1995-2000 %**	**1990-2000 %**
<$30,000	<1	13	14	-9	5	-4
$30,000-$60,000	-18	1	-18	-26	-6	-31
>$60,000	-6	10	3	-16	2	-14

Occupation

White-collar workers reported spending the most annually on gaming activities in 2000 (Figure 2.7). Blue-collar workers reported spending the second highest amount, despite a continued decline in their reported spending since 1990.

Figure 2.7: Average annual reported spending on gaming activities by respondents in inflation adjusted terms, by occupational group - 1990, 1995 and 2000



There have been large decreases in reported spending on gaming activities between 1990 and 2000 (Table 2.21). Beneficiaries reported spending the most annually on gaming activities in 1990, but their spending since then has declined by almost 60%. The average annual reported spending by blue-collar workers has also decreased, by 43% during this period. Conversely the average annual reported spending by students has more than doubled during his period, though their spending is still relatively low.

Table 2.21: Average annual reported spending by respondents on gaming activities, by occupational group - 1990, 1995 and 2000

	Actual/nominal dollar amounts			Amount in inflation adjusted terms in 2000 dollars		
	1990	**1995**	**2000**	**1990**	**1995**	**2000**
White Col.	$405	$458	$543	$482	$492	$543
Blue Col.	$782	$567	$527	$931	$609	$527
Home Duty	$282	$320	$475	$336	$344	$475
Retired	$237	$319	$309	$282	$343	$309
Ben./Unemp.	$965	$402	$472	$1,149	$432	$472
Student	$130	$217	$377	$155	$233	$377

	1990-1995 %	**1995-2000 %**	**1990-2000 %**	**1990-1995 %**	**1995-2000 %**	**1990-2000 %**
White Col.	13	19	34	2	10	13
Blue Col.	-27	-7	-33	-35	-13	-43
Home Duty	13	48	68	2	38	41
Retired	35	-3	30	22	-10	10
Ben./Unemp.	-58	17	-51	-62	9	-59
Student	67	74	190	50	62	143

The increases in the average annual reported spending of students since 1990 is in contrast to the trend in the 15-24 year age group, which suggests that the average of student gaming spending is being influenced by adult tertiary students.

Highest Qualification

The lower respondents' educational qualification the more, on average, they reported spending on gaming activities annually in 2000 (Figure 2.8). The reported spending on gaming activities by people whose highest educational qualification was university entrance/sixth form certificate/bursary increased dramatically between 1995 and 2000 (87% in inflation adjusted terms - Table 2.22). The "other tertiary" and university graduates groups had more modest increases during the 1990-2000 period, while other groups have had declines in their reported average annual spending.

Figure 2.8: Average annual reported spending on gaming activities by <u>respondents</u> in <u>inflation adjusted terms</u>, by educational qualification - 1990, 1995 and 2000

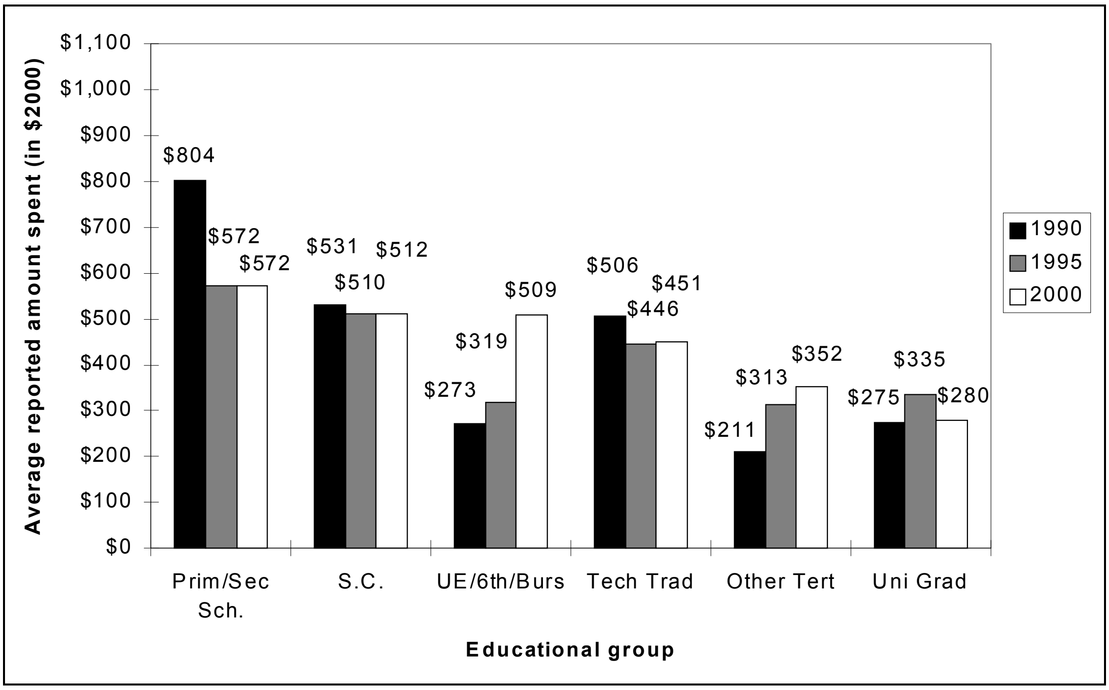


Table 2.22: Average annual reported spending by respondents on gaming activities, by educational qualification - 1990, 1995 and 2000

	Actual/nominal dollar amounts			Amount in inflation adjusted terms in 2000 dollars		
	1990	**1995**	**2000**	**1990**	**1995**	**2000**
Prim/Sec Sch.	$675	$532	$572	$804	$572	$572
S.C.	$446	$475	$512	$531	$510	$512
UE/6th/Burs	$229	$297	$509	$273	$319	$509
Tech Trad	$425	$415	$451	$506	$446	$451
Other Tert	$177	$291	$352	$211	$313	$352
Uni Grad	$231	$312	$280	$275	$335	$280

	1990-1995 %	**1995-2000 %**	**1990-2000 %**	**1990-1995 %**	**1995-2000 %**	**1990-2000 %**
Prim/Sec Sch.	-21	8	-15	-29	0	-29
S.C.	7	8	15	-4	<1	-4
UE/6th/Burs	30	71	122	17	60	87
Tech Trad	-2	9	6	-12	1	-11
Other Tert	64	21	99	48	12	67
Uni Grad	35	-10	21	22	-16	2