

# People's Participation in and Attitudes to Gaming, 1985-2000

Final Results of the 2000 Survey

**by Ben Amey**  
**Research Services**  
**Te Tari Taiwhenua - Department of Internal Affairs**

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Thanks also must go to Andy Heinemann and his team at the National Research Bureau (NRB) for their work in the field.

## Foreword

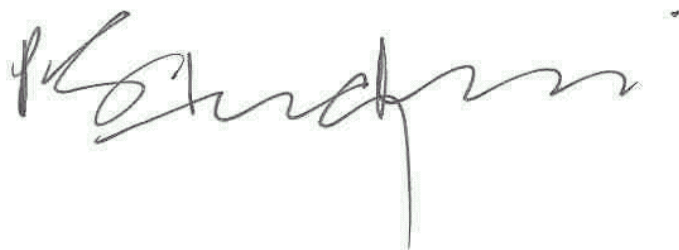
*People's Participation in and Attitudes towards Gaming, 1985-2000: Final results of the 2000 survey* is the fourth report in a survey series that was first undertaken in 1985, prior to the introduction of Lotto. The survey has been updated at five-yearly intervals since 1985 with surveys conducted in 1990, 1995 and now 2000.

This series has coincided with the introduction of several new gaming activities, such as casinos, sports-betting and New Zealand Lotteries Commission games like Instant Kiwi and TeleBingo. The report series has, in this time, charted the rise and in some cases the fall in participation in gaming activities in New Zealand.

The survey series also investigates public attitudes to gaming. This research looks at factors that people think should guide gaming legislation, desirability of gaming activities, where the profits from gaming activities go, and definition of worthy causes for the receipt of gaming profits. The series also looks at new forms of gaming, prior to their introduction or up-take in New Zealand. This year, the report looks at the prevalence of Internet-based gaming activity and the public attitudes to Internet-based gaming.

The 2000 survey involved face-to-face interviews with 1,500 New Zealanders around the country about their participation in, and attitudes towards gaming. I would like to thank the interview participants for their willingness to give up their valuable time to make this study possible. I would also like to thank Andy Heinemann and his team of National Research Bureau interviewers for their work. I would especially like to acknowledge the work of Margaret de Joux during her stewardship of Research Services in seeing the need for this survey and creating a consistent and extremely useful body of work.

This survey series sits neatly alongside the body of work conducted by Dr. Max Abbott et al with the New Zealand Gaming Survey. Together, this report series contributes greatly to the wealth of knowledge about gaming in New Zealand and adds to the international body of work. It is important for our policymakers to have this information help inform policy and allow evidence based decision-making. Most importantly, this is an on-going body of work that helps put a public face on policy development in an area that impacts on a great deal of New Zealanders.



Peter Hughes  
Secretary for Internal Affairs

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## **Executive Summary**

This report details the results of a survey of people's participation in and attitudes to gaming. A randomly selected sample of 1,500 people aged 15 years and over living in private household were interviewed face-to-face between June and July 2000. The questionnaire was based on previous surveys conducted by the Department of Internal Affairs in 1985, 1990 and 1995.

### **Participation and expenditure**

#### *Participation*

The majority of the sample (87%) had taken part in at least one gaming activity in the 12 months prior to being surveyed, compared to 90% in 1995 and 1990, and 85% in 1985.

The proportion of respondents who had not done any gaming activities has increased since 1995, despite an increase in the number of gaming activities available during this time. However, there has been an increase in the proportion of respondents who had done 7 or more gaming activities at least once in the past 12 months.

The only gaming activities to show increased participation levels between 1995 and 2000 were casinos and sports-betting.

The majority of respondents (75%) had played Lotto, although this has declined slightly since 1995. Buying raffle tickets was the only other gaming activity that the majority of respondents did in 2000 (67%). The next most common gaming activity was buying Instant Kiwi/scratch tickets (48%) – the first time in this survey series that participation levels for Instant Kiwi have dropped below 50% of respondents.

For the first time in this survey series there were fewer males than females playing at least one gaming activity. Female participants were more likely to play Lotto, Instant Kiwi or other scratchies and TeleBingo than male participants.

Respondents aged between 15-34 years were more likely to have played non-casino gaming machines and Instant Kiwi at least once in the past 12 months.

Māori respondents were more likely to have played Lotto, Instant Kiwi, non-casino gaming machines and TeleBingo at least once in the past 12 months compared to the rest of the population. Māori and Pacific peoples were more likely than respondents in the General population to have played Daily Keno, sports-betting and housie at least once in the past year.

Respondents from households with an annual income of \$30,000 or more were more likely to have played casino gaming machines, table games at a casino, placed bets on a horse or dog race and placed bets on sporting events at least once in the past year. By comparison, respondents from households with income of under \$30,000 were more likely to have played housie and TeleBingo.

Blue-collar workers were most likely to have participated in gaming activities, while students were the least likely. The unemployed were most likely to have played TeleBingo and

housie. Together with homemakers they were most likely to have played Daily Keno. Students were most likely to have played non-casino gaming machines at least once in the 12 months.

University graduates were less likely to have participated in a gaming activity in the past 12 months. However, those university graduates that had participated in a gaming activity were more likely to have played a casino gaming machine, and played a table game at a casino.

#### *Frequency of participation*

Except for Internet-based gaming, only Lotteries Commission run activities (Lotto, TeleBingo and Daily Keno) were played at least once a week or more frequently by more than a quarter of people who participated in them.

#### *Reasons for participation*

The predominant reason for involvement in all forms of gaming other than raffles and casinos was to win prizes or money. A sizeable proportion of participants attended casinos to win prizes/money, but this was the only activity that the majority of participants did not cite winning prizes/money as a reason for participation. Notably, participants often bet on horse and dog racing, sporting events, gaming machines, and housie for “entertainment” and “for excitement or as a challenge”.

#### *Expenditure*

The proportion of people who reported spending over \$1,000 on gaming activities annually increased slightly since 1990. However, there was an increase in the proportion of people who did not spend anything (10% of respondents in 1990 compared to 17% of respondents in 2000). The overall average (mean) amount reported spent on gaming decreased between 1990 and 2000 in inflation adjusted terms (\$531 in 1990 compared to \$470 in 2000).

Only 18% of respondents had played gaming machines at least once in 2000 compared to 28% of respondents in 1990. Despite this, the annual reported spending on gaming machines of all respondents increased between 1990 and 2000 in inflation adjusted terms (\$43 was reported spent on average in 1990 compared to \$98 reported spent on average in 2000 by all respondents).

#### *Beliefs about playing activities*

People who placed a bet on a sporting event were most likely to feel they had won money overall (29%). Housie players were the most likely to say they had won money or broken even overall (63%), followed by those who had placed a bet on horse and/or dog race (49%) and those who had placed a bet on a sporting event (45%).

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 overall.

The majority of participants said they 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 or a skill to improve their chances of winning, followed by Lotto and non-casino gaming machines.

## **Public Attitudes to Gaming**

### *Gaming legislation*

The four most important factors that people thought should guide government when reviewing gaming regulations were:

- Limiting the harm gaming can cause people
- Ensuring profits fund worthy causes
- Preventing criminal activity
- Ensuring fairness for players

People who had done few or no gaming activities were more likely to favour the more “interventionist” options. Conversely, the more gaming activities a person had done the more likely they were to favour the more “liberal” or “free-market” options.

### *Worthy causes*

The majority of respondents favour gaming activities being run to fund worthy causes. Two other popular reasons are for gaming activities to be run as profit sharing between a promoter and a worthy cause, and for sales promotions.

Organisations that most people feel are worthy causes to receive gaming profits, in order of consensus, were:

- Welfare organisations
- Rescue organisations
- Health research organisations
- Educational groups
- Amateur sports
- Community/recreational groups
- Amateur arts and culture groups
- Science research

### *Who should distribute gaming profits?*

When asked what group or groups should distribute the profits to worthy causes, almost half felt community representatives, followed by local councils, should do this.

### *Where do the profits go?*

There was a reasonably high level of uncertainty about where gaming profits go. Respondents considered Lotto to give the highest proportion of its profits to worthy causes, followed by TeleBingo – both activities run by the Lotteries Commission. The activities that most feel do not fund worthy causes are horse or dog racing, sports-betting, and Internet-betting.

### *Public awareness of Funding Agencies*

The vast majority of New Zealanders have heard of the Hillary Commission and the Lottery Grants Board, while comparatively few have heard of Creative New Zealand.

### *How many gaming operators should there be?*

The majority of people support the number of national lottery agencies, sports-betting organisations, and casinos currently available in New Zealand. However, 28% do not want any casinos available in New Zealand.

### *Age restrictions*

The majority of people feel there should be a common age restriction for all gaming activities and that this should be 18 years of age. However, a large minority of people (39%) prefer the current situation of different age limits, tailored to suit each particular gaming activity. This group preferred a higher age limit for casinos than other activities (preferring a median age limit of 20.1 years) and comparatively lower age limits for Lotteries Commission-run games such as Lotto (most of which currently do not have any age limits).

### *Desirability of gaming activities*

Over half of respondents feel that 0900 telephone games, casinos, and Internet-based gaming are socially undesirable. An increasing proportion of people are saying that gaming machines and betting on horse and/or dog races are also socially undesirable activities. Opposition to horse and/or dog racing in particular is higher among younger people.

### *Advertising of gaming activities*

Almost all New Zealanders (89%) could remember seeing or hearing some form of gaming advertising in the 12 months prior to being surveyed. Of those who had seen gaming advertising, most could recall advertisements for Lotteries Commission run games, particularly those for Lotto.

### *Gambling problems*

Since 1985, there has been a steady increase in the proportion of the population who believe very strongly that there is a problem in New Zealand with people being heavily involved in gambling. Most people believe very strongly that there should be special help and support available to those who want to give up gambling. The majority of people also feel that the gaming industry itself has a responsibility to meet some or all of the costs of helping problem gamblers.

### *Would warnings about problem gambling make any difference?*

Most of the people who were asked whether warnings about problem gambling on or with gaming activities would affect how much they played felt such warnings would make no difference to how they currently played. However, the survey does indicate that groups more vulnerable to problem gambling would be somewhat more likely to take notice of such warnings.

### *Internet-based gaming*

Less than 2% of New Zealanders had placed a bet via the Internet in the 12 months prior to being surveyed. However, most had only played trial games and therefore had not spent any money.

### *Interest in future participation in Internet-based gaming*

Only 8% of New Zealanders said they would be interested in placing bets on the Internet in the future (this includes those who had already placed a bet via the Internet). Future Internet-based activities of most interest were sports-betting, lotteries/sweepstakes, and casinos.



Of those interested in Internet-based activities, most said they would look to increase the amount currently spent on gaming to cover future spending. An exception was for people interested in buying lottery or sweepstakes tickets via the Internet. They indicated they would look to fund their purchasing of lottery or sweepstakes tickets from money they currently spend on (New Zealand based) gaming activities.



## Section 1: Introduction

In June through to September 2000 the Department of Internal Affairs conducted a survey of people's participation in and attitudes to gaming. The survey was based on similar surveys conducted by the Department in 1985, 1990 and 1995.

The market research company National Research Bureau (NRB) was commissioned to do the fieldwork and data processing. The questionnaire was developed by the Internal Affairs Research Services staff in liaison with staff in Gaming, Censorship and Regulation (GCR) Gaming Policy and other relevant branches of the Department, as well as in association with other interested government agencies.

The questionnaire was based closely on questionnaires from previous surveys carried out by the Department in 1985 (Wither, 1987), 1990 (Christoffel, 1992) and 1995 (Reid and Searle, 1996). The survey was conducted to continue the quinquennial monitoring of public attitudes towards gaming, begun by the Department in 1985. The specific aims of the 2000 survey were to obtain information on:

- Current participation in gaming activities
- Public preferences for the regulation of gaming activities
- Public attitudes towards aspects of the current gaming legislation
- Public attitudes towards gaming
- Likely impact of Internet-based gaming
- Public awareness of expenditure on gaming activities
- Aspects that promote and/or inhibit/deter participation in new and existing gaming activities
- Changes in gaming behaviour and attitudes to gaming over time

The period between the 1995 and 2000 surveys has seen the introduction of TeleBingo, the establishment of three additional casinos and the applications being submitted for three more. Also during this period sports-betting has been introduced to the marketplace. Therefore, this survey was able to observe the change in casino participation since their introduction to New Zealand just prior to the 1995 survey (Christchurch casino in 1994) and their impact on gaming participation since 1995 (Sky City casino in Auckland opened in 1996). Although not necessarily new, Internet-based gaming activities are activities that are being looked at for the first time in this survey. This survey looks at the prevalence of, and public attitudes towards this form of gaming.

This report only briefly describes the broad level trends and main results, relying on the reader to observe results of interest from the tables and figures provided. Only sizeable differences are mentioned in the cross-tabulated results (e.g. sizeable differences by sex, age, ethnicity). Sub-sections of cross-tabulations may not appear if there are no significant trends or discernible differences.

## 1.1 Methodology

The questionnaire used in this survey was based largely on the questionnaire used in previous surveys. New questions were developed in consultation with the relevant interested areas within and outside of the Department. The survey was a face-to-face survey with respondents drawn from a randomly selected sample of 1,500 people aged 15 years and over in private households. The response rate was 54%<sup>1</sup>. This survey has a larger population than the two previous surveys (1995 and 1990 - 1,200) and is equal to the size initial survey, conducted in 1985.

The fieldwork was carried out between June and July 2000. Showcards were used for most of the questions in case the topic was considered sensitive by interviewees (e.g. personal income) and to better enable respondents to answer complex questions. A copy of the questionnaire is included in Appendix B.

The term “gaming” rather than “gambling” was used throughout most of the questionnaire and this report to avoid confusion, as some people may not consider some of the activities surveyed to be gambling, such as buying Lotto tickets. This practice has been continued from previous surveys where the terminology has been shown to have worked in the desired way. A brief explanation of “gaming” was used by interviewers in their introduction to potential interviewees (see Appendix B).

The questionnaire contains a section on people’s attitudes to different aspects of gaming and its regulation. In addition, respondents were also asked about their knowledge and access to the Internet and their attitudes and participation in Internet-based gaming, their attitudes towards the legalisation of new gaming activities and attitudes towards current age restrictions, and recommendations for future legislation.

Results from the survey were re-weighted by age, sex and household size. These weighted results were cross-tabulated by respondent and household characteristics. These were sex, age, ethnicity, geographical location, personal and household income, occupation and highest educational attainment level. In addition, results were also cross-tabulated by the number of gaming activities respondents had participated in<sup>2</sup> and the amount spent on gaming activities.

Care should be taken when interpreting percentages that are not based on the total sample, for example when examining participants in a particular gaming activity (e.g. housie n=53). In some of these cases, the numbers of respondents are less than 100. The sampling error for a sample of 1,500 is 2.5% at the 95% confidence level. In theory, with a sample of this size, one can say with 95% certainty that the results have a statistical precision of plus or minus 2.5% percentage points of what they would be if the entire adult population had been surveyed with complete accuracy.

Unfortunately, there are several other possible sources of error in all surveys that are probably more serious than theoretical calculations of sampling error. They include refusals to be interviewed (non-response), question wording and question order, interviewer bias, weighting by demographic control data and data entry errors. It is difficult or impossible to quantify the errors that may result from these factors.

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<sup>1</sup> Further information on the response rate to the survey can be found in Appendix A

<sup>2</sup> All references to the number of gaming activities refer to gaming activities a person had done in the 12 months prior to their being surveyed (June - July 2000)

## 1.2 Analysis

### *Age*

For the purpose of analysis the age groups used in this report are in ten-year increments beginning with the 15 to 24 years age group, up to the top bracket of people aged 65 years and over.

### *Ethnicity*

The ethnic groups used in the analysis for this report comprise people in the following ethnic groups: Māori; Pacific peoples; and the General population (includes all those who do not belong to Māori or Pacific peoples ethnic groups). The questionnaire did allow respondents to choose more ethnic groups, but due to the small numbers involved in some groups respondents were grouped into three groups. These ethnic groups represent sole counts (i.e. each person was counted only once regardless of how many ethnic groups they indicated they belonged to), as defined by the official guidelines as defined by Statistics New Zealand (SNZ). For reference material on this topic please refer to the Standard Classification of Ethnicity, 1996 on the SNZ web site:

(<http://www.stats.govt.nz/domino/external/web/carsweb.nsf/Classifications?openview>)

### *Area*

The results were also divided into three geographical groupings: South Island, Lower North Island and Upper North Island. The lower North Island refers to the areas of Wellington, Taranaki and Hawke's Bay as defined by SNZ, while the upper North Island refers to those living in the remaining areas of the North Island.

### *Household income*

All incomes, unless otherwise stated, refer to annual, pre-tax, household income in New Zealand dollars in year 2000 values. Household income was divided into three income brackets of households with income: under \$30,000; \$30,000 to \$60,000; and, over \$60,000.

### *Occupation*

People's occupations were categorised as blue-collar, white-collar, retired, home duties, unemployed/beneficiary, homemaker, and student.

### *Highest qualification*

Respondents were categorised on the basis of their highest educational qualification. The categories used were:

- No formal qualifications
- School Certificate
- UE/Matric/Sixth Form Certificate/Bursary
- Technical or trade qualifications
- University qualifications
- Other tertiary qualifications (e.g. teaching, nursing).

### *Number of gaming activities*

This refers to the number of gaming activities a person had done in the 12 months prior to being surveyed. The results have been sorted into four categories: none, 1-3, 4-6, 7-9, and 10 or more.

### *Reported expenditure*

The gaming expenditure data are based on the average annual reported spending for each gaming activity. This is calculated by cross-tabulating respondents' estimates of how often they participated in a gaming activity with their estimated average expenditure in an average or typical session of that particular activity. Therefore these data are *estimates* and should be treated extremely cautiously. However, they do provide a basis for comparison between the sub-populations (e.g. ethnic groups, age, sex) and also show trends over time.

The dollar amounts for the estimated annual average expenditure where applicable from the 1985, 1990, and 1995 surveys 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". The actual amounts of money in the year mentioned are also featured in the report and are referred to as "face-value" or alternately as "nominal value".

### *Time series*

The Department of Internal Affairs has conducted a survey of public attitudes and participation in gaming quinquennially since 1985. Much of the current survey questionnaire contains questions comparable to the previous questionnaires. Wherever possible this information is presented here, although this is done mainly for broad-level results.

## Section 2: Gaming Participation Summary Information

Data presented in this section include information on both participants and respondents<sup>3</sup>. 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<sup>4</sup>, 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.

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<sup>3</sup> Respondents refers to all 1,500 people who answered the survey whereas participants refers to the number of people who played that activity

<sup>4</sup> 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 <sup>a</sup> %	1995 %	1998 <sup>b</sup> %	1999 <sup>c</sup> %	2000 %
Bought a Lotto ticket	3 <sup>d</sup>	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 <sup>e</sup>	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 <sup>f</sup>	8	5	8
Bought a Daily Keno ticket	N/A	N/A	N/A	11 <sup>g</sup>	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 <sup>h</sup>
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

<sup>a</sup> Records activity only in last 6 months, from 1991 Abbott survey

<sup>b</sup> Records gaming activity in the last 12 months, from 1998 Values Study

<sup>c</sup> Records activity only in last 6 months, from 1999 Abbott survey

<sup>d</sup> Lotto was unavailable in New Zealand in 1985, so these tickets would have been bought overseas

<sup>e</sup> "Casino" includes all respondents who played Table games and/or gaming machines at a casino

<sup>f</sup> Sports-betting was not available in New Zealand, this was asked about bets placed with an Australian betting agency

<sup>g</sup> Daily Keno had been operating for about 3 months at the time of this survey

<sup>h</sup> 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<sup>5</sup>). 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).

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<sup>5</sup> 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<sup>6</sup>*

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%).

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<sup>6</sup> 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

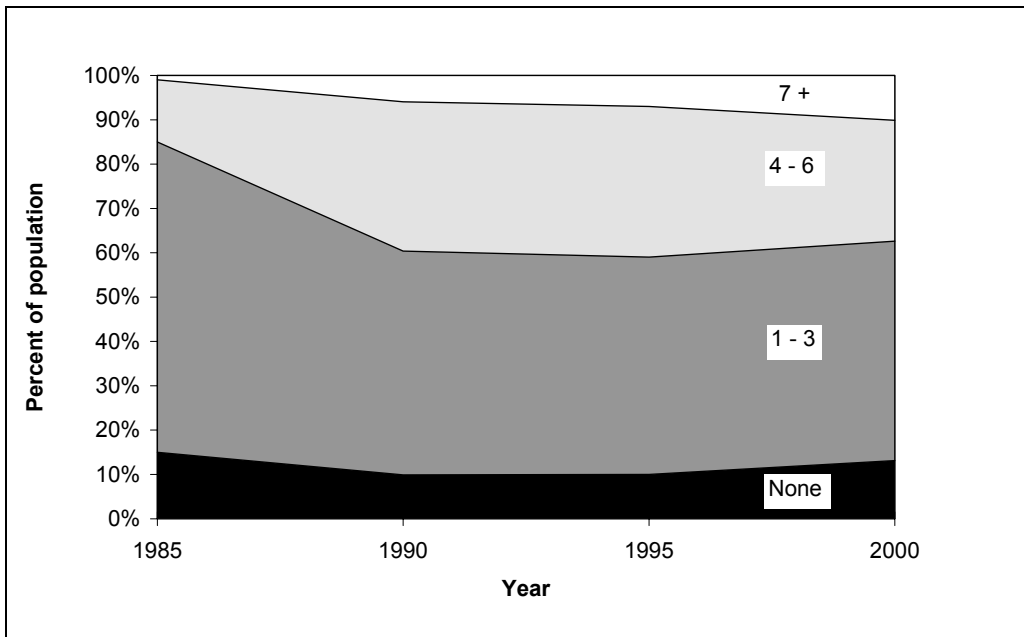
For the remainder of the report, the top category has been divided into two groups, those who have done between seven to nine gaming activities and those who have done ten or more.

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

<b>Response option</b>	<b>%</b>
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 respondents over a 12 month period - 1985, 1990, 1995 and 2000**



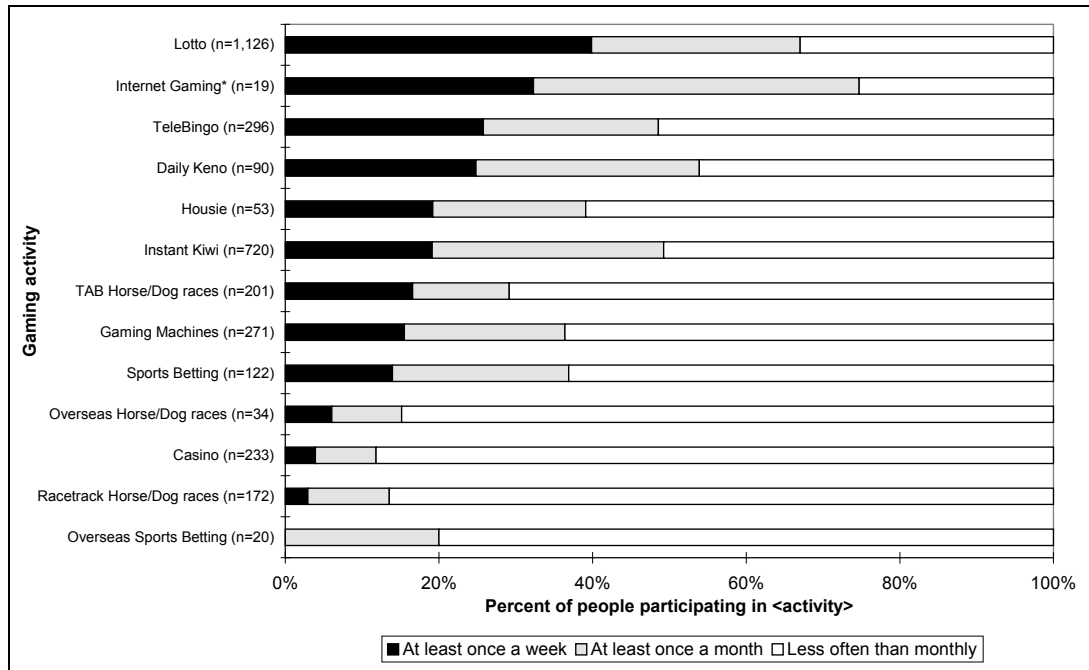
**Table 2.4: Number of gaming activities participated in by respondents over a 12 month period - 1985, 1990, 1995 and 2000**

Number of activities	1985	1990	1995	2000
	(n=1,500) %	(n=1,500) %	(n=1,500) %	(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<sup>7</sup> gaming on a monthly<sup>8</sup> 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.

<sup>7</sup> 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

<sup>8</sup> "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 <sup>a</sup>			Less often than monthly			Not played activity at all		
	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
Instant Kiwi	N/A	14	10	9	N/A	26	21	14	N/A	23	27	24
TeleBingo	N/A	N/A	N/A	5	N/A	N/A	N/A	4	N/A	N/A	N/A	10
Gaming machines (not in a casino)	N/A	5	3	3	N/A	8	6	4	N/A	16	15	11
Casino	N/A	N/A	<1	1	N/A	N/A	<1	1	N/A	N/A	5	14
TAB horse/dog races <sup>b</sup>	5	4	3	2	4	3	4	2	10	13	12	9
Sports-betting <sup>c</sup>	N/A	N/A	N/A	1	N/A	N/A	N/A	2	N/A	N/A	N/A	5
Daily Keno	N/A	N/A	2	1	N/A	N/A	2	2	N/A	N/A	6	3
Housie	2	2	2	1	1	1	1	1	4	2	3	2

<sup>a</sup> "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

<sup>b</sup> Excludes bets placed on-course/track-side

<sup>c</sup> 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/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 %	2000 %	1990 %	2000 %	1995 %	2000 %	1985 %	1990 %	1995 %	2000 %	1990 %	2000 %						
To win prizes/ money	83	81	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	12	10	43	61	43	38	28	33	24	36	50	33	30
To support worthy causes	8	7	9	3	2	2	2	N/A	1	1	<1	19	22	19	15	4	4	3
Out of curiosity	9	4	4	18	9	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	1	-	N/A	4	3	4	9	4	6	4	1	2	3
As a gift for another person	13	15	21	8	12	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	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	0	-	3 <sup>a</sup>	14	10	10	45	34	16	16	4	2	8
As entertainment	N/A	13	12	N/A	14	7	15	N/A	N/A	40	40	N/A	N/A	29	37	N/A	48	48
Others	2	1	<1	3	1	0	-	5	4	1	4	5	2	3	-	7	2	2
Don't know	N/A	N/A	<1	N/A	N/A	N/A	-	N/A	N/A	N/A	-	N/A	N/A	N/A	-	N/A	N/A	-

<sup>a</sup> 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  
<sup>b</sup> "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 respondents. 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 respondents have not 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 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**

<b>Response option</b>	<b>Played cards for money (n=1,423) %</b>	<b>Played dice games (n=1,471) %</b>	<b>Gone to a casino evening (n=1,346) %</b>	<b>Made bets with friends (n=1,145) %</b>	<b>Taken part in telephone games (n=1,453) %</b>	<b>Bought any raffle or lottery tickets* (n=473) %</b>
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 %	1990 %	1995 %	2000 %	
Not interested	56	43	51	57	57	67	58	71	63	69	67	69	71	75	72	72	64	62	68	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	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	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	6	6	6
Too expensive	10	10	8	8	7	5	6	5	8	7	5	6	4	4	2	4	6	4	7	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	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	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	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	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<sup>9</sup>.

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).

<sup>9</sup> 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<sup>a</sup>**

	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 <sup>b</sup> (n=271)	8	92	1
Gaming machines <sup>c</sup> (n=387)	6	93	1
Instant Kiwi (n=720)	2	97	1
Casino gaming machines <sup>d</sup> (n=116)	2	97	1
TeleBingo (n=296)	<1	99	1
Housie (n=53)	0	100	<1

<sup>a</sup> This question was not asked of sports-betting and horse and/or dog racing participants

<sup>b</sup> Gaming machine participants were only asked this question once. If they had also played gaming machines in a casino they skipped this particular question

<sup>c</sup> Includes participants who played gaming machines at a casino and participants who had played a gaming machine outside of a casino

<sup>d</sup> 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<sup>10</sup> (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.

<sup>10</sup> 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 <sup>a</sup>**

	<b>1990</b> (n=1,200) %	<b>1995</b> (n=1,200) %	<b>2000</b> (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

<sup>a</sup> 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<sup>11</sup> and an adjusted amount in 2000 dollar amounts or inflation adjusted terms<sup>12</sup>. 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<sup>13</sup>).

<sup>11</sup> Refers to the actual amount of money in the year mentioned otherwise referred to as the “face-value” or alternately as “nominal value”

<sup>12</sup> 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”

<sup>13</sup> 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**

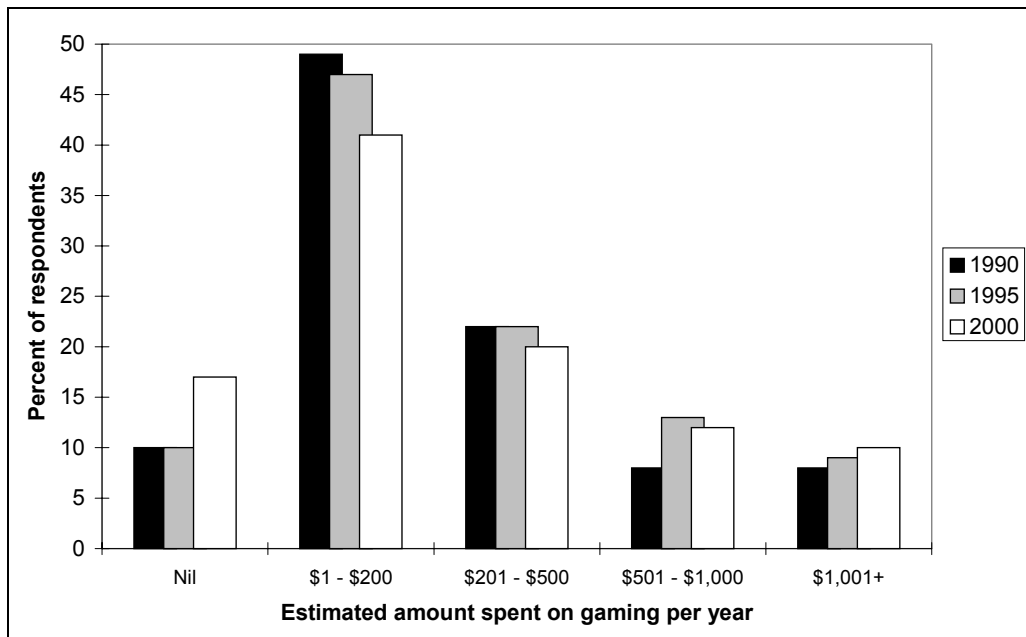
Year	Average amount spent	Average amount spent (in 2000 \$'s)
1990 (n=1,200)	\$446	\$531
1995 (n=1,200)	\$413	\$444
2000 (n=1,500)	\$470	\$470

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**

<b>Response option</b>	<b>Average day</b>	<b>Average week</b>	<b>Average session</b>
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<sup>a</sup>**

	<b>Average annual amount reported spent by <u>participants</u></b>	<b>Average annual amount reported spent by all <u>respondents</u></b>
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

<sup>a</sup> 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**

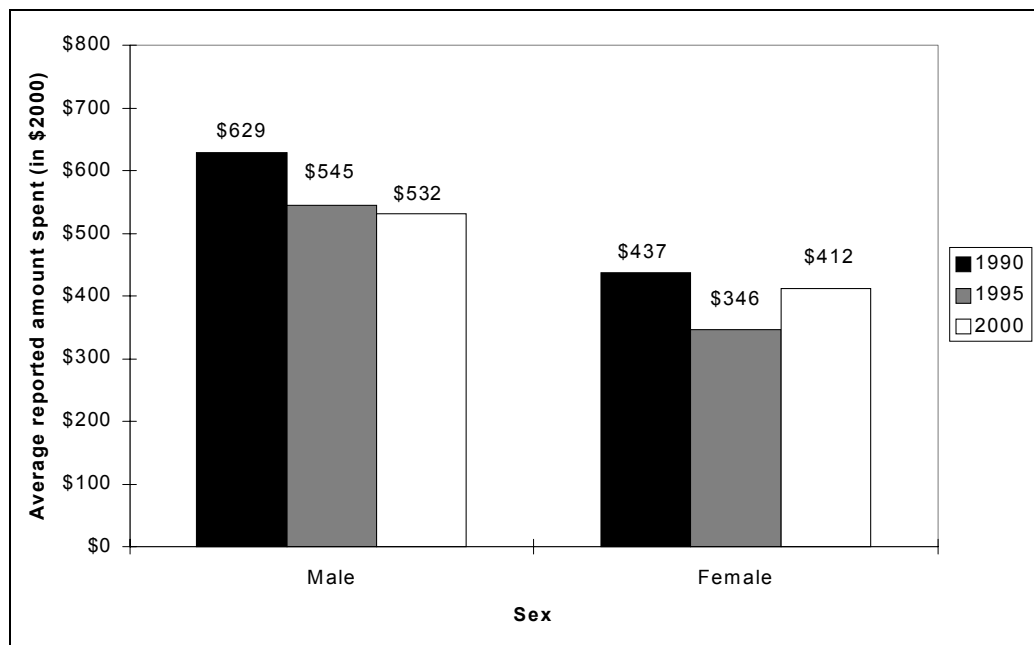


Table 2.17 shows the average amount male and female respondents reported spending on gaming activities in a 12 month period. The left-hand side of the Table shows the nominal dollar amounts reported for each of the years surveyed. The right-hand side of the Table displays the same information in inflation 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.

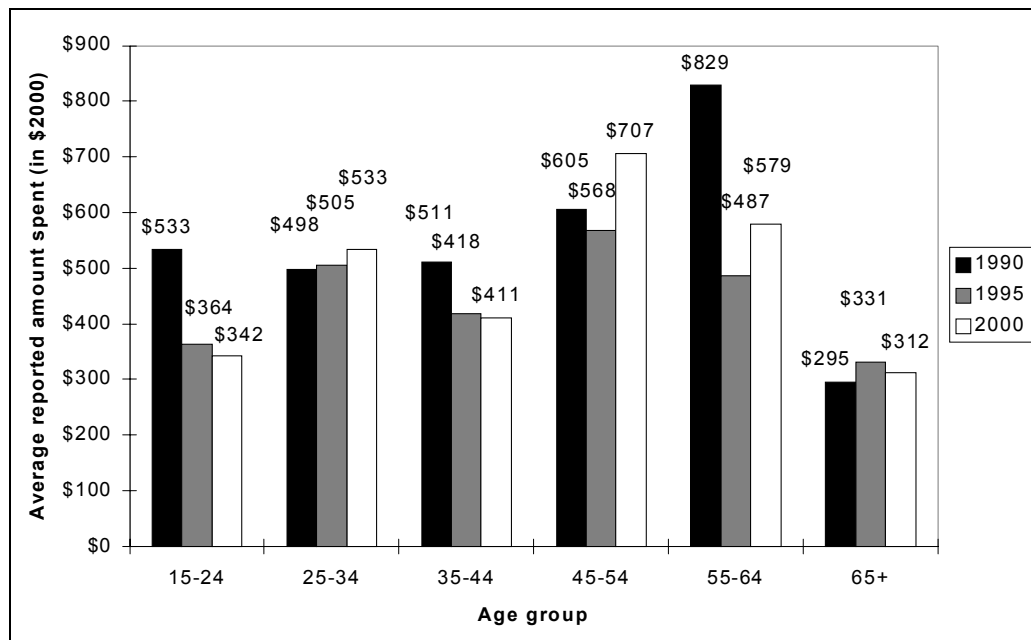
**Table 2.17: Average annual reported spending by respondents on gaming activities, by sex - 1990, 1995 and 2000**

	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
	<b>1990-1995</b>	<b>1995-2000</b>	<b>1990-2000</b>	<b>1990-1995</b>	<b>1995-2000</b>	<b>1990-2000</b>
	%	%	%	%	%	%
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 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%<sup>14</sup>.

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

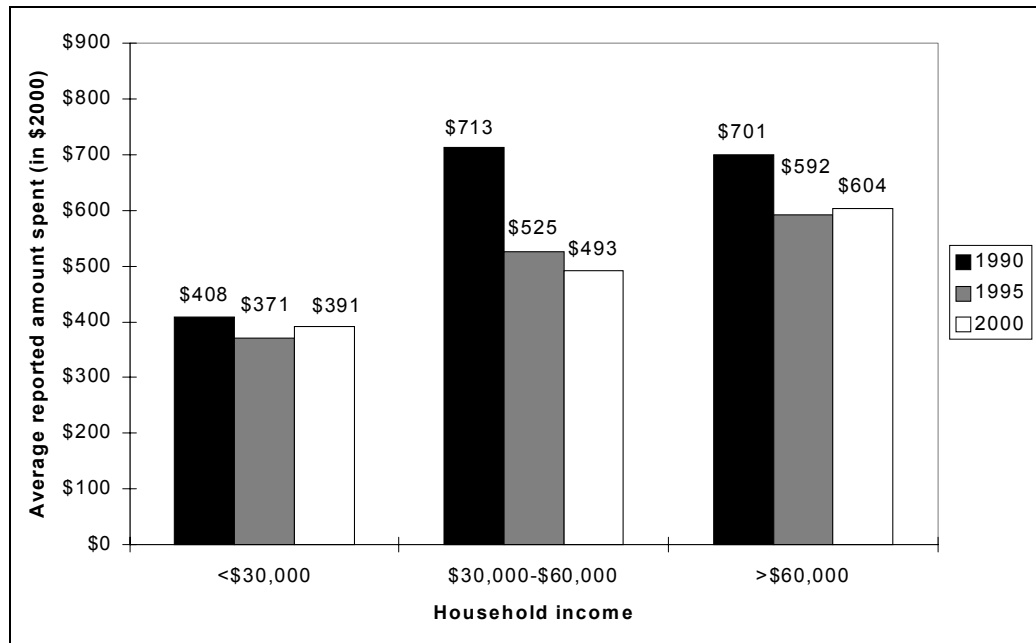
	Actual/nominal dollar amounts			Amount in inflation adjusted terms in 2000 dollars		
	1990	1995	2000	1990	1995	2000
Māori	\$912	\$686	\$538	\$1,086	\$737	\$538
Pacific peoples	N/A	N/A	\$684	N/A	N/A	\$684
General	\$407	\$376	\$446	\$485	\$404	\$446
	<b>1990-1995</b>	<b>1995-2000</b>	<b>1990-2000</b>	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

<sup>14</sup> 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

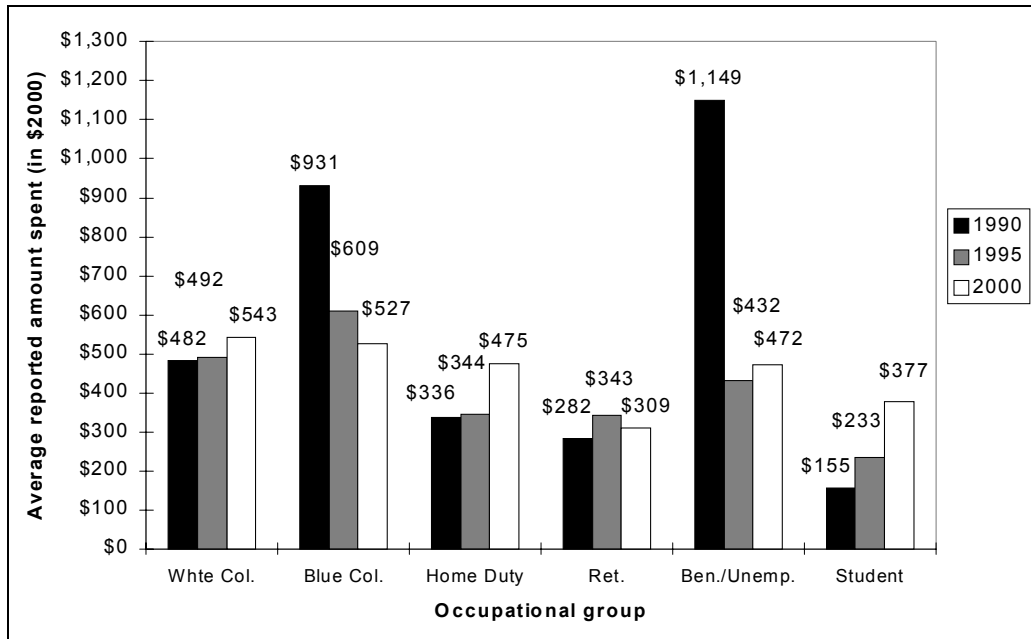
  

	1990-1995	1995-2000	1990-2000	1990-1995	1995-2000	1990-2000
	%	%	%	%	%	%
<\$30,000	<1	13	14	-9	5	-4
\$30,000-\$60,000	-18	1	-18	-26	-6	-31
>\$60,000	-6	10	3	-16	2	-14

*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**

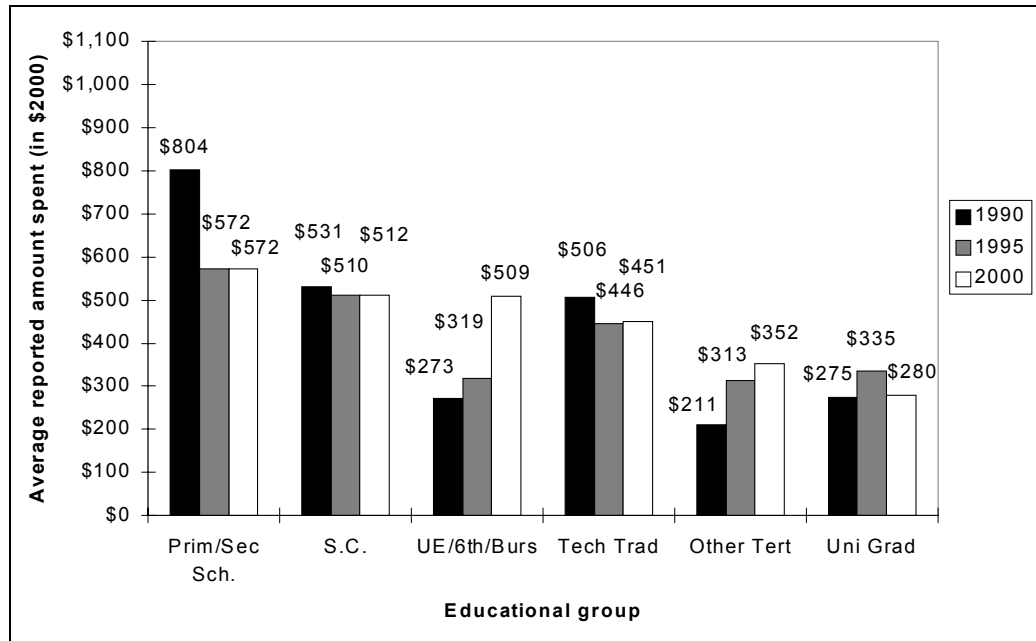
	Actual/nominal dollar amounts			Amount in inflation adjusted terms in 2000 dollars		
	1990	1995	2000	1990	1995	2000
White Col.	\$405	\$458	\$543	\$482	\$492	\$543
Blue Col.	\$782	\$567	\$527	\$931	\$609	\$527
Home Duty	\$282	\$320	\$475	\$336	\$344	\$475
Retired	\$237	\$319	\$309	\$282	\$343	\$309
Ben./Unemp.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



## Section 3: Individual Activities

This section details the results relating to participation, reported expenditure, and reasons for taking part, for the nine gaming activities that are subject to government regulation. The four Lotteries Commission games (Lotto, Instant Kiwi, TeleBingo, and Daily Keno) are discussed first, followed by gaming machines, betting on horse and dog races, housie, betting at casinos and betting on a sporting event.

Where relevant, comparisons are made with the previous Department of Internal Affairs surveys (1995, 1990 and 1985). Both participation and expenditure data are broken down by the following personal characteristics: sex, ethnicity, age, household income, occupation, education level, number of gaming activities participated in and amount reported spent on gaming.

Participation data covers rates of participation over the last 12 months and frequency of participation. The results presented in this section are based on both:

- Respondents (1,500 respondents for the 2000 and 1985 surveys and 1,200 respondents for the 1990 and 1995 surveys)
- Participants in each activity (number varies depending on the activity for example: Lotto participants = 1,126 and housie participants = 53)

Unless otherwise stated, “frequent participation” in a gaming activity means taking part once or more per week and “infrequently” refers to people who play less often than monthly.

### 3.1 Lotto

Lotto was introduced to New Zealand on 1 August 1987. The game involves participants trying to predict four or more of seven numbers, which are randomly drawn from 40 balls (numbered 1 to 40). Participants select six numbers per “board”. Each board contains numbers in the range of 1 to 40 and each ticket consists of 12 “boards”. Each board costs 50 cents to play and the minimum entry per ticket is four boards (\$2).

Lotto Strike, an addition to Lotto, was introduced to New Zealand on 3 April 1993<sup>15</sup>. Lotto Strike is a variation on the Lotto format, with participants attempting to select the first four numbers in the order in which they are drawn for the main Lotto draw. Each Lotto Strike board costs \$1. Prizes are awarded for getting any one or more of the numbers in the order in which they are drawn.

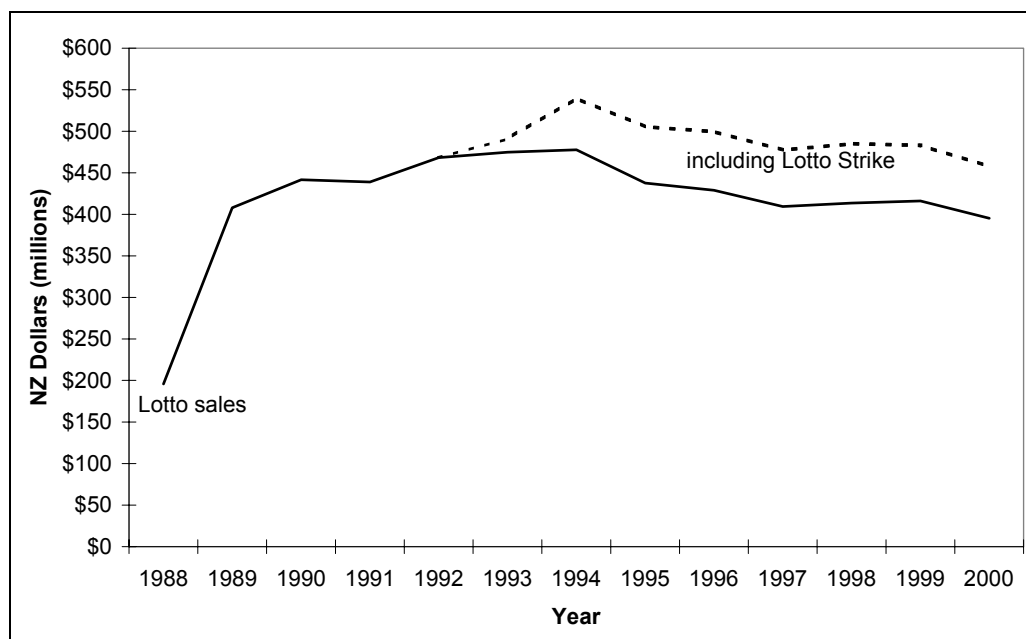
Table 3.1 and Figure 3.1 show the sales for Lotto and Lotto Strike since their introduction to New Zealand. Sales of Lotto tickets continually increased since its introduction until they reached a peak in 1993/1994. Since then sales have declined, almost continuously, at least in inflation adjusted terms<sup>16</sup>.

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<sup>15</sup> Powerball was introduced in early 2001, after the survey was conducted

<sup>16</sup> 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”

**Figure 3.1: Annual Lotto sales in inflation adjusted terms - 1988-2000**



Source: New Zealand Lotteries Commission annual reports

**Table 3.1: Annual Lotto sales - 1988-2000**

Year	Actual/nominal <sup>17</sup> dollar amounts (\$millions)			Amount in inflation adjusted terms/ in 2000 dollars (\$millions)		
	Lotto	Lotto Strike	Lotto sales (incl. Lotto Strike)	Lotto	Lotto Strike	Lotto sales (incl. Lotto Strike)
1988 <sup>a</sup>	\$147		\$147	\$196		\$196
1989	\$323		\$323	\$408		\$408
1990	\$371		\$371	\$442		\$442
1991	\$378		\$378	\$439		\$439
1992	\$408		\$408	\$468		\$468
1993 <sup>b</sup>	\$419	\$14	\$433	\$475	\$16	\$491
1994	\$429	\$56	\$484	\$478	\$62	\$540
1995	\$407	\$63	\$471	\$438	\$68	\$505
1996	\$408	\$67	\$476	\$429	\$70	\$500
1997	\$394	\$66	\$460	\$409	\$68	\$477
1998	\$403	\$70	\$473	\$413	\$72	\$485
1999	\$406	\$65	\$471	\$416	\$67	\$483
2000	\$395	\$63	\$458	\$395	\$63	\$458

<sup>a</sup> Lotto was introduced 1 August 1987

<sup>b</sup> Lotto Strike was introduced on 3 April 1993

All amounts are rounded to the nearest million

Source: New Zealand Lotteries Commission annual reports

<sup>17</sup> Refers to the actual amount of money in the year mentioned otherwise referred to as the “face-value” or alternately as “nominal value”

### Participation

Table 3.2 shows the proportion of respondents who played Lotto in the last 12 months and how often they bought a Lotto ticket. Approximately 75% of respondents reported they had played Lotto at least once in the past year, compared to a peak of 80% of respondents in 1995 and 78% in 1990. The increase in the proportion of people playing Lotto between 1990 and 1995 occurred solely amongst the infrequent players (those who played less than once a month) while the decreases in the proportions playing between 1995 and 2000 occurred almost solely amongst those who played every week.

**Table 3.2: Q24, Frequency of buying Lotto tickets by respondents in the last 12 months - 1990, 1995 and 2000**

Response option	1990 (n=1,200) %	1995 (n=1,200) %	2000 (n=1,500) %
At least once a week	35	35	30
At least once a month (but not weekly)	21	20	20
Less often than monthly	23	25	25
Total who played Lotto	78	80	75
Not played Lotto	22	20	25

Table 3.3 shows the frequency with which those who had played Lotto bought a ticket. Since 1990 there has been a continued decline in the proportion of Lotto participants who purchased a ticket weekly and a corresponding increase in the proportion of people who played infrequently (less than once a month).

**Table 3.3: Q24, Frequency of buying Lotto tickets by participants in the last 12 months - 1990, 1995 and 2000**

Response option	1990 (n=939) %	1995 (n=960) %	2000 (n=1,126) %
Once a week	45	44	40
Once every 2 weeks	8	8	8
Once every 3 weeks	5	4	4
Once a month	13	13	15
Once every 2 months	6	8	8
Once every 3 months	9	9	9
Once every 6 months	8	9	10
Once a year	3	5	4
Less frequently than once a year	3	<1	2
Don't Know/No reply	-	<1	-

### Reported expenditure

Table 3.4 forms the basis of the estimation of the total amount spent on Lotto. In conjunction with similar calculations for the other gaming activities, this approach is used to calculate the total amount spent on gaming activities. People were asked in Question 25 to estimate how much they spend in an average session of each activity, which in the case of Lotto was in the average week. For participants who play Lotto every week spending the same amount of money, these data would be fairly representative, but for those who play irregularly or spend irregular amounts each

time they play, these data are less accurate. Therefore, these results should be viewed with caution.

Over half of the participants (58%) said they spent an average of \$5 in the average week they played Lotto (this includes any spending on Lotto Strike), most likely playing 10 lines of Lotto (the minimum bet is 4 lines or \$2). The proportion of people spending \$5 or less has decreased slightly since 1995 while the proportion spending \$10 or more on Lotto tickets has increased (Table 3.4).

**Table 3.4: Q25, How much participants reported spending on Lotto tickets in an average week - 1995, 2000**

Response option	1995	2000
	(n=939) %	(n=1,126) %
\$1 - \$4	13	9
\$5	60	58
\$6 - \$9	9	9
\$10	11	17
\$11+	7	8
Mean	-	\$6.80

Table 3.5 is calculated by multiplying a person's reported expenditure in Table 3.4 by the frequency with which they played Lotto (reported in Table 3.3). In nominal terms, the spending on Lotto has increased between 1990 and 2000 by 15%. However, in real, inflation adjusted, terms there has been a 4% decrease in spending on Lotto. The average annual reported spending by Lotto participants was \$200<sup>18</sup>.

**Table 3.5: Average estimated annual reported spending on Lotto by respondents - 1990, 1995 and 2000**

Year	Average amount spent	Average (in 2000 \$'s)
1990 (n=1,200)	\$131	\$156
1995 (n=1,200)	\$163	\$175
2000 (n=1,500)	\$150	\$150

#### *Reasons for participation*

Of those who had purchased Lotto tickets, most of the participants (82%) in the 2000 survey stated that their main motivation for playing Lotto was to win prizes/money which was consistent with both the 1990 and 1995 surveys (Table 3.6). Twenty-one percent of participants reported buying a ticket as a gift (up from 15% in 1995 and 13% in 1990). This may be part of the reason for the increase in the proportion of people who played infrequently between 1995 and 2000.

<sup>18</sup> This information is not available for the previous surveys

**Table 3.6: Q26, Reasons why participants buy Lotto tickets - 1990, 1995 and 2000**

Response option	1990	1995	2000
	(n=939) %	(n=960) %	(n=1,126) %
To win prizes/money	83	81	82
For excitement/or a challenge	21	14	11
To support worthy causes	8	7	9
Out of curiosity	9	4	4
To oblige or please other people	3	4	3
As a gift for another person	13	15	21
As an interest/or a hobby	11	3	3
To be with people/ get out of the house	0	<1	<1
As entertainment	N/A	13	12
Others	2	<1	<1
Don't know	N/A	<1	<1

*Showcard*

*Multiple response*

#### ***Beliefs about playing Lotto<sup>19</sup>***

This sub-section looks at the perceptions participants have of their recent experience (in the last 12 months) playing Lotto. Table 3.7 shows the average chance of winning a prize playing Lotto for each of the prize categories (does not include Lotto Strike) while Table 3.8 shows how well participants believed they did in the preceding year playing Lotto.

**Table 3.7: Lotto prize structure and average chance of winning**

Prize Tier	Winning numbers required	Chances of winning per line played
Division One	6 winning numbers	1 in 3,838,380
Division Two	5 winning numbers + bonus number	1 in 639,730
Division Three	5 winning numbers	1 in 19,386
Division Four	4 winning numbers	1 in 456
Division Five	3 winning numbers + bonus number	1 in 363

Source: "More About Lotteries", New Zealand Lotteries Commission, p12

The majority of participants (86%) who bought a Lotto ticket in the past year reported that they lost money overall. There was no discernible difference between their reported winning or losing money overall and the frequency with which participants played Lotto.

<sup>19</sup> Questions in this sub-section were introduced in the 2000 survey

**Table 3.8: Q27, Whether participants have won or lost money overall when buying Lotto tickets in the last 12 months (n=1,126)**

Response option	%
Won money overall	5
Broken even	9
Lost money overall	86
Don't know	<1

When asked if they used a specific system or skill when playing Lotto to improve their chance of winning Lotto, 9% of respondents reported that they did (Table 3.9).

**Table 3.9: Q28, Do participants use a system or special skills to improve their chances of winning at Lotto (n=1,126)**

Response option	%
Yes	9
No	91
Don't know/Don't know of any such system	<1

Of those who reported using some form of system or skill when playing Lotto, choosing your own numbers was the preferred method (64%), followed by choosing the same numbers (19%).

**Table 3.10: Q28, System or special skills used by participants to improve their chances of winning at Lotto (n=104)**

Response option	%
Choose own numbers	64
Use same numbers every time	19
Others	17

“Other” systems or skills used by participants were:

- Buy lucky dips (4)
- Statistical analysis (2)
- “Change supermarkets”
- “Change Lotto shops”
- “Use four basic favourite numbers and add different ones”
- “Three regular lucky numbers”
- “7 comes up more than any other numbers, I do combinations of minimum and maximum numbers”
- “Mind-power, positive thinking”
- “Try to work out combinations”
- “Sent away for horoscope with my lucky numbers”
- “Good luck charms, money bowls, lucky numbers predicted for me”
- “Used the numbers off a winning ticket”
- “Additional numbers”
- “Ask the lady for the winning ticket”
- “Quick pick”
- “Use the numbers that haven't come up and put in a few more”

### 3.2 Further analysis of Lotto

Table 3.11: Lotto participation by personal characteristics of respondents - 1990, 1995, and 2000 surveys; and percentage of Lotto participants - 2000

		1990 % of sample (n=1,200)	1995 % of sample (n=1,200)	2000 % of sample (n=1,500)	2000 % of players (n=1,126)	
TOTAL LOTTO PLAYERS		78	80	75	100	
Sex	<i>Male</i>	79	82	70	45	
	<i>Female</i>	77	79	80	55	
Age	<i>15-24 years</i>	72	65	60	15	
	<i>25-34 years</i>	83	88	81	22	
	<i>35-44 years</i>	82	85	78	20	
	<i>45-54 years</i>	85	82	83	17	
	<i>55-64 years</i>	81	85	79	11	
	<i>65+ years</i>	69	77	72	15	
Ethnicity <sup>20</sup> (1990-1995)	<i>NZ Māori</i>	78	82	N/A	N/A	
	<i>Other</i>	78	80	N/A	N/A	
	(2000)	<i>NZ Māori</i>	N/A	N/A	82	11
		<i>Pacific peoples General<sup>21</sup></i>	N/A	N/A	68	6
Personal income <sup>20</sup>	<i>Under \$20,000</i>	74	74	70	40	
	<i>\$20-\$40,000</i>	85	87	80	33	
	<i>\$40,000+</i>	80	88	81	20	
Household Income <sup>20</sup>	<i>Under \$30,000</i>	76	76	75	25	
	<i>\$30-\$60,000</i>	82	83	78	35	
	<i>\$60,000+</i>	77	83	77	28	
Occupation	<i>White collar</i>	82	88	80	37	
	<i>Blue collar</i>	84	83	82	24	
	<i>Home duties</i>	75	76	77	10	
	<i>Retired</i>	70	79	74	16	
	<i>Benefit/unemp</i>	82	75	74	5	
	<i>Student</i>	67	58	51	9	
Education	<i>Prim/sec school</i>	80	85	78	26	
	<i>School Cert</i>	82	82	73	17	
	<i>UE/6FC/Bursary</i>	76	71	76	16	
	<i>Trade/tech qual</i>	89	83	82	16	
	<i>Other tertiary</i>	72	80	73	19	
	<i>Univ graduate</i>	59	74	67	6	

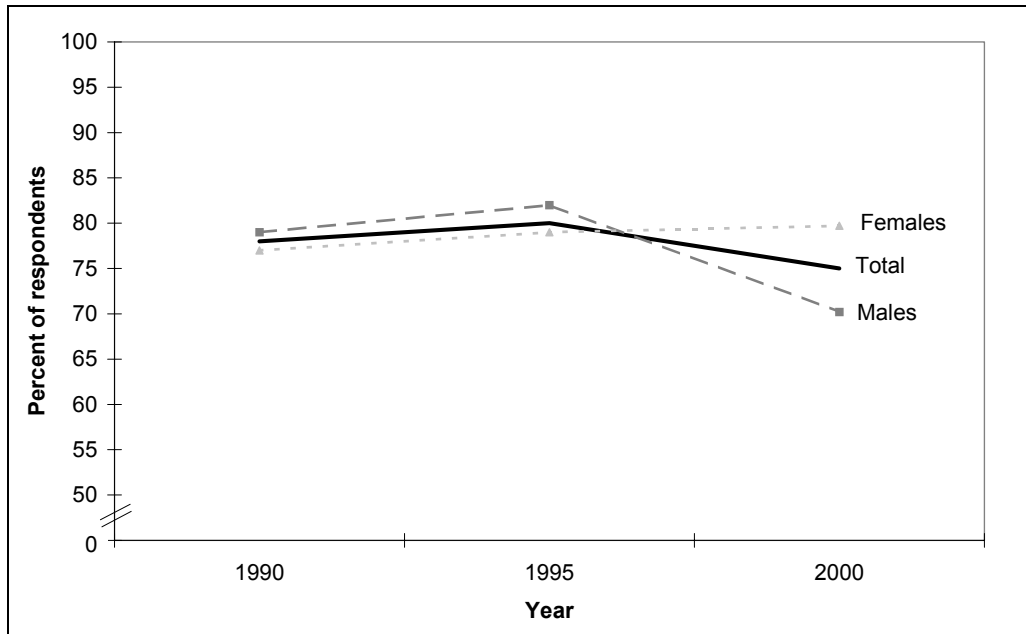
<sup>20</sup> Percentages may not add up to 100% due to non-responses to certain questions

<sup>21</sup> 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

## Sex

For the first time in this survey series females were more likely than males to have played Lotto at least once during the year (80% and 70% respectively). Overall, Lotto participation has declined between 1995-2000 – these decreases were due solely to decreases in male participation (Figure 3.2). Female participation actually continued to increase during this period, although not enough to halt the overall decline in participation levels.

**Figure 3.2: Proportion of respondents who played Lotto, by sex - 1990, 1995 and 2000**



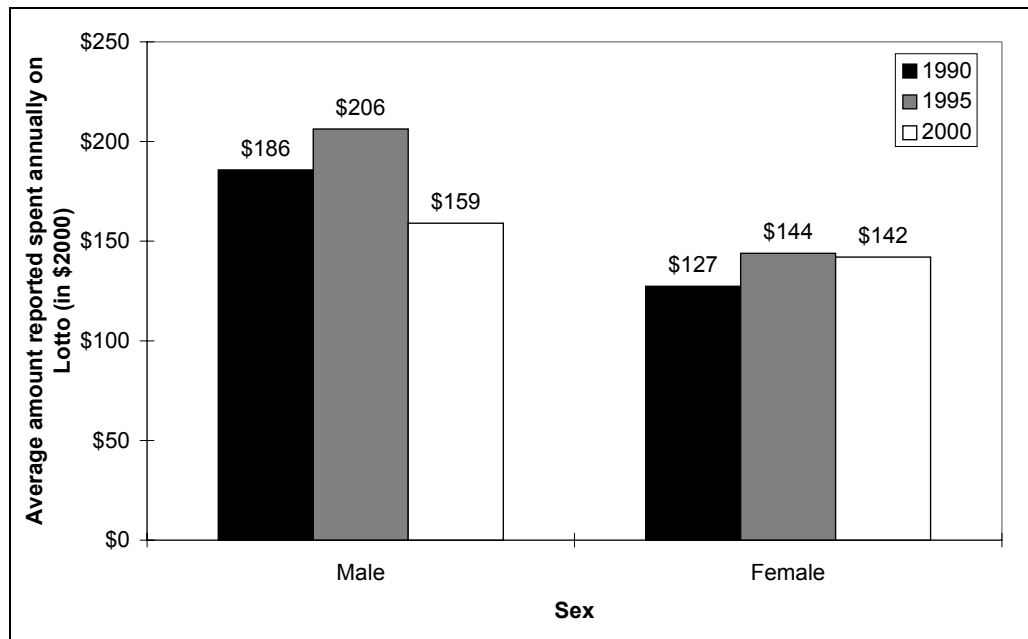
Although fewer males than females played Lotto in the 12 months prior to being surveyed, the males that did play bought tickets more frequently than female participants. Forty-four percent of male players reported buying a ticket at least once week, compared with 31% of female participants.

Males reported spending more on Lotto tickets in the average week, with 30% of male participants spending \$10 or more on tickets compared to 20% of female participants. The reported declines in Lotto sales seem to be largely attributable to the decline in male participation. As males tend to spend more and purchase tickets more frequently, a decrease in the proportion of males would have a substantially greater impact on overall sales levels. This can be seen in Figure 3.3, which shows the average annual amount spent on Lotto tickets by all respondents in inflation adjusted terms (this includes those who did not play Lotto).

The decline in male participation in Lotto between 1995 and 2000 has affected the average reported spending on Lotto for male respondents as shown in Figure 3.3, in inflation adjusted terms. By comparison, there has been only a small decline in the amount female respondents reported spending annually on Lotto tickets between 1995 and 2000 in inflation adjusted terms.



**Figure 3.3: Average estimated annual spending on Lotto by respondents in inflation adjusted terms, by sex - 1990, 1995 and 2000**



There was little difference between males and females as to the reasons why they play Lotto, although 26% of female participants reported buying Lotto tickets as a gift, as opposed to only 15% of male participants. This is consistent with the 1995 survey. Slightly more males (11%) than females (8%) claimed they had a system or special skill that improved their chances of winning Lotto.

### Age

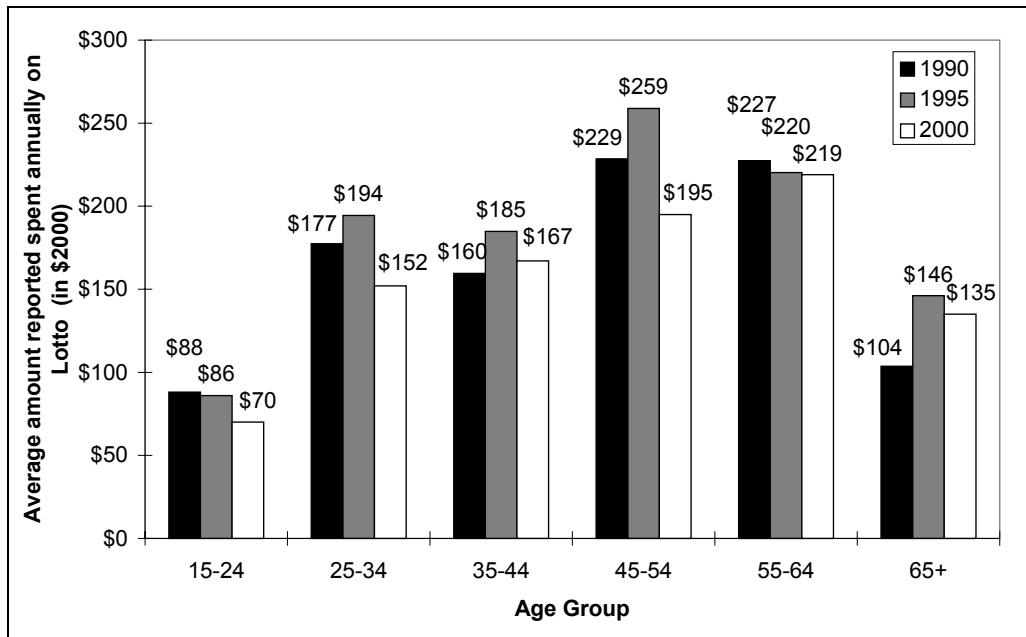
Respondents in the 45-54 age range were the most likely to have bought a Lotto ticket. They were the only age group that had an increase in participation in Lotto between 1995 and 2000 (Table 3.11). People in the youngest age group were the least likely to buy Lotto tickets and the proportion of participants in the 15-24 year age group has steadily declined since 1990.

People in the 15-24 age group were not only were less likely to play Lotto, but those that did participate played Lotto less frequently than participants in older age groups. Only 20% of those aged 15-24 bought Lotto tickets once a week, compared to 40% of the rest of the population. People in the 45-64 year age group were most likely to buy tickets once a week (55% compared to 34% of other age groups), similar to the 1990 (59%; 40%) and 1995 (57%; 40%) surveys. There was a decrease in those playing Lotto once a week in the 65 years and over age group, from 48% in 1995 to 42% in 2000.

Lotto participants in the 45-64 year age groups were the most likely to spend an average of \$10 or more per week on Lotto tickets in 2000 (29% compared to 22% of participants in the other age groups). Of all respondents, people in these two age groups were also the most likely to report spending the highest amount of money on

Lotto tickets annually, in inflation adjusted terms (Figure 3.4). However, people in the 45-54 year age group no longer reported spending the most annually on Lotto tickets. By 2000, this was respondents in the 55-64 year age group (\$219 compared to \$195 reported spent by those in the 45-54 year age group).

**Figure 3.4: Average estimated annual spending on Lotto by respondents in inflation adjusted terms, by age group - 1990, 1995 and 2000**



Participants in the 65 years and over age group were less likely than other age groups to play Lotto to win prizes/money (71% compared to 84% of those under 65 years of age).

#### *Ethnicity*

The 2000 survey saw the addition of a new category to the ethnic group analysis - Pacific peoples. Results showed that respondents in this category were less likely (68%) to have bought a Lotto ticket during the year than either Māori respondents (82%) or respondents in the General population (75%). However, more Pacific peoples (90%) played Lotto at least once a month. This is considerably higher than either Māori (79%) or the General population (73%).

Of Lotto participants, a higher proportion of Pacific peoples (60%) and Māori (38%) reported spending \$10 or more on a Lotto ticket in the average week, compared to the General population (20%).

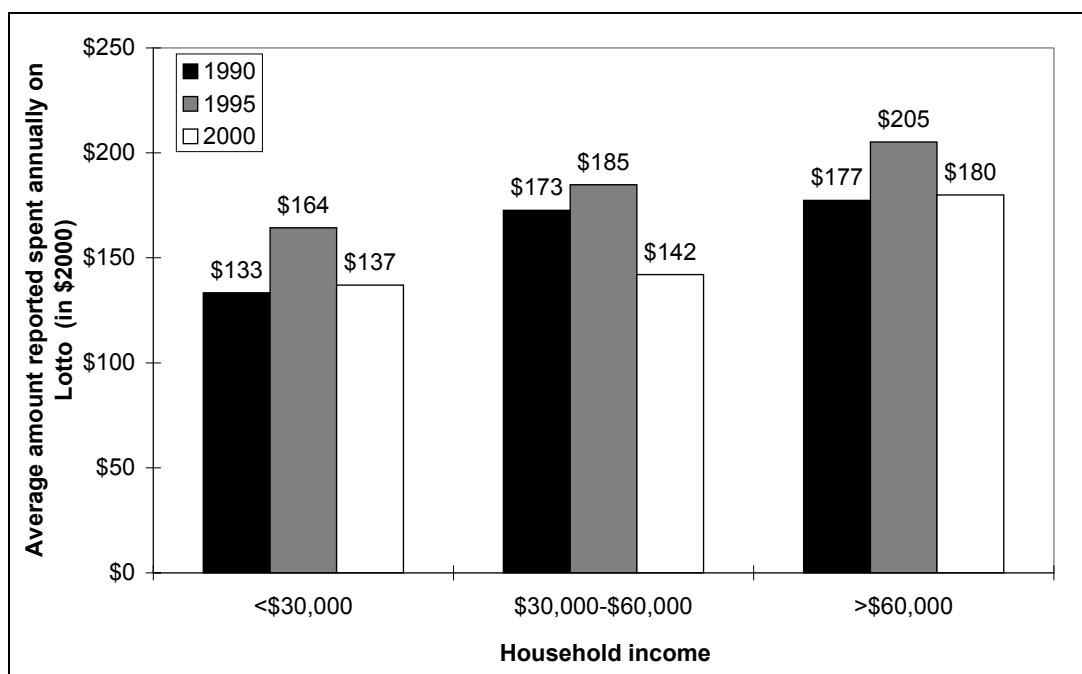
Pacific peoples were more likely to buy Lotto tickets to win prizes/money (91%) and to support worthy causes (16%) than either Māori (87%; 4%) or the General population (81%; 9%). Pacific peoples (18%) were also more likely to buy tickets for “excitement or a challenge” compared to Māori (8%) and the General population (12%). Māori participants (24%) were more likely than Pacific peoples (14%) or participants in the General population (21%) to buy a Lotto ticket as a gift for another person.

Pacific peoples said they were more likely to win money overall playing Lotto (13%) than either Māori (8%) or the General population (4%). However, Māori said they were more likely to break even (20%) than either Pacific peoples (9%) or participants in the General population (7%). Almost a third of Pacific peoples (31%) reported using some form of system, as opposed to only 12% of Māori participants, and 9% of the General population.

#### Household Income

People living in households with an income of more than \$60,000 were more likely to buy Lotto tickets frequently than people in lower income households (46% compared to 37% of people from households with an income of under \$60,000). A greater proportion of participants from higher income households reported spending \$10 or more on average on Lotto than people from lower income households (28% compared to 23% of participants from households with incomes of under \$60,000).

**Figure 3.5: Average estimated annual spending on Lotto by respondents in inflation adjusted terms, by household income - 1990, 1995 and 2000**



Participants from higher income households were less likely to say that they won money or broke even overall playing Lotto (10%) compared to participants from lower income households (15% of participants from households with an income of under \$60,000).

#### Occupation

Since the 1995 survey, there have been several changes in the pattern of Lotto buying. In 1995, white-collar workers were the most likely to have bought Lotto tickets, while in 2000 they have been surpassed by blue-collar workers (a trend consistent with the 1990 survey). However, between 1995 and 2000 there was a decrease in participation rates by all occupations except home-duties.

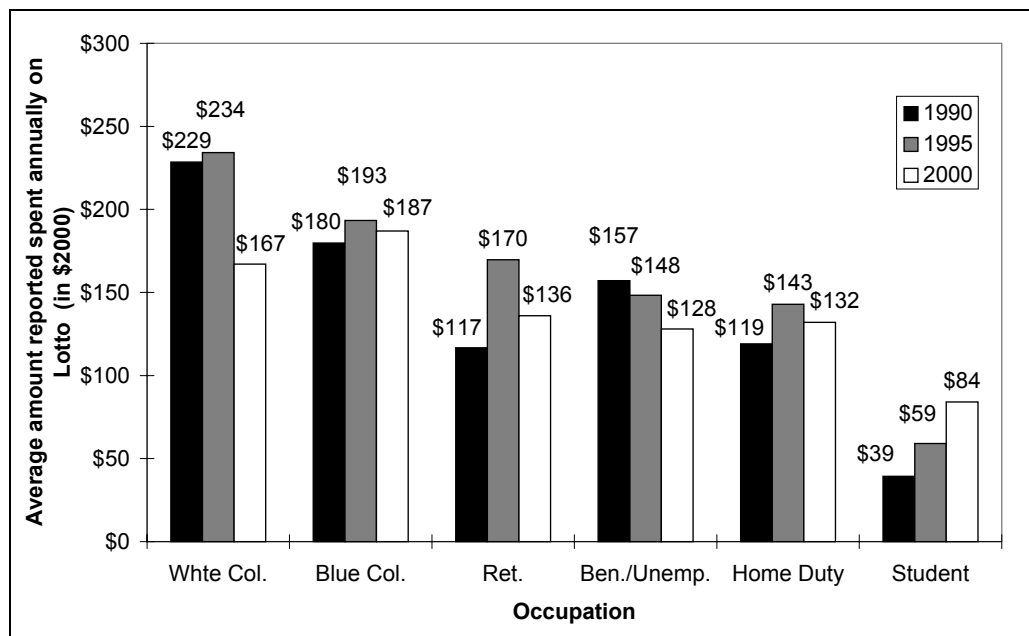
White-collar workers showed the greatest decrease in playing Lotto, from 88% in 1995 to 80% in 2000. Students were less likely than any other occupation to have bought Lotto tickets in the past year (51%), and their participation levels had dropped from 58% in 1995.

As in 1995 and 1990, blue-collar workers were the most likely to buy Lotto tickets on a weekly basis (47%) closely followed by retired people (42%). Students were the least likely to buy Lotto tickets weekly.

A higher proportion of blue-collar workers and beneficiaries who played Lotto reported spending \$10 or more on Lotto tickets on average compared to participants in other occupational groups (32% compared to 22% of participants in other occupations).

Because blue-collar workers played Lotto more frequently than other occupations, and they reported spending the most in a typical week of buying Lotto, as can be expected, they spent more on Lotto tickets annually (Figure 3.6). Prior to 2000, white-collar workers had reported spending the most on Lotto, but there has been a substantial decline in their spending on Lotto in inflation adjusted terms between 1995 and 2000. This is largely attributable to the decrease in the proportions of white-collar workers playing Lotto. However, white-collar workers were still the second highest spending group on Lotto tickets annually in 2000.

**Figure 3.6: Average estimated annual spending on Lotto by respondents in inflation adjusted terms, by occupation group - 1990, 1995 and 2000**



Despite increases in reported spending, students continued to spend the least amount of money on Lotto tickets annually. However, of those who played Lotto, students were the most likely to say that they won money overall compared to other occupations (12% compared to 4% of other occupations). Beneficiaries were the

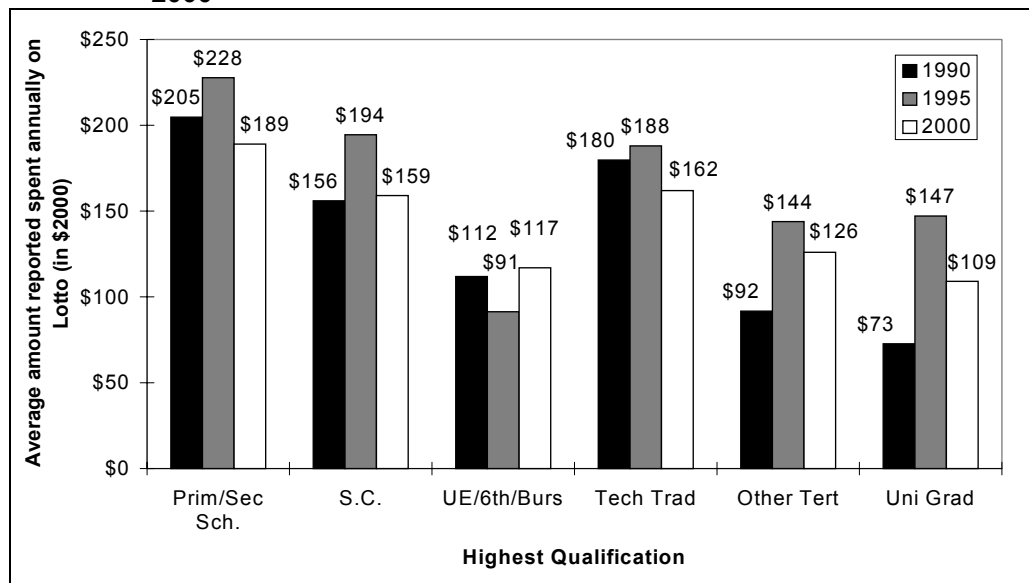
most likely to say they broke even playing Lotto (14% compared to 8% of other occupations). Fourteen percent of both unemployed and blue-collar workers said they used some form of system to increase their chances of winning at Lotto, compared to 3% of students<sup>22</sup>.

**Highest Qualification**

Only those with UE/6FC/Bursary had an increase in the proportion of respondents purchasing Lotto tickets in the past year (up from 71% in 1995 to 76% in 2000). Consistent with the 1990 and 1995 surveys, those with no formal qualifications were the most frequent buyers of Lotto tickets, with 49% of participants in this category playing Lotto every week. This is an increase of 5% from the 1995 survey. University graduates and those with UE/6FC/Bursary were the least likely to play Lotto weekly.

A higher proportion of Lotto participants with no educational qualifications reported spending \$10 or more on Lotto tickets in the average week of playing compared to people with educational qualifications (31% compared to 22% of participants with educational qualifications). People with no educational qualifications were also likely to spend the most on Lotto tickets on an annual basis compared to respondents with qualifications (Figure 3.7).

**Figure 3.7: Average estimated annual spending on Lotto by respondents in inflation adjusted terms, by highest qualification - 1990, 1995 and 2000**



<sup>22</sup> As this question was not asked in either the 1990 or 1995 survey, it is not possible to compare the results of this question to previous surveys.

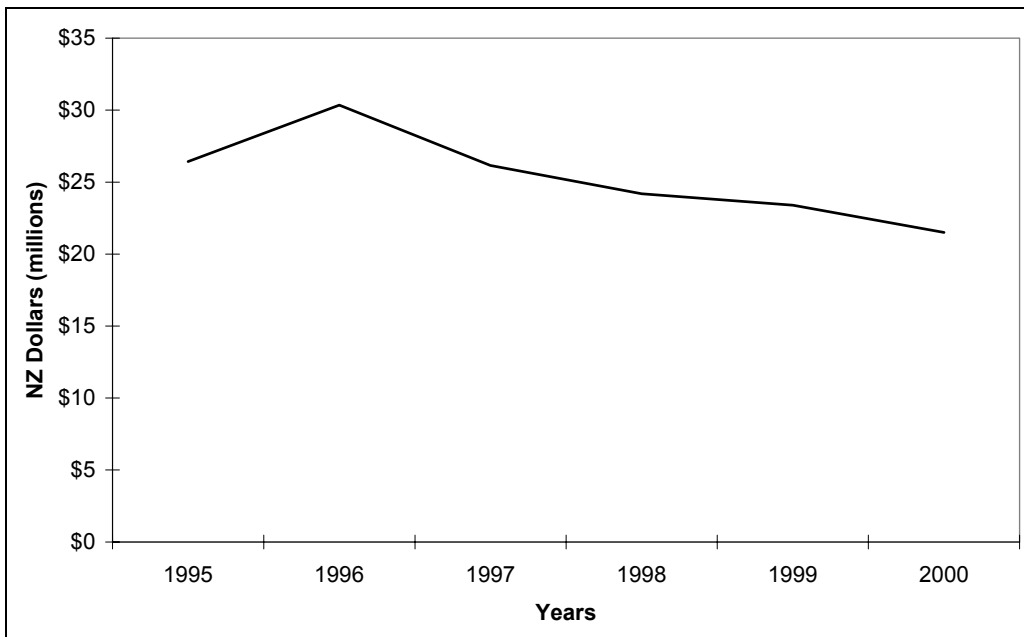
### 3.3 Daily Keno<sup>23</sup>

Daily Keno was introduced in October 1994. It is a gaming activity that is similar to Lotto except it involves a draw of 20 numbers out of a total of 80 numbers. Players can select between one and ten numbers. The amount of the prize depends on how many numbers the player has selected, how many of their selected numbers match the drawn numbers, and the amount spent on the ticket.

As Daily Keno was introduced in October 1994, just three to four months information was collected in the 1995 survey, which means that the information is not fully comparable with the 2000 results. Some comparisons will still be made with results from the 2000 survey in order to ascertain if those group of people who initially started playing Daily Keno in 1994 are still participating.

Annual Daily Keno sales have continuously declined since reaching a sales peak in their second year of operation (Figure 3.8 and Table 3.12). In inflation adjusted terms, annual sales have decreased by nearly a fifth (19%) since 1995, and 29% since the peak in sales in 1996.

**Figure 3.8: Annual Daily Keno sales in inflation adjusted terms, 1995-2000**



Source: New Zealand Lotteries Commission annual reports

<sup>23</sup> Questions in this sub-section were asked only of those who had participated in Daily Keno at least once in the last 12 months (n=90). Because of the small number of Daily Keno participants in the sample, all figures must be treated with caution

**Table 3.12: Annual Daily Keno sales - 1995-2000**

	<b>Nominal dollars</b> (\$millions)	<b>Inflation adjusted dollars</b> (\$millions)
1995	\$25	\$26
1996	\$29	\$30
1997	\$25	\$26
1998	\$24	\$25
1999	\$23	\$24
2000	\$22	\$22
	<b>Nominal change</b> %	<b>Adjusted change</b> %
1995-2000	-13	-19
1996-2000	-26	-29

*All amounts are rounded to the nearest million*

*Source: New Zealand Lotteries Commission annual reports*

#### **Participation**

Only 6% of respondents participated in Daily Keno in the past year, down from 11% in 1995. This comparison should be viewed with caution, as initial participation in 1995 was most likely due to Daily Keno's novelty value.

**Table 3.13: Frequency of buying Daily Keno tickets by respondents in the last 12 months - 1995 and 2000**

<b>Response option</b>	<b>1995</b> (n=1,200) %	<b>2000</b> (n=1,500) %
At least once a week	2	1
At least once a month (but not weekly)	2	2
Less often than monthly	6	3
Total who played Daily Keno <sup>a</sup>	11	6
Not played Daily Keno	89	94

<sup>a</sup> *Due to rounding percentages may not match*

Twenty-four percent of Daily Keno participants played at least once a week (Table 3.14) and 29% played Keno at least once a month (but not weekly). However, most participants played Daily Keno infrequently (45%). Compared to 1995, participants are playing Daily Keno more regularly. In 1995, 21% of participants had played at least weekly and a further 21% of participants had played at least once a month (but not weekly), but most played Daily Keno infrequently (58%).

**Table 3.14: Q29, Frequency of buying Daily Keno tickets by participants in the last 12 months - 1995 and 2000**

Response option	1995	2000
	(n=133) %	(n=90) %
Four times a week or more	2	9
Two or three times a week	2	9
Once a week	17	6
Once every 2 weeks	8	7
Once every 3 weeks	5	3
Once a month	8	19
Once every 2 months	5	3
Once every 3 months	9	5
Once every 6 months	9	15
Once a year	21	15
Less frequently than once a year	14	7
Don't know	2	-

*Reported expenditure*

Table 3.15 compares the average Daily Keno expenditure in an average or typical day a participant plays Daily Keno. Despite a decline in the number of people playing Daily Keno since 1995 there has been an increase in the proportion of participants who spent \$3 or more on Daily Keno in an average session. This apparent difference has to be viewed with caution as the 1995 survey covered a period of only about 3 months after the game had been introduced.

**Table 3.15: Q30, How much participants reported spending on Daily Keno tickets in an average day - 1995 and 2000**

Response option	1995	2000
	(n=133) %	(n=90) %
\$1 - \$2	52	29
\$3 - \$4	9	17
\$5	24	29
\$6+	14	25
Don't know	1	-
Mean	-	\$5.40

While the proportion of participants that reported spending \$3 or more in an average session appears to have increased, the average annual reported spending on Daily Keno for respondents remained the same for 1995 and 2000, in inflation adjusted terms (Table 3.16). This was due mostly to the decline in the numbers of participants. The average annual reported spending on Daily Keno by participants was \$173 in 2000.



**Table 3.16: Average estimated annual reported spending on Daily Keno by respondents - 1995 and 2000**

Year	Average amount spent	Average (in 2000 \$'s)
1995 (n=1,200)	\$9	\$10
2000 (n=1,500)	\$10	\$10

*Reasons for participation*

Of the 6% of respondents who took part in Daily Keno, 73% reported they did so to win money. Other reasons participants gave were “out of curiosity” (15%), as “entertainment” (15%), and for “excitement, or a challenge” (10%). Only two percent of participants said they bought Daily Keno tickets to “support worthy causes”.

**Table 3.17: Q31, Reasons why participants buy Daily Keno tickets - 1995 and 2000**

Response option	1995	2000
	(n=133) %	(n=90) %
To win prizes/money	64	73
For excitement/or a challenge	12	10
To support worthy causes	2	2
Out of curiosity	30	15
To oblige or please other people	<1	-
As a gift for another person	2	6
As an interest/or a hobby	4	6
To be with people/ get out of the house	-	-
As entertainment	7	15
Others	-	-
Don't know	-	-

*Multiple response*

*Beliefs about playing Daily Keno*

This sub-section looks at the perception participants have of their recent history (in the last 12 months) playing Daily Keno. According to the New Zealand Lotteries Commission the odds of winning a prize playing Daily Keno ranges from 1 in 4 to 1 in 21.6. Table 3.18 shows how well participants believed they did in the preceding year playing Daily Keno.

Participants were asked if they had won money, lost money, or broken even overall playing Daily Keno in the last 12 months. The majority of participants (72%) reported they had lost money overall. However, 20% of participants reported they had broken even, and 7% said they had won money overall.

**Table 3.18: Q32, Whether participants have won or lost money overall when buying Daily Keno tickets in the last 12 months (n=90)**

Response option	%
Won money overall	7
Broken even	20
Lost money overall	72
Don't know	<1

Participants were also asked if they had a special skill or system that they used to improve their chances of winning at Daily Keno. Sixteen percent of participants reported that they used some form of system for choosing their numbers (higher than the 9% of Lotto players who reported using a system).

**Table 3.19: Q33, Do participants use a system or special skills to improve their chances of winning at Daily Keno (n=90)**

<b>Response option</b>	<b>%</b>
Yes	16
No	84
Don't know/Don't know of any such system	-

Systems or skills respondents reported they used were:

- Choose own numbers - birthdays, anniversaries etc (6)
- “Stay over the same numbers”
- “Sometimes use kids birthdays; look at numbers previously out in the last draw, less chance of them coming out twice in a row. Also closing eyes and marking numbers on sheet”
- “Work on looking at the information working out the more chances by the numbers you take from 1-10 chances of winning. Taking numbers that I think are lucky”
- “Lucky numbers with horoscope”
- “Try to work out right numbers”

### 3.4 Further analysis of Daily Keno

**Table 3.20: Daily Keno participation by personal characteristics of respondents - 1990, 1995<sup>24</sup>, and 2000 surveys; and percentage of Daily Keno participants - 2000**

		1995 % of sample (n=1,200)	2000 % of sample (n=1,500)	2000 % of players (n=90)	
TOTAL DAILY KENO PLAYERS		11	6	100	
Sex	<i>Male</i>	10	5	42	
	<i>Female</i>	12	7	59	
Age	<i>15-24 years</i>	11	5	17	
	<i>25-34 years</i>	12	6	21	
	<i>35-44 years</i>	11	5	16	
	<i>45-54 years</i>	14	10	27	
	<i>55-64 years</i>	11	8	13	
	<i>65+ years</i>	8	3	7	
Ethnicity <sup>25</sup> (1990-1995)	<i>NZ Māori</i>	22	N/A	N/A	
	<i>Other</i>	10	N/A	N/A	
	(2000)	<i>NZ Māori</i>	N/A	13	21
		<i>Pacific peoples</i>	N/A	22	24
<i>General</i> <sup>26</sup>		N/A	4	53	
Personal income <sup>25</sup>	<i>Under \$20,000</i>	13	7	47	
	<i>\$20-\$40,000</i>	11	7	38	
	<i>\$40,000+</i>	7	3	10	
Household income <sup>25</sup>	<i>Under \$30,000</i>	13	9	37	
	<i>\$30-\$60,000</i>	11	6	33	
	<i>\$60,000+</i>	8	5	21	
Occupation	<i>White collar</i>	8	4	23	
	<i>Blue collar</i>	14	9	33	
	<i>Home duties</i>	13	11	18	
	<i>Retired</i>	8	2	6	
	<i>Benefit/unemp</i>	19	14	12	
	<i>Student</i>	11	4	8	
Education	<i>Prim/sec school</i>	18	10	41	
	<i>School Cert</i>	13	8	23	
	<i>UE/6FC/Bursary</i>	7	5	12	
	<i>Trade/tech qual</i>	7	3	8	
	<i>Other tertiary</i>	6	4	11	
	<i>Univ graduate</i>	5	4	4	

#### Sex

In the 2000 survey, Keno participants were more likely to be female than male (Table 3.20). However, more males (15%) played Keno at least four times a week than female participants (5%). However, more females played at least once a week compared to male participants (28% compared to 20% of male participants).

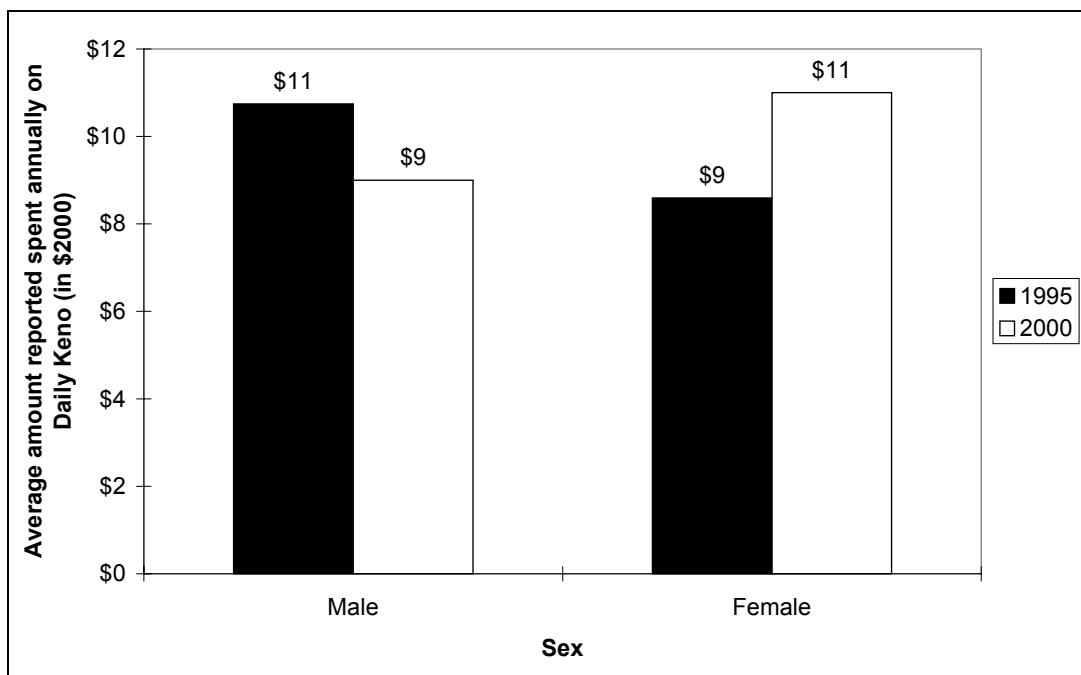
<sup>24</sup> As Daily Keno has only operated since October 1994, only three to four months information was collected in the 1995 survey

<sup>25</sup> Percentages may not add up to 100% due to non-responses to certain questions

<sup>26</sup> 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

A higher proportion of males (31%) reported spending \$6 or more in an average session playing Daily Keno compared to female participants (20%). This is reflected in the average spending per session (\$6.10 for males compared to \$4.90 for female participants) and in the total amount spent annually by Keno participants (\$183 compared to \$166 for female participants).

**Figure 3.9: Average estimated annual spending on Daily Keno by respondents in inflation adjusted terms, by sex - 1995 and 2000**



Female participants were more likely to say they won money overall (10%) compared to male participants (3%). However, males were more likely to say they broke even (26%) playing Keno compared to female participants (15%). Females were slightly more likely to say they had a system or skill special to improve their chances of winning at Keno compared to male participants (18% compared to 14% of male participants).

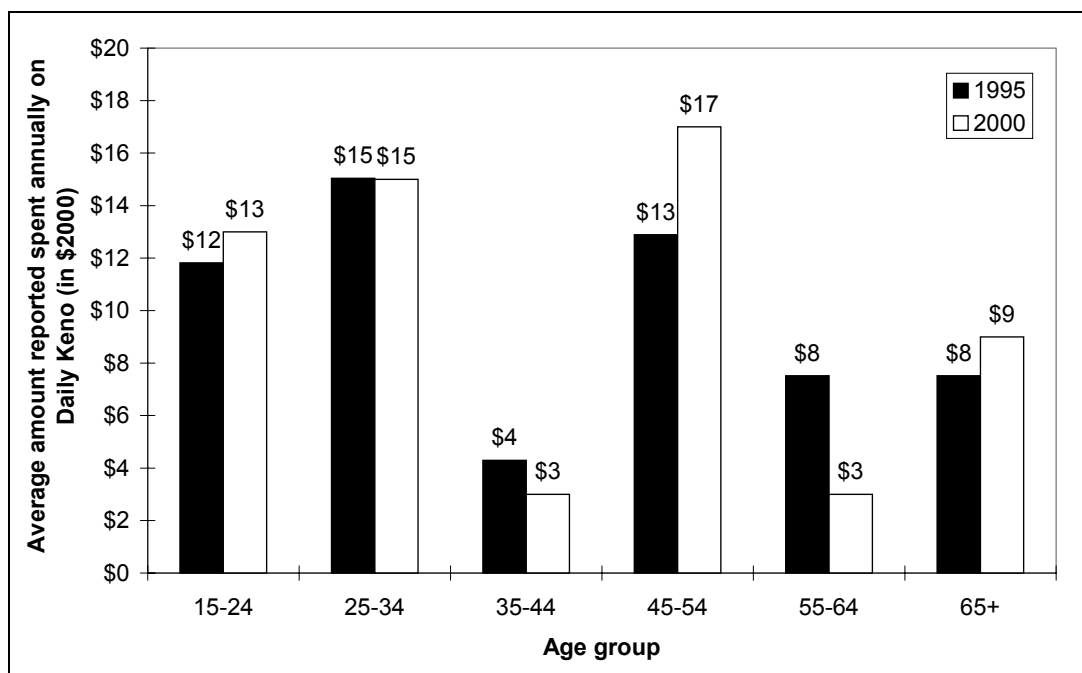
#### Age

Those in the 45-54 age group were most likely to have bought Daily Keno in the previous year (10% compared to 5% of respondents in other age groups - Table 3.20). However, participants in the youngest age group were most likely to play Daily Keno at least monthly (83% played Keno once a month or more compared to 47% of participants in older age groups).

The youngest age groups had the highest proportion of participants who spent \$6 or more in an average day of playing Daily Keno (53% compared to 20% of participants in older age groups). However, people in the oldest age group had the highest proportion of people who spent \$5 or more on Daily Keno, and because of this the average amount spent by participants in these two age groups was equal (\$8.00).

As a higher proportion of respondents in the 45-54 year age group played Daily Keno, they had the highest average annual spend on Daily Keno of all respondents (Figure 3.10). However, people aged 65 years and over had the highest average annual reported spending of participants (\$361) followed by participants under the age of 35 years (both \$234).

**Figure 3.10: Average estimated annual spending on Daily Keno by respondents in inflation adjusted terms, by age group - 1995 and 2000**



Compared to younger participants, a higher proportion of participants in the oldest age group played Daily Keno to win prizes/money (90% compared to 71% of people in the other age groups) and “as entertainment” (55%; 12%).

Participants over the age of 45 years were the most likely to say they won money overall playing Daily Keno (14% compared to less than 1% of participants under the age of 45 years). However, participants under the age of 35 years were the most likely to have broken even playing Daily Keno (35% compared to 11% of those aged 35 years and over). Participants between the ages of 25 and 34 years were the most likely to say they used a special skill or system to improve their chance of winning at Daily Keno (31% compared to 13% of participants in other age groups).

#### *Ethnicity*

A greater proportion of Pacific peoples (22%) had bought Daily Keno tickets than either Māori respondents (13%) or respondents in the General population (4%) in 2000. This result is not comparable with the 1995 survey, as Pacific peoples were not separated from the General population. However, in the 1995 survey a far greater proportion of Māori had bought Daily Keno tickets than the rest of the population (Table 3.20). Māori were the most frequent players of Daily Keno, with 46% of Māori participants playing at least once a week compared to 19% of the rest of the population in 2000.

Participants in the General population were most likely to spend \$5 or more on Daily Keno tickets (60% compared to 49% of the two other ethnic groups combined). However, Māori participants were most likely to spend \$6 or more on Daily Keno (37% compared to 21% of the two other ethnic groups combined).

Pacific peoples on average spent the most on average annually on Daily Keno of all respondents (\$50 compared to \$37 by Māori and \$4 by the General population). Māori spent the most of all participants on average annually (\$280 compared to \$234 for Pacific peoples and \$101 for the General population).

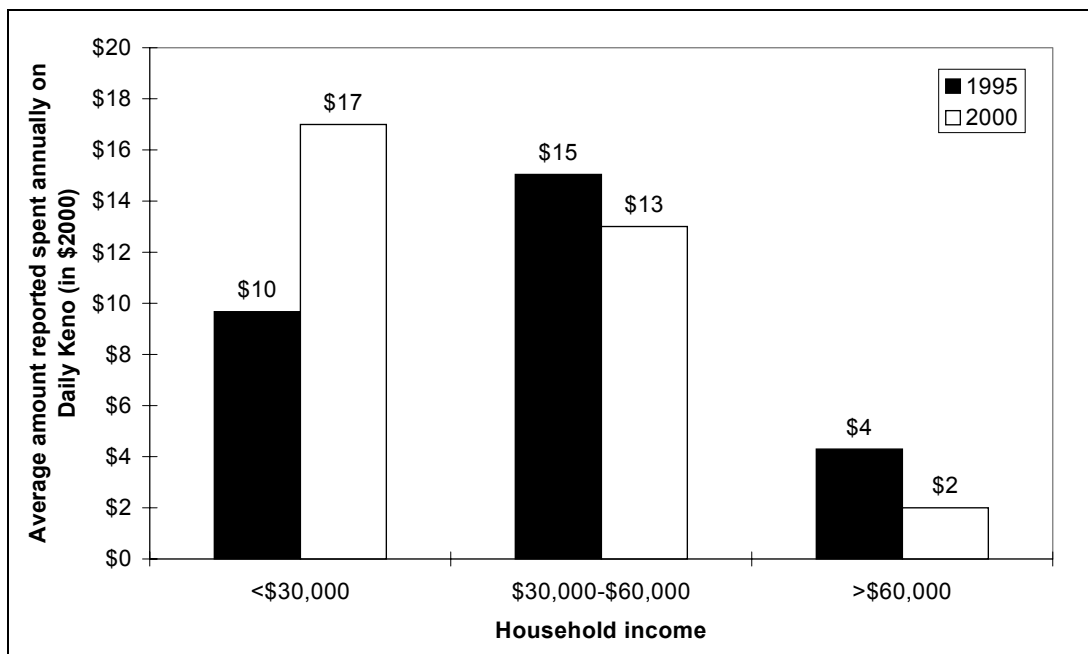
A higher proportion of Pacific peoples felt they had won money or broken even overall playing Daily Keno compared to other participants (32% compared to 25% of the rest of the population). Pacific peoples (26%) and Māori (21%) were more likely to employ a system than participants in the General population (10%).

*Household income*

The lower a respondent's personal or household income, the greater the likelihood of their having bought a Daily Keno ticket in the past year (Table 3.20). Participants from households with an annual income of \$60,000 or less were more likely to play Daily Keno on a weekly basis (27% compared to 9% of participants from households with an income of over \$60,000).

Respondents from lower income households were more likely to report spending a higher amount on average annually on Daily Keno (Figure 3.11). This result was similar for Daily Keno participants, but people from households with an income of between \$30,000-\$60,000 spent the most on average, annually on Daily Keno (\$222) compared to participants from households with an income of over \$60,000 (\$43).

**Figure 3.11: Average estimated annual spending on Daily Keno by respondents in inflation adjusted terms, by household income - 1995 and 2000**



The lower the household income, the more likely participants were to cite a desire to win prizes/money as a reason for playing Daily Keno (79% of those from households of under \$30,000 compared to 65% of participants from households with an income of \$30,000 or more).

A high proportion of Pacific peoples felt they won money or broken even overall (40%) playing Daily Keno compared to 24% of Māori participants and 12% of participants in the General population. A quarter of Pacific peoples said they had a special skill or system that they used to improve their chances of winning, compared to 13% of Māori and none of the participants in the General population.

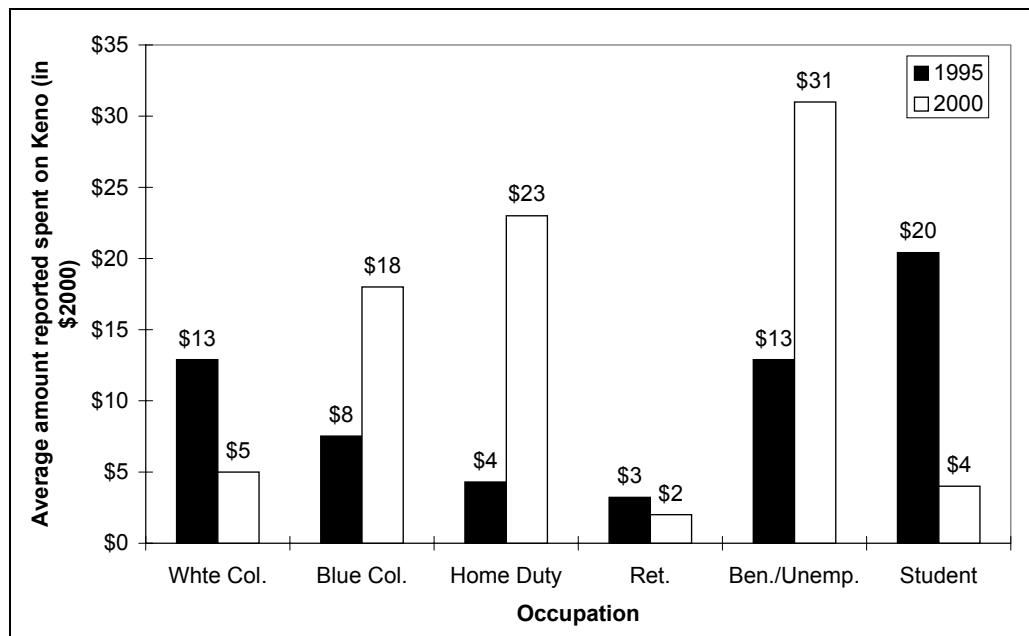
*Occupation*

In the 2000 survey, homemakers and beneficiaries were most likely to have played Daily Keno at least once in the previous year (12% compared to 5% of respondents in other occupations). However, blue-collar workers (33%) and white-collar workers (23%) comprised the greatest proportion of Daily Keno participants (Table 3.20).

Homemakers and blue-collar workers were the most frequent participants in Daily Keno, with 30% playing at least once a week compared to 9% of participants in other occupations.

More than half of students (53%) reported spending \$6 or more on Daily Keno tickets compared to 23% of participants in other occupational groups. However, the number of students who were Daily Keno players was small. Beneficiaries and homemakers were the respondents who were most likely to spend the most annually on average on Daily Keno (Figure 3.12). They were also the biggest spenders annually on average of all Daily Keno participants (\$229 by beneficiaries and \$208 by homemakers).

**Figure 3.12: Average estimated annual spending on Daily Keno by respondents in inflation adjusted terms, by occupation - 1995 and 2000**



Homemakers were more likely to play Daily Keno to win money or prizes than participants in other occupational groups (82% compared to 72% of participants in other occupations).

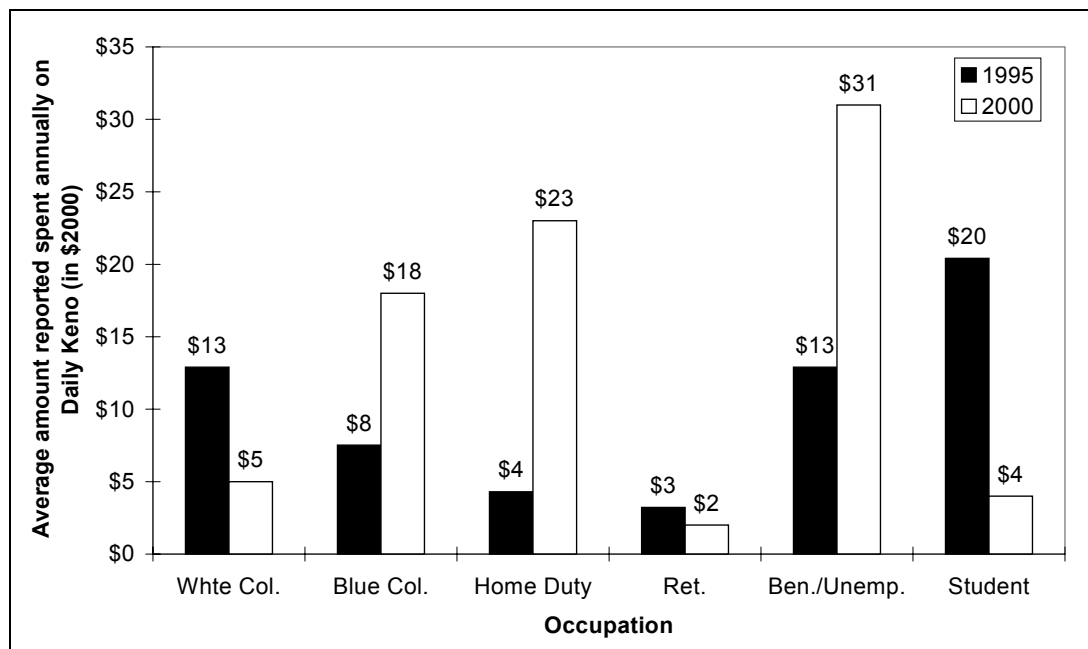
Participants who were homemakers or retired were most likely to say they had won money overall playing Daily Keno (18% compared to 4% of other occupations). Blue-collar workers and beneficiaries were most likely to say that they had broken even overall playing Daily Keno (32% compared to 10% of participants in other occupations). Homemakers were most likely to say they had a special skill or system to improve their chances at winning at Daily Keno (39% compared to 12% of participants in other occupations).

*Educational level*

The lower a respondents' education level, the greater was the likelihood of their having bought a Daily Keno ticket in the previous year (Table 3.20). Participants with no qualifications, or university entrance/sixth form/bursary qualifications were the most likely to play Daily Keno at least weekly (35% compared to 12% of participants with other qualifications).

Participants with university entrance/sixth form/bursary as their highest educational qualification and university graduates were the most likely to spend \$5 or more on Daily Keno tickets in an average session (73% compared to 52% of participants with other qualifications). Respondents with no formal qualifications or with university entrance/sixth form/bursary qualifications reported spending the highest average amount annually on Daily Keno (Figure 3.13). Daily Keno participants from these two groups reported spending the most on average annually on Daily Keno (\$262 for participants with no formal qualifications and \$246 for participants with university entrance/sixth form/bursary qualifications compared to \$10 for the lowest spending group - university graduates).

**Figure 3.13: Average estimated annual spending on Daily Keno by respondents in inflation adjusted terms, by highest qualification - 1995 and 2000**





Participants with no formal qualifications were the most likely to say they had won money overall playing Daily Keno (15% compared to 2% of participants with other qualifications). However, participants with university entrance/sixth form/bursary qualifications were the most likely to say they broke even overall (38% compared to 18% of participants with other qualifications). A higher proportion of participants with no formal qualifications, university entrance/sixth form/bursary or other tertiary qualifications said they used a system or special skill to improve their chances of winning Daily Keno (19% compared to 9% of participants with other qualifications).

### 3.5 Instant Kiwi or other scratch tickets<sup>27</sup>

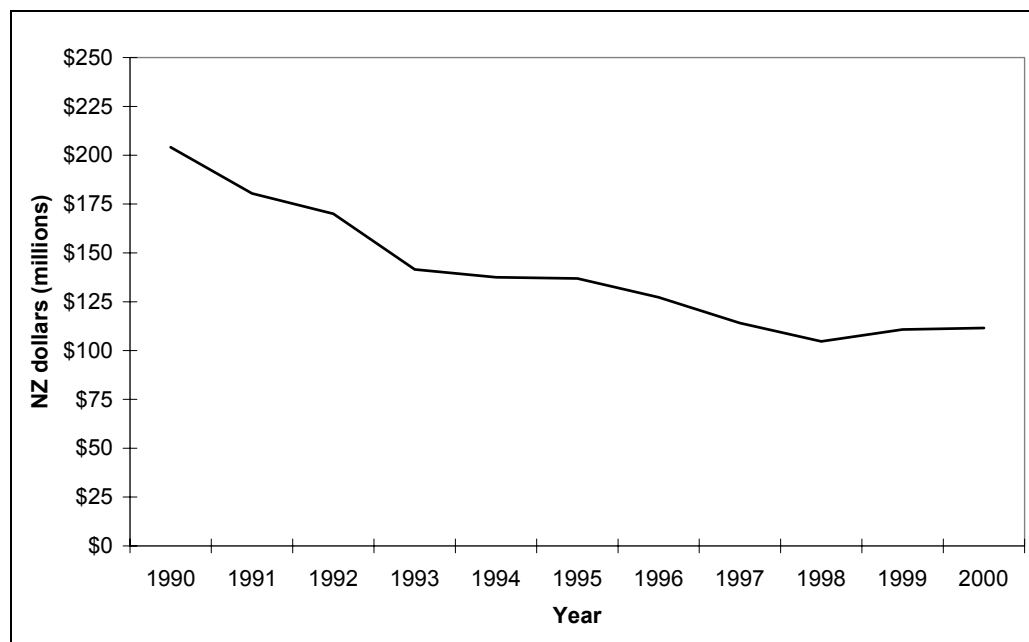
Instant Kiwi was introduced in September 1989. It is a form of instant lottery in which participants buy a ticket and scratch a panel or series of panels to see if they have won a cash prize. Prizes usually range from \$2 to \$25,000, although sometimes larger prizes are offered for short periods. All Instant Kiwi games are closed and recalled as soon as the last top prize has been claimed regardless of how many smaller prizes remain<sup>28</sup>.

The game is also known by other names such as “Scratch Kiwi”, or “scratchies” and since its introduction numerous variations in format and game rules have been available at various times. It is the only game run by the Lotteries Commission that has an age restriction (participants must be 16 years of age or older).

Despite comparisons being made with the 1990 results, it should be noted that Instant Kiwi had only been operating for about six months at the time of the 1990 survey, and therefore data for a full 12 months were not available.

Sales of Instant Kiwi have continually declined since their introduction in 1989, although there have been slight increases in sales since 1998 (Figure 3.14). Since 1990, sales have decreased by 45% in inflation adjusted terms, despite a 7% increase in sales between 1998 and 2000 (Table 3.21).

**Figure 3.14: Annual Instant Kiwi sales in inflation adjusted terms - 1990-2000**



Source: New Zealand Lotteries Commission annual reports

<sup>27</sup> Questions in this sub-section were asked only of those who had bought Instant Kiwi or other scratch tickets at least once in the last 12 months (n=720)

<sup>28</sup> Up-to-date print-outs of how many prizes have been won in any particular game, and how many are still available to be won can be requested at the point of sale

**Table 3.21: Annual Instant Kiwi sales - 1990-2000**

<b>Year</b>	<b>Nominal dollars (\$millions)</b>	<b>Adjusted (2000) dollars (\$millions)</b>
1990	\$171	\$204
1991	\$156	\$180
1992	\$148	\$170
1993	\$125	\$142
1994	\$123	\$138
1995	\$127	\$137
1996	\$121	\$127
1997	\$110	\$114
1998	\$102	\$105
1999	\$108	\$111
2000	\$112	\$112

<b>Time period</b>	<b>Nominal change %</b>	<b>Adjusted change %</b>
1990-2000	-35	-45
1995-2000	-12	-18
1998-2000	9	7

**Participation**

The survey results show a similar decline in participation relative to the decline in sales seen in Figure 3.14. In 1990 66% of respondents had participated in Instant Kiwi and by 1995 this had declined to 58% of respondents. In 2000, for the first time in this survey series, less than half of respondents (48%) said they had played Instant Kiwi at least once in the 12 months prior to being surveyed.

The proportion of respondents who played Instant Kiwi at least once a week has steadily declined between 1990 and 2000 (Table 3.22), similarly to the proportion of respondents who played at least once a month. The proportion of infrequent players has increased only slightly since 1990.

**Table 3.22: Frequency of buying Instant Kiwi tickets by respondents in the last 12 months - 1990, 1995 and 2000**

	<b>1990 (n=1,200) %</b>	<b>1995 (n=1,200) %</b>	<b>2000 (n=1,500) %</b>
At least once a week	14	10	9
At least once a month (but not weekly)	26	21	14
Less often than monthly	23	27	24
Total who played Instant Kiwi	63	58	48
Not played Instant Kiwi	37	42	52

Almost a fifth (19%) of participants in 2000 reported buying tickets at least once a week, similar to 1990 and 1995 (Table 3.23). The proportion of participants who played at least once a month (but not weekly) has decreased since 1990 while the proportion of infrequent players (those who played less often than monthly) has increased.

**Table 3.23: Q34, Frequency of buying Instant Kiwi or other scratch tickets by participants in the last 12 months - 1990, 1995 and 2000**

Response option	1990	1995	2000
	(n=787) %	(n=690) %	(n=720) %
Four times a week or more	1	<1	2
Two or three times a week	4	4	4
Once a week	17	14	14
Once every 2 weeks	12	12	7
Once every 3 weeks	8	5	4
Once a month	19	19	19
Once every 2 months	8	9	12
Once every 3 months	8	13	13
Once every 6 months	12	16	17
Once a year	6	8	7
Less frequently than once a year	5	1	2
Don't know	-	<1	-

*Reported expenditure*

A higher proportion of participants in 2000 reported spending \$5 or more on Instant Kiwi tickets in an average day compared to 1995 (Table 3.24).

**Table 3.24: Q35, How much participants reported spending on Instant Kiwi or other scratch tickets in an average day - 1995 and 2000**

Response option	1995	2000
	(n=690) %	(n=720) %
\$1	13	9
\$2	41	35
\$3 - \$4	22	19
\$5	14	21
\$6+	10	15
Don't know	<1	-
Mean	-	\$4.00

The average estimated annual expenditure of respondents on Instant Kiwi decreased in inflation adjusted terms between 1990 and 2000 (Table 3.25). This was predominantly due to the decline in participation amongst respondents during this period.

**Table 3.25: Average estimated annual reported spending on Instant Kiwi by respondents - 1990, 1995 and 2000**

Year	Average amount spent	Average (in 2000 \$'s)
1990 (n=1,200)	\$56	\$67
1995 (n=1,200)	\$46	\$49
2000 (n=1,500)	\$47	\$47

The decline in the average estimated annual expenditure between 1995 and 2000 was not as steep as the decline between 1990 and 1995 (Table 3.25). When combined with the increase in average expenditure of participants in an average session (Table 3.24), this suggests that there has been an increase in participant expenditure (as

opposed to an increase in the numbers of people playing) between 1995 and 2000. This has contributed to the recent increase in the overall expenditure on Instant Kiwi, as evidenced by the increase in sales between 1998 and 2000 (Figure 3.14). This is made all the more remarkable because not only has there been a decrease in the number of participants but there has also been a decline in the frequency of participation by participants between 1995 and 2000, although these declines were not as high amongst the most frequent participants.

#### *Reasons for participation*

Participants' main reasons for playing were to win prizes or money (Table 3.26). "Other" reasons why people bought Instant Kiwi or other Scratch tickets were to use up spare/loose change (9); to relieve boredom/fill in time (2); "Happen to be where it is sold"; "Impulse"; and "It's a quick result".

**Table 3.26: Q36, Reasons why participants buy Instant Kiwi or other scratch tickets - 1990, 1995 and 2000**

Response option	1990	1995	2000
	(n=787) %	(n=690) %	(n=720) %
To win prizes/money	75	67	75
For excitement/or a challenge	24	19	21
To support worthy causes	3	2	4
Out of curiosity	18	9	8
To oblige or please other people	2	3	3
As a gift for another person	8	12	16
As an interest/or a hobby	7	3	3
To be with people/ get out of the house	0	<1	<1
As entertainment	N/A	14	17
Others	3	1	2
Don't know	3	-	<1

*Multiple response*

#### *Beliefs about playing Instant Kiwi*

The overall chances of winning a prize in a \$1 game on Instant Kiwi are 1 in 6 according to the New Zealand Lotteries Commission. However, this does not guarantee that every sixth ticket in sequential order will win a prize. According to the New Zealand Lotteries Commission:

*"The prizes are printed on tickets randomly in order to ensure that nobody can detect where they are until a ticket is purchased and the latex covering is scratched off the prize area. In each game, the winning and non-winning combinations are randomly distributed throughout all game tickets. If they were not randomly distributed, the games would be in jeopardy because it would be possible to detect where the prizes were."*

The following table (Table 3.27) shows the overall chances of winning at Instant Kiwi. The odds in Instant Kiwi games vary from game to game depending on the prize structure of each game<sup>29</sup>.

<sup>29</sup> The prize structure of current games are held at point of sale

**Table 3.27: Instant Kiwi prize structure and average chance of winning**

Prize Tier	Value of prizes available	Overall chances of winning
\$1 ticket	\$2, \$3, \$4, \$6, \$8, \$10, \$15, \$100, \$1,000, \$10,000	1 in 6
\$2 ticket	\$3, \$4, \$6, \$8, \$10, \$20, \$50, \$1,000, \$5,000, \$25,000	1 in 4.55
\$3 ticket	\$3, \$5, \$6, \$7, \$8, \$9, \$10, \$12, \$20, \$50, \$100, \$500, \$1,000, \$50,000	1 in 4.2 to 1 in 4.39
\$4 ticket	\$6, \$7, \$8, \$14, \$50, \$100, \$7,000, \$75,000	1 in 4.49
\$5 ticket	\$6, \$8, \$10, \$16, \$20, \$100, \$5,000, \$10,000, \$100,000	1 in 4.56

Source: "More About Lotteries", New Zealand Lotteries Commission

A high proportion of participants said they won money or broke even overall playing Instant Kiwi (Table 3.28).

**Table 3.28: Q37, Whether participants have won or lost money overall when buying Instant Kiwi or other scratch tickets in the last 12 months (n=720)**

Response option	%
Won money overall	11
Broken even	30
Lost money overall	58
Don't know	1

Few participants said they used a special skill or system to help improve their chances playing Instant Kiwi (Table 3.29). However, some of the comments set out below show that participants clearly do not understand how randomly prize tickets are distributed.

**Table 3.29: Q38, Do participants use a system or special skills to improve their chances of winning at Instant Kiwi (n=720)**

Response option	%
Yes	2
No	97
Don't know/Don't know of any such system	1

Of the 2% of participants who said they used a system or special skill to improve their chances of winning with Instant Kiwi tickets:

- "You wait to see if someone buys a lot, I buy the next one - I work in a Lotto shop"
- "I buy at least 3 or 4 in a row, they say every 3 or 4 tickets wins"
- "Buy from the same reel of tickets, i.e. buy 2 treasures instead of 1 treasure and 1 crossword, increases the odds of winning"
- "Buy the same kind"
- "Buy two at a time and then at least one of them wins"
- "After winning don't buy from same line of scratchies"
- "Only buy treasures"
- "Take 2 \$1 tickets off separate rolls"
- "Depends on the pictures on the tickets"

- “I get the pretty picture ones”
- “Look at the picture - if I like it, I buy it”
- “Buy the best looking ones”
- “Play to limit your losses. Stop playing when you lose”
- “Daughter chooses”
- “Get my child to pick them”

### 3.6 Further analysis of Instant Kiwi

**Table 3.30: Instant Kiwi participation by personal characteristics of respondents - 1990, 1995, and 2000 surveys; and percentage of Instant Kiwi participants - 2000**

		1990 <sup>30</sup> % of sample (n=1,200)	1995 % of sample (n=1,200)	2000 % of sample (n=1,500)	2000 % of players (n=720)
TOTAL INSTANT KIWI PLAYERS		66	58	48	100
Sex	<i>Male</i>	65	53	43	43
	<i>Female</i>	66	62	53	57
Age	<i>15-24 years</i>	71	61	55	22
	<i>25-34 years</i>	66	66	53	22
	<i>35-44 years</i>	69	58	46	19
	<i>45-54 years</i>	65	54	49	16
	<i>55-64 years</i>	61	53	41	9
	<i>65+ years</i>	56	47	39	12
Ethnicity <sup>31</sup> (1990-1995)	<i>NZ Māori</i>	67	61	N/A	N/A
	<i>Other</i>	65	57	N/A	N/A
	(2000)				
	<i>NZ Māori</i>	N/A	N/A	56	12
	<i>Pacific peoples</i>	N/A	N/A	38	5
	<i>General</i> <sup>32</sup>	N/A	N/A	48	82
Personal income <sup>31</sup>	<i>Under \$20,000</i>	63	55	50	44
	<i>\$20-\$40,000</i>	72	62	52	34
	<i>\$40,000+</i>	62	58	42	16
Household Income <sup>31</sup>	<i>Under \$30,000</i>	63	54	49	25
	<i>\$30-\$60,000</i>	67	56	52	37
	<i>\$60,000+</i>	70	61	47	27
Occupation	<i>White collar</i>	67	63	47	34
	<i>Blue collar</i>	73	59	52	23
	<i>Home duties</i>	65	56	48	10
	<i>Retired</i>	53	46	41	13
	<i>Benefit/unemp</i>	70	57	54	6
	<i>Student</i>	68	57	51	13
Education	<i>Prim/sec school</i>	68	61	48	24
	<i>School Cert</i>	65	63	46	17
	<i>UE/6FC/Bursary</i>	67	60	55	18
	<i>Trade/tech qual</i>	73	53	52	17
	<i>Other tertiary</i>	61	50	46	18
	<i>Univ graduate</i>	48	49	36	5

#### *Sex*

Females (53%) were more likely than males (43%) to have bought Instant Kiwi tickets in the past year. Female and male participation rates were roughly equal in 1990, and both female and male participation rates have declined since then, but the

<sup>30</sup> Instant Kiwi had only been operating for about six months at the time of the 1990 survey, and therefore data for a full 12 months were not available

<sup>31</sup> Percentages may not add up to 100% due to non-responses to certain questions

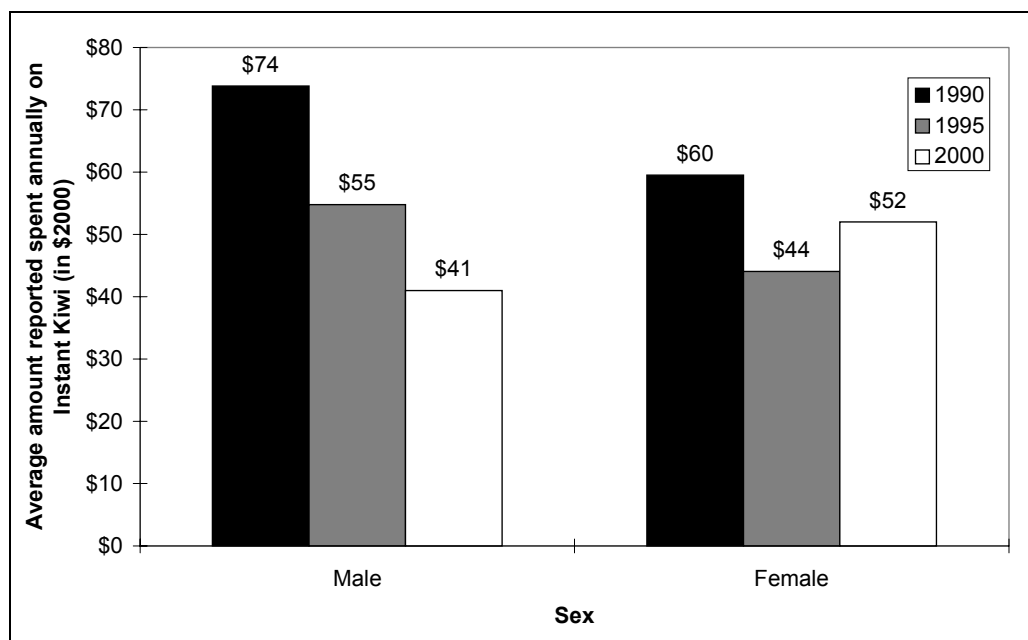
<sup>32</sup> General population refers to the remaining respondents who did not indicate they belonged to the Māori or Pacific peoples ethnic groups



declines were more pronounced amongst males. Males were more likely to have played Instant Kiwi frequently (at least once a week) than females (22% compared to 17% of females).

The average annual reported spending for male respondents has decreased steadily since 1990. The reported expenditure for females has decreased overall since 1990, despite an increase in the average reported expenditure between 1995 and 2000 (Figure 3.15). The difference in the average reported spending between male and female respondents is attributable largely to the imbalance in participation rates between the sexes. The average reported spending by participants on Instant Kiwi is relatively equal (\$96 for males and \$98 for females).

**Figure 3.15: Average estimated annual reported spending on Instant Kiwi by respondents in inflation adjusted terms, by sex - 1990, 1995 and 2000**



Female participants were more likely to say they had won money or broken even overall playing Instant Kiwi than male participants (46% compared to 34% of males).

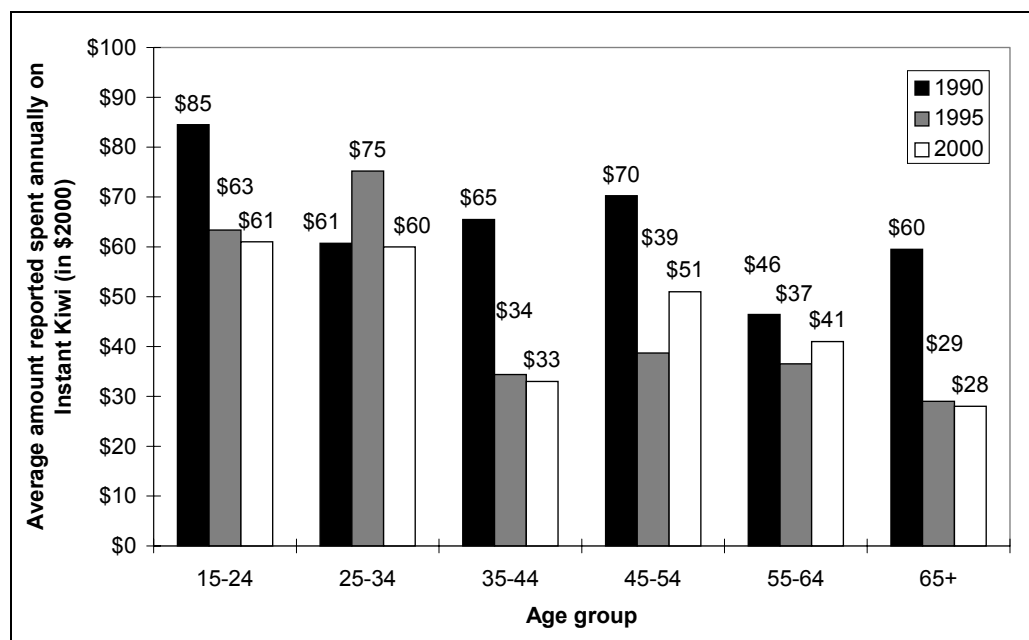
### Age

People in the younger age groups favour Instant Kiwi. The majority of respondents under the age of 35 years of age bought Instant Kiwi ticket in the past year (Table 3.30). This occurred despite declines in participation rates amongst all age groups between 1990 and 2000. People under the age of 35 years of age also comprised 44% of all participants in 2000.

Participants under the age of 35 years were more likely to play Instant Kiwi frequently than participants in the older age groups (22% compared to 18% of participants aged 35 years and over). Declines in participation amongst people under the age of 35 years appear to have been predominantly from the less frequent players between 1995 and 2000.

Participants in the 25-34 year age groups had the highest proportion of people who reported spending an average of \$5 or more a week on Instant Kiwi tickets (46% compared to 33% of participants in other age groups). Respondents between the ages of 45-64 years were the only groups to have increases in their average annual reported spending between 1995 and 2000 (Figure 3.16). However, respondents under the age of 35 years reported spending the most annually, on average, of all age groups on Instant Kiwi tickets in 2000. Similarly, participants under the age of 35 years on average reported spending the most annually on Instant Kiwi (\$111 for participants under the age of 25 years and \$115 by those aged between 25-34 years compared to \$72 by participants aged 65 years or more).

**Figure 3.16: Average estimated annual reported spending on Instant Kiwi by respondents in inflation adjusted terms, by age group - 1990, 1995 and 2000**



Participants under the age of 35 years were more likely to play Instant Kiwi to win prizes or money compared to other participants (80% compared to 71% of participants aged 35 years and over). Participants aged under 35 years were also more likely to say they won money, or broke even overall playing Instant Kiwi (51% compared to 31% of participants aged 35 years and over).

#### *Ethnicity*

Māori were more likely to have played Instant Kiwi (56% compared to 38% of Pacific peoples and 48% of respondents in the General population), but the majority of participants were from the General population (Table 3.30). Pacific peoples who played Instant Kiwi were more likely to buy tickets at least once a week compared to participants from other ethnic groups (37% compared to 18% of participants in the rest of the population).

A higher proportion of Māori participants reported spending an average of \$5 or more a week on Instant Kiwi tickets (44% compared to 34% of participants in the rest of the population). Pacific peoples on average reported spending the most on Instant Kiwi annually of all participants (\$182 compared to \$165 for Māori and \$83 for participants in the General population). However, of all respondents Māori had the highest average annual reported spending (\$92 compared to \$65 for Pacific peoples and \$40 for the General population).

Māori were also the most likely of all participants to say that they had won money, or broken even overall (51% compared to 31% of Pacific peoples and 40% of the General population). Māori participants were also the most likely to say they used a system or special skill to improve their chances of winning at Instant Kiwi (6% compared to 2% of the rest of participants).

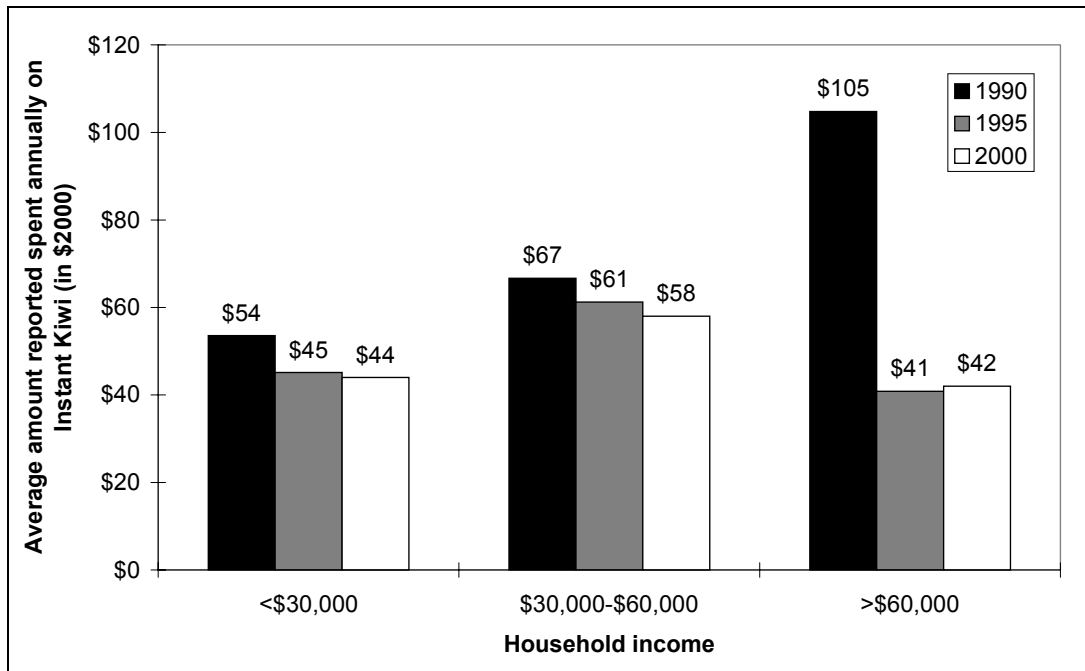
#### *Household income*

The proportion of respondents who had played Instant Kiwi at least once in the past 12 months has declined across all household income groups (Table 3.30). However, declines in the proportion of respondents who played Instant Kiwi in households with income of \$60,000 or more was the steepest of all income groups. A higher proportion of participants in the highest income households played Instant Kiwi infrequently (57% compared to 47% of participants from lower income households).

A higher proportion of participants from households with an income of \$60,000 or more spent an average of \$5 or more per week on Instant Kiwi compared to participants from other households (42% compared to 35% of participants from households with incomes of under \$60,000).

Due to the dramatic declines in the proportion of respondents who played Instant Kiwi during the 1990 to 2000 period, respondents from higher income households reported spending the least amount of money on average annually in 2000 (Figure 3.17). Of the people playing Instant Kiwi, participants from households with an income of \$30,000-\$60,000 were, on average, the biggest reported spenders on Instant Kiwi annually (\$111 compared to \$89 by participants from households with an income of under \$30,000 and \$91 by participants from households with an income of \$60,000 or more).

**Figure 3.17: Average estimated annual reported spending on Instant Kiwi by respondents in inflation adjusted terms, by household income - 1990, 1995 and 2000**



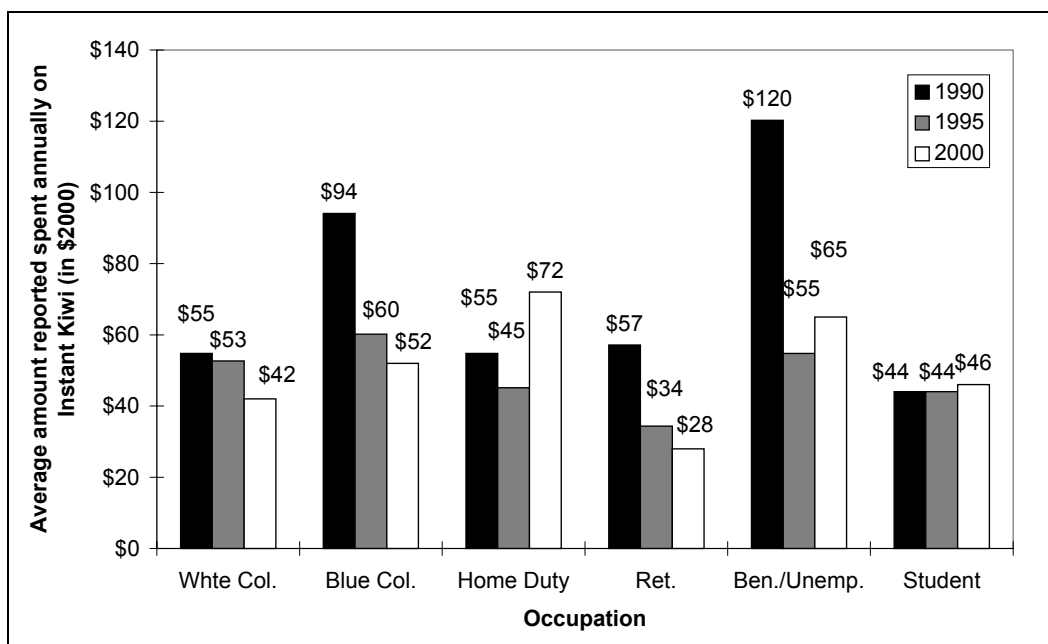
### Occupation

The proportion of respondents playing Instant Kiwi has continually declined between 1990 and 2000 across all occupational groups (Table 3.30). More than half of beneficiaries (54%), blue-collar workers (52%) and students (51%) still played Instant Kiwi at least once in the last 12 months in 2000. However, white-collar (34%) and blue-collar workers (23%) comprised the highest proportion of participants (Table 3.30).

There was little difference in the frequency with which participants from different occupational groups played Instant Kiwi. A higher proportion of blue-collar workers and beneficiaries reported spending an average of \$5 or more per week on Instant Kiwi compared to other participants (43% compared to 33% for participants in other occupational groups). Despite this, homemakers spent the most on average annually of respondents (Figure 3.18).

Students were the most likely to say they won money or broke even overall playing Instant Kiwi (58% compare to 38% of participants in other occupations). White-collar workers were the most likely to say they had a special skill or system that they used to improve their chance of winning (4% compared to 1% of participants from other occupations).

**Figure 3.18: Average estimated annual reported spending on Instant Kiwi by respondents in inflation adjusted terms, by occupation - 1990, 1995 and 2000**



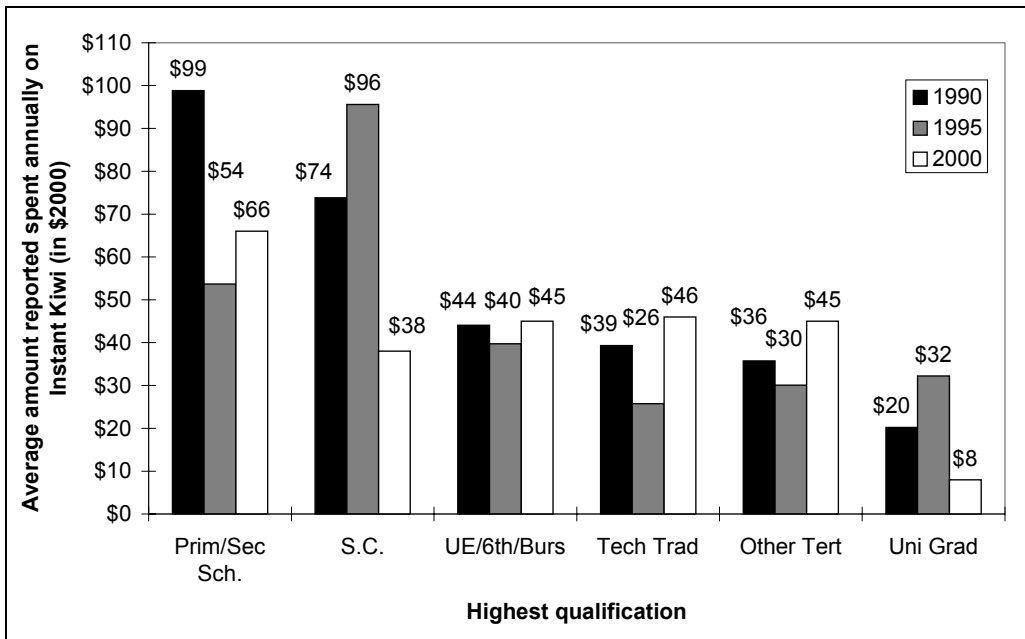
#### *Highest qualification*

Respondents who had university entrance/sixth form certificate/bursary (55%) as their highest qualification were the most likely to have played Instant Kiwi in the past 12 months followed by respondents who had a trade/technical qualification (52%) compared to people with other qualifications (Table 3.30). Almost a quarter of participants with no formal educational qualifications played Instant Kiwi at least once a week (25% compared to 17% of participants with educational qualifications).

People with no formal qualifications had the highest proportion of participants who reported spending an average of \$6 or more on Instant Kiwi weekly (19% compared to 14% of participants with other educational qualifications). Participants with no formal qualifications reported spending the most on average annually on Instant Kiwi. University graduates reported spending the lowest amount on average (\$139 for those without formal qualifications and \$24 for university graduates). There was a similar pattern observed amongst respondents (Figure 3.19).

Participants with a tertiary qualification other than a trade or university qualification were the most likely to say they won money or broke even overall playing Instant Kiwi (52% compared to 39% of participants with other qualifications). They were also more likely to say they used a system or special skill that improved their chances of winning at Instant Kiwi (6% compared to 1% of participants with other qualifications).

**Figure 3.19: Average estimated annual reported spending on Instant Kiwi by respondents in inflation adjusted terms, by highest qualification - 1990, 1995 and 2000**



### 3.7 TeleBingo<sup>33</sup>

TeleBingo was introduced to the New Zealand market on 24 July 1996 and ceased on 27 June 2001. The game was similar to housie or bingo, with participants buying a minimum of two tickets (\$4). Additional tickets could be purchased at a cost of \$2 each. The diagram below shows two examples of “winning” tickets (the circles represent the position of the numbers that need to match the numbers drawn). Participants watched a game show screened weekly at 9:30pm on Wednesday nights on TVONE. Throughout the show numbers are drawn and prizes are won for matching the numbers drawn with:

- Numbers on a ticket in the “four corners” (see diagram below), from the first 27 numbers drawn
- Numbers on the ticket forming a diagonal “Cross” (see diagram below), from the first 34 numbers drawn
- All the numbers on the ticket (“Bingo”), from any of the numbers drawn. A minimum of 34 numbers are drawn, regardless of whether or not someone has already won bingo.

**Four corners:**

✓	20	31	50	62
7	17	42	48	68
12	22	33	46	70
9	29	39	60	71
3	30	40	57	75

**Cross:**

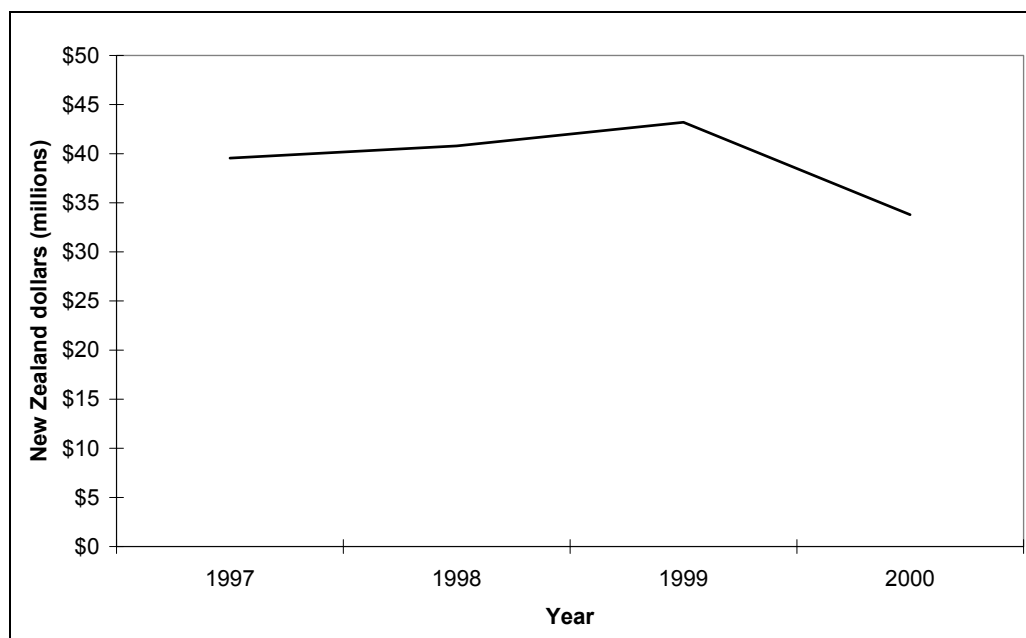
✓	20	31	50	62
7	17	42	48	68
12	22	33	46	70
9	29	39	60	71
3	30	40	57	75

Annual TeleBingo sales continuously increased after its introduction in the 1996/1997 financial year, reaching a sales peak in 1999 (Figure 3.20). The decline in sales between 1999 and 2000 was attributed to the shift in the screening time of the televised show to a later time in the evening.

TeleBingo sales have decreased by 15% in inflation adjusted terms since their introduction in the 1997 financial year (Table 3.31). However, the decline in sales occurred between 1999 and 2000 when sales decreased by more than a fifth in inflation adjusted terms (22%).

<sup>33</sup> Questions in this sub-section were asked only of those who had bought TeleBingo tickets at least once in the last 12 months (n=296)

**Figure 3.20: Annual TeleBingo sales in inflation adjusted terms, 1995-2000**



Source: New Zealand Lotteries Commission annual reports

**Table 3.31: Annual TeleBingo sales - 1995-2000 <sup>a</sup>**

	<b>Nominal dollars</b> (\$millions)	<b>Adjusted (2000) dollars</b> (\$millions)
1997	\$38	\$40
1998	\$40	\$41
1999	\$42	\$43
2000	\$34	\$34
	<b>Nominal change</b> %	<b>Adjusted change</b> %
1997-2000	-11	-15
1999-2000	-20	-22

<sup>a</sup> All amounts are rounded to the nearest million

### Participation

Almost a fifth of respondents (20%) reported playing TeleBingo at least once in the 12 months prior to being surveyed (Table 3.32), with the majority playing infrequently (less than once a month).

**Table 3.32: Q24, Frequency of buying TeleBingo tickets by respondents in the last 12 months - 2000**

<b>Response option</b>	<b>2000</b>
At least once a week	5
At least once a month (but not weekly)	4
Less often than monthly	10
Total who played TeleBingo	20 <sup>a</sup>
Not played TeleBingo	80

<sup>a</sup> Due to rounding percentages may not match



Over a quarter of participants played TeleBingo frequently (Table 3.33), but the majority (51%) of participants played infrequently.

**Table 3.33: Q39, Frequency of buying TeleBingo tickets by participants in the last 12 months (n=296)**

Response option	%
Once a week	26
Once every 2 weeks	8
Once every 3 weeks	3
Once a month	11
Once every 2 months	9
Once every 3 months	14
Once every 6 months	14
Once a year	10
Less frequently than once a year	4

*Reported expenditure*

The majority (66%) of participants reported purchasing an average of two TeleBingo tickets (\$4) a week, which is the minimum entry amount (Table 3.34). The 7% of participants who spent less than \$4 in the average week probably shared the cost of a ticket with others. Respondents reported spending an average of \$19 annually on TeleBingo, while participants reported spending an average of \$96 annually.

**Table 3.34: Q40, How much participants reported spending on TeleBingo tickets in an average week (n=296)**

Response option	%
\$1 - \$3	7
\$4	66
\$5 - \$6	14
\$7+	14
Don't know	<1
Mean	\$4.90

*Reasons for participation*

The object of playing TeleBingo was to win money or prizes for the majority of participants. To a lesser extent TeleBingo was seen as a form of entertainment (Table 3.35).

**Table 3.35: Q41, Reasons why participants buy TeleBingo tickets (n=296)**

Response option	%
To win prizes/money	70
For excitement/or a challenge	19
To support worthy causes	3
Out of curiosity	7
To oblige or please other people	2
As a gift for another person	4
As an interest/or a hobby	6
To be with people/ get out of the house	<1
As entertainment	36
Don't know	<1

*Multiple response*

*Beliefs about playing TeleBingo*

Table 3.36 shows the odds of winning each of the prize tiers when playing TeleBingo.

**Table 3.36: TeleBingo prize structure and average chance of winning**

Prize tier	Winning numbers	Chance of winning (per entry)
Bingo	Match all numbers on ticket	1 in 350,000
Cross	Match cross pattern corner to corner	1 in 929.22
Four corners	Match four corners	1 in 23.085

Source: "More About Lotteries", New Zealand Lotteries Commission, p17

Most participants (78%) felt they lost money overall playing TeleBingo in the last 12 months (Table 3.37). An equal proportion of participants felt they had won money (11%) or broken even (11%) overall playing TeleBingo in the past 12 months.

**Table 3.37: Q42, Whether participants have won or lost money overall when buying TeleBingo tickets in the last 12 months (n=296)**

Response option	%
Won money overall	11
Broken even	11
Lost money overall	78

Less than 1% of participants said they used a special skill or system to improve their chances of winning at TeleBingo (Table 3.38).

**Table 3.38: Q43, Do participants use a system or special skills to improve their chances of winning at TeleBingo (n=296)**

Response option	%
Yes	<1
No	99
Don't know/Don't know of any such system	<1

### 3.8 Further analysis of TeleBingo

**Table 3.39: TeleBingo participation by personal characteristics of respondents - 2000; and percentage of TeleBingo participants - 2000**

		2000 % of sample (n=1,500)	2000 % of players (n=296)
TOTAL TELEBINGO PLAYERS		20	100
Sex	<i>Male</i>	16	40
	<i>Female</i>	23	60
Age	<i>15-24 years</i>	14	14
	<i>25-34 years</i>	19	20
	<i>35-44 years</i>	19	18
	<i>45-54 years</i>	22	17
	<i>55-64 years</i>	27	14
	<i>65+ years</i>	22	17
Ethnicity <sup>34</sup>	<i>NZ Māori</i>	31	16
	<i>Pacific peoples</i>	20	7
	<i>General</i> <sup>35</sup>	19	77
Personal income <sup>34</sup>	<i>Under \$20,000</i>	21	45
	<i>\$20-\$40,000</i>	21	33
	<i>\$40,000+</i>	14	14
Household Income <sup>34</sup>	<i>Under \$30,000</i>	26	32
	<i>\$30-\$60,000</i>	23	39
	<i>\$60,000+</i>	13	18
Occupation	<i>White collar</i>	16	29
	<i>Blue collar</i>	24	26
	<i>Home duties</i>	21	10
	<i>Retired</i>	25	20
	<i>Benefit/unemp</i>	30	8
	<i>Student</i>	11	7
Education	<i>Prim/sec school</i>	27	34
	<i>School Cert</i>	22	20
	<i>UE/6FC/Bursary</i>	19	16
	<i>Trade/tech qual</i>	16	13
	<i>Other tertiary</i>	15	15
	<i>Univ graduate</i>	10	3

#### Sex

Almost a quarter (23%) of female respondents played TeleBingo at least once in the 12 months prior to being surveyed compared to 16% of males. Females comprised 60% of all TeleBingo participants, compared to the remaining 40% of participants who were males (Table 3.39). Male and females played TeleBingo with relatively equal frequency, with just under 50% of both groups playing TeleBingo at least once a month.

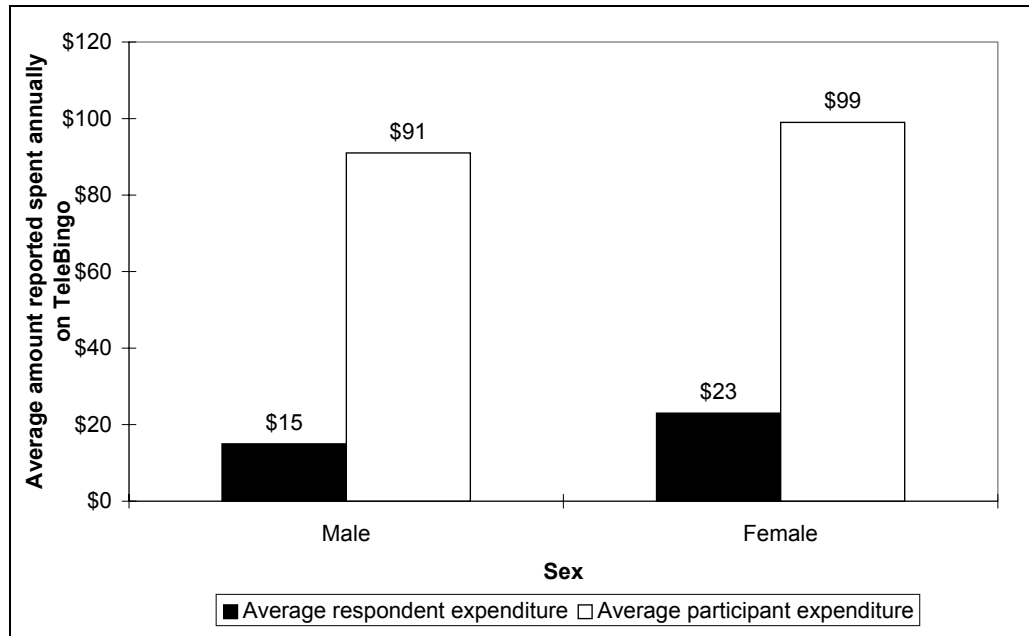
Female participants reported slightly higher expenditure on TeleBingo compared to males (30% of female participants spent \$5 or more in the average session compared

<sup>34</sup> Percentages may not add up to 100% due to non-responses to certain questions

<sup>35</sup> 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

to 24% of male participants). However, there was little difference in the average expenditure per session between males and females (\$4.90 for females and \$4.80 for males). Due to the close similarities in the frequency of male and female participation and male and female expenditure on TeleBingo, there was little difference in the annual expenditure of participants (Figure 3.21). There was greater difference between male and female respondents' expenditure on TeleBingo due to the higher rates of participation by females.

**Figure 3.21: Average estimated annual reported spending on TeleBingo by respondents and participants, by sex**



Female participants were slightly more likely than males to feel they were lucky at playing TeleBingo with 24% of females reporting winning money or breaking even overall compared to 20% of males.

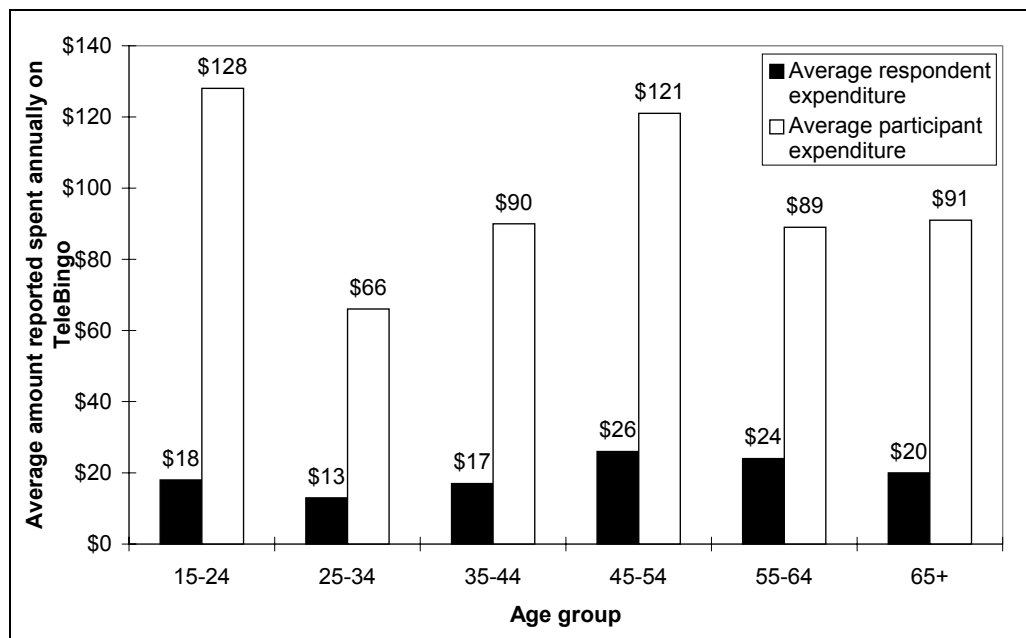
### Age

Participants between the ages of 25-34 years of age comprised the biggest proportion of TeleBingo participants (Table 3.39). Participants under the age of 25 years or between the ages of 55-64 years comprised the smallest proportion of participants (14% of participants each). However, people between the ages of 55-64 years comprised the highest proportion of TeleBingo respondents (27% compared to 19% of respondents in other age groups).

Participants under the age of 25 years reported spending the most on TeleBingo in an average session (\$5.70) followed by participants in the 45-54 year age group (\$5.30). The lowest average spending by participants was by people in the 55-64 year age group who reported spending \$4.10. A higher proportion of participants under the age of 25 years reported spending \$5 or more in an average session of playing TeleBingo compared to other age groups (45% compared to 25% of participants aged 25 years and over). Participants under the age of 25 years of age spent the most on

average annually on TeleBingo followed by those in the 45-54 year age group (Figure 3.22). However, respondents aged 45 years and over spent the most annually on TeleBingo.

**Figure 3.22: Average estimated annual reported spending on TeleBingo by respondents and participants, by age group**



Participants under the age of 25 years were also more likely to play TeleBingo to “win prizes or money” (77% compared to 68% of participants aged 25 years and over), and as “entertainment” (43%; 35%).

Participants in the youngest age group were also more likely to say they won money, or broke even overall playing TeleBingo (35% compared to 20% of participants aged 25 years and over).

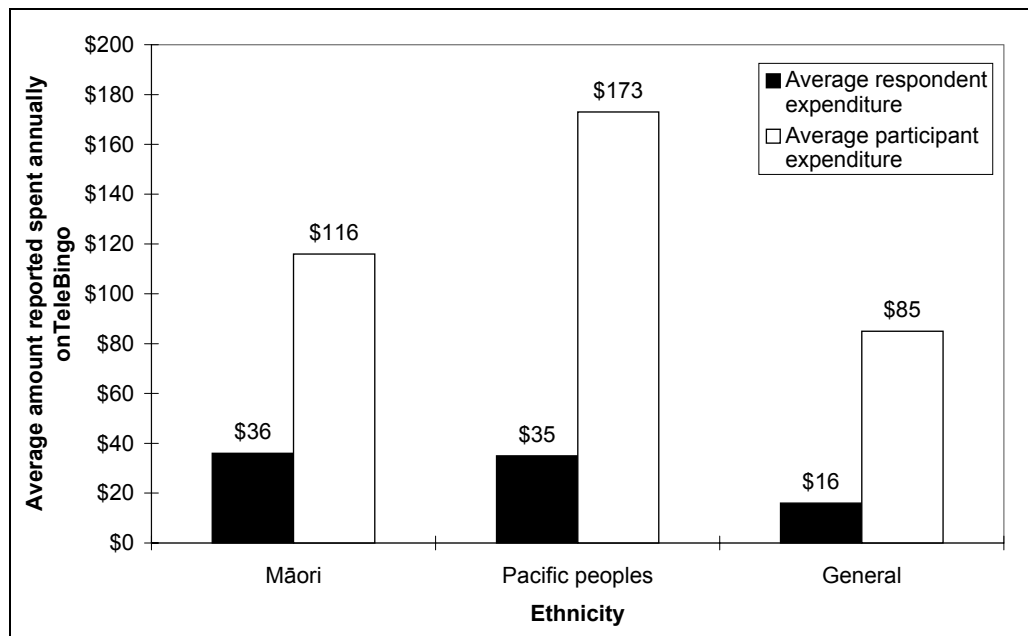
### *Ethnicity*

Māori respondents were most likely to have played TeleBingo at least once in the last 12 months (31% of Māori compared to 20% of Pacific peoples and 19% of respondents in the General population). Both Māori and Pacific peoples were the most frequent players of TeleBingo with 60% of Māori participants and 63% of Pacific participants having played TeleBingo at least monthly compared to 45% of the General population.

Māori and Pacific peoples had the highest proportions of participants who spent an average of \$5 or more in an average session of TeleBingo (46% of Māori participants and 57% of Pacific peoples compared to 21% of participants in the General population). Māori and Pacific participants were also more likely to spend the most on average in a typical session of TeleBingo (\$5.90 for Māori participants, \$6.30 for Pacific peoples compared to \$4.50 for the General population). Of all participants, Pacific peoples reported spending the most amount of money annually on TeleBingo,

but due to their comparatively low level of respondent participation, Māori respondents reported spending slightly more annually (Figure 3.23).

**Figure 3.23: Average estimated annual reported spending on TeleBingo by respondents and participants, by ethnicity**



Māori and Pacific peoples were more likely to play TeleBingo to win prizes/money (82% or Māori participants, 79% of Pacific peoples compared to 66% of the General population). However, participants from the General population were more likely to play TeleBingo for entertainment (39% compared to 26% for Māori and Pacific peoples).

Māori participants were more likely to report that they had won money or broken even overall playing TeleBingo in the last 12 months (35% of Māori participants compared to 22% of Pacific peoples and 20% of the General population).

#### *Household income*

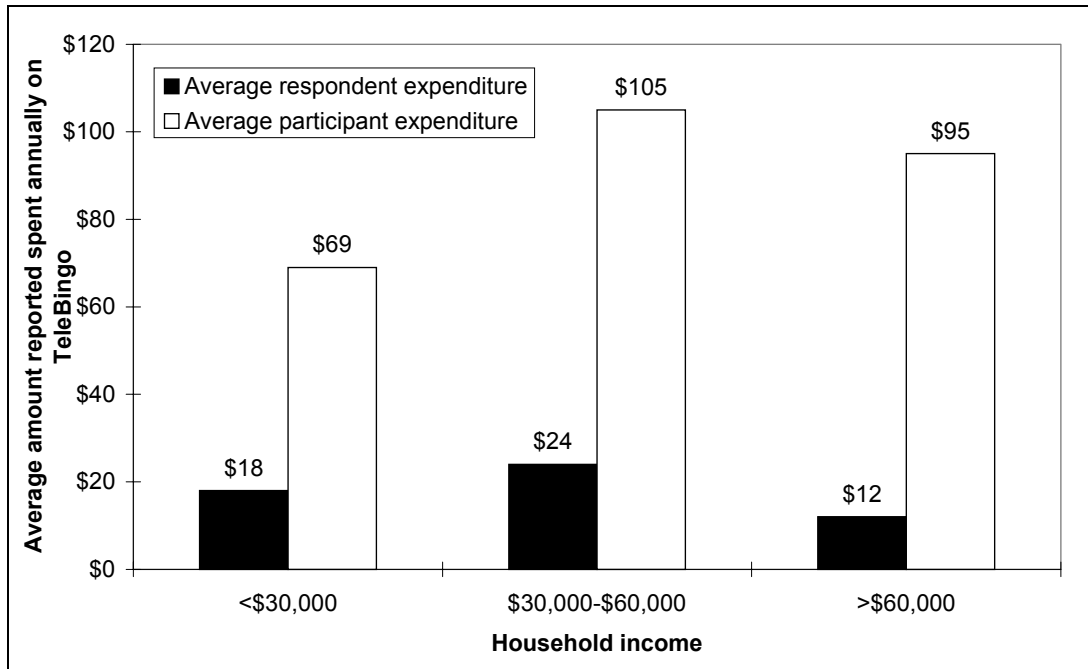
People from lower income households were more likely to have played TeleBingo in the last 12 months compared to respondents from households with an income of over \$60,000 (Table 3.39).

TeleBingo participants who lived in households with an annual income of \$30,000-\$60,000 were the most frequent players (33% played at least once a week compared to 18% of participants with other household incomes).

People from households with an income of over \$60,000 had the highest proportion of participants who reported spending \$5 or more in an average session of TeleBingo (38% compared to 25% of participants from households with an income of under \$60,000). They also spent the most on average in a typical session of TeleBingo (\$5.50 compared to \$4.60 for participants from households with an income of under

\$60,000). However, the average annual reported spending on TeleBingo by participants from households with an income of \$60,000 or more was lower than people from households with an income of \$30,000-\$60,000 because they do not play TeleBingo as frequently. Similarly, respondents from households with an income of under \$30,000 spent more on average annually than respondents from households with an income of \$60,000 or more because of their comparatively higher participation rates (Figure 3.24).

**Figure 3.24: Average estimated annual reported spending on TeleBingo by respondents and participants, by household income**



Participants from lower income households were the most likely to play TeleBingo to win prizes/money (75% compared to 65% of participants from households with an income of \$30,000 or more).

A higher proportion of participants from households with an income of between \$30,000-\$60,000 reported that they won money or broke even overall (30% compared to 18% of participants from households with higher or lower income).

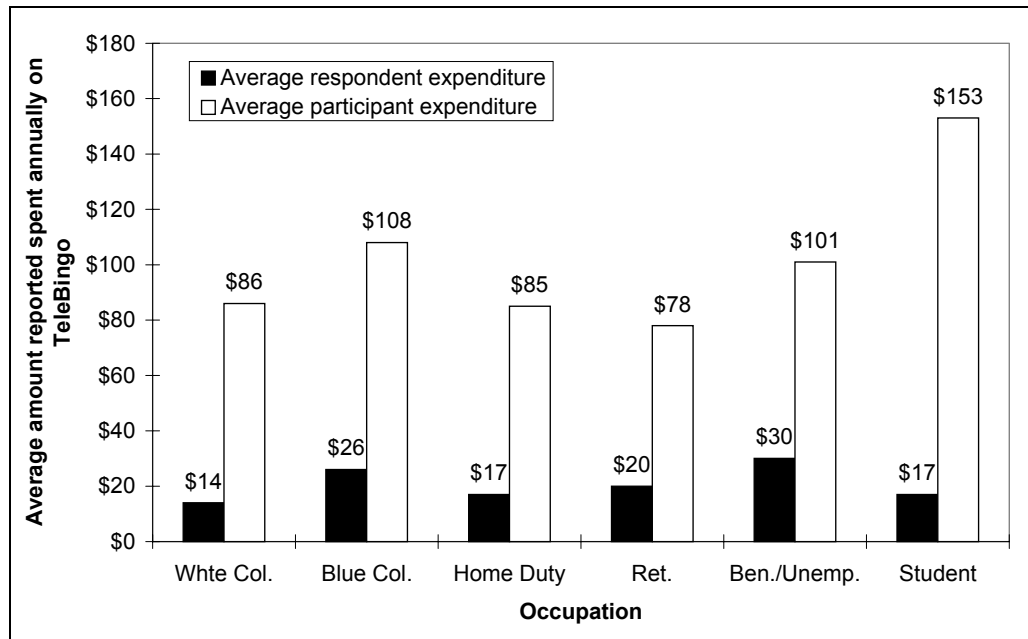
#### *Occupation*

Beneficiaries/unemployed persons were the most likely of all respondents to have played TeleBingo at least once in the 12 months prior to being surveyed (30% of respondents compared to 19% of respondents in other occupations). However, they were only a small proportion of TeleBingo participants (8%), with white-collar workers (29%) comprising the biggest proportion of participants (Table 3.39).

Beneficiaries and students were the most frequent participants in TeleBingo (66% of participants played at least monthly or weekly compared to 46% of participants in other occupations).

Beneficiaries and students also had the highest proportion of participants who reported spending \$5 or more in an average session of TeleBingo (41% compared to 25% of participants in other occupations). However, students (\$5.80) and blue-collar workers (\$5.60) on average spent the most on TeleBingo in an average session. Participants from these two occupational groups also spent the most on average annually on TeleBingo (Figure 3.25). However, beneficiaries spent the most of all respondents due to their comparatively higher rates of participation.

**Figure 3.25: Average estimated annual reported spending on TeleBingo by respondents and participants, by occupation**



Blue-collar workers were the most likely to report playing TeleBingo to “win prizes or money” (82% compared to 66% of participants in other occupations). Students were the most likely to play TeleBingo for “excitement or a challenge” (34% compared to 18% of participants in other occupations).

Students and homemakers were the most likely to say they had won money playing TeleBingo in the 12 months prior to being surveyed (27% compared to 8% of participants in other occupations). Blue-collar workers were more likely to say they had broken even when playing TeleBingo in the 12 months prior to being surveyed (20% compared to 8% of participants in other occupations). However, homemakers were the most likely to say they had won or broken even overall (37% compared to 21% of participants in other occupations).

**Highest qualification**

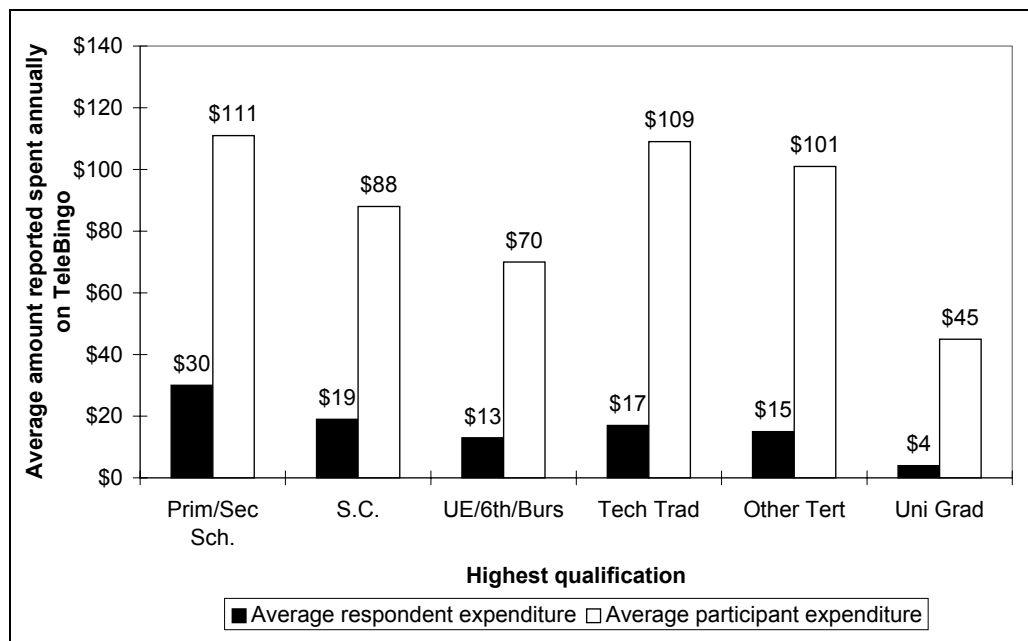
Respondents without formal educational qualifications were the most likely to have played TeleBingo at least once in the 12 months prior to being surveyed (Table 3.39). Together with people whose highest educational qualification was School Certificate, they comprised 54% of all TeleBingo participants. Participants with no formal educational qualifications and those with Other Tertiary qualifications played TeleBingo most often (56% played at least monthly compared to 41% of participants



with other qualifications). However, people with a trade/technical qualification had the highest proportion of participants who played at least once a week (34% compared to 24% of participants with other qualifications).

People whose highest educational attainment was university entrance/sixth form certificate/bursary had the highest proportion of participants who reported spending \$5 or more in an average session of TeleBingo (43% compared to 24% of participants with other qualifications). They also reported spending the most on average in a typical session of TeleBingo (\$5.40). However, participants with no formal educational qualifications and those with technical/trade qualifications reported spending the most annually due to their more frequent participation (Figure 3.26). People with school certificate as their highest qualification and those without formal educational qualifications reported spending the most on TeleBingo of all respondents due to their relatively higher levels of participation.

**Figure 3.26: Average estimated annual reported spending on TeleBingo by respondents and participants, by highest qualification**



University graduates were the most likely to have played TeleBingo for “excitement” (37% compared to 19% of participants with other qualifications).

Participants without formal educational qualifications were most likely to say they had won money (19% compared to 7% of participants with other qualifications). However, participants whose highest educational attainment was university entrance/sixth form certificate/bursary and those with an Other Tertiary qualification were more likely to say they had broken even playing TeleBingo (16% compared to 9% of participants with other qualifications). Overall, those without formal educational qualifications and those with university entrance/sixth form certificate/bursary were the most likely to have won money or broken even overall playing TeleBingo (28% compared to 16% of other participants with other educational qualifications).

### 3.9 Housie<sup>36</sup>

Housie (known in other countries as bingo) has been legal in New Zealand since 1959. Housie games must be run to raise money for a specified charitable or community purpose and the profits that housie sessions make must be returned to the society's authorised purposes, under the Gaming and Lotteries Act<sup>37</sup>. There are two types of housie games:

- Housie Part 1: Up to 1000 cards may be sold per session and 70% must be paid out in prizes from the gross takings of each session
- Housie Part 2: Up to 200 cards may be sold per session and 85% must be paid out in prizes from the gross takings per session.

#### *Participation*

Few respondents reported playing housie in the 12 months prior to being surveyed (Table 3.40). The proportion of respondents who played housie has halved since 1985. The declines in respondent participation have occurred amongst both frequent and infrequent players, although a higher proportion of respondents continue to play less often than monthly.

**Table 3.40: Q44, Frequency of playing a session of housie by respondents in the last 12 months - 1985, 1990, 1995 and 2000**

<b>Response option</b>	<b>1985</b> (n=1,500) %	<b>1990</b> (n=1,200) %	<b>1995</b> (n=1,200) %	<b>2000</b> (n=1,500) %
At least once a week	2	2	2	1
At least once a month (but not weekly)	1	1	1	1
Less often than monthly	4	2	3	2
Total who played Housie	8	5	6	4
Not played Housie	92	95	94	96

<sup>a</sup> Due to rounding percentages may not match

Table 3.41 shows how often (the frequency with which) participants played housie in the last 12 months. Between 1995 and 2000 there has been a sharp decline in the proportion of people who played housie frequently (at least once a week). There was a slight increase in the proportion of people playing less frequently than weekly, but at least once a month. Most of the increases occurred in the proportion of people who played once every six months or less frequently.

<sup>36</sup> Questions in this sub-section were asked only of those who had played Housie at least once in the last 12 months (n=53). Because of the small number of housie participants in the sample, all figures must be treated with caution

<sup>37</sup> For further information on the rules and regulations around housie, refer to the Gaming section of the Department of Internal Affairs web-site: [www.dia.govt.nz](http://www.dia.govt.nz)

**Table 3.41: Q44, Frequency of playing a session of housie by participants in the last 12 months - 1985, 1990, 1995 and 2000**

Response option	1985	1990	1995	2000
	(n=119) %	(n=66) %	(n=74) %	(n=53) %
Four times a week or more	1	4	0	4
Two or three times a week	10	13	7	8
Once a week	21	27	23	7
Once every 2 weeks	5	8	7	<1
Once every 3 weeks	-	3	1	-
Once a month	7	8	8	19
Once every 2 months	9	4	5	5
Once every 3 months	5	8	5	9
Once every 6 months	14	8	21	27
Once a year	20	15	14	19
Less frequently than once a year	8	3	8	2
Don't know	1	-	1	-

*Reported expenditure*

In 1995, the majority (56%) of participants spent an average of \$10 or less in a typical day playing housie (Table 3.42). However, between 1995 and 2000 there has been an upward shift in the average amount spent, with 39% of participants reporting spending \$21 or more in an average day playing housie compared to 18% in 1995.

**Table 3.42: Q45, How much participants reported spending on housie in an average session - 1995 and 2000**

Response option	1995	2000
	(n=74) %	(n=53) %
\$1 - \$5	23	18
\$6 - \$10	33	26
\$11 - \$20	26	17
\$21 - \$30	12	26
\$31+	6	13
Don't know	1	-
Mean	-	\$18.20

*Percentages may not add up to 100% due to rounding*

The amount respondents reported spending on housie sharply declined, by 77% in inflation adjusted terms, since 1990<sup>38</sup>. The decline in reported spending between 1990 and 1995 occurred despite a slight increase in the proportion of respondents who played housie. However, part of the decline in annual reported spending on housie between 1995 and 2000 was attributable to a decline in the proportion of respondents who had played housie.

<sup>38</sup> The average annual amount spent on housie was not calculated in the 1985 survey

**Table 3.43: Average estimated annual reported spending by respondents on housie - 1990, 1995 and 2000**

Year	Average amount spent	Average (in 2000 \$'s)
1990	\$52	\$62
1995	\$27	\$29
2000	\$14	\$14

Year	% change in nominal terms	% change in inflation adjusted terms
1990-1995	-48	-53
1995-2000	-48	-52
1990-2000	-73	-77

*Reasons for participation*

Between 1985 and 2000, the main reason given by participants for playing housie was to win prizes or money (Table 3.44). Until 2000, the second most important reason had been to be with people or get out of the house. For the first time in this survey series, the social aspect of housie playing has been supplanted by the “entertainment” and “excitement or a challenge” options.

**Table 3.44: Q46, Reasons why participants play housie - 1985, 1990, 1995 and 2000**

Response option	1985	1990	1995	2000
	(n=119) %	(n=66) %	(n=74) %	(n=53) %
To win prizes/money	39	50	47	50
For excitement/or a challenge	28	33	24	36
To support worthy causes	19	22	19	15
Out of curiosity	NA	3	1	6
To oblige or please other people	9	4	6	4
As a gift for another person	NA	NA	NA	3
As an interest/or a hobby	NA	13	9	11
To be with people/ get out of the house <sup>a</sup>	39 33	45	34	16
As entertainment	NA	NA	29	37
Other	5	2	3	-
Don't know	-	-	1	-

<sup>a</sup> Asked as two separate questions in 1985, afterwards combined

NA - Not asked

Multiple response

*Beliefs about playing housie*

The majority of participants (63%) felt that they had won money or broken even overall playing housie in the 12 months prior to being surveyed, although more participants thought they had broken even than had won money overall.

**Table 3.45: Q47, Whether participants have won or lost money overall when playing housie in the last 12 months (n=53)**

<b>Response option</b>	<b>%</b>
Won money overall	28
Broken even	35
Lost money overall	37

None of the housie participants said they used a special skill or system to improve their chances of winning at housie (Table 3.46). This was the only activity asked about in this survey where no participants reported that they used a system or special skill to improve their chances of winning.

**Table 3.46: Q48, Do participants use a system or special skills to improve their chances of winning at housie (n=53)**

<b>Response option</b>	<b>%</b>
Yes	-
No	100
Don't know/Don't know of any such system	-

### 3.10 Further analysis of housie

**Table 3.47: Housie participation by personal characteristics of respondents - 1990, 1995, and 2000 surveys; and percentage of housie participants - 2000**

		1985 % of sample (n=1,500)	1990 % of sample (n=1,200)	1995 % of sample (n=1,200)	2000 % of sample (n=1,500)	2000 % of players (n=53)	
TOTAL HOUSIE PLAYERS		8	5	6	4	100	
Sex	Male	5	2	3	2	23	
	Female	11	9	9	5	77	
Age	15-24 years	10	4	9	6	30	
	25-34 years	7	6	7	3	17	
	35-44 years	6	4	5	2	13	
	45-54 years	7	6	4	4	15	
	55-64 years	10	8	7	4	11	
	65+ years	7	5	4	3	15	
Ethnicity <sup>39</sup> (1990-1995)	NZ Māori	NA	12	25	N/A	N/A	
	Other	NA	5	4	N/A	N/A	
	(2000)	NZ Māori	N/A	N/A	N/A	9	25
		Pacific peoples	N/A	N/A	N/A	11	23
General <sup>40</sup>		N/A	N/A	N/A	2	53	
Personal income <sup>39</sup>	Under \$20,000	NC	6	9	5	60	
	\$20-\$40,000	NC	6	3	3	25	
	\$40,000+	NC	1	2	1	6	
Household Income <sup>39</sup>	Under \$30,000	NC	7	8	6	38	
	\$30-\$60,000	NC	5	8	3	30	
	\$60,000+	NC	1	1	2	15	
Occupation	White collar	4	5	3	3	26	
	Blue collar	8	5	5	4	26	
	Home duties	12	9	16	4	11	
	Retired	9	4	2	3	15	
	Benefit/unemp	10	9	12	10	15	
	Student	8	3	9	1	4	
Education	Prim/sec school	NC	9	11	4	28	
	School Cert	NC	5	8	6	30	
	UE/6FC/Bursary	NC	5	5	5	25	
	Trade/tech qual	NC	3	2	1	4	
	Other tertiary	NC	1	4	2	9	
	Univ graduate	NC	0	<1	1	2	

NC - not comparable

NA - not asked

N/A - not applicable

<sup>39</sup> Percentages may not add up to 100% due to non-responses to certain questions

<sup>40</sup> 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

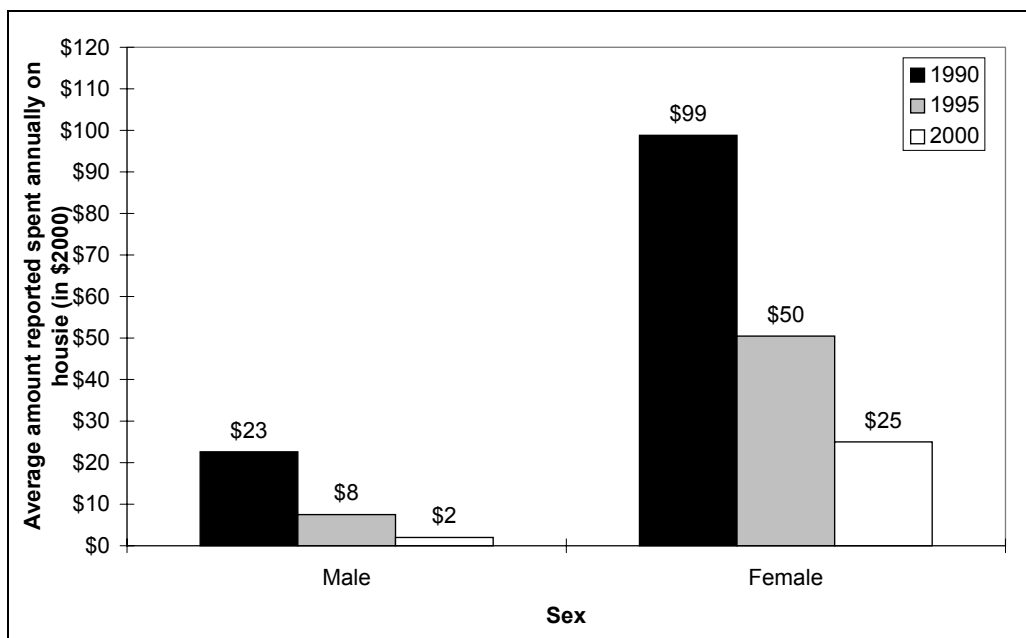
## Sex

Fewer male respondents played housie between 1985 and 2000, compared to females (Table 3.47). The increase in participation in housie between 1990 and 1995 occurred solely due to an increase in the proportion of male participation while the decline between 1995 and 2000 were due to an almost halving of female participation. However, females comprised 77% of all participants in 2000. Not only did fewer males play housie in 2000, they also played less frequently than female participants (80% of males played once every six months or less compared to 35% of female participants).

A higher proportion of male participants reported spending more than \$10 in an average housie session (68% compared to 52% of females). Male participants, on average, spent more on housie in a typical session than females (\$21.40 compared to \$17.20 by females).

Due to their considerably lower participation rates, male respondents reported spending considerably less on housie annually compared to female respondents (Figure 3.27). Despite males reporting spending more on housie in a typical session than females, the average annual reported spending on housie by male participants was considerably lower than female participants due to the relative low number of times males played housie in a year (\$121 compared to \$464 for female participants).

**Figure 3.27: Average estimated annual reported spending on housie by respondents in inflation adjusted terms, by sex - 1990, 1995 and 2000**



Females' reasons for playing housie differed to those of male participants. Females were more likely to play housie:

- As entertainment (43% of females compared to 19% of male participants)
- For excitement or a challenge (38%; 27%)
- To get out of the house/be with people (20%; 3%)

However, males were more likely to play housie to “support worthy causes” than female participants (22% compared to 12% of female participants).

Female participants were more likely to say they won money overall playing housie in the last 12 months compared to males (32% compared to 14% of male participants). They were also more likely to say they broke even playing housie compared to males (38% compared to 25% of male participants).

### *Age*

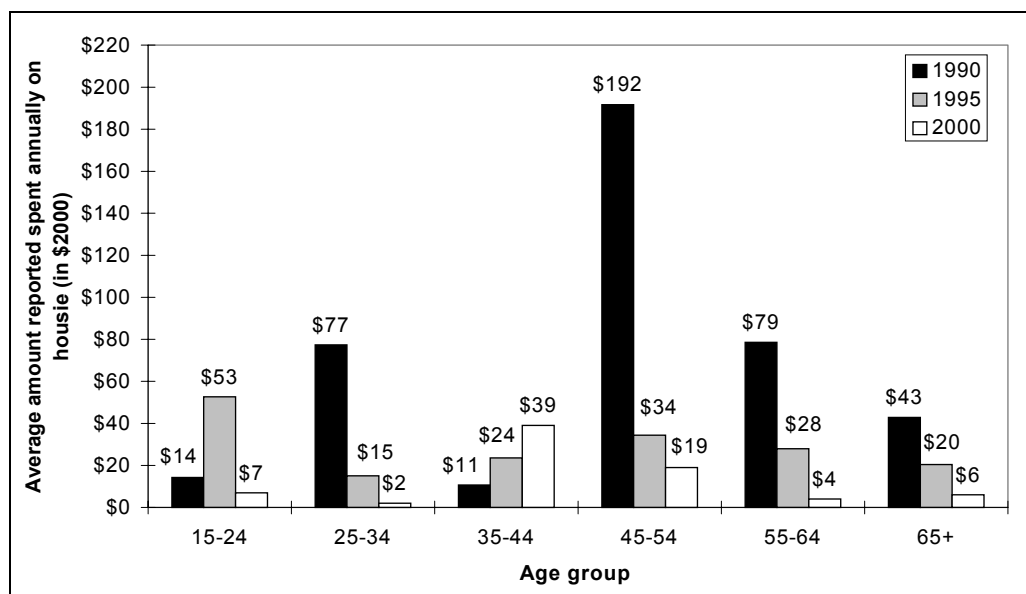
People under the age of 25 years comprised the highest proportion of respondents who had played housie between 1985 and 2000, except in 1990 (Table 3.47). People in this group also comprised 30% of all housie participants in 2000. However, participants between the ages of 35-44 and 45-54 years of age played housie more frequently than participants in other age groups. Sixty percent of participants in the 35-44 year age group and 42% of those in the 45-54 year age group played housie at least monthly compared to 36% of participants in other age groups.

People between the ages of 35-54 years had the highest proportion of participants who reported spending more than \$20 in a typical session playing housie (78% compared with 23% of participants of other ages). People in the 35-44 year and 45-54 year age groups also reported spending the most in a typical session playing housie (\$25.30 by those aged between 35-44 years and \$23.20 by those aged between 45-54 years compared to the lowest, \$8.40, spent by those aged 65 years and over).

Annual spending on housie has declined steadily since 1990 for respondents in most age groups with only the 35-44 year age group recording an increase in reported spending in inflation adjusted terms (Figure 3.28). Respondents in the 35-44 year age group on average spent the most on housie in 2000. Respondents in this group also reported spending considerably more annually on housie than other participants (\$1,633 compared to the next highest, \$505 by participants in the 45-54 year age group and \$188 by those aged 65 years and over).



**Figure 3.28: Average estimated annual reported spending on housie by respondents in inflation adjusted terms, by age group - 1990, 1995 and 2000**



Participants aged between 35-54 years were more likely to say they had won money or broken even overall playing housie in the past 12 months compared to participants in other age groups (87% compared to 51% of participants in other age groups).

#### *Ethnicity*

Māori and Pacific peoples were more likely to have played housie at least once in the 12 months prior to being surveyed than respondents in the General population (9% of Māori, 11% of Pacific peoples compared to 2% of respondents in the General population). However, the General population comprised 53% of participants while Māori comprised 25% and Pacific peoples the remaining 23% of participants (Table 3.47).

Pacific peoples played housie more frequently than other participants (57% played at least monthly, compared to 38% of Māori and 32% of the General population).

A higher proportion of Māori participants reported spending an average of \$21 or more on housie in a typical housie session (63% compared to 40% of Pacific peoples and 27% of the General population). On average, Māori participants reported spending \$25.70 in a typical session playing housie, compared to \$19.60 spent by Pacific peoples and \$14.10 by participants in the General population. Pacific peoples reported spending the most annually on housie of all respondents (\$48 compared to \$19 by Māori respondents and \$10 by those in the General population).

Participants from the General population were more likely to play housie for “entertainment” reasons compared to other participants (50% compared to 33% of Māori participants and 10% of Pacific peoples).

Pacific peoples and Māori were more likely to say they had won money or broken even overall playing housie in the past 12 months compared to participants in the

General population (67% of Māori and 70% of Pacific peoples compared to 58% of participants in the General population).

*Household income*

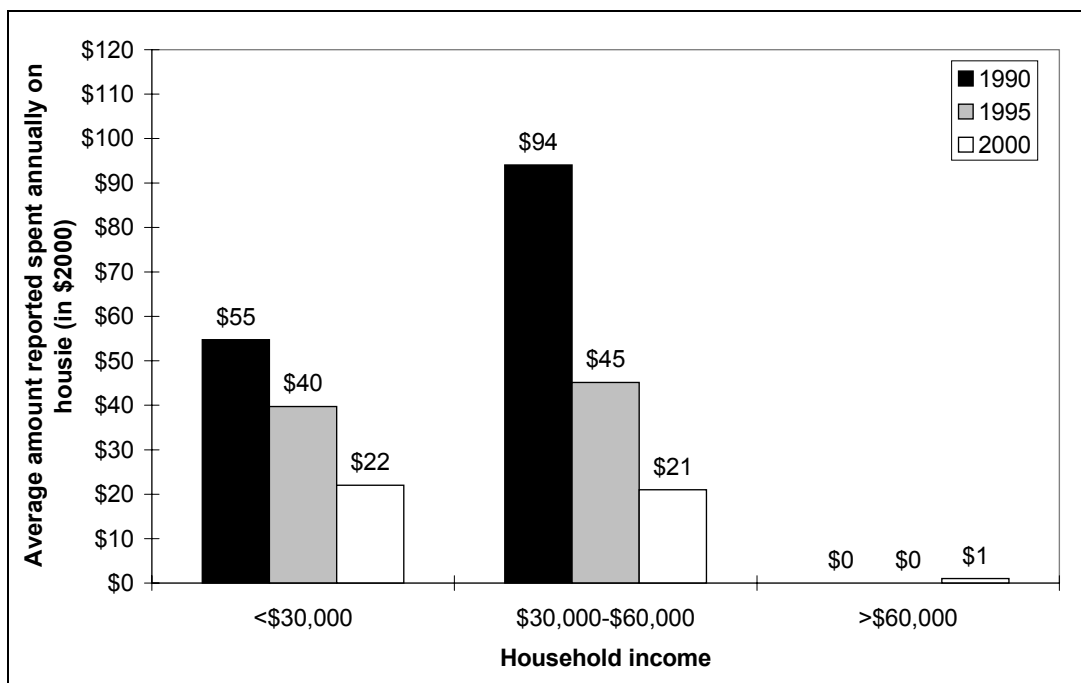
The lower their household income, the more likely the respondent was to have played housie at least once in the 12 months prior to being surveyed (6% of respondents from households with an income under \$30,000 had played housie at least once compared to 3% of other respondents). People from households with an income of under \$30,000 comprised 38% of all housie participants.

Participants from households with incomes under \$30,000 played housie more frequently than participants from households with higher incomes (62% played at least monthly or weekly, compared to 17% of participants from households with an income of \$30,000 or more).

A higher proportion of participants from households with an income of \$60,000 or more spent an average of \$21 or more in a typical session playing housie (50% compared to 36% of participants from households with an income of under \$60,000). People from households with an income of \$60,000 or more spent an average of \$24.70 in a typical session compared to \$14.50 by participants from households with an income of between \$30,000-\$60,000 and \$17.70 by participants from households with an income of under \$30,000.

Respondents from middle-income households (\$30,000-\$60,000) spent the most on average annually on housie between 1990 and 1995 (Figure 3.29). However, by 2000 respondents from households with incomes under \$30,000 spent slightly more on housie annually.

**Figure 3.29: Average estimated annual reported spending on housie by respondents in inflation adjusted terms, by household income - 1990, 1995 and 2000**



Participants from households with an income of under \$30,000 were more likely to play housie to “win money or prizes” compared to other participants (57% compared to 38% of participants with other household income). They were also more likely to play housie to “be with people/get out of the house (22%; 13%).

The lower their household income, the more likely participants were to have won money or broken even overall playing housie (71% of participants with household income of under \$30,000 and 47% of participants with household income of between \$30,000-\$60,000, compared to 38% of participants from households with incomes of \$60,000 or more).

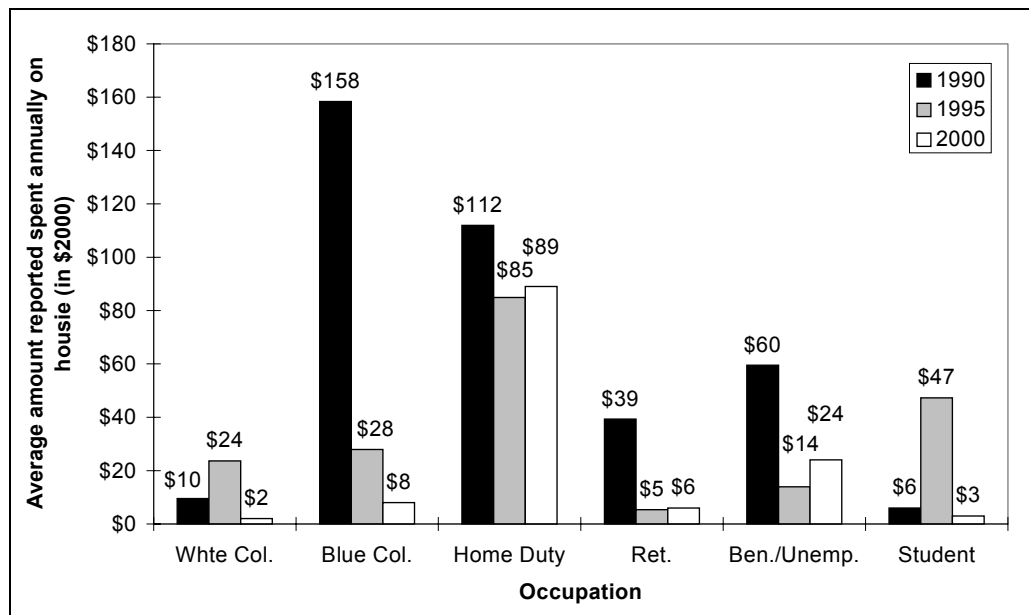
**Occupation**

Respondents who were unemployed or on a benefit were more likely to have played housie at least once in the 12 months prior to being surveyed (10% compared to 3% of respondents in other occupations). However, over half of all participants (52%) were blue-collar and white-collar workers (Table 3.47).

Homemakers, beneficiaries and students were the most frequent players of housie (56% played at least monthly compared to 28% of participants in other occupations).

Blue-collar workers, homemakers and students had the highest proportion of participants who spent an average of \$21 or more in a typical session playing housie (64% compared to 23% of participants in other occupations). Blue-collar workers and students reported spending the most on average in a typical session playing housie of all participants (\$23.50 reported spent by blue-collar workers and \$23.30 reported spent by students compared to the lowest group, retired people who reported spending an average of \$13.30). Homemakers reported spending the most annually on housie of all respondents (Figure 3.30).

**Figure 3.30: Average estimated annual reported spending on housie by respondents in inflation adjusted terms, by occupation - 1990, 1995 and 2000**



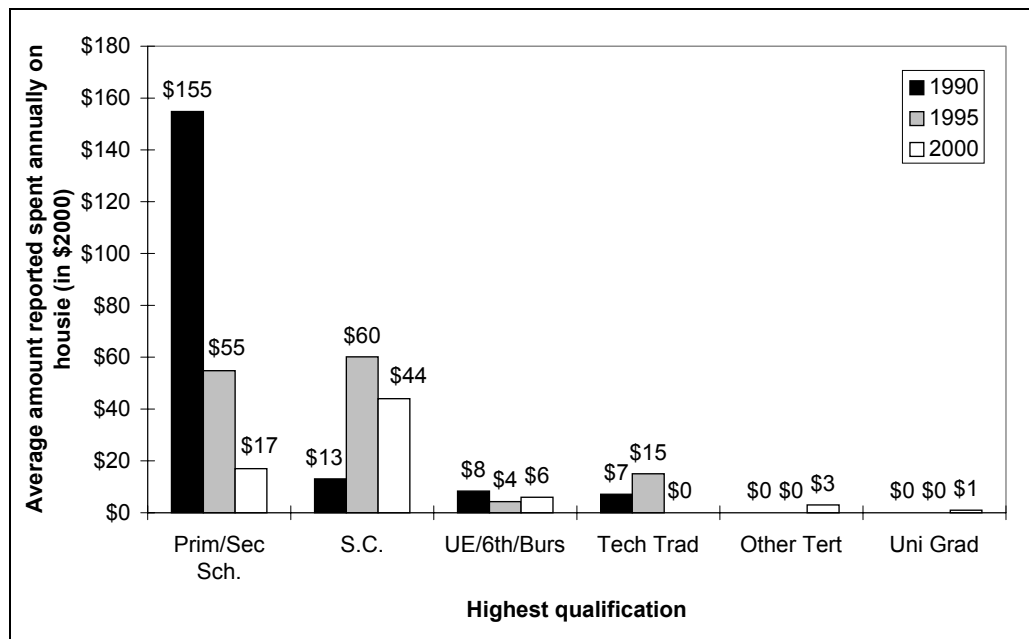
White-collar workers were the only group of participants of whom the majority did not report that they had won money or broken even overall playing housie in the last 12 months (37% compared to 76% of participants in other occupational groups).

**Highest Qualification**

A higher proportion of respondents with no formal qualifications, or high school/secondary qualifications (either School Certificate or University Entrance/Sixth Form Certificate/Bursary) played housie at least once in the 12 months prior to being surveyed (5% compared to 1% of respondents with other qualifications). Together, participants in these groups comprised 83% of all housie participants (Table 3.47).

Participants who had no formal qualifications and those with University Entrance/Sixth Form Certificate/Bursary as their highest educational qualification reported spending the most in a typical session playing housie (\$22 by University Entrance/Sixth Form Certificate/Bursary participants, \$21 by participants with no formal qualifications compared to \$5 for the lowest group, University graduates). However, on an annual basis, respondents with School Certificate as their highest educational qualification spent the most on housie (Figure 3.31).

**Figure 3.31: Average estimated annual reported spending on housie by respondents in inflation adjusted terms, by highest qualification - 1990, 1995 and 2000**



### 3.11 Horse or dog races<sup>41</sup>

Betting on horse races has always been legal in New Zealand, although betting through bookmakers was outlawed with the Gaming Amendment Act 1920. Established in 1950 following the recommendations of the Finlay Commission on gaming and horse racing, the Totalisator Agency Board (henceforth referred to as the TAB) was established following a public referendum (held in 1949) and the passing of the Gaming Amendment Act 1949. Betting on greyhound racing was later legalised in 1981<sup>42</sup>.

The TAB provides an on-course betting system for the country's 159 harness, galloping and greyhound racing clubs. The activities of the TAB are overseen by a Board comprised of one representative each from galloping, harness and greyhound racing bodies, together with two Members of the New Zealand Racing Industry Board, the chief executive of the TAB and a Member appointed by the Minister for Racing. The TAB itself is accountable to the New Zealand Racing Industry Board, which distributes all profits generated by the TAB to the Racing Industry ([http://www.tab.co.nz/tab\\_corporate.cfm](http://www.tab.co.nz/tab_corporate.cfm)).

This sub-section of the report distinguishes between three methods of betting:

1. On-course/track-side;
2. Off-course/New Zealand TAB-based; and
3. Overseas-based betting organisations.

Some of these options have several ways for participants to place bets, via: Internet accounts, telephone accounts and retail outlets.

#### *Participation*

Figure 3.32 shows the proportion of respondents who had placed a bet on a horse or dog race at least once in the 12 months prior to being surveyed. It also shows the proportion of respondents who placed bets through the New Zealand TAB, at a racetrack, through an overseas betting organisation and through a bookmaker. It is possible for respondents to use any one or any combination of these organisations to place a bet on horse or dog racing. It can be ascertained from Figure 3.32 that a certain proportion of respondents used at least both the New Zealand TAB and the racetrack to place bets on racing events between 1985 and 2000.

The question on the use of bookmakers was asked only in 1985, similarly the question on placing bets with overseas-based betting organisations was asked only in the 2000 survey. In both cases, fewer than 5% of respondents had used either method to place bets on races.

Participation in race-betting has declined since 1985, with a particularly sharp decline between 1995 and 2000 (Figure 3.32). With the exception of 1995, a higher proportion of respondents placed bets at least once in the 12 months prior to being surveyed through the New Zealand TAB compared to the proportion of respondents

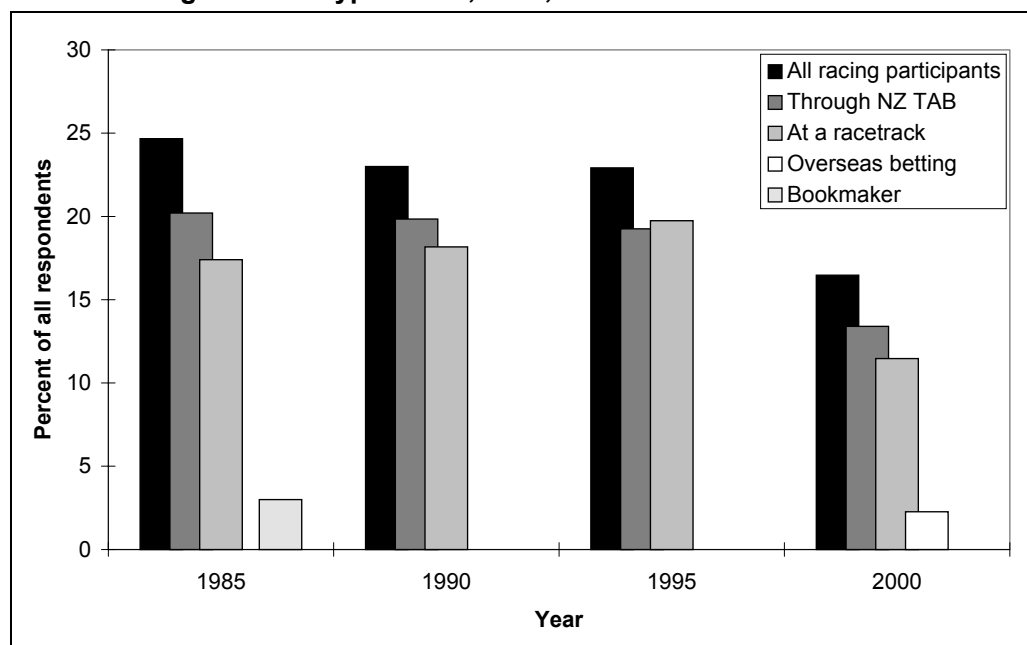
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<sup>41</sup> Questions in this sub-section were asked only of the 247 respondents who had placed money on a horse or dog race through any or all of the following: the New Zealand TAB; at a racetrack; and/or through an overseas betting organisation, in the last 12 months

<sup>42</sup> Source: Grant, 2000

who placed bets at least once at a racetrack. The proportion of respondents who had placed a bet at a racetrack increased gradually between 1985 and 1995, while overall participation declined. However, the decline in participation between 1995 and 2000 was more pronounced for betting at a racetrack.

**Figure 3.32: Participation in race-betting by respondents, by betting organisation type - 1985, 1990, 1995 and 2000**



*Question on "Bookmakers" was asked only in 1985*

*Question on placing bets with "overseas based betting organisations" was asked only in 2000*

The proportion of respondents who had placed a bet on a race through the New Zealand TAB at least once in the 12 months prior to being surveyed has decreased markedly between 1995 and 2000 (Table 3.48). However, changes to participation in race-betting between 1985 and 2000 were masked by shifts in the frequency of respondent participation. Between 1985 and 2000 there was a continual decline in the proportion of respondents placing bets through the New Zealand TAB at least once a week, but this decline was matched by an increase in the proportion of respondents who placed a bet less often than once a month. In 1995, this too began to decline.

**Table 3.48: Q.50, Frequency of placing bets on horse/dog races through the New Zealand TAB by respondents in the last 12 months - 1985, 1990, 1995, and 2000**

	1985 (n=1,500) %	1990 (n=1,200) %	1995 (n=1,200) %	2000 (n=1,500) %
At least once a week	5	4	3	2
At least once a month (but not weekly)	4	3	4	2
Less often than monthly	10	13	12	9
Played activity	20	20	19	13
Not played activity at all	80	80	81	87

*Percentages may not add up to 100% due to rounding*

The majority of participants who placed bets on races through the New Zealand TAB did so less often than once a month. Between 1985 and 2000, there has been a decrease in the frequency with which participants placed a bet on racing events through the New Zealand TAB (Table 3.49). For example, nearly a fifth (19%) of participants placed a bet once a week in 1985 compared to 10% in 2000. Conversely, only 11% of participants placed a bet through the New Zealand TAB once a year in 1985 compared 26% of participants in 2000.

**Table 3.49: Q50, Frequency of placing money on a horse or dog race through the New Zealand TAB by participants in the last 12 months - 1985, 1990, 1995 and 2000**

Response option	1985	1990	1995	2000
	(n=303) %	(n=238) %	(n=231) %	(n=201) %
Four times a week or more	1	2	2	2
Two or three times a week	7	4	3	4
Once a week	19	14	12	10
Once every 2 weeks	8	7	6	4
Once every 3 weeks	1	1	2	2
Once a month	11	9	10	6
Once every 2 months	8	6	5	7
Once every 3 months	10	10	10	10
Once every 6 months	16	16	13	18
Once a year	11	19	23	26
Less frequently than once a year	5	11	13	9
Not specified	3	0	1	1

The vast majority of participants who placed money on races at a racetrack did so less often than once a month (Table 3.50). Despite an increase in the proportion of participants who placed bets less often than once a month between 1985 and 1995, sharp declines between 1995 and 2000 meant that the proportion declined slightly overall between 1985 and 2000.

**Table 3.50: Q49, Frequency of placing money on a horse or dog race at a racetrack by participants in the last 12 months - 1985, 1990, 1995 and 2000**

Response option	1985	1990	1995	2000
	(n=261) %	(n=218) %	(n=237) %	(n=172) %
Four times a week or more	-	<1	1	-
Two or three times a week	<1	<1	<1	<1
Once a week	<1	2	<1	2
Once every 2 weeks	2	2	<1	1
Once every 3 weeks	<1	<1	<1	<1
Once a month	7	5	5	9
Once every 2 months	7	6	4	1
Once every 3 months	15	11	10	7
Once every 6 months	22	16	16	23
Once a year	26	30	27	35
Less frequently than once a year	17	26	34	20
Not specified	1	<1	<1	1

Respondents were asked for the first time in the 2000 survey whether or not they had placed a bet on a racing event using an overseas betting organisation. A small proportion of respondents said they had used an overseas betting organisation (Figure 3.32). However, the majority of participants did not place bets very often, with 66% of participants reporting placing a bet once a year or less (Table 3.51).

**Table 3.51: Q51, Frequency of placing money on a horse or dog race through an overseas betting organisation by participants in the last 12 months (n=33)**

<b>Response option</b>	<b>%</b>
Two or three times a week	3
Once a week	3
Once every 3 weeks	3
Once a month	6
Once every 3 months	9
Once every 6 months	9
Once a year	45
Less frequently than once a year	21

*Caution is needed due to the small numbers of participants (n=33)*

Table 3.52 shows that just over half of participants (51%) spent \$10 or less on an average day betting on racing events. Despite this, the average bet was \$23.20, which is due to the large amounts of money bet by participants who spent more than \$20 in a typical session placing money on racing events.

**Table 3.52: Q52, How much participants reported spending on horse or dog races in an average day (n=247)**

<b>Response option</b>	<b>%</b>
\$1 - \$5	25
\$6 - \$10	26
\$11 - \$20	26
\$21+	23
Mean	\$23.20

*Expenditure information is for all forms of race-betting (through the NZ TAB, at a racetrack and through an overseas betting organisation)*

The main reason, given by the majority of participants, for placing a bet on a race was “to win prizes/money” (Table 3.53). “Entertainment” and “excitement/or a challenge” were also mentioned by around 40% of participants. Some of the other reasons given by participants for placing money on horse or dog races were:

- Melbourne cup (2)
- Brother/brother-in-law racing his horse (2)
- “Heard that a horse’s name was the same as my surname”
- “Knew the owner”
- “A tip or a feeling”
- “Work related, due to sponsorship”
- “Cultural/family”
- “Given tip by horse owners”



**Table 3.53: Q53, Reasons why participants place money on a horse or dog race - 1985, 1990, 1995 and 2000**

Response option	1985	1990	1995	2000
	(n=370) %	(n=276) %	(n=275) %	(n=247) %
To win prizes/money	66	52	46	58
For excitement/or a challenge	43	61	43	38
To support worthy causes	NA	1	<1	<1
Out of curiosity	NA	7	4	3
To oblige or please other people	NA	4	3	4
As a gift for another person	NA	<1	<1	<1
As an interest/or a hobby	36	22	11	12
To be with people/ get out of the house	NA	14	10	10
As entertainment	NA	NA	40	40
Others	2	4	<1	4
Don't know	<1	1	-	-

*NA Not asked*

*Multiple response*

Almost half of participants said they had won money or broken even overall placing bets on horse or dog races in the past 12 months (Table 3.54).

**Table 3.54: Q54, Whether participants have won or lost money overall when placing money on a horse or dog race in the last 12 months (n=247)**

Response option	%
Won money overall	20
Broken even	29
Lost money overall	51
Don't know	<1

### 3.12 Further analysis of horse/dog racing

**Table 3.55: Horse/dog racing participation by personal characteristics of respondents - 1985, 1990, 1995, and 2000 surveys; and percentage of horse/dog racing participants - 2000**

		1985 % of sample (n=1,500)	1990 % of sample (n=1,200)	1995 % of sample (n=1,200)	2000 % of sample (n=1,500)	2000 % of players (n=247)
TOTAL HORSE/DOG RACING BETTORS		25	23	23	17	100
Sex	<i>Male</i>	26	25	25	18	53
	<i>Female</i>	24	21	21	15	47
Age	<i>15-24 years</i>	21	27	16	15	17
	<i>25-34 years</i>	26	26	27	16	20
	<i>35-44 years</i>	29	25	26	14	16
	<i>45-54 years</i>	27	18	28	19	17
	<i>55-64 years</i>	29	24	23	19	13
	<i>65+ years</i>	15	12	17	18	16
Ethnicity <sup>43</sup> (1990-1995)  (2000)	<i>NZ Māori</i>	NA	23	23	N/A	N/A
	<i>Other</i>	NA	24	23	N/A	N/A
	<i>NZ Māori</i>	N/A	N/A	N/A	19	11
	<i>Pacific peoples General <sup>44</sup></i>	N/A	N/A	N/A	12 17	5 83
Location	<i>Upper North Island</i>	25	21	23	15	47
	<i>Lower North Island</i>	25	22	22	19	27
	<i>South Island</i>	24	29	24	17	26
Personal income <sup>43</sup>	<i>Under \$20,000</i>	NC	20	18	12	32
	<i>\$20-\$40,000</i>	NC	29	26	21	40
	<i>\$40,000+</i>	NC	21	36	20	23
Household Income <sup>43</sup>	<i>Under \$30,000</i>	NC	21	19	14	20
	<i>\$30-\$60,000</i>	NC	24	25	16	33
	<i>\$60,000+</i>	NC	26	29	22	37
Occupation	<i>White collar</i>	25	25	32	21	43
	<i>Blue collar</i>	32	27	25	18	24
	<i>Home duties</i>	22	21	14	13	8
	<i>Retired</i>	20	13	17	19	18
	<i>Benefit/unemp</i>	27	26	16	11	4
	<i>Student</i>	14	29	12	5	4
Education	<i>Prim/sec school</i>	24	15	27	18	27
	<i>School Cert</i>	20	24	21	12	13
	<i>UE/6FC/Bursary</i>	29	26	19	20	19
	<i>Trade/tech qual</i>	22	28	21	13	12
	<i>Other tertiary</i>	22	30	18	21	24
	<i>Univ graduate</i>	16	27	27	9	4

<sup>43</sup> Percentages may not add up to 100% due to non-responses to certain questions

<sup>44</sup> 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

## Sex

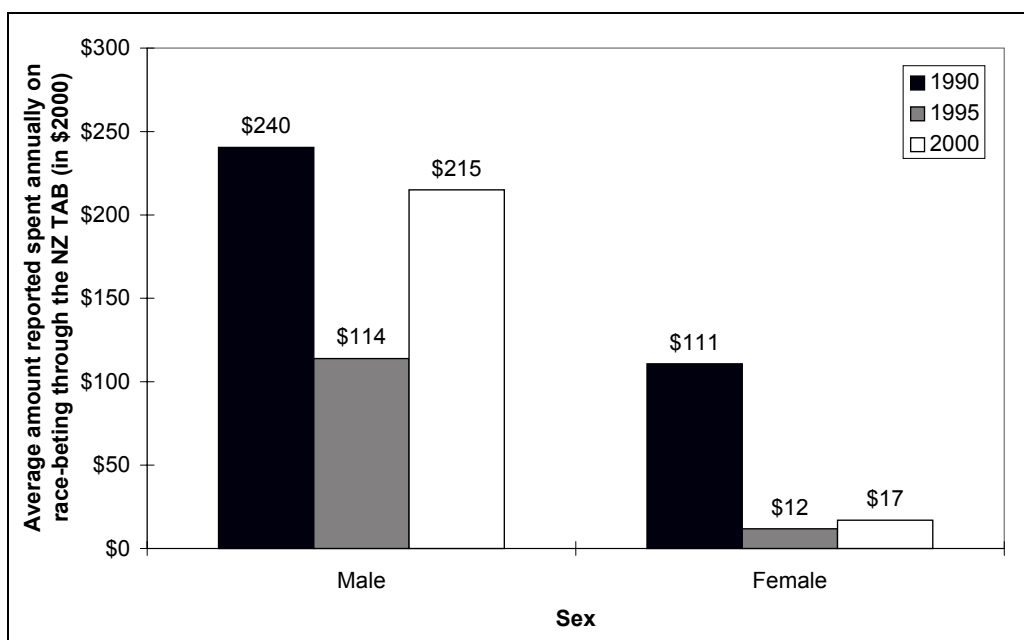
Male respondents were slightly more likely to have placed at least one bet on a horse or dog race in the 12 months prior to being surveyed compared to females (Table 3.33). A higher proportion of male participants placed bets on racing through the New Zealand TAB at least once a month compared to females (38% compared to 19% of females).

A similar proportion of male and female respondents had placed a bet on a horse or dog race at a racetrack (12% of male and 11% of female respondents). However, male participants participated more frequently than female participants (18% compared to 8% of females placed a bet at least monthly).

A higher proportion of male participants (59%) reported spending an average of \$11 or more in a typical session of race-betting compared to females (38%)<sup>45</sup>. The average reported spending by males in a typical session of race-betting was \$29.00 compared to \$16.70 for female participants. Male spending was much higher than the reported spending by females due to the higher participation rates by males across all three types of race-betting asked about.

Male respondents reported spending more annually through the New Zealand TAB on race-betting than females (Figure 3.33). Annual reported spending for both groups had declined since 1990, despite increases between 1995 and 2000.

**Figure 3.33: Average estimated annual reported spending on race-betting by respondents in inflation adjusted terms, by sex - 1990, 1995 and 2000**



*Only covers reported annual spending on bets made through the NZ TAB*

<sup>45</sup> Expenditure information is for all forms of race-betting (through the NZ TAB, at a racetrack and through an overseas betting organisation)

Male participants were more likely to place a bet “to win prizes/money” (61% of males compared to 55% of female participants), and to “get out of the house/be with friends” (12%; 7%). However, female participants were more likely to place a bet as “entertainment” (44% of females compared to 38% of male participants).

### *Age*

Respondents aged 45 years and over were slightly more likely to have placed a bet on a horse or dog race at least once in the 12 months prior to being surveyed in 2000 (Table 3.55). However, a fifth of participants were between the ages of 25-34 years.

The proportion of respondents who had placed a bet on a horse or dog race declined across almost all age groups between 1985 and 2000. The exception was in the 65 years and over age group, which had a slight increase during the 1985-2000 period.

Race-betting was more common amongst participants in the older age groups (37% of participants aged 45 years and over placed a bet at least once a month or once a week compared to 22% of participants under the age of 45 years).

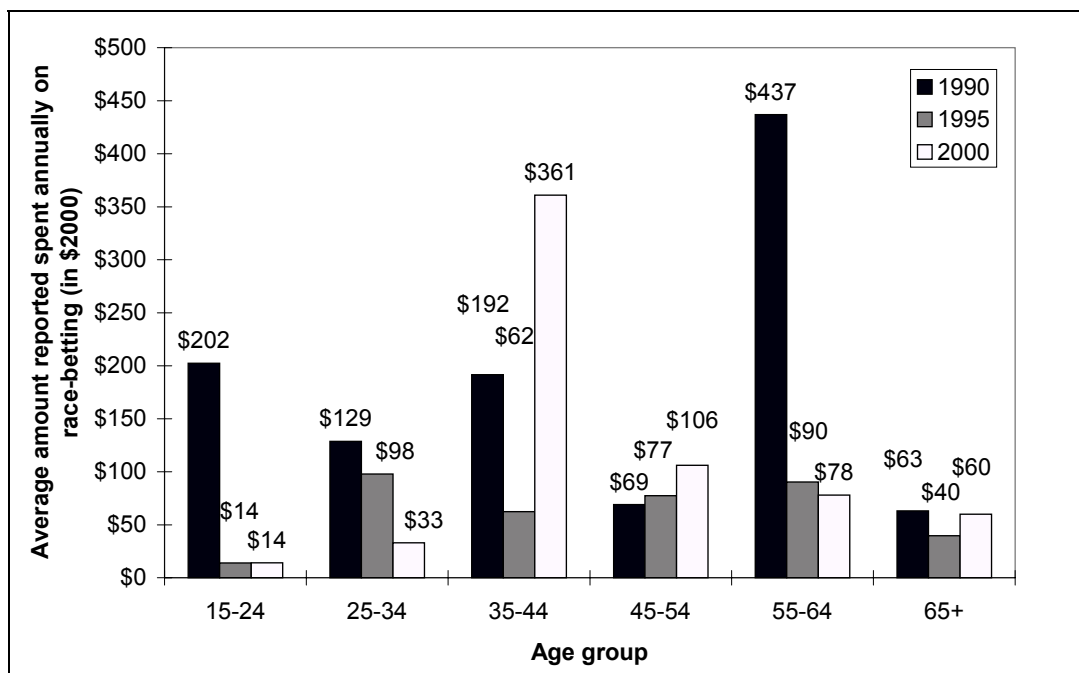
Fewer participants in the youngest and oldest age groups reported spending over \$10 in an average session of race-betting (37% compared to 54% of participants in between the ages of 25 years and 64 years of age)<sup>46</sup>. Participants between the age of 35-44 years reported spending the most on average in a typical session of race-betting (\$36.10 compared to \$25.10 by participants aged between 25-34 years who were the next highest spenders).

There has been a continued decline in reported spending across most age groups between 1990 and 2000 (Figure 3.34). However, there was increased spending by respondents aged between 35 and 54 years between 1995 and 2000.

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<sup>46</sup> Expenditure information is for all forms of race-betting (through the NZ TAB, at a racetrack and through an overseas betting organisation)

**Figure 3.34: Average estimated annual reported spending on race-betting by respondents in inflation adjusted terms, by age group - 1990, 1995 and 2000**



*Only covers reported annual spending on bets made through the NZ TAB*

People under the age of 45 years were more likely to say that they had won money or broken even overall placing bets on races in the 12 months prior to being surveyed (58% compared to 39% of people aged 45 years and over).

#### *Ethnicity*

Participation rates in race-betting were similar for respondents in each ethnic group (Table 3.55). The proportion of respondents who had placed a bet through an overseas betting organisation were also similar. However, Māori were less likely to have placed a bet at a racetrack than respondents in other ethnic groups (7% of Māori compared to 12% of respondents in the rest of the population). They were more likely to have placed a bet through the NZ TAB than other respondents (18%; 13%).

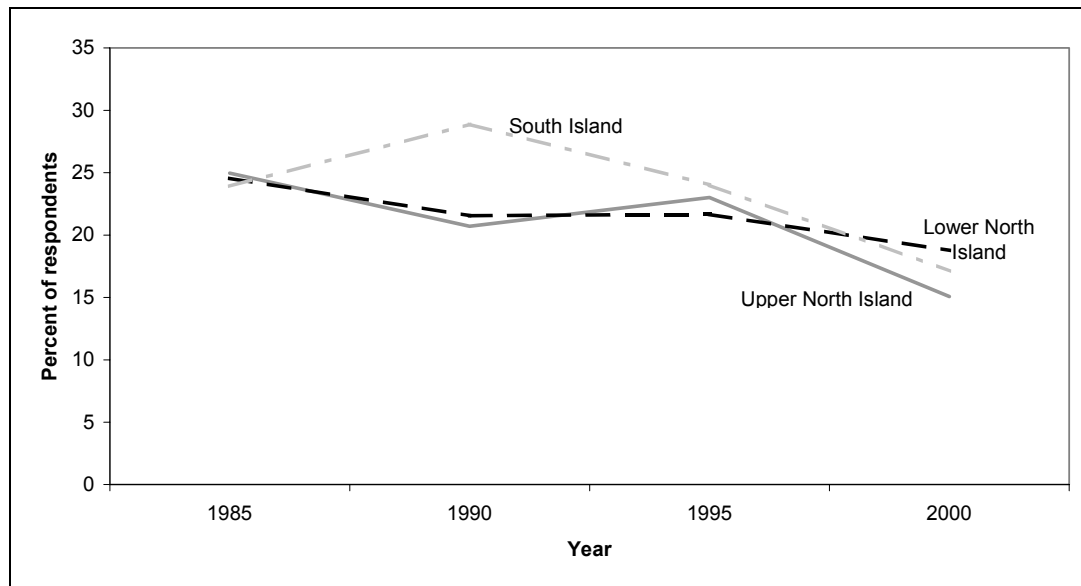
Participants from the General population spent the most on average in a typical session of race-betting (\$24.10 compared to \$15.60 for Māori participants and \$17.20 for Pacific peoples). Respondents from the General population also spent more on average annually on race-betting through the NZ TAB compared to respondents in other ethnic groups (\$126 compared to \$52 by Māori respondents and \$49 by Pacific peoples).

Māori participants were more likely to say they had won money or broken even overall placing a bet on races in the past 12 months compared to other participants (57% compared to 47% of participants in the rest of the population).

### Location

Respondents in the Upper North Island and in the South Island were slightly less likely to have placed a bet on a race compared to respondents in the Lower North Island in 2000 (Table 3.55). The decline in participation between 1995 and 2000 was more marked for respondents from the Upper North Island and the South Island compared to respondents from the Lower North Island (Figure 3.35). The decline in participation levels between 1995 and 2000 may be due to the introduction of new, localised, forms of gaming, for example casinos.

**Figure 3.35: Participants in race-betting as a proportion of all respondents, by location – 1985, 1990, 1995 and 2000**



Despite having a lower proportion of respondents who placed bets on races, participants from the South Island (\$28.10) and the Upper North Island (\$23.80) reported spending more on average in a typical session of race-betting than their Lower North Island counterparts (\$17.50). However, participants from the Lower North Island were more likely to say they had won money or broken even overall placing bets on racing in the 12 months prior to being surveyed (53% compared to 47% of participants from the rest of the country).

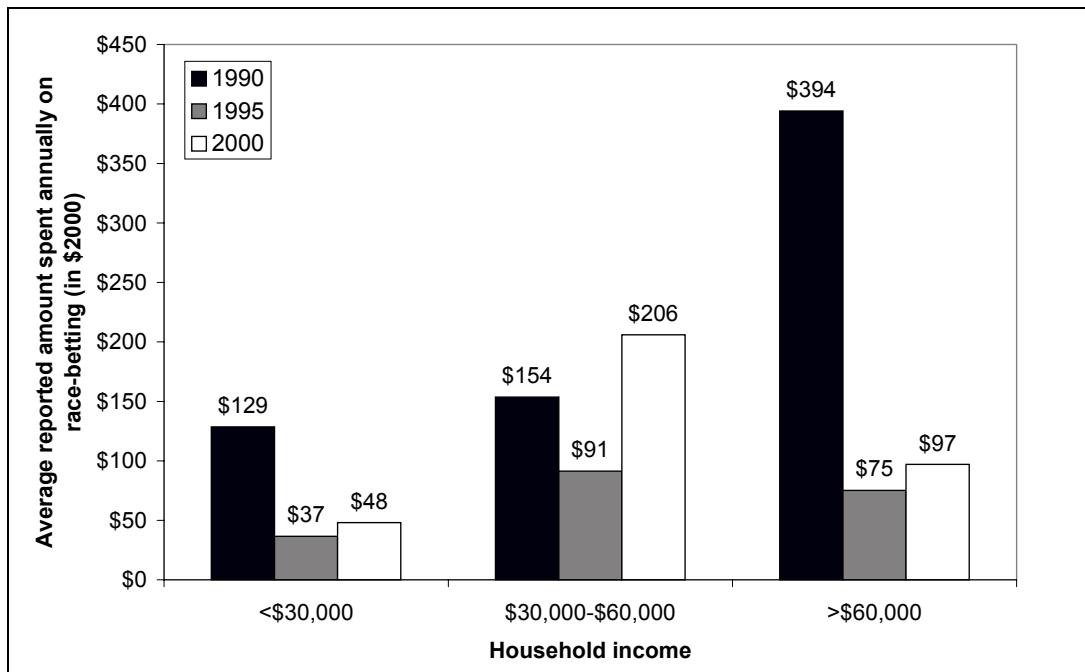
### Household income

Respondents from households with an income of over \$60,000 were more likely to have placed a bet on a horse or dog race at least once in the 12 months prior to being surveyed (Table 3.55). Between 1990 and 2000 participation rates for respondents from higher income households were consistently higher than participation rates of respondents from households with incomes of under \$30,000. The participation rates of respondents from households with incomes of \$60,000 or less steadily declined between 1990 and 2000 (by 33% overall). By comparison, respondents from households with an income of over \$60,000 had a decline in participation of 15% between 1990 and 2000.

The higher their household income, the more money participants were likely to report spending on race-betting in a typical session. Participants from households with an income of over \$60,000 reported spending an average of \$27.10 in a typical session of race-betting compared to \$24.90 by participants from households with an income of \$30,000-\$60,000 and \$16.30 by participants from households with an income of under \$30,000.

Respondents from households with incomes between \$30,000-\$60,000 reported spending the most on average annually on race-betting in 1995 and 2000 (Figure 3.36). The average amount reported spent on race-betting annually had declined between 1990 and 1995, but has increased since 1995 across all household income groups.

**Figure 3.36: Average estimated annual reported spending on race-betting by respondents in inflation adjusted terms, by household income – 1990, 1995 and 2000**



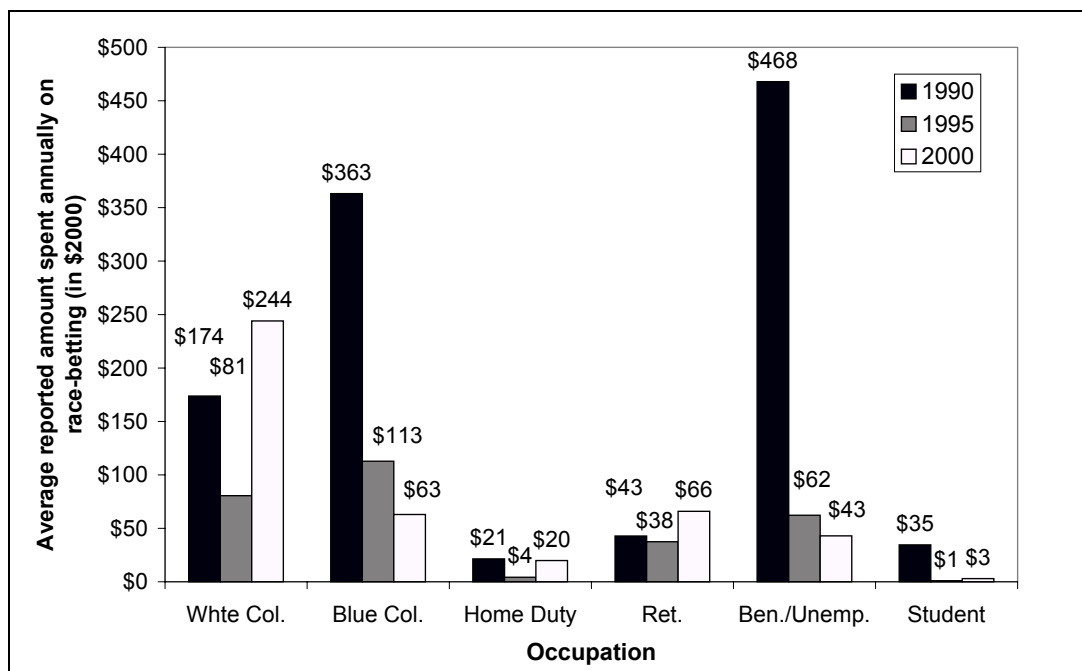
*Only covers reported annual spending on bets made through the NZ TAB*

### Occupation

White-collar workers, blue-collar workers and retired people were more likely to have placed a bet on a horse or dog race at least once in the past 12 months compared to respondents in other occupations (Table 3.55). There have been overall declines in the proportion of respondents who had placed a bet on a horse or dog racing throughout the period from 1985 to 2000 across all occupational groups. The one exception was retired people, whose participation rates have increased steadily since 1990. White-collar workers comprised almost half of all participants who had placed a bet on racing at least once in the 12 months prior to being surveyed in 2000 (Table 3.55).

White-collar (\$29.50) and blue-collar workers (\$23.90) reported spending the most on average in a typical session of race-betting especially compared to retired people who reported spending the least amount on average (\$13.70). White-collar workers reported spending the most on average annually on race-betting of all respondents partly due to a combination of factors including their higher participation rates, high average spend per session (Figure 3.37).

**Figure 3.37: Average estimated annual reported spending on race-betting by respondents in inflation adjusted terms, by occupation – 1990, 1995 and 2000**



*Only covers reported annual spending on bets made through the NZ TAB*

The majority of students, blue-collar workers and homemakers who participated in race-betting said that they had won money or broken even overall placing a bet on a horse or dog race in the 12 months prior to being surveyed (62% compared to 42% of other participants).

#### *Highest qualification*

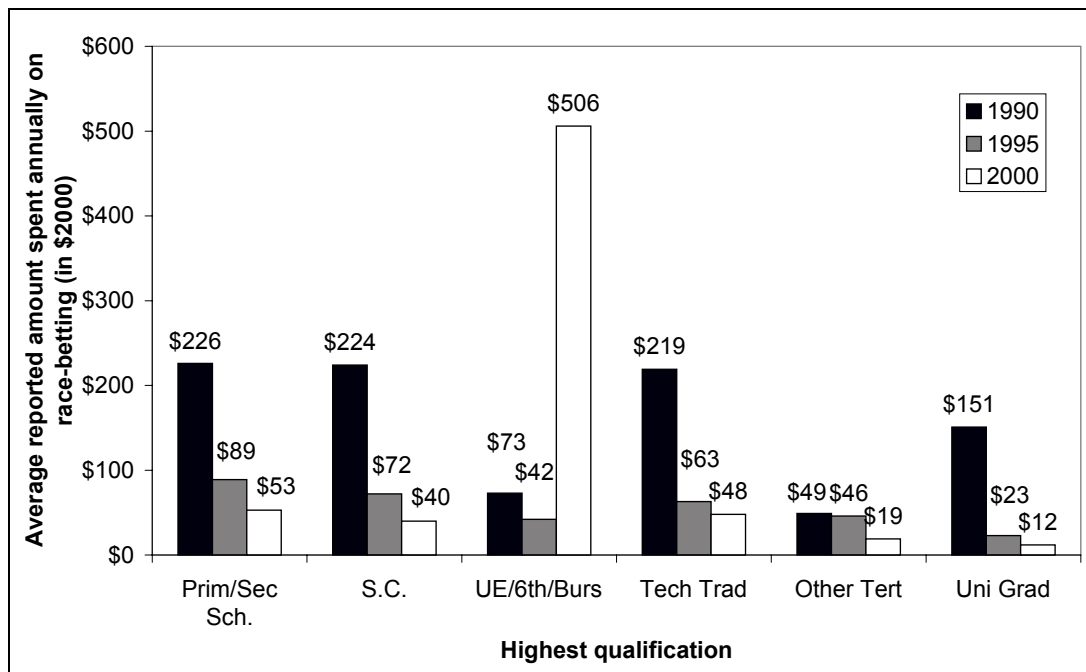
Respondents with other tertiary qualifications or university entrance/6<sup>th</sup> form certificate/bursary were the most likely to have placed a bet on racing at least once in the 12 months prior to being surveyed in 2000. They were the only groups to have an increase in participation between 1995 and 2000. University graduates had a substantial decline (67%) in participation between 1995 and 2000. The other group most likely to place a bet on racing were respondents without a formal qualification (Table 3.55).

Proportionately, participants with no formal qualifications were the biggest group to place bets on racing followed by participants with other tertiary qualifications (together they comprised 51% of all participants).



Participants with university entrance/6<sup>th</sup> form certificate/bursary qualifications (\$36.00) reported spending the most on average in a typical session of race-betting, followed by university graduates (\$33.10). This compares with the lowest average reported spend per session of \$16.50 by participants with other tertiary qualifications. Respondents with university entrance/6<sup>th</sup> form certificate/bursary qualifications reported spending the most on average annually on race-betting through the NZ TAB in 2000 (Figure 3.38). Respondents with university entrance/6<sup>th</sup> form certificate/bursary qualifications were the only group to have an increase in their reported spending between 1995 and 2000. In contrast, the average amount reported spent annually across all other education groups steadily declined between 1990 and 2000.

**Figure 3.38: Average estimated annual reported spending on race-betting by respondents in inflation adjusted terms, by highest qualification – 1990, 1995 and 2000**



*Only covers reported annual spending on bets made through the NZ TAB*

Participants with a university entrance/6<sup>th</sup> form certificate/bursary qualification or other tertiary qualification were more likely to say they had won money or broken even overall placing bets on racing in the past 12 months (62% compared to 42% of participants with other qualifications).

### 3.13 Sports-betting<sup>47</sup>

In December 1995, Parliament approved legislation allowing New Zealanders to bet on a wide range of sporting events through the New Zealand TAB. In July 1996, the TAB launched sports-betting on a Bledisloe Cup rugby match. The TAB offers betting on 23 different sporting codes including American Football, Athletics, Basketball, Bowls, Cricket, Golf, Motor Sport, Rugby League, Rugby Union, Snooker and Billiards, Soccer, Softball, Tennis, Triathlon and Yachting<sup>48</sup>.

#### *Participation*

Less than 10% of respondents said that they had placed a bet on a sporting event through the New Zealand TAB at least once in the 12 months prior to being surveyed. Of the 8% of respondents that had placed a bet, most of them did so less often than once a month (Table 3.56).

**Table 3.56: Q56, Frequency of placing a bet on a sporting event by respondents in the last 12 months<sup>a</sup>**

<b>Response option</b>	<b>At least once a week</b>	<b>At least once a month<sup>b</sup></b>	<b>Less often than monthly</b>	<b>Not played activity at all</b>
Sports-betting	1	2	5	92

<sup>a</sup> Excludes bets placed on a sporting-event through an overseas betting organisation

<sup>b</sup> “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 3.56 shows how frequently the 126 participants placed bets on sporting events through the NZ TAB. Just over half of participants placed a bet once every three months or less frequently.

**Table 3.57: Q55, Frequency of placing money on a sporting event through the New Zealand TAB by participants in the last 12 months (n=126)**

<b>Response option</b>	<b>%</b>
Two or three times a week	2
Once a week	11
Once every 2 weeks	5
Once every 3 weeks	5
Once a month	13
Once every 2 months	8
Once every 3 months	11
Once every 6 months	20
Once a year	22
Never <sup>a</sup>	3

<sup>a</sup> Never – is the proportion of participants who had placed money on a sporting event but had not placed a bet through the New Zealand TAB

<sup>47</sup> Questions in this sub-section were asked only of the 126 participants who had placed money on a sporting event either through the New Zealand TAB or an overseas betting organisation in the last 12 months. Because of the small number of sports-betting participants in the sample, all figures must be treated with caution

<sup>48</sup> Source: [www.tab.co.nz](http://www.tab.co.nz)

There were few participants who had placed a bet on a sporting event through an overseas betting organisation (Table 3.58). Most participants who had placed a bet on a sporting event through an overseas betting organisation did so annually or less frequently.

**Table 3.58: Q56, Frequency of placing money on a sporting event through an overseas betting organisation by participants in the last 12 months (n=126)**

<b>Response option</b>	<b>%</b>
Once every 2 weeks	3
Once a year	9
Less frequently than once a year	4
Never <sup>a</sup>	84

<sup>a</sup> Never – is the proportion of participants who had placed money on a sporting event but had not placed a bet through an overseas betting organisation

Caution is needed due to the small numbers of actual participants (n=20)

#### *Reported expenditure*

The majority of participants (63%) bet an average of \$5 to \$10 in a typical session of sports-betting (Table 3.59). However, the average bet made in a typical session of sports-betting was \$12.60, due to larger bets made by some of the 28% of participants who bet more than \$10. Participants on average placed \$189 on sporting events annually. The average amount placed annually on sporting events by respondents was \$15.

**Table 3.59: Q57, How much participants reported spending on sporting events in an average day (n=126)**

<b>Response option</b>	<b>%</b>
\$1 - \$4	8
\$5	35
\$6 - \$10	28
\$11+	28
Don't know	<1
Mean	\$12.60

#### *Reasons for participation*

The main reason given by participants for placing bets on sporting events was to win prizes/money (Table 3.60). Almost half of participants (46%) placed bets for “excitement or a challenge”, and just a third (35%) placed bets “as entertainment”.

**Table 3.60: Q58, Reasons why participants placed money on sporting events (n=126)**

<b>Response option</b>	<b>%</b>
To win prizes/money	65
For excitement/or a challenge	46
To support worthy causes	<1
Out of curiosity	3
To oblige or please other people	2
As a gift for another person	<1
As an interest/or a hobby	12
To be with people/ get out of the house	-
As entertainment	35
Others	1
Don't know	-

*Multiple response*

***Beliefs about sports-betting***

The majority of participants (56%) felt that they had lost money overall placing bets on sporting events in the last 12 months (Table 3.61). However, a relatively high proportion of participants felt they had won money overall (29%) or broken even overall (16%).

**Table 3.61: Q59, Whether participants have won or lost money overall when placing money on a sporting event in the last 12 months (n=126)**

<b>Response option</b>	<b>%</b>
Won money overall	29
Broken even	16
Lost money overall	56

### 3.14 Further analysis of sports-betting

**Table 3.62: Sports-betting participation by personal characteristics of respondents and percentage of sports-betting participants**

		2000 % of sample (n=1,500)	2000 % of players (n=126)
TOTAL SPORTS BETTORS		8	100
Sex	<i>Male</i>	12	67
	<i>Female</i>	5	33
Age	<i>15-24 years</i>	9	21
	<i>25-34 years</i>	13	31
	<i>35-44 years</i>	8	19
	<i>45-54 years</i>	7	13
	<i>55-64 years</i>	6	7
	<i>65+ years</i>	5	9
Ethnicity <sup>49</sup>	<i>NZ Māori</i>	11	13
	<i>Pacific peoples</i>	17	14
	<i>General</i> <sup>50</sup>	7	72
Personal income <sup>49</sup>	<i>Under \$20,000</i>	5	27
	<i>\$20-\$40,000</i>	11	42
	<i>\$40,000+</i>	11	25
Household Income <sup>49</sup>	<i>Under \$30,000</i>	6	17
	<i>\$30-\$60,000</i>	10	38
	<i>\$60,000+</i>	11	35
Occupation	<i>White collar</i>	11	44
	<i>Blue collar</i>	11	28
	<i>Home duties</i>	5	6
	<i>Retired</i>	5	9
	<i>Benefit/unemp</i>	9	6
	<i>Student</i>	5	8
Education	<i>Prim/sec school</i>	8	23
	<i>School Cert</i>	8	18
	<i>UE/6FC/Bursary</i>	10	20
	<i>Trade/tech qual</i>	7	13
	<i>Other tertiary</i>	10	22
	<i>Univ graduate</i>	6	5

#### Sex

Males were more likely to have placed a bet on a sporting event at least once in the last 12 months compared to female respondents (Table 3.62). Consequently, they comprised a higher proportion of participants (67%) compared to females (the remaining 33% of participants).

Males participated more frequently in sports-betting using the NZ TAB, than female participants (42% placed a bet at least once a month compared to 24% of female participants). However, females were slightly more likely to have placed a bet on a

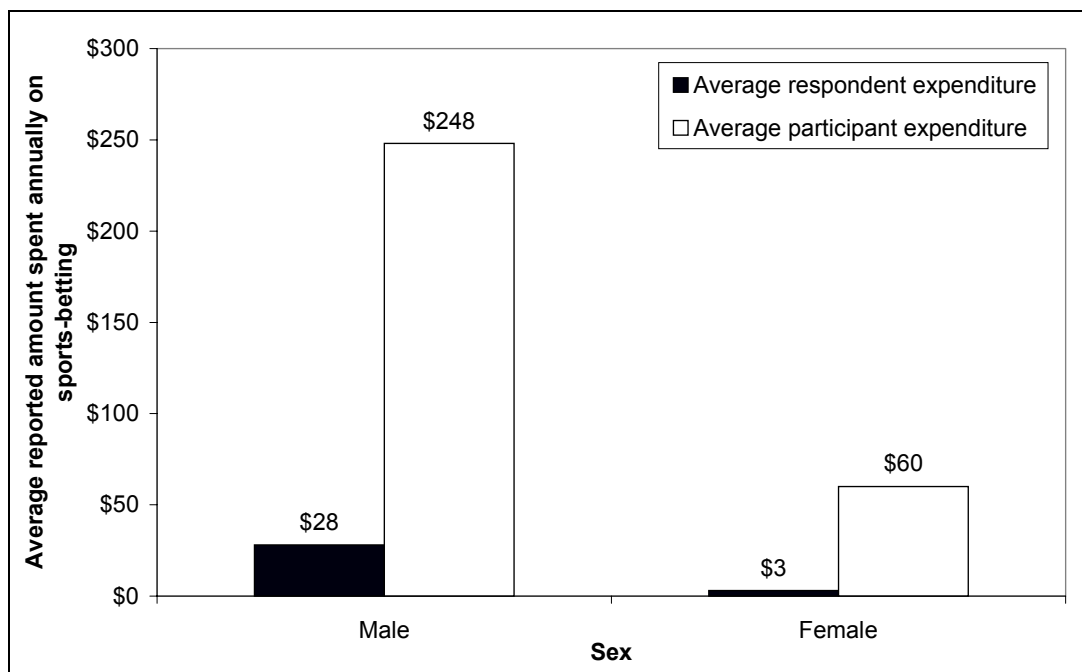
<sup>49</sup> Percentages may not add up to 100% due to non-responses to certain questions

<sup>50</sup> 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

sporting event through an overseas betting organisation than males (15% of female sports-betting participants compared to 11% of male sports-betting participants).

A higher proportion of male participants reported spending an average of \$6 or more in a typical session of sports-betting compared to females (65% of male participants compared to 41% of female participants). The average amount reported spent in a typical session of sports-betting by males was \$14.20, compared to \$9.20 by female participants. The higher participation levels and more frequent participation in sports-betting by males meant that they reported spending more on average annually on sports-betting than female participants (Figure 3.39).

**Figure 3.39: Average estimated annual reported spending on sports-betting by respondents and participants, by sex**



Males were more likely to say that they placed a bet on sporting events to win prizes/money compared to female participants (70% of males compared to 55% of female participants).

Males were slightly more likely to say they won money or broke even overall placing bets on sporting events in the 12 months prior to being surveyed than female participants (46% compared to 42% of female participants). However, females were slightly more likely to feel that they had won money overall (30% compared to 28% of males).

#### Age

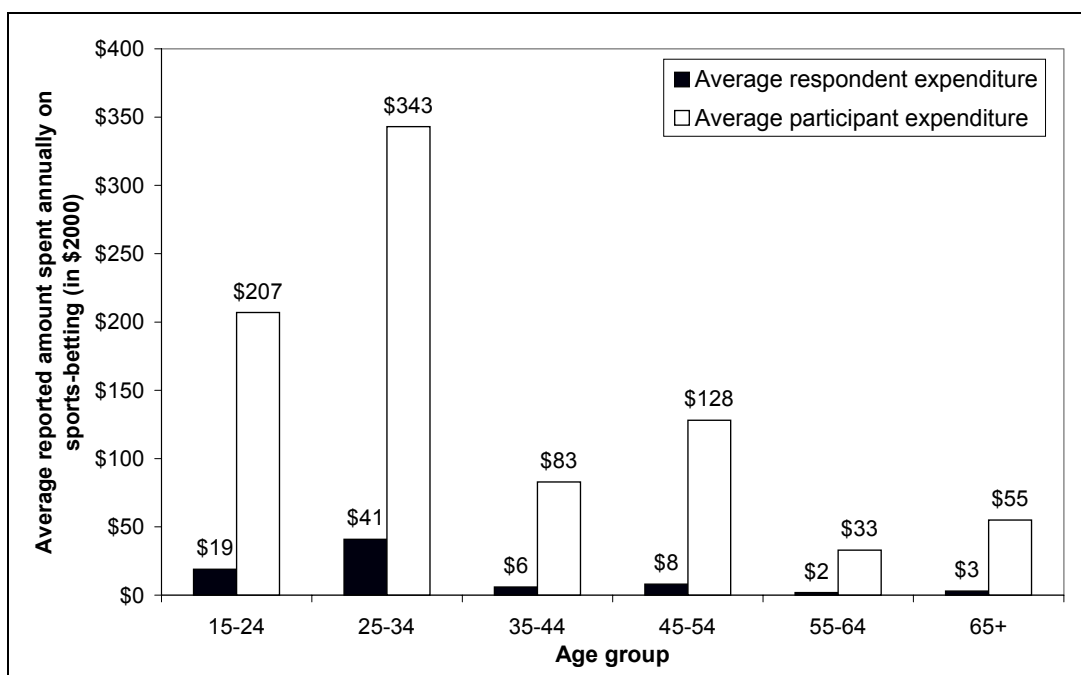
Respondents in the 25-34 year age group were most likely to have placed a bet on a sporting event at least once in the 12 months prior to being surveyed compared to respondents in other age groups (Table 3.62). Proportionately, participants in the 25-34 year and 35-44 year age groups comprised 51% of all sports bettors.

Participants in the youngest age group (15-24 years) placed bets more frequently than participants in other age groups (66% of participants under the age of 25 years played at least once a month, compared to 29% of participants over the age of 25 years).

A higher proportion of participants under the age of 35 years reported betting an average of \$11 or more in a typical session of sports-betting compared to participants aged 35 years and over (35% compared to 22% of participants aged 35 years and over). The average amount reported spent in a typical session was also higher for those in the 15-24 year (\$15.10) and 25-34 year (\$13.60) age groups, especially compared to participants in the 45-54 year age group (\$8.70).

Respondents under the age of 35 years on average reported spending a higher amount on sports-betting annually than respondents aged 35 years and over (Figure 3.40). Participants under the age of 35 years also reported spending the most annually on average of all participants.

**Figure 3.40: Average estimated annual reported spending on sports-betting by respondents and participants, by age group**



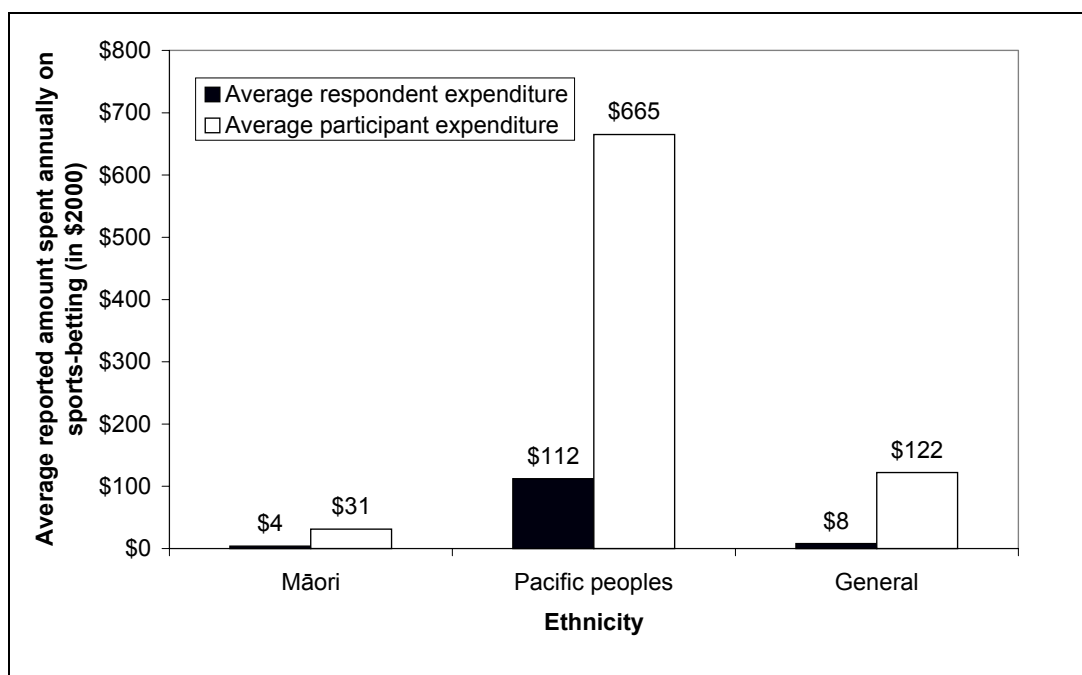
Participants aged between 15-24 years were the most likely to say they had won money or broken even overall placing bets on sporting events (52% compared to 42% of participants aged 25 years and over).

#### *Ethnicity*

Māori (11%) and Pacific peoples (17%) were more likely to have placed a bet on a sporting event at least once in the 12 months prior to being surveyed compared to respondents in the General population (7%). Pacific peoples placed bets on sporting events more frequently than other participants in the rest of the population (86% placed a bet at least monthly or weekly compared to 27% of participants in the rest of the population).

A higher proportion of Pacific peoples reported spending \$6 or more on average in a typical session of sports-betting (81% compared to 53% of participants in the rest of the population). Pacific peoples reported spending more on average in a typical session of sports-betting (\$24.90 compared to \$11.50 by participants in the General population and \$5.40 by Māori participants). Pacific peoples also reported spending more on average annually on sports-betting compared to respondents in the rest of the population (Figure 3.41).

**Figure 3.41: Average estimated annual reported spending on sports-betting by respondents and participants, by ethnicity**



Pacific peoples were more likely to say that they placed bets on sporting events to win prizes/money compared to other participants (74% compared to 64% of participants in the rest of the population).

Pacific peoples and Māori participants were the most likely to say that they had won money or broken even overall placing bets on sporting events in the last 12 months (64% of Pacific peoples and 60% of Māori participants compared to 38% of participants in the General population).

#### *Household income*

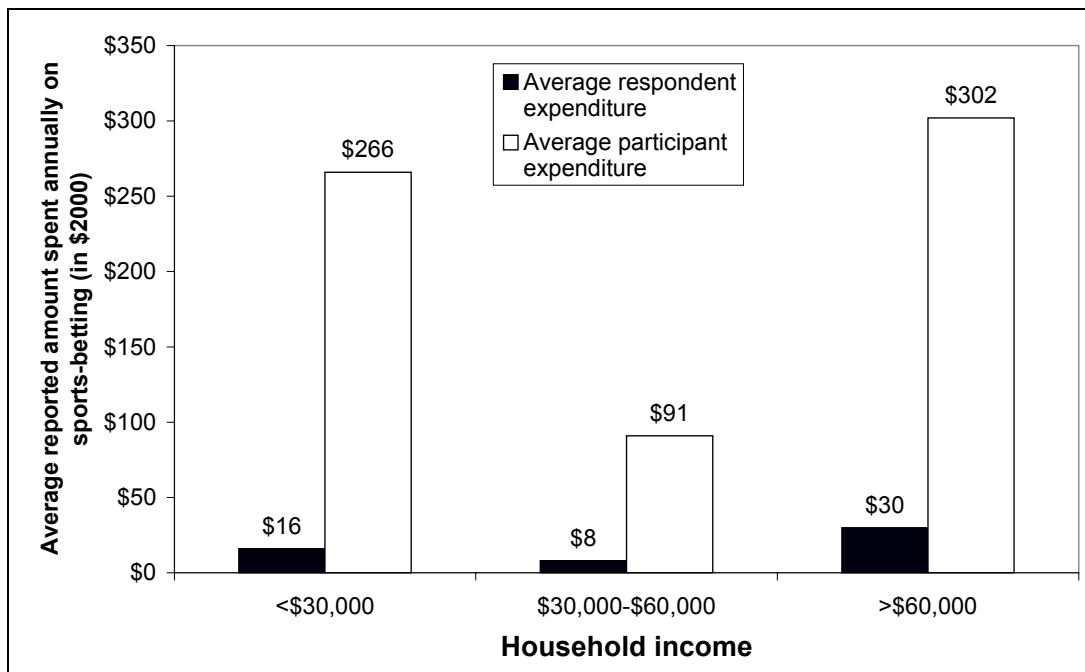
Respondents from higher income households were more likely to have placed a bet on a sporting event at least once in the 12 months prior to being surveyed (Table 3.62). However, participants from households with an income of under \$30,000 placed bets on sporting events more frequently than other participants (75% placed a bet at least once a month or more frequently compared to 30% of participants from households with an income of \$30,000 or more).



A higher proportion of participants (70%) from households with an income of under \$30,000 reported spending an average of \$6 or more in a typical session of sports-betting compared to 41% of participants with a household income of \$30,000-\$60,000 and 64% of participants with a household income of over \$60,000. The average amount reported spent in a typical session by participants from households with an income of under \$30,000 was \$17.20 compared to \$9.80 by participants from households with income of \$30,000-\$60,000 and \$13.30 by participants from households with income of over \$60,000.

Participants from households with income of over \$60,000 reported spending the most on average annually on sports-betting. This was true despite participants from households with an income of under \$30,000 having a higher proportion of participants who played more frequently and reported spending more in an average session of sports-betting (Figure 3.42). This spending is due to participants from households with incomes of over \$60,000 having a higher proportion of frequent, high-spending sports bettors compared to a higher proportion of participants from households with income under \$30,000 spending a little amount relatively frequently.

**Figure 3.42: Average estimated annual reported spending on sports-betting by respondents and participants, by household income**



Participants from households with an income of under \$30,000 were more likely to place bets on sporting events to win prizes/money than other participants (73% compared to 62% of participants from households with an income of \$30,000 or more).

Participants from households with income of over \$60,000 were more likely to say they had won money or broken even overall placing bets on sporting events in the last 12 months (56% compared to 37% of participants with household income of \$60,000 or less).

### Occupation

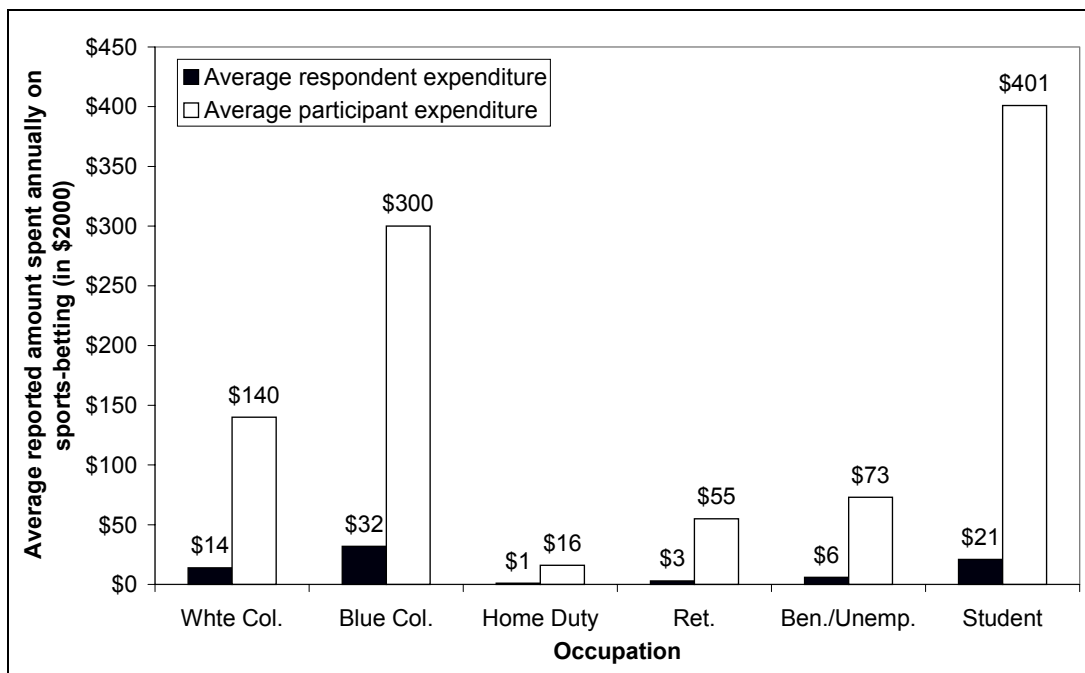
Blue-collar and white-collar workers were more likely than other respondents to have placed a bet on a sporting event at least once in the 12 months prior to being surveyed (Table 3.62). Together, participants in these two groups comprised 72% of all participants.

Students were more likely to place a bet on a sporting event frequently compared to participants in other occupations (86% placed a bet on average at least once a month compared to 31% of participants with other occupations).

A higher proportion of blue-collar workers reported betting an average of \$6 or more in a typical session of sports-betting compared to other participants (66% compared to 52% of participants in other occupations). Despite this, students (\$21.50) had the highest average reported spending in a typical session of sports-betting, followed by blue-collar (\$13.40) and white-collar workers (\$12.20) while the unemployed had lowest average spending per session (\$5.40).

As blue-collar workers were more likely to have placed a bet on a sporting event than students, the average annual reported spending on sports-betting by blue-collar workers was higher (Figure 3.43). However, the students who had placed a bet on a sporting event at least once in the 12 months prior to being surveyed, reported spending more on average annually on sports-betting than other participants (Figure 3.43).

**Figure 3.43: Average estimated annual reported spending on sports-betting by respondents and participants, by occupation**



Blue-collar workers and unemployed participants were more likely to say they bet on sporting events to win prizes/money (76% compared to 58% of participants in other occupations).

Students and unemployed participants were more likely to say they had won money or broken even overall betting on sporting events in the last 12 months compared to other participants (82% compared to 39% of other participants in other occupations).

#### *Highest qualification*

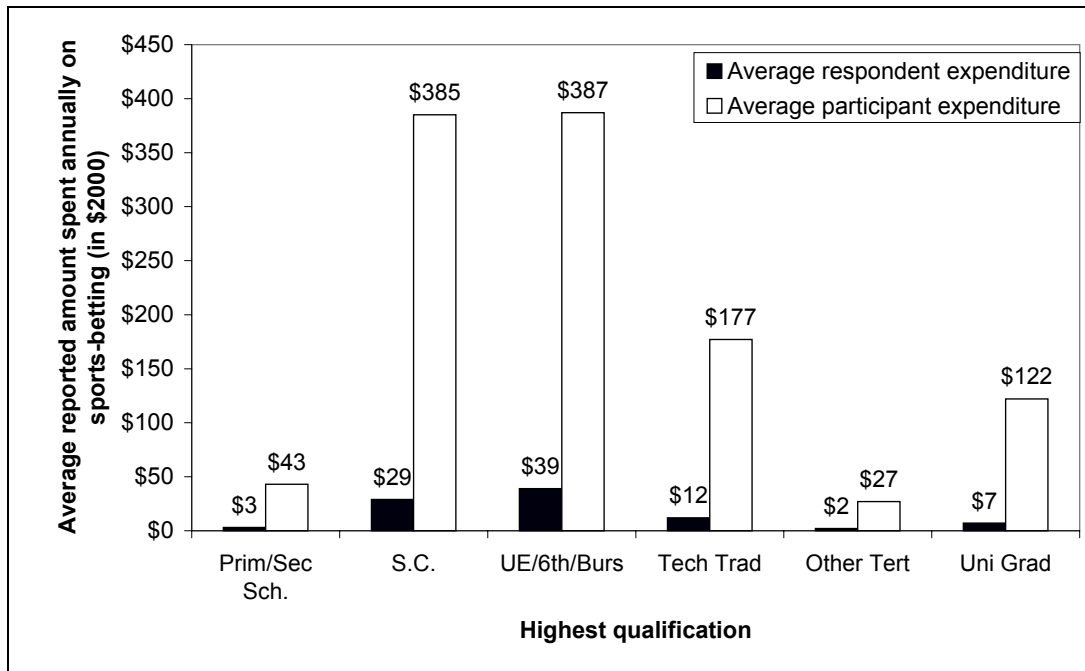
Respondents with university entrance/6th form certificate/bursary or other tertiary qualifications were slightly more likely to have placed a bet on a sporting event at least once in the 12 months prior to being surveyed than other respondents (Table 3.62). However, participants with no formal qualifications comprised the largest proportion of participants (Table 3.62).

Participants with school certificate, university entrance/6th form certificate/bursary or other tertiary qualifications were more frequent sports bettors than other participants (53% placed a bet at least once a month or more frequently compared to 16% of participants with other qualifications).

A higher proportion of participants with university entrance/6th form certificate/bursary qualifications reported spending an average of \$6 or more in a typical session of sports-betting compared to other participants (85% compared to 49% of participants with other qualifications). Participants with university entrance/6th form certificate/bursary qualifications (\$17.90) or school certificate (\$16.80) reported spending the most on average in a typical session of sports-betting especially compared to university graduates who spent the least on average (\$5.00).

Participants with school certificate or university entrance/6th form certificate/bursary qualifications reported spending the most on average annually of all participants in sports-betting (Figure 3.44).

**Figure 3.44: Average estimated annual reported spending on sports-betting by respondents and participants, by highest qualification**



University graduates and participants with university entrance/6<sup>th</sup> form certificate/bursary qualifications were more likely to bet on sporting events to win prizes/money compared to participants with other qualifications (74% compared to 61% of participants with other qualifications).

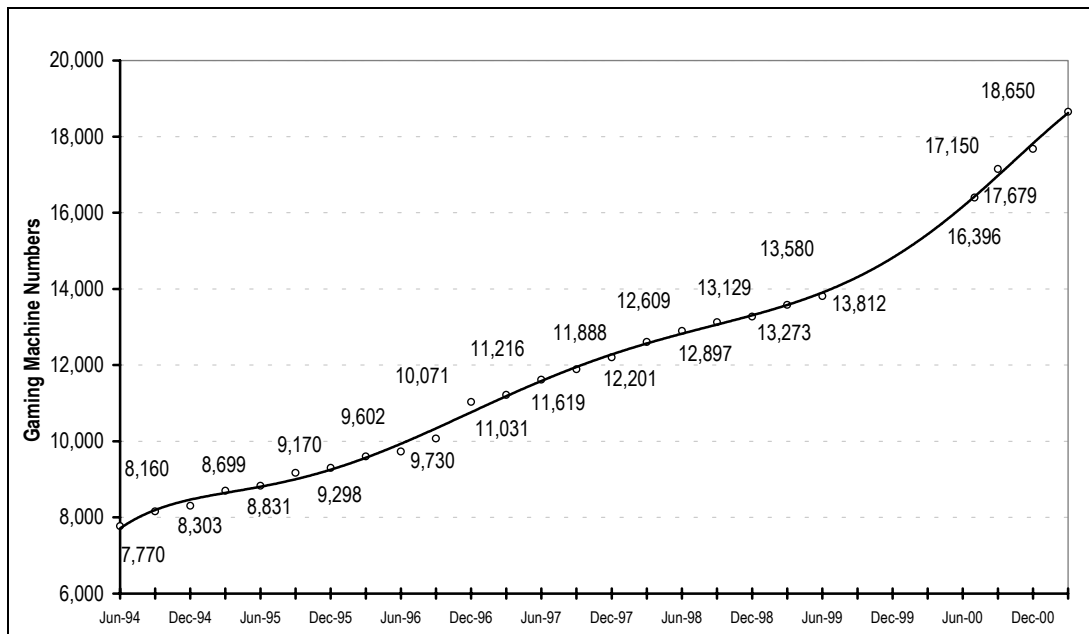
University graduates and participants with other tertiary qualifications were more likely to say they had won money or broken even overall placing bets on sporting events in the last 12 months (59% compared to 40% of participants with other qualifications).

### 3.15 Non-casino gaming machines<sup>51</sup>

Gaming machines were gradually introduced into New Zealand during the 1980s, although they were relatively rare until the end of the decade because of uncertainty about their legal status. Following conflicting court decisions on the legality of the machines, Internal Affairs introduced a licensing regime in 1988. This made the operation of gaming machines legal under the Gaming and Lotteries Act<sup>52</sup>, provided they were run by a non-commercial “society” to raise money for an “authorised purpose”<sup>53</sup>. Gaming machines are typically available in commercial sites (such as hotels, tenpin bowling alleys and snooker parlours), and in licensed clubs and sports clubs<sup>54</sup>. They are also available in casinos. However, questions in this section were only asked of participants who had played a gaming machine that was based outside of a casino.

There were more than 8,000 licensed non-casino gaming machines in New Zealand in 1995. Between 1995 and 2000 there has been a steady increase in the numbers of gaming machines in New Zealand, with close to 18,000 available by the end of 2000 (Figure 3.45).

**Figure 3.45: Non-casino gaming machine numbers: June 1994 to March 31 2001 at 3-monthly intervals**



Source: <http://www.gaming.dia.govt.nz/DIAwebsite.nsf/URL/GamingLicensing-GamingMachineStatistics>

<sup>51</sup> Questions in this sub-section were asked only of the 271 participants who had played a gaming machine (not in a casino) in the last 12 months

<sup>52</sup> For more information refer to the following website:  
<http://rangi.knowledge-basket.co.nz/gpacts/public/text/1977/an/084.html>

<sup>53</sup> For information on licensing conditions refer to the following website:  
<http://www.gaming.dia.govt.nz/DIAwebsite.nsf/URL/GamingLicensing-LicenceConditionsforGamingMachineOperators>

<sup>54</sup> Source: Department of Internal Affairs, 1995

*Participation*

Less than a fifth of respondents (18%) in the 2000 survey had played gaming machines at least once in the 12 months prior to being surveyed – down from 28% in 1990 (Table 3.63).

**Table 3.63: Q60, Frequency of playing a non-casino gaming machine by respondents in the last 12 months– 1990, 1995 and 2000**

	<b>1990</b> (n=1,200) %	<b>1995</b> (n=1,200) %	<b>2000</b> (n=1,500) %
At least once a week	5	3	3
At least once a month (but not weekly)	8	6	4
Less often than monthly	16	15	11
Total who played gaming machines	28	24	18
Not played activity at all	72	76	82

*Due to rounding percentages may not match*

The proportion of participants who had played gaming machines at least once in the 12 months prior to being surveyed remained relatively unchanged between 1990 and 2000, despite a slight dip in 1995. The main change in the proportions of participation was a decrease in the proportion of participants who played less than once a week, but at least once a month and a corresponding increase in the proportion that played less frequently (Table 3.64).

**Table 3.64: Q60, Frequency of playing gaming machines (not in a casino) by participants in the last 12 months – 1990, 1995 and 2000**

<b>Response option</b>	<b>1990</b> (n=341) %	<b>1995</b> (n=291) %	<b>2000</b> (n=271) %
Four times a week or more	2	2	2
Two or three times a week	4	3	4
Once a week	11	8	10
Once every 2 weeks	11	5	7
Once every 3 weeks	3	3	2
Once a month	13	15	12
Once every 2 months	8	6	8
Once every 3 months	12	15	16
Once every 6 months	16	21	18
Once a year	11	15	18
Less frequently than once a year	10	6	5
Don't know	-	<1	-

*Reported expenditure*

The proportion of participants who reported spending an average of \$10 or more in a typical session playing gaming machines has almost doubled between 1995 and 2000 (30% of participants in 1990 and 59% in 2000 reported spending \$10 or more on gaming machines). The average reported spending in a typical session for participants was \$15.00.

**Table 3.65: Q61, How much participants reported spending on non-casino gaming machines in an average session – 1995 and 2000**

Response option	1995	2000
	(n=291) %	(n=271) %
Up to \$4	35	22
\$5 - \$9	36	19
\$10	19	27
\$11 - \$20	7	19
\$21+	4	13
Mean	-	\$15.00

The average annual expenditure by respondents on gaming machines has more than doubled in inflation adjusted terms between 1990 and 2000, despite continued declines in participation. Therefore, **a smaller proportion of people who played gaming machines in 2000 spent more on average on gaming machines than a larger proportion of people who played machines in 1990.**

**Table 3.66: Average estimated annual spending on non-casino gaming machines by respondents - 1990, 1995 and 2000**

Year	Average amount spent	Average (in 2000 \$'s)
1990	\$37	\$43
1995	\$24	\$26
2000	\$98	\$98

Year	% change in nominal terms	% change in inflation adjusted terms
1990-1995	-34	-41
1995-2000	308	280
1990-2000	168	125

*Reasons for playing*

Most participants (57%) in 2000 played gaming machines to win prizes/money (Table 3.67). This is the first time the majority of participants selected this option. Other reasons selected by a large minority of participants were “as entertainment” and for excitement and/or a challenge. Some of the “other” reasons participants had for playing gaming machines were:

- To get rid of change (2)
- To fill in time (2)
- Because they are there/there at the time (2)
- “Waiting for another game of batons up”

**Table 3.67: Q62, Reasons why participants play gaming machines (not in a casino) – 1990, 1995 and 2000**

Response option	1990	1995	2000
	(n=341) %	(n=291) %	(n=271) %
To win prizes/money	49	46	57
For excitement/or a challenge	50	33	30
To support worthy causes	4	4	3
Out of curiosity	21	11	11
To oblige or please other people	1	2	3
As a gift for another person	NA	<1	-
As an interest/or a hobby	8	2	6
To be with people/ get out of the house	4	2	8
As entertainment	NA	48	48
Others	7	2	2
Don't know	1	<1	-

NA – not asked

Multiple response

**Beliefs about playing gaming machines**

Most participants (58%) felt that they lost money overall playing gaming machines and 25% said they had broken even overall playing gaming machines (Table 3.68).

**Table 3.68: Q63, Whether participants have won or lost money overall when playing gaming machines (not in a casino) in the last 12 months (n=271)**

Response option	%
Won money overall	17
Broken even	25
Lost money overall	58
Don't know	<1

A relatively high proportion of gaming machine participants (8%) said that they used a special skill or system to improve their chances of winning at playing gaming machines (Table 3.69).

**Table 3.69: Q64, Do participants use a system or special skills to improve their chances of winning at non-casino gaming machines (n=271)**

Response option	%
Yes	8
No	92
Don't know/Don't know of any such system	1

The 20 participants who said they used a special skill or system to improve their chances of winning at gaming machines identified the following:

- Poker machine skills (2)
- “Call in a frequent card”
- “Observation - do not play a machine where someone else has won”
- “Play poker only”



- “Play 5 lines at a time”
- “Watch other people and see how they do it”
- “Bet with maximum credit”
- “Keep playing to improve the winning”
- “Choose a machine in my favour, some machines won more than others”
- “Statistical analytical gaming system”
- “Fluctuate numbers I press, don’t press 5 all the time”
- “Use more than one machine, put \$1 in and wait to see which machine is lucky”
- “Try to play combinations not generally used”
- “Watch others to see how much money has gone in, and paid out”
- “I only use the machines with card games, I think they involve more skill if you know the game”
- “I touch the machine on the 1-2-3-4-5 when it’s hot, just wait and it will give money or if the machine is full when you drop your coin it will more likely pay out, when empty it will eat your money”

#### *Consumer educational information*

Questions in this section were asked to gauge the effect that possible changes to the gaming machine environment would have on participants’ intentions to play. The responses reflect only people’s intentions and may not necessarily reflect what would actually happen if any of these options were introduced. Also, these questions do not necessarily reflect any proposed changes to the way gaming machines are currently operated.

Three questions were asked of gaming machine players and for each question participants were asked to say what effect each of the three options would have on how they play gaming machines. The three questions asked of participants were:

1. If gaming machines had a warning that in the long run the house always wins, what difference do you think this would make to how you play?
2. If you could programme the gaming machine to alert you after you had played for a set time, or to show how much money was spent in a session, what difference do you think this would make to how you play?
3. If winnings of \$50 or more were paid by cheque instead of in cash, what difference do you think this would make to how you play machines?

The majority of participants felt that none of the options asked about would change how often they played gaming machines (Table 3.70). However, of all the options, paying winnings by cheque would have the most effect on how often participants would play gaming machines. Participants indicated that warnings about the length of time a person had spent playing the machine would also have more of an effect than a warning that “the House always wins”.

If winnings of \$50 or more were paid by cheque instead of cash 38% of participants felt this would mean they would play less or much less than they currently did. Just over a quarter (26%) of participants felt that warnings about how much time or money they spent on gaming machines would cause them to play less or much less. This suggests that these people may have bet more money or lost track of time while playing gaming machines in the past.

**Table 3.70: How changes to gaming machines could affect how often participants play non-casino gaming machines (n=271)**

<b>Response option</b>	<b>Warning that “the House always wins” %</b>	<b>Warnings about length of time/money spent playing %</b>	<b>Winnings were paid by cheque %</b>
Much less	5	5	14
Less	13	21	24
Same as now - no difference	78	66	56
More	1	5	3
Much more	<1	1	2
Don't play anyway	2	1	2
Don't know	<1	-	-

*Percentages may not add to 100% due to rounding*

### 3.16 Further analysis of non-casino gaming machines

**Table 3.71: Non-casino gaming machine participation by personal characteristics of respondents and percentage of gaming machine participants – 1990, 1995 and 2000**

		1990 % of sample (n=1,200)	1995 % of sample (n=1,200)	2000 % of sample (n=1,500)	2000 % of players (n=271)
TOTAL GAMING MACHINE PLAYERS		28	24	18	100
Sex	<i>Male</i>	33	30	18	49
	<i>Female</i>	24	19	18	51
Age	<i>15-24 years</i>	47	43	28	30
	<i>25-34 years</i>	30	28	24	27
	<i>35-44 years</i>	25	21	13	14
	<i>45-54 years</i>	24	14	17	14
	<i>55-64 years</i>	19	14	11	7
	<i>65+ years</i>	13	12	10	8
Ethnicity <sup>55</sup> (1990-1995)	<i>NZ Māori</i>	32	33	N/A	N/A
	<i>Other</i>	28	23	N/A	N/A
	(2000)				
	<i>NZ Māori</i>	N/A	N/A	28	15
	<i>Pacific peoples</i>	N/A	N/A	11	4
	<i>General</i> <sup>56</sup>	N/A	N/A	18	80
Personal income <sup>55</sup>	<i>Under \$20,000</i>	25	22	18	43
	<i>\$20-\$40,000</i>	34	27	21	37
	<i>\$40,000+</i>	30	30	15	15
Household Income <sup>55</sup>	<i>Under \$30,000</i>	23	20	15	20
	<i>\$30-\$60,000</i>	32	26	22	41
	<i>\$60,000+</i>	35	27	19	29
Occupation	<i>White collar</i>	28	26	18	34
	<i>Blue collar</i>	39	32	21	25
	<i>Home duties</i>	20	11	14	8
	<i>Retired</i>	11	13	11	10
	<i>Benefit/unemp</i>	34	21	18	5
	<i>Student</i>	49	39	27	19
Education	<i>Prim/sec school</i>	29	25	18	25
	<i>School Cert</i>	31	24	16	16
	<i>UE/6FC/Bursary</i>	37	30	23	20
	<i>Trade/tech qual</i>	27	25	16	14
	<i>Other tertiary</i>	20	21	18	19
	<i>Univ graduate</i>	15	19	17	6

#### Sex

The proportion of male and female respondents who had played gaming machines at least once in the 12 months prior to being surveyed declined between 1990 and 2000, but the decline in male participation was more marked relative to the decline in

<sup>55</sup> Percentages may not add up to 100% due to non-responses to certain questions

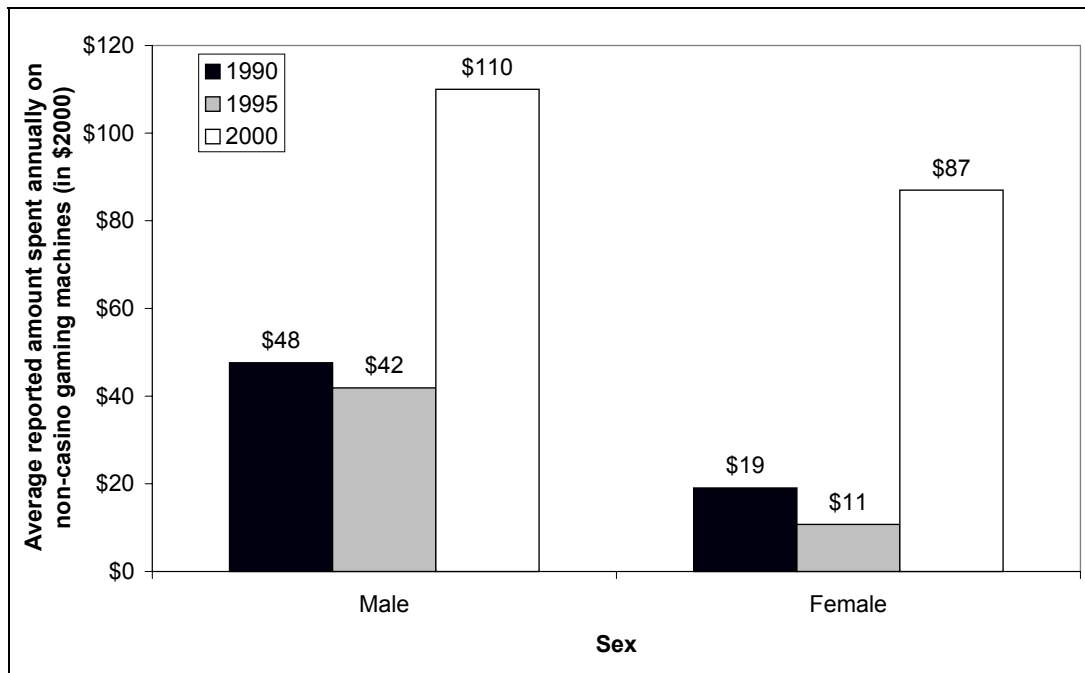
<sup>56</sup> General population refers to the remaining respondents who did not indicate they belonged to the Māori or Pacific peoples ethnic groups. For further explanation refer to the methodology section

female participation (Table 3.71). For the first time in this survey series slightly more females (51% of participants) had played gaming machines than males (49% of participants). However, males played gaming machines more frequently than female participants (44% played at least once a month compared to 29% of female participants).

A similar proportion of male and female participants reported spending an average of \$10 or more in a typical session playing gaming machines (59% of males and 58% of females). The average amount reported spent in a typical session playing gaming machines was also similar for males (\$15.20) and female participants (\$14.80).

The average annual reported expenditure on gaming machines by male and female respondents increased markedly between 1990 and 2000. This increase occurred despite a decrease in reported spending by male and female respondents in the 1990 to 1995 period. The increase occurred despite of a continued decrease since 1990 in the proportion of respondents who had played gaming machines at least once in the 12 months prior to being surveyed (Figure 3.46).

**Figure 3.46 Average estimated annual reported spending on non-casino gaming machines by respondents in inflation adjusted terms, by sex – 1990, 1995 and 2000**



A higher proportion of female participants (36%) played gaming machines for “excitement or for a challenge” compared to males (24%).

Female participants were also more likely to feel that they had won money overall playing gaming machines than males (20% compared to 13% of male participants). However, males were slightly more likely to say they had broken even overall than female participants (26% compared to 24% of female participants).

Warnings on gaming machines that “the house always wins” would have a greater impact on the way females played compared to male participants (22% of females would play less or much less compared to 14% of males). However, alerts about the length of time played or money spent would have a greater impact on reducing how often males played compared to female participants (29% of males would play less or much less compared to 23% of female participants). Males were also more likely to play gaming machines less or much less if winnings of \$50 or more were paid by cheque (40% compared to 35% of female participants).

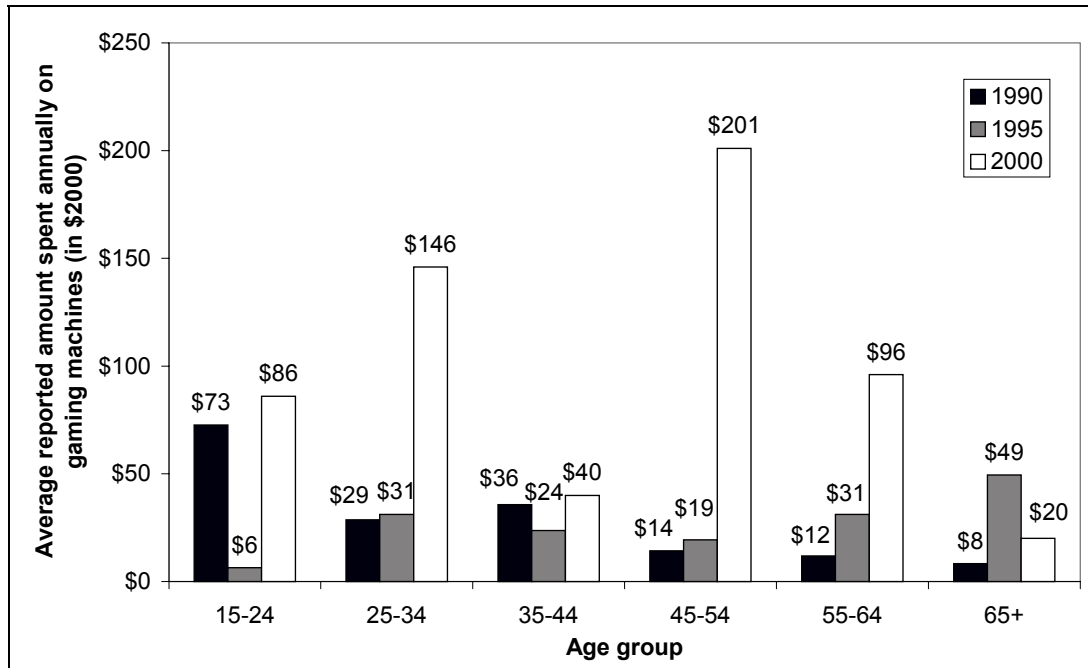
**Age**

Respondents under the age of 35 years were more likely to have played gaming machines at least once in the 12 months prior to being surveyed (Table 3.71). Together, participants between the ages of 15-34 years comprised 57% of all gaming machine participants.

Participants aged 45 years and over played gaming machines more frequently than participants under the age of 45 years (44% played at least once a month compared to 32% of participants under the age of 45 years).

A higher proportion of participants in the 45-54 year age group (58%) reported spending \$11 or more on average in a typical session playing gaming machines compared to respondents in other age groups. Respondents in the 45-54 year age group reported spending the most on average annually on gaming machines (Figure 3.47).

**Figure 3.47: Average estimated annual reported spending on non-casino gaming machines by respondents in inflation adjusted terms, by age group – 1990, 1995 and 2000**



Participants under the age of 35 years were the most likely to say that they had won money or broken even overall playing gaming machines in the 12 months prior to being surveyed (44% compared to 36% of participants aged 35 years and over).

Participants between the age of 15-24 years of age were more likely to say they used a special skill or system to improve their chances of winning while playing gaming machines (11% compared to 6% of participants aged 25 years and over).

Of the three consumer warnings questions:

- Participants under the age of 55 years were more likely to say they would play gaming machines less or much less if gaming machines carried a warning that “the house always wins” (20% compared to 7% of participants aged 55 years and over)
- Participants under the age of 55 years were more likely to say they would play gaming machines less or much less if gaming machines could alert them to the time spent or money spent playing (30% compared to 2% of participants aged 55 years and over)
- Participants aged between 15-24 years were more likely than other participants to say they would play gaming machines less or much less if winnings over \$50 were paid by cheque (46% compared to 34% of participants aged 25 years and over)

### *Ethnicity*

Māori respondents were more likely to have played gaming machines at least once in the 12 months prior to being surveyed compared to the rest of population (Table 3.71). A higher proportion of Pacific peoples (54%) and Māori participants (44%) reported playing gaming machines at least once a month compared to participants in the General population (34%).

A higher proportion of Pacific peoples (45%) reported spending \$11 or more on average in a typical session playing gaming machines compared to Māori participants (30%) and participants in the General population (32%). Pacific peoples (\$20.60) spent the most on average in a typical session playing gaming machines compared to Māori participants (\$13.60) and participants in the General population (\$15.00).

Respondents in the General population (\$103) reported spending the most on average annually on gaming machines compared to Māori respondents (\$83) and Pacific peoples (\$67). However, of all participants, Pacific peoples spent the most on average (\$621) compared to participants in the General population (\$586) and Māori participants (\$295).

**Almost half of Māori participants (48%) felt they had broken even overall playing gaming machines. Overall, Māori participants (69%) were more likely to say that they had won money or broken even compared to Pacific peoples (33%) and participants in the General population (36%).**

Participants in the General population and Māori participants were more likely to say they used a special skill or system to improve their chances of winning when playing gaming machines (8% compared to no Pacific peoples).

Pacific peoples were more likely to say they would play gaming machines less or much less if gaming machines carried a warning that “the house always wins” (73% compared to 16% of participants in the rest of the population).

Māori participants were more likely to say they would play less or much less if gaming machines alerted them to how much time or money they spent playing gaming machines (41% compared to 27% of Pacific peoples and 23% of the General population). A higher proportion of Pacific peoples felt they would play gaming machines more or much more if gaming machines alerted them to how much time or money they spent playing gaming machines (30% compared to 6% of the rest of the population).

A high proportion of Māori participants said that if winnings of more than \$50 were paid by cheque they would play less or much less, especially compared to other participants (58% compared to 44% of Pacific peoples and 33% of the General population).

#### *Household income*

Respondents from households with an income of \$30,000-\$60,000 were more likely to have played gaming machines at least once in the 12 months prior to being surveyed in 2000 (Table 3.71). There were declines in participation across all groups between 1990 and 2000, but the declines in participation were more marked for respondents from households with incomes of over \$60,000. For the first time in this survey series respondents with household income of over \$60,000 were not the main players of gaming machines.

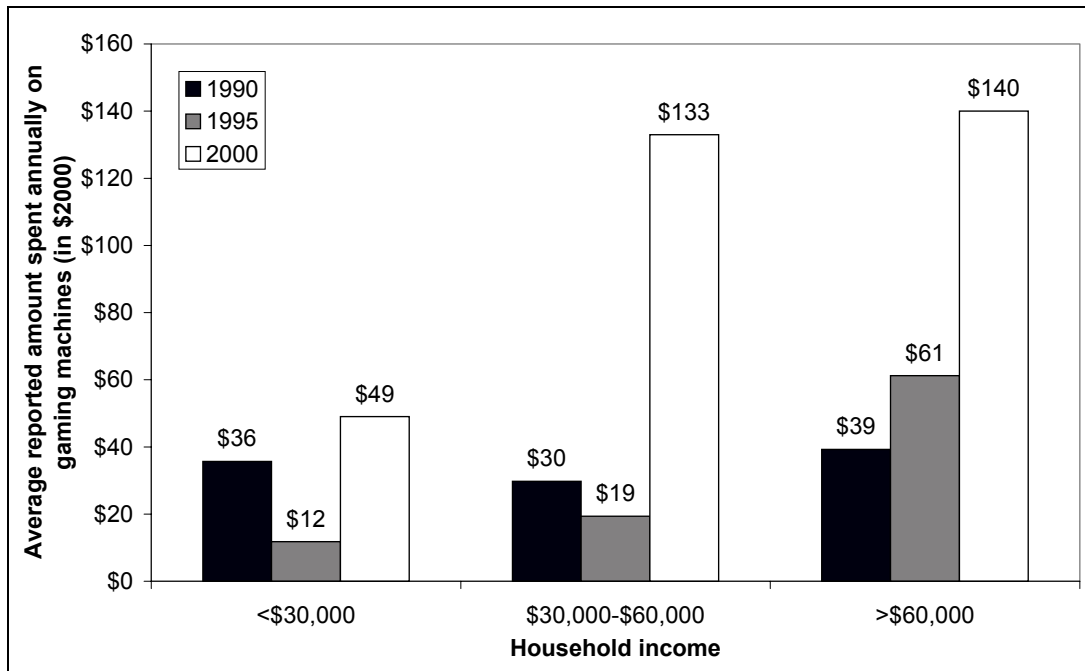
A higher proportion of participants in the households with an income over \$60,000 played gaming machines at least once a month compared to participants from households with lower household incomes (50% compared to 34% of participants from households with income of \$60,000 or less).

There was little difference between the proportions of participants’ reported spending on gaming machines. However, the higher their household income, the more they reported spending on average on gaming machines in a typical session (\$15.30 by participants from households with incomes under \$30,000, \$15.70 by participants with income of \$30,000-\$60,000 and \$16.10 by participants with household income of more than \$60,000)<sup>57</sup>. Due to the higher frequency of participation and the higher average spend in a typical session playing gaming machines, participants with household income of more than \$60,000 reported spending much more on average annually on gaming machines (Figure 3.48).

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<sup>57</sup> Due to non-responses some averages may not equal the overall average reported in Table 3.65

**Figure 3.48: Average estimated annual reported spending on non-casino gaming machines by respondents in inflation adjusted terms, by household income – 1990, 1995 and 2000**



Participants from households with income of under \$30,000 were more likely to say they played gaming machines to win prizes/money (70% compared to 55% of participants with household income of \$30,000 or more). Participants from households with income of \$30,000 or more were more likely to say they played gaming machines “as entertainment” (53% compared to 27% of participants with household income of under \$30,000).

Participants from households with income of over \$60,000 were more likely to say they used a special skill or system that improved their chances of winning when playing gaming machines (15% compared to 4% of participants with household income of \$60,000 or less).

Participants from households with income of under \$30,000 were more likely to say they would play less or much less if gaming machines carried warnings that “the house always wins” compared to other participants (31% compared to 16% of participants from households with income of \$30,000 or more).

However, participants from households with income of \$30,000 or more were more likely to say they would play gaming machines less or much less if gaming machines could alert them after they had played for a set time, or show them how much money they had spent (28% compared to 22% of participants from households with income of under \$30,000). There was little difference in the reaction between the income groups to the effect of winnings being paid by cheque.



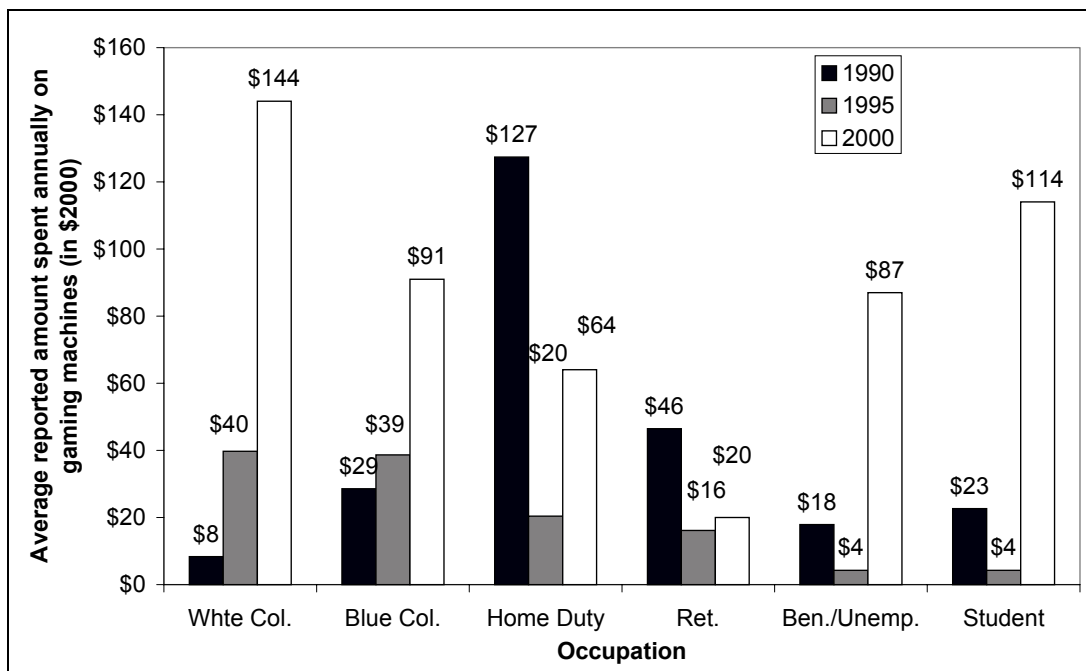
### Occupation

Students were more likely to have played gaming machines at least once in the 12 months prior to being surveyed in 2000 than other respondents (Table 3.71). Between 1990 and 2000 the participation rates have decreased consistently across all occupational groups. The two exceptions were homemakers, who had a slight increase in the 1995-2000 period but had declined overall and retired respondents who increased slightly from 1990-1995 but were relatively static overall in the 1990-2000 period. Students had the sharpest decrease in participation levels between 1990 and 2000.

Unemployed/beneficiary participants played gaming machines most frequently compared to other participants (54% played at least once a month compared to 25% of participants in other occupations).

Unemployed/beneficiaries reported spending the most on average in a typical session playing gaming machines compared to other participants (57% spent \$11 or more in average session playing gaming machines compared to 29% of participants in other occupations). Unemployed/beneficiaries (\$20.90) and homemakers (\$22.90) reported spending the most on average in a typical session particularly compared to retired participants (\$10.30). White-collar workers reported spending the most on average annually on gaming machines in 2000, followed by students (Figure 3.49). White-collar workers average spending was higher due to a few participants who played regularly and spent large amounts.

**Figure 3.49: Average estimated annual reported spending on non-casino gaming machines by respondents in inflation adjusted terms, by occupation – 1990, 1995 and 2000**



Students, the unemployed/beneficiaries and homemakers were more likely to play gaming machines to win prizes/money (67% compared to 52% of participants in other occupations).

Homemakers were the most likely to say they had won money or broken even overall playing gaming machines (54% compared to 40% of participants in other occupations).

White-collar workers and students were the most likely to say they used a special skill or system to improve their chances of winning when playing gaming machines (11% compared to 5% of other participants).

Homemakers and unemployed/beneficiaries were more likely to play gaming machines less or much less if the machines carried warnings that “the house always wins” (34% compared to 16% of participants in other occupations).

Homemakers and students were more likely to play gaming machines less or much less if gaming machines could alert them after they had played for a set time, or show them how much money they had spent (36% compared to 23% of participants in other occupations).

Unemployed/beneficiaries were more likely to play gaming machines less or much less if winnings of \$50 or more were paid by cheque (59% compared to 36% of participants in other occupations). A relatively small proportion of homemakers said that it would make them play less or much less (21%).

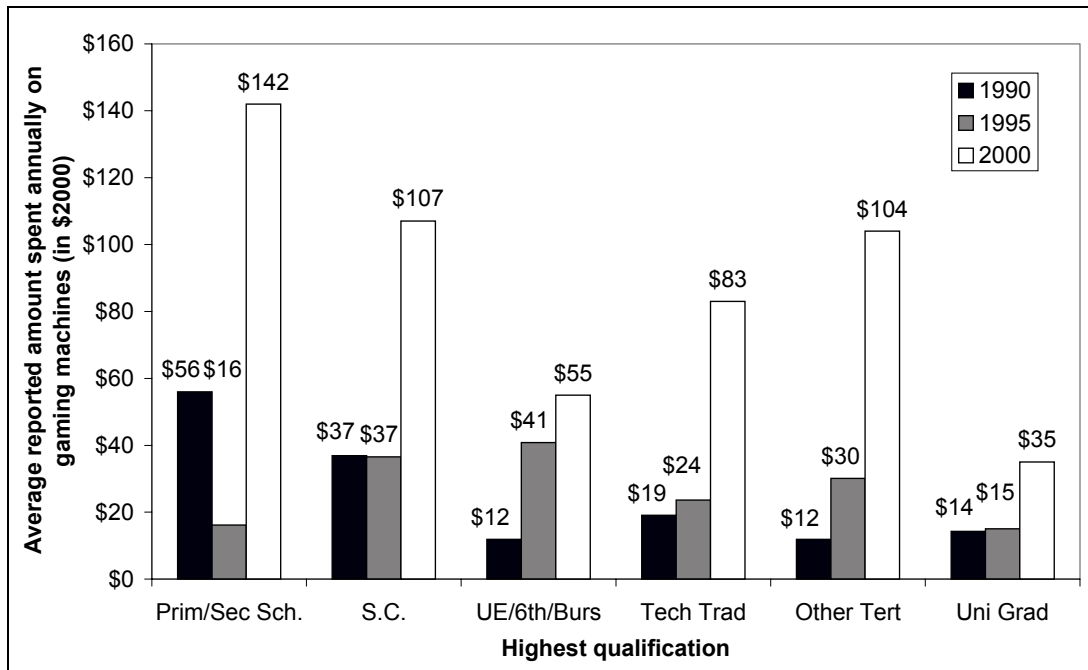
#### *Highest qualification*

Respondents with university entrance/6<sup>th</sup> form certificate/bursary qualifications were more likely to have played a gaming machine at least once in the last 12 months compared to other respondents (Table 3.71).

Participants with no formal educational qualifications and those with other tertiary qualifications played gaming machines more frequently than other participants (41% played at least once a month compared to 33% of participants with other qualifications).

A higher proportion of participants with no formal educational qualifications reported spending \$11 or more on average on gaming machines in a typical session playing gaming machines (41% compared to 28% of participants with qualifications). Participants with no formal qualifications had the highest average reported spending in a typical session of playing machines (\$18.60 compared to the lowest average reported spending of \$10.50 by participants with university entrance/6<sup>th</sup> form certificate/bursary qualifications). Respondents with no formal qualifications also reported spending the most on average annually of all respondents (Figure 3.50).

**Figure 3.50: Average estimated annual reported spending on non-casino gaming machines by respondents in inflation adjusted terms, by highest qualification – 1990, 1995 and 2000**



Participants with no formal qualifications were more likely to say they had won money or broken even overall playing gaming machines compared to other participants (46% compared to 40% of other participants).

University graduates were more likely to say they used a special skill or system to improve their chances of winning when playing gaming machines compared to participants with other qualifications (37% compared to 6% of participants with other qualifications).

Participants with no formal educational qualifications and participants with university entrance/6<sup>th</sup> form certificate/bursary qualifications were more likely to say they would play gaming machines less or much less if machines carried a warning that “the house always wins” (29% compared to 11% of participants with other qualifications).

University graduates were more likely to say they would play gaming machines less or much less if machines could alert them after they had played for a set time, or show them how much money they had spent (40% compared to 26% of participants with other qualifications).

University graduates were also more likely to say they would play gaming machines less or much less if winnings of \$50 or more were paid by cheque (49% compared to 37% of participants with other qualifications).

### 3.17 Casinos<sup>58</sup>

Casino operation was legalised in New Zealand under the Casino Control Act 1990. The Casino Control Authority determines policy relating to casinos and also issues casino licences. The first casino in New Zealand – the Christchurch casino - opened in November 1994. Since 1994 a further four casinos have opened:

- Sky City (Auckland) February 1996
- Wharf casino (Queenstown) September 1999
- Dunedin casino (Dunedin) October 1999
- Sky Alpine Queenstown casino (Queenstown) December 2000

Another casino licence has been granted for Riverside Casino in Hamilton, which is currently under construction and is expected to open in July-August 2002. For the period that this survey covers, there were four casinos in operation, three in the South Island and one in Auckland.

**Table 3.72: Casino gaming table and gaming machine numbers (as at 1 October 2000)**

	Gaming tables	Gaming machines
Christchurch casino	37	506
Sky City	98	1,417
Wharf casino	6	75
Dunedin casino	12	170
Sky Alpine Queenstown casino	9	70
Total	162	2,238

Source: Casino Control Authority, 2000

#### Participation

The majority of respondents (84%) had not bet on a table game or a gaming machine at a casino at all in the 12 months prior to being surveyed (Table 3.73). However, the proportion of respondents who had bet at a casino at least once in the 12 months prior to being surveyed had trebled, from 5% in 1995 to 16% in 2000.

**Table 3.73: Frequency of betting at a casino by respondents in the last 12 months - 1995 and 2000**

	1995 (n=1,200) %	2000 (n=1,500) %
At least once a week	<1	1
At least once a month (but not weekly)	<1	1
Less often than monthly	5	14
Played at a Casino	5	16
Not played activity at all	95	84

<sup>58</sup> Questions in this sub-section were asked only of the 233 participants who had placed money either on a gaming machine and/or a table game at a casino, in the last 12 months

Almost a quarter (24%) of participants bet at a casino once every six months and 23% more frequently than this, but the majority of participants bet less frequently (Table 3.74). Between 1995 and 2000 there has been a slight increase in the frequency with which participants bet at a casino. This is likely due to the increase in the availability of casinos, but despite the increased availability of casinos the activity remains for most participants an infrequent event relative to other gaming activities.

**Table 3.74: Q68, Frequency of betting at a casino by participants in the last 12 months – 1995 and 2000**

Response option	1995	2000
	(n=63) %	(n=233) %
Once a week	0	4
Once every 2 weeks	2	3
Once every 3 weeks	0	-
Once a month	5	5
Once every 2 months	1	4
Once every 3 months	11	7
Once every 6 months	15	24
Once a year	36	39
Less frequently than once a year	29	15
Don't know	1	-

*Reported expenditure*

Just under half of all participants (48%) reported spending an average of \$21 or more in a typical session of betting on gaming activities at a casino (Table 3.75). The average amount spent by participants was \$48.20. Reported spending in 2000 was similar in proportion to 1995 - 53% of participants reported spending between \$1-\$20 in a typical session at the casino in 1995 and the remaining 48% of participants spent \$21 or more in 1995.

**Table 3.75: Q69, How much participants reported spending at a casino in an average day (n=233)**

Response option	%
\$1 - \$15	22
\$20	30
\$21 - \$50	25
\$51+	23
Mean	\$48.20

Respondents spent slightly more on average annually on casinos in 1995 compared to respondents in 2000 (Table 3.76).

**Table 3.76: Average estimated annual spending at casinos by respondents - 1995 and 2000**

Year	Average amount spent	Average (in 2000 \$'s)
1995	\$42	\$45
2000	\$44	\$44

Year	% change in nominal terms	% change in inflation adjusted terms
1995-2000	5	-2

The relatively high average spending per session on casinos and lower annual spending is a reflection of how infrequently most participants bet at a casino.

*Visiting casinos*

It would be assumed with the increase in the number of casinos since 1995 and their increased coverage across the country, that fewer participants would have made a special trip to another town to go to a casino. Most participants did not make a special trip to another town just to go to a casino, although the proportion that did rose slightly between 1995 and 2000 (Table 3.77).

**Table 3.77: Q70, Did participants make a trip to another town especially to go to a casino in the last 12 months – 1995 and 2000**

Response option	1995 (n=63) %	2000 (n=233) %
Yes	13	16
No	87	84

Table 3.78 shows whether or not the participants who had made a special trip to another town would do so again. The majority of participants said they would do so again.

**Table 3.78: Q71, Would participants make a trip to another town again, especially to go to a casino – 1995<sup>59</sup> and 2000**

Response option	1995 (n=37) %	2000 (n=37) %
Yes	74	83
No	26	16
Don't know	-	<1

<sup>59</sup> Only participants who said they had gone to the Christchurch casino in 1995 were asked to answer this question (n=37) – this excludes those who had gone to overseas casinos in 1995

*Reasons for participation*

The casino was the only gaming activity that the majority of participants said they played for entertainment (Table 3.79). The importance of the entertainment factor of casinos is probably influenced by the relative infrequency of participation in this activity (most people visited a casino once a year, or with even less frequency). Therefore, the activity is viewed as a special event or occasion. The novelty value of casinos has greatly diminished for most participants in the intervening period since 1995. There was a greater emphasis on playing to “win prizes/money than there was in 1995 (45% compared to 38% of participants in 1995). Some of the “other” reasons given by participants for going to a casino were:

- “Gone for a meal and went by through the machines, hence my quick play with a machine”
- “Passing by”
- “Like the atmosphere - it’s congenial. You can go on your own and not feel uncomfortable. I like the restaurant the food is wonderful. It is an asset to Christchurch”

**Table 3.79: Q72, Reasons why participants bet at a casino – 1995 and 2000**

Response option	1995	2000
	(n=63) %	(n=233) %
To win prizes/money	38	45
For excitement/or a challenge	37	32
To support worthy causes	NA	<1
Out of curiosity	44	15
To oblige or please other people	2	7
As a gift for another person	NA	<1
As an interest/or a hobby	NA	2
To be with people/ get out of the house	6	13
As entertainment	57	58
Others	NA	1
Don’t know	NA	-

*Multiple response*

*NA - Not asked*

***Beliefs about playing gaming machines at a casino***

The remaining questions in this sub-section were only asked of the 116 participants who had played a gaming machine only at a casino. The responses from those participants who had played a gaming machine both inside and outside a casino are covered in the equivalent tables in the previous sub-section (Table 3.68 to Table 3.70).

The majority of participants felt they lost money overall playing gaming machines (Table 3.80). However, nearly a quarter of participants (24%) felt they won money overall playing gaming machines at a casino.

**Table 3.80: Q73, Whether participants have won or lost money overall when playing gaming machines at a casino in the last 12 months (n=116)**

<b>Response option</b>	<b>%</b>
Won money overall	24
Broken even	17
Lost money overall	58
Don't know	-

Few participants said they used a special skill or system to improve their chances of winning at gaming machines played in a casino (Table 3.81) compared to participants who played gaming machines outside a casino (Table 3.69).

**Table 3.81: Q74, Do participants use a system or special skills to improve their chances of winning at casino gaming machines (n=116)**

<b>Response option</b>	<b>%</b>
Yes	2
No	97
Don't know/Don't know of any such system	<1

The participants who said they used a special skill or system to improve their chances of winning at gaming machines identified the following:

- “Only play games with an element of skill”
- “Watch when someone has been on a while then go on that machine”
- “Play one type of machine only”

*Consumer educational information*

Questions in this section were asked to gauge the effect of possible changes to the gaming machine environment would have on participants’ intention to play. The responses reflect only people’s intentions and may not necessarily reflect what would actually happen if any of these options were introduced. Also, these questions do not necessarily reflect any proposed changes to the way gaming machines are currently operated.

Three questions were asked of gaming machine players and for each question participants were asked to say what effect each of the three options would have on how they play gaming machines. The three questions asked of participants were:

1. If gaming machines had a warning that in the long run the house always wins, what difference do you think this would make to how you play?
2. If you could programme the gaming machine to alert you after you had played for a set time, or to show how much money was spent in a session, what difference do you think this would make to how you play?
3. If winnings of \$50 or more were paid by cheque instead of in cash, what difference do you think this would make to how you play machines?

Unlike participants who played gaming machines outside a casino, there was little difference in the proportion of participants who would said there would be “no



difference” to how they play given each of the consumer information scenarios presented in Table 3.82. However, a higher proportion of participants said they would play much less if gaming machines carried warnings that “the house always wins” compared to the other options. Warnings about the length of time/money spent playing gaming machines, although lower than the first option, had a higher proportion of participants who would play much less compared to the effect of having winnings of \$50 or more were paid by cheque.

**Table 3.82: Q75-Q77, How changes to gaming machines could affect how often participants play casino gaming machines (n=116)**

Response option	Warning that	Warnings about	Winnings were
	“the House always wins” %	length of time/money spent playing %	paid by cheque %
Much less	17	13	7
Less	12	20	20
Same as now - no difference	64	61	64
More	1	<1	3
Much more	3	2	3
Don’t play anyway	3	4	4
Don’t know	-	-	-

*Percentages may not add to 100% due to rounding*

### 3.18 Further analysis of casinos

**Table 3.83: Casino participation by personal characteristics of respondents and percentage of casino participants – 1995 and 2000**

		1995 % of sample (n=1,200)	2000 % of sample (n=1,500)	2000 % of players (n=233)	
TOTAL CASINO PLAYERS		5	16	100	
Sex	<i>Male</i>	6	16	50	
	<i>Female</i>	5	15	50	
Age	<i>15-24 years</i>	7	15	18	
	<i>25-34 years</i>	6	19	24	
	<i>35-44 years</i>	5	15	19	
	<i>45-54 years</i>	5	21	21	
	<i>55-64 years</i>	4	17	12	
	<i>65+ years</i>	2	6	6	
Ethnicity <sup>60</sup> (1990-1995)	<i>NZ Māori</i>	3	N/A	N/A	
	<i>Other</i>	6	N/A	N/A	
	(2000)	<i>NZ Māori</i>	N/A	13	8
		<i>Pacific peoples</i>	N/A	13	6
<i>General</i> <sup>61</sup>		N/A	16	84	
Personal income <sup>60</sup>	<i>Under \$20,000</i>	4	11	31	
	<i>\$20-\$40,000</i>	7	17	35	
	<i>\$40,000+</i>	6	24	30	
Household income <sup>60</sup>	<i>Under \$30,000</i>	2	11	18	
	<i>\$30-\$60,000</i>	6	17	37	
	<i>\$60,000+</i>	9	21	38	
Occupation	<i>White collar</i>	8	21	47	
	<i>Blue collar</i>	6	19	26	
	<i>Home duties</i>	4	15	9	
	<i>Retired</i>	2	5	5	
	<i>Benefit/unemp</i>	2	5	2	
	<i>Student</i>	4	14	11	
Education	<i>Prim/sec school</i>	3	11	17	
	<i>School Cert</i>	6	14	16	
	<i>UE/6FC/Bursary</i>	7	18	18	
	<i>Trade/tech qual</i>	4	17	17	
	<i>Other tertiary</i>	4	17	21	
	<i>Univ graduate</i>	9	25	11	

#### Sex

A similar proportion of males and females had bet at a casino at least once in the 12 months prior to being surveyed (Table 3.83). Males and female participants also played gaming machines with similar frequency to each other. A slightly higher proportion of females (6%) played once a week or more compared to male participants (2%).

<sup>60</sup> Percentages may not add up to 100% due to non-responses to certain questions

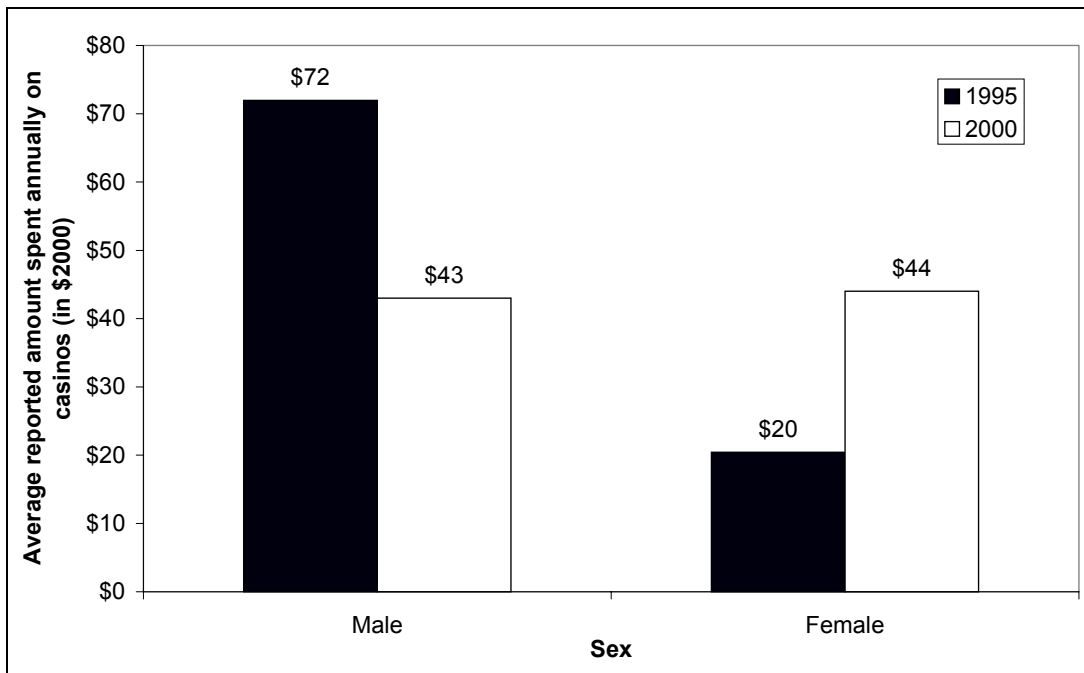
<sup>61</sup> General population refers to the remaining respondents who did not indicate they belonged to the Māori or Pacific peoples ethnic groups. For further explanation refer to the methodology section

A similar proportion of males (48%) and female participants (47%) reported spending an average of \$21 or more at a casino in a typical session. However, males (\$51.90) reported spending more on average in a typical session of betting at a casino than females (\$44.60).

Male respondents reported spending \$1 less on average annually compared to female respondents (Figure 3.51). Male annual reported expenditure had declined in the 1995-2000 period while female reported expenditure had more than doubled in inflation adjusted terms.

The differences in reported expenditure in 2000 were more pronounced amongst participants, with female participants reporting spending an average of \$291 annually compared to \$270 by male participants. Despite males spending more on average in a typical session at a casino, females spent more annually than males because a few high spending participants played more frequently than male participants.

**Figure 3.51: Average estimated annual spending at casinos by respondents in inflation adjusted terms, by sex - 1995 and 2000**



A similar proportion of male (16%) and female participants (15%) said they made a special trip to another town to visit a casino. However, 88% of male participants said they would do so again, compared to 78% of female participants who had made a special trip to another to visit a casino in the 12 months prior to being surveyed.

A higher proportion of female participants bet a casino for “excitement or a challenge” compared to male participants (36% compared to 28% of male

participants). A higher proportion of females bet at a casino “as entertainment” compared to males (63% compared to 52% of male participants).

A higher proportion of male participants said they had won money (31%) or broken even (17%) overall when playing casino gaming machines compared to female participants (48% of males compared to 36% of female participants).

Female participants were more likely to say they used a special skill or system to improve their chances of winning when playing casino gaming machines (3% compared to less than 1% of male participants).

Female participants were far more likely to be influenced to play casino gaming machines less or much less if the machines carried warnings that the house always wins (44% compared to 12% of male participants).

Male participants were more likely to be influenced to play casino gaming machines less or much less if the machines alerted users about the time or money spent playing gaming machines than they were about warnings that the house always wins. Female participants were less likely to be influenced to play gaming machines less or much less if the machines alerted users about the time or money spent playing casino gaming machines than they were about warnings that the house always wins, but they were still more likely to play less or much less than male participants (37% compared to 28% of males).

Male participants were more likely to play casino gaming machines less or much less if winnings of \$50 or more were paid by cheque than they were with the other options. They were also more likely to play less or much less than female participants (30% compared to 24% of female participants).

### *Age*

Respondents aged 65 years and over were the least likely to have attended a casino in the 12 months prior to being surveyed and respondents aged between 45-54 years the most likely (Table 3.83). However, participants between the ages of 25-34 years comprised the biggest proportion of participants.

Participants aged between 15-24<sup>62</sup> years of age bet at a casino with the most frequency. About one quarter (27%) of participants aged 15-24 years bet at a casino at least once a month compared to 8% of participants aged 25 years and over.

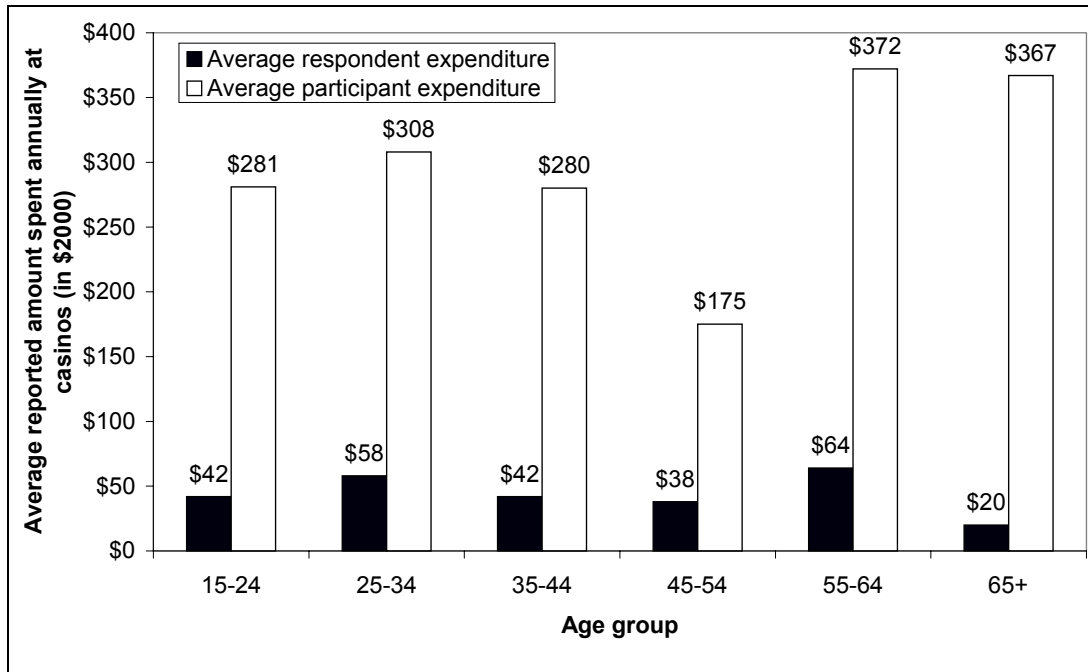
A higher proportion of participants aged between 35-54 years reported spending an average of \$21 or more in a typical session of betting at a casino compared to other participants (57% compared to 41% of other participants). However, participants in the 35-44 year age group (\$61.80) and 25-34 year age group (\$52.40) had the highest average reported spending in a typical session of betting at a casino, especially compared to participants between the age of 55-64 years who bet least on average (\$25.90).

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<sup>62</sup> The minimum age for betting in a casino is currently 20 years of age

Despite participants aged 55 years and over reporting spending less on average in a typical session of betting at a casino and betting less often than other participants, they reported spending more on average annually at a casino due to a few participants who reported spending large amounts of money frequently, at casinos compared to other participants (Figure 3.52).

**Figure 3.52: Average estimated annual reported spending at casinos by respondents and participants, by age group**



Participants aged between 15-24 years of age were more likely to say they had made a special trip to another town to visit a casino (29% compared to 13% of participants aged 25 years and over).

Participants under the age of 35 years and those aged 65 years and over were more likely to say they had won money or broken even overall betting on gaming machines at a casino (60% compared to 29% of participants between the ages of 35-64 years).

Participants under the age of 45 years were more likely to bet on casino gaming machines less or much less if machines carried a warning that “the house always wins” (36% compared to 22% of participants aged 45 years and over). However, a relatively high proportion of participants between the ages of 15-24 years said they would play casino gaming machines much more often if machines carried a warning that “the house always wins” (17%).

A higher proportion of participants between the ages of 35-44 years said they would play casino gaming machines less or much less if machines alerted users to how much time/money they had spent (49% compared to 27% of other participants).

Participants between the ages of 25-34 years were more likely to say they would play gaming machines less or much less if winnings of \$50 or more were paid by cheque (46% compared to 20% of other participants). A relatively high proportion of participants between the ages of 15-24 years said they would play gaming machines much more often if winnings were paid by cheque (28% of participants aged between 15-24 years).

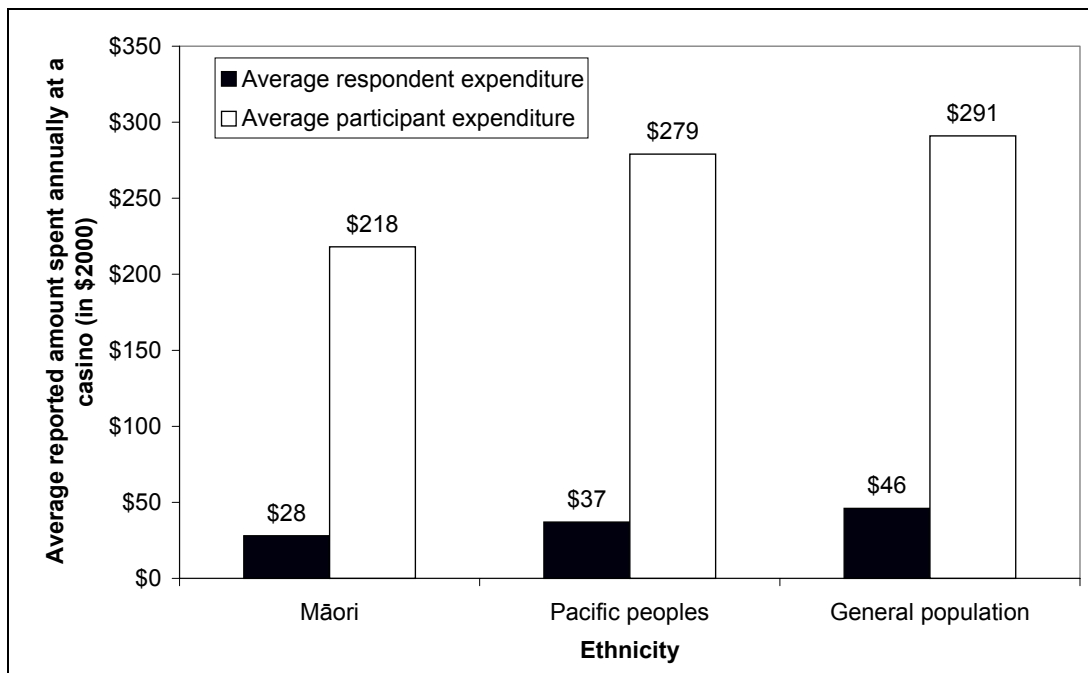
**Ethnicity**

Respondents in the General population were slightly more likely to have placed a bet at a casino at least once in the 12 months prior to being surveyed in 2000 than Māori and Pacific peoples (Table 3.83). However, Māori and Pacific peoples were more likely to bet at a casino at least once a month compared to participants in the General population (21% compared to 10% of participants in the General population).

A higher proportion of Pacific peoples (63%) reported spending \$21 or more in a typical session at a casino compared to participants in the General population (48%) and Māori (29%). However, participants in the General population (\$51.10) reported spending more on average in a typical session at a casino compared to Pacific peoples (\$36.70) and Māori participants (\$31.40).

Participants in the General population reported spending more on average annually at a casino due to a relatively few participants who spent a lot of money relatively frequently (Figure 3.53).

**Figure 3.53: Average estimated annual reported spending at casinos by respondents and participants, by ethnicity**



A higher proportion of participants in the General population made a special trip to another town to visit a casino (15% compared to 9% of other participants).

The main reason Pacific peoples gave for betting at a casino was to win prizes/money (74% compared to 44% of other participants). The main reason for betting given by the majority of participants in the General population was “as entertainment” (60 compared to 48% of other participants).

Māori and Pacific peoples were more likely to say they had won money or broken even overall when playing a gaming machine at a casino in the last 12 months (55% compared to 39% of participants in the General population).

Māori and Pacific peoples were more likely to say they would play casino gaming machines less or much less if the machines carried a warning that “the house always wins” (55% compared to 24% of participants in the general population). Māori and Pacific peoples were also more likely to say they would play gaming machines less or much less if machines alerted users to how much time/money they had spent (45% compared to 31% of participants in the General population).

Māori participants were more likely to say they would play casino gaming machines less or much less if winnings of \$50 or more were paid by cheque (42% compared to 27% of participants in the rest of the population). However, a higher proportion of Māori and Pacific peoples said they would play casino gaming machines more if winnings of \$50 or more were paid by cheque (15% compared to none of the participants in the General population).

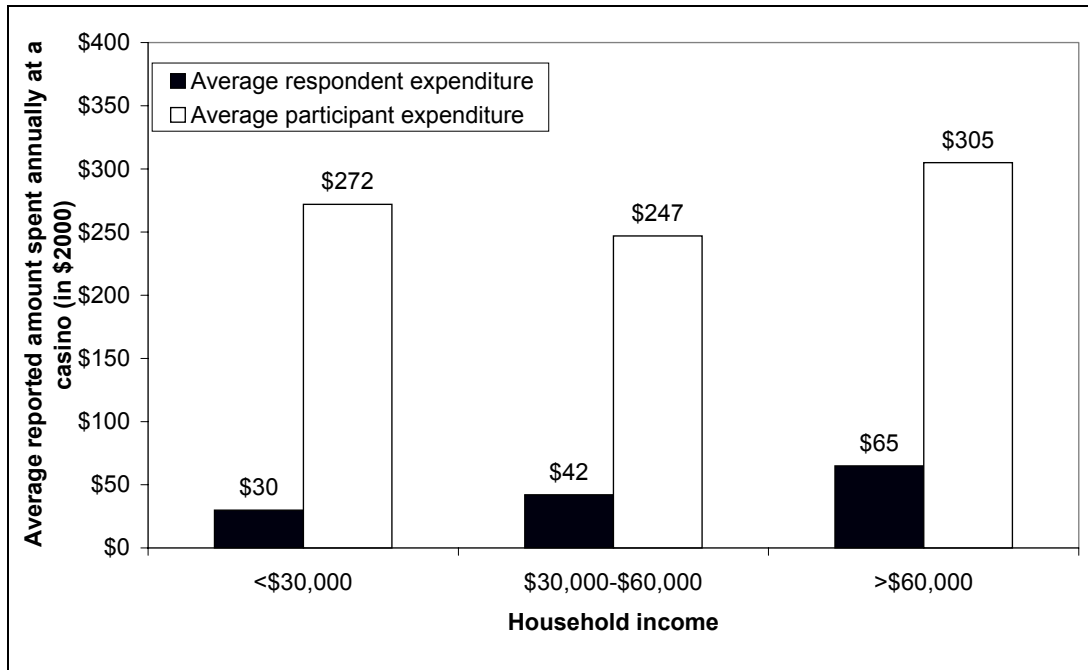
#### *Household income*

The higher the household income, the more likely the respondent is to have bet at a casino at least once in the 12 months prior to being surveyed (Table 3.83). Between 1995 and 2000, there was a sizeable increase across all household income groups in the proportion of respondents who bet at a casino at least once. Increases in participation were relatively even for each household income group in the 1995-2000 period.

A higher proportion of participants from households with income of under \$30,000 bet at a casino at least once a month compared to participants from households with income of \$30,000 or more (19% compared to 10% of participants from households with income of \$30,000 or more).

A higher proportion of participants from households with income of \$30,000 or more reported spending an average of \$21 or more in a typical session at a casino (49% compared to 38% of participants from households with income of under \$30,000). Participants from households with income of over \$60,000 reported spending the most on average (\$57.20) in a typical session at a casino compared to participants from households with income of between \$30,000-\$60,000 (\$46.30) and participants with household income under \$30,000 (\$32.00). Participants from households with income of over \$60,000 also reported spending the most on average annually (Figure 3.54).

**Figure 3.54: Average estimated annual reported spending at casinos by respondents and participants, by household income**



Participants from households with income of over \$60,000 were more likely to have made a special trip to another town to visit a casino (21% compared to 13% of participants from households with income of \$60,000 or less).

Participants from households with income of over \$60,000 were also more likely to bet a casino for entertainment reasons than other participants (68% compared to 47% of participants with household income of \$60,000 or less).

Participants with household income of under \$30,000 were more likely to say that they had won money or broken even overall when playing gaming machines at a casino (55% compared to 35% of participants with household income of \$30,000 or more).

Participants from households with income of between \$30,000-\$60,000 were more likely to say they would play casino gaming machines less or much less if machines carried a warning that “the house always wins” (40% compared to 21% of other participants).

There was no discernable difference in the responses by participants in each of the household income groups if casino gaming machines alerted users to how much time/money they had spent.

Participants from households with income of between \$30,000-\$60,000 were more likely to say they would play casino gaming machines less or much less if winnings of \$50 or more were paid by cheque (32% compared to 14% of other participants).



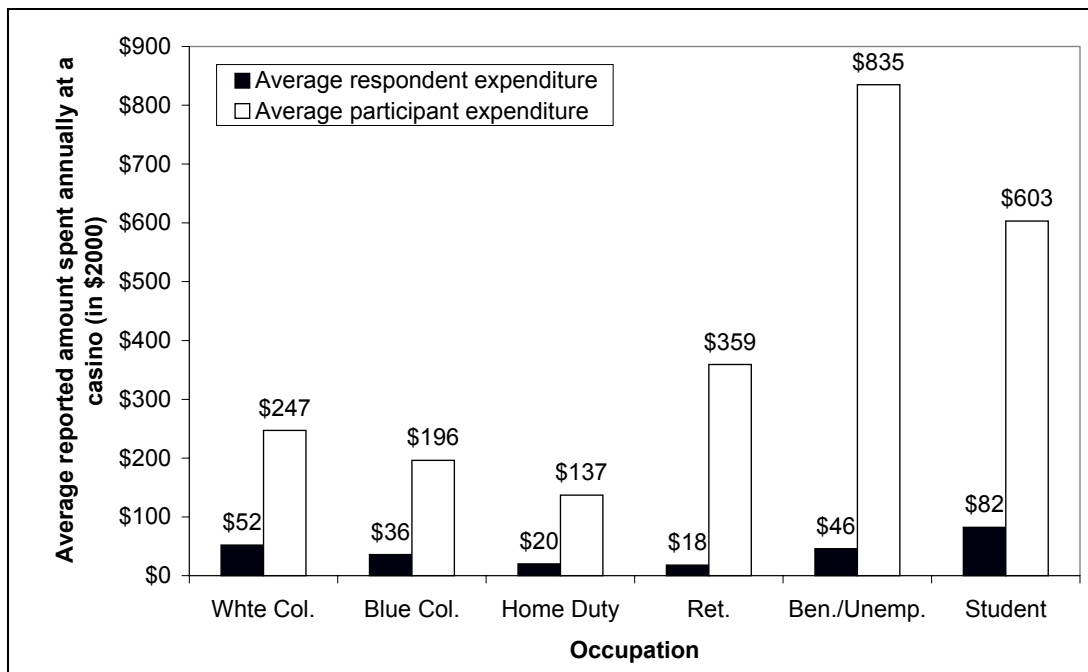
### Occupation

White-collar workers were more likely than other respondents to have bet at a casino at least once in the 12 months prior to being surveyed in 2000, followed by blue-collar workers (Table 3.83). White-collar workers alone accounted for almost half (47%) of all participants and together with blue-collar workers they accounted for 73% of all participants.

A higher proportion of students and unemployed/beneficiaries bet at least once a month at casinos compared to other participants (37% compared to 8% of participants with other occupations).

A higher proportion of students and homemakers reported spending \$21 or more on average in typical session of betting at a casino (54% compared to 45% of participants with other occupations). Students also reported spending the most on average in a typical session at a casino (\$52.20), followed by blue-collar workers (\$50.70). Retired people reported spending the least of all occupational groups in a typical session (\$29.90). Students reported spending the most on average annually at casinos of all respondents (Figure 3.55). However, unemployed/ beneficiaries reported spending the most on average annually of all participants. The difference between the average amount spent annually by participants and respondents was due to the different participation rates of students and beneficiaries (Table 3.83).

**Figure 3.55: Average estimated annual reported spending at casinos by respondents and participants, by occupation**



Students and unemployed/beneficiaries were more likely to have made a special trip to another city to visit a casino (23% compared to 15% of participants with other occupations).

Homemakers, students and unemployed/beneficiaries were more likely to bet at a casino to win prizes/money (62% compared to 40% of other participants).

Students and unemployed/beneficiaries were also more likely to say they had won money or broken even overall playing gaming machines at a casino (56% compared to 36% of other participants).

Homemakers and beneficiaries said they were more likely to play casino gaming machines less or much less if machines carried a warning that “the house always wins” (74% compared to 23% of other participants). Homemakers were more likely to play casino gaming machines less or much less if machines alerted users to how much time/money they had spent (53% compared to 29% of other participants). Students were more likely to play casino gaming machines less or much less if winnings of \$50 or more were paid by cheque (58% compared to 23% of other participants).

#### *Highest qualification*

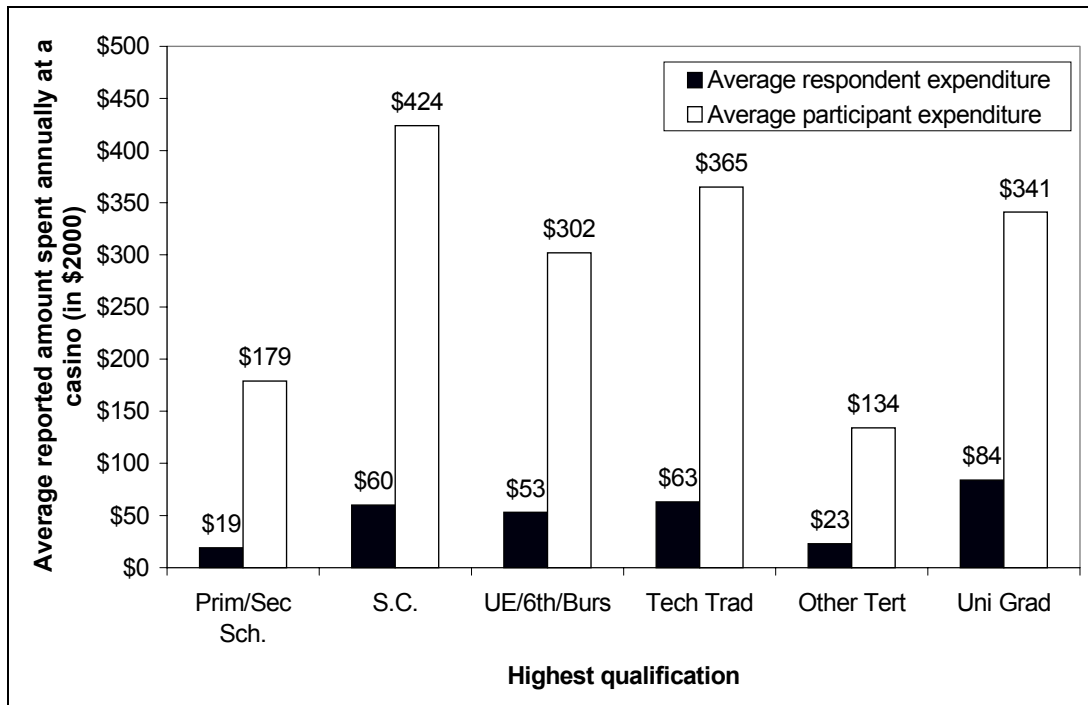
University graduates were more likely than other respondents to have bet at a casino at least once in the 12 months prior to being surveyed (Table 3.83).

A higher proportion of participants with school certificate and university graduates bet at a casino at least once a month (17% compared to 10% of other participants).

A higher proportion of participants with school certificate or university entrance/6th form certificate/bursary qualifications reported spending an average of \$21 or more in a typical session of betting at a casino (58% compared to 42% of other participants). Participants with university entrance/6th form certificate/bursary qualifications (\$67.10) and participants with school certificate (\$50.40) also reported spending the most on average in a typical session of betting at a casino. Participants with other tertiary qualifications reported spending the least on average in a typical session of betting at a casino (\$38.50).

Participants with school certificate also reported spending the most on average annually at a casino compared to other participants (Figure 3.56). However, due to their higher participation levels, university graduates reported spending slightly more than respondents with school certificate.

**Figure 3.56: Average estimated annual reported spending at casinos by respondents and participants, by highest qualification**



Participants with no formal educational qualifications were more likely to have made a special trip to another town to bet at a casino (24% compared to 14% of participants with formal qualifications).

Participants with no formal educational qualifications were more likely to bet at a casino to win prizes/money (56% compared to 44% of other participants), and to place bets for “excitement or a challenge” (46% compared to 30% of other participants). Participants with no formal qualifications were less likely than other participants to bet at a casino for entertainment (43% compared to 63% of other participants).

Participants with no formal educational qualifications were more likely to say they had won money or broken even overall when playing gaming machines at a casino (58% compared to 37% of other participants).

Participants with no formal educational qualifications or with school certificate were more likely to say they would play casino gaming machines less or much less if machines carried warnings that “the house always wins” (43% compared to 19% of other participants). A high proportion of participants with school certificate said they would play casino gaming machines less or much less if machines alerted users to how much time/money they had spent (41% compared to 32% of other participants). A high proportion of participants with school certificate or university entrance/6th

form certificate/bursary qualifications said they would play casino gaming machines less or much less if winnings of \$50 or more were paid by cheque (46% compared to 18% of other participants).

## Section 4: Public attitudes to gaming

Respondents were asked a number of questions to gauge their opinions on a variety of gaming matters: factors to guide gaming legislation; defining worthy causes; distribution of gaming profits; public awareness of funding agencies; age restrictions on gaming activities; desirability of gaming activities; gaming advertising; and problem gambling.

### 4.1 Factors to guide gaming legislation<sup>63</sup>

Government from time to time decides to reassess, with a view to possible reforms, how some or all of the gaming activities in New Zealand are operated and/or regulated. The reasons for a reassessment can stem from the introduction of new forms of gaming to the New Zealand market, or from a perception of inadequacies or loopholes in the way the gaming industry currently operates.

One of the questions in the current survey asked people to choose the four most important factors of the twelve listed, that should guide government when reassessing the regulation of gaming activities.

The twelve options presented a wide spectrum of factors to respondents, ranging from views seeking to protect individuals and society (“interventionist”) to more “free-market” views. The three top options listed in Table 4.1 received the support of the majority of people, but the fourth factor was less decided. Although “ensuring fairness for players” was the most popular fourth option it did not receive support from the majority of people. Two other options also received a sizeable proportion of support from people - “restricting opportunities to gamble” and “limiting the size/number of groups running gaming activities” (Table 4.1).

**Table 4.1: Four most important factors that should guide the Government when reassessing the regulation of gaming activities**

Response option	Order of Importance				All %
	First %	Second %	Third %	Fourth %	
Limiting the harm it can cause people	34	19	14	7	74
Ensuring profits fund worthy causes	19	20	19	14	72
Preventing criminal activity	15	18	12	11	57
Ensuring fairness for players	8	11	13	13	44
Restricting opportunities to gamble	9	9	8	9	35
Limiting size/number of groups running activities	3	6	10	13	31
Generating tourism from gaming	3	3	5	9	20
Giving people more choice	3	4	5	5	16
Generating gaming jobs	2	5	4	5	16
Market to decide how much is available	1	3	4	6	14
Encouraging competition in the industry	<1	1	3	4	8
Supporting the racing industry	2	1	2	3	8
No reply	<1	<1	1	2	4

*Multiple response*

*Showcard*

*Percentages may not equal the total sum due to rounding*

<sup>63</sup> Questions in this section were asked of all 1,500 respondents, where applicable, unless otherwise stated

There are many restrictions on how the gaming industry currently operates. The law in New Zealand makes a distinction between operating a gaming activity and an ordinary business. For example, there are currently restrictions on how many casinos are allowed to operate in New Zealand and also where they are allowed to operate. When asked, a large majority (78%) felt that there was a need for special laws to control gaming, though almost a fifth of respondents (18%) thought gaming should be treated the same as an ordinary business (Table 4.2).

**Table 4.2: Q80, Should there be special laws controlling gaming activities or should gaming be treated in a similar manner to other ordinary business or sporting activities**

<b>Response option</b>	<b>%</b>
Special laws controlling gaming	78
Treated the same as ordinary business	18
Don't know	4

## 4.2 Further analysis of factors to guide gaming legislation

The following analysis examines differences in the responses to Questions 79 and 80 by selected characteristics of respondents.

### Sex

When asked what factors should guide government when reviewing gaming, females were more likely than males to favour “ensuring that profits fund worthy causes” (74% compared to 69%) and “restricting opportunities to gamble” (41%; 29%), while males were more likely to favour: “giving people more choice” (19%; 14%); “encouraging competition in the industry” (11%; 5%); and “supporting the racing industry” (10%; 6%).

Similarly, females were slightly more likely to favour special laws controlling gaming (80% compared to 77%) while males were more likely to favour treating the gaming industry the same as other businesses (20%; 15%).

### Age

People under the age of 25 years were more likely than older people to favour the gaming industry being regulated to “generate gaming jobs” (24% compared to 14% of those aged 25 years and over); “generate tourism jobs” (25%; 19%); and “give people more choice” (24%; 15%). Those aged under 25 years were less likely than older people to favour “supporting the racing industry” (5%; 9%) or “limiting the harm gaming can cause people” (67%; 76%).

The under 25 years group were also more likely to favour the gaming industry being treated the same as other businesses (27% of those aged 15-24 years compared to 15% of those aged 25 years and over).

### *Ethnicity*

People in the General population were less likely than Māori and Pacific peoples to want government to regulate gaming activities so that gaming jobs were generated (14% compared to 26% for Māori and 26% for Pacific peoples). People in the General population were however, more likely to want gaming activities to generate tourism jobs than Māori and Pacific peoples (22%; 8% and 17%). Pacific peoples were more likely than other people to favour government regulating the gaming industry to “give people more choice” (42% compared to 19% for Māori and 14% for the General population). The majority of Pacific peoples favoured the gaming industry being run to “ensure that profits went to worthy causes”, but were less likely to choose this option compared to people from other ethnic groups (57% compared to 72% of Māori and 73% of the General population).

### *Occupation*

People who were unemployed and/or receiving a benefit were more likely than people in other occupations to favour gaming being run “to give people more choice”, while homemakers were amongst the least likely to favour this approach (28% of unemployed compared to 14% of homemakers and 16% for the other occupations). Conversely, homemakers were more likely to favour “restricting people’s opportunities to gamble” than people in other occupations. People who were unemployed and/or receiving a benefit were also less likely to favour this option than people from other occupations (23% of unemployed compared to 50% of homemakers and 27% for the other occupations).

### *Highest qualification*

The higher the person’s educational qualifications, the more likely they were to believe that there should be special laws controlling gaming activities (87% for university graduates compared to 71% for those without any qualifications).

### *Number of activities<sup>64</sup>*

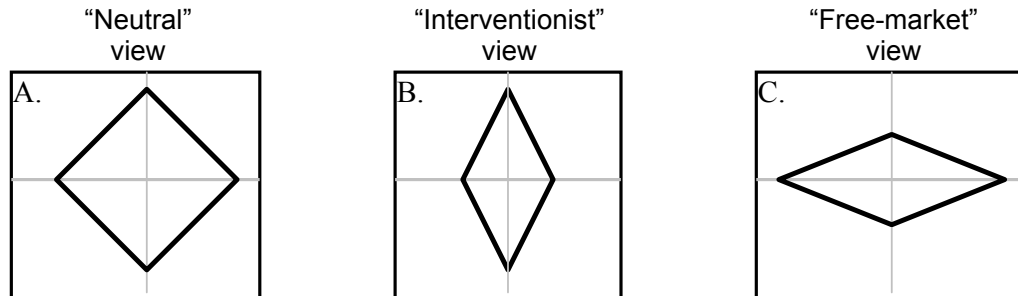
There was a difference of opinion on what are the four most important factors that should guide government depending on the number of gaming activities respondents had done in the 12 months prior to the survey. There was a greater consensus of opinion about the four most important factors amongst those who had done no gaming activities in comparison to those who had done ten or more activities. Those who had not done any gaming activities were more likely to favour the following options - “limiting the harm it can cause people”, “preventing criminal activity” and “limiting the size and numbers of groups running gaming activities”. They were also the only group to favour “restricting opportunities to gamble” as one of their four main factors.

Conversely, people who had done ten or more gaming activities were less likely to favour the above options and instead were more likely to favour “generating gaming jobs”, “supporting the racing industry”, “generating tourism jobs from gaming”, “encouraging competition” and “giving people more choice”. They were also the only group to select the latter option as one of their four main options.

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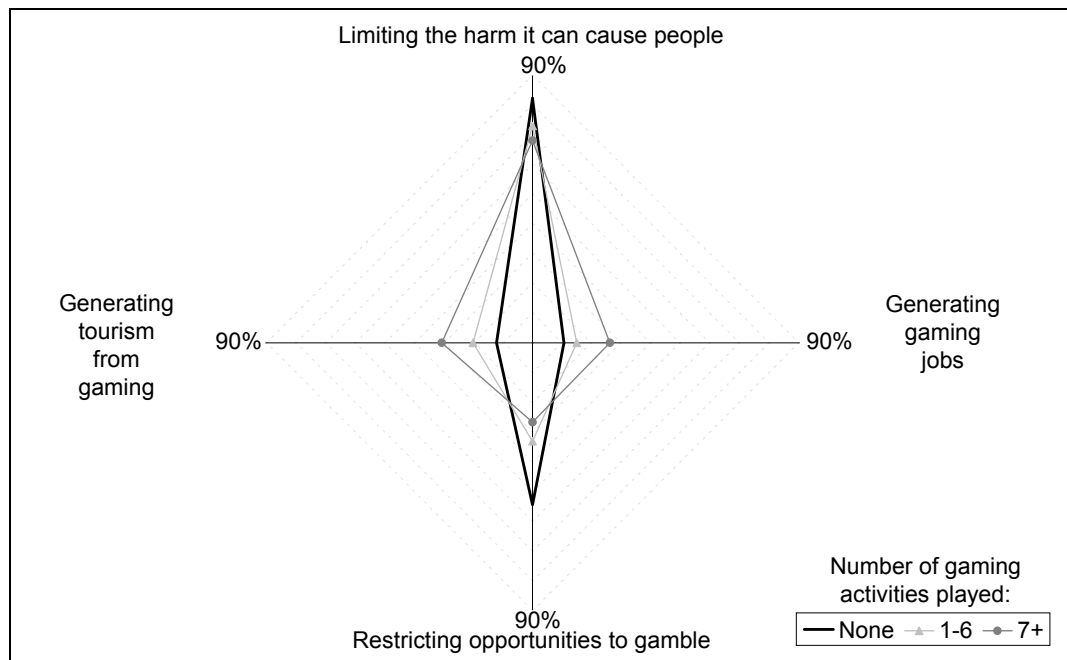
<sup>64</sup> All references to the number of gaming activities refer to gaming activities a person had done in the 12 months prior to their being surveyed (June - August 2000)

Figure 4.1 compares and contrasts the differing viewpoints of people with differing levels of gaming experience. The vertical axis features two options that could be described as “interventionist” while the horizontal axis features two views that could be described as “free-market” options. The three diagrams below show the shapes that could be expected in Figure 4.1 if the groups held one of these viewpoints:



In Figure 4.1 it is clear that although the majority of people favour one of the “interventionist” options (limiting the harm gaming can cause people), regardless of gaming experience, the line representing those who had done no gaming activities closely resembled the shape of the “interventionist” viewpoint in Diagram B. This is also true for the line representing those who had done one to six gaming activities, though to a lesser extent.

**Figure 4.1: Ratings of important factors that government should use when reassessing gaming activities, by the number of gaming activities people had done in the last 12 months**



A noticeably higher proportion of the most experienced gaming group favoured the “free-market” options in Figure 4.1 compared to the other groups, with their line more closely resembling Diagram C. It should be noted, however, that a smaller proportion of people favour the “free-market” options, irrespective of how many gaming



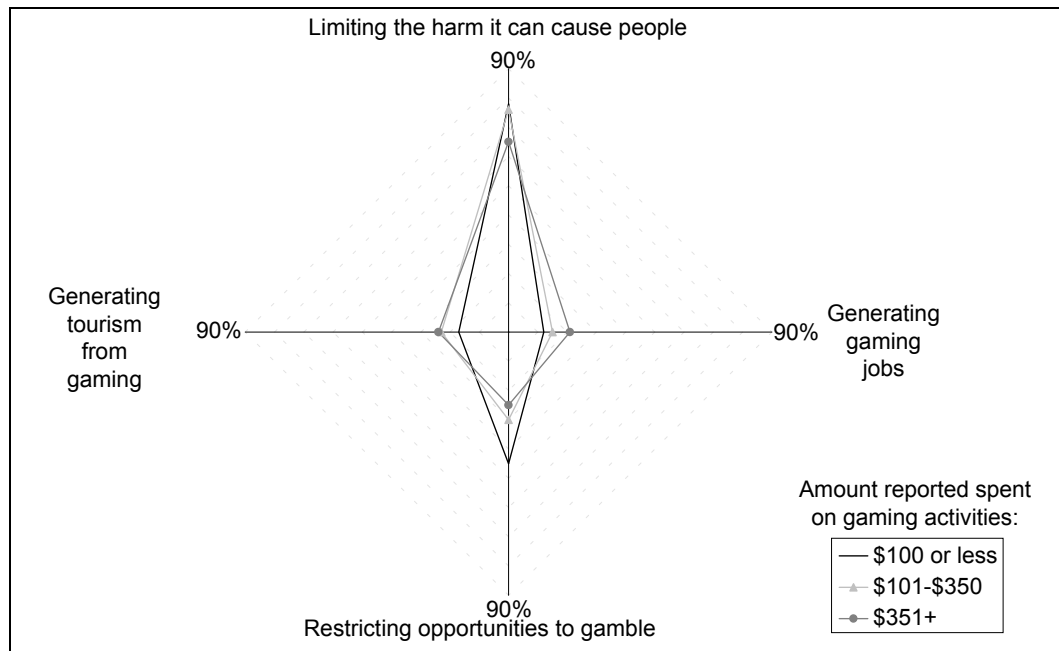
activities they had played and that there is very high support for limiting harm, regardless of gaming experience.

Differences were also apparent when people were asked about whether or not the gaming industry should be regulated (Table 4.2). Half of those few who had done ten or more gaming activities were in favour of gaming activities being treated in a similar manner to other ordinary businesses or sporting activities, whereas almost all (88%) of those who had done no gaming activities were in favour of special laws for controlling gaming activities.

**Amount reported spent on gaming activities**

Similar to people’s responses by the number of gaming activities they had played, the more money they reported spending on gaming, the more likely they were to favour more “free-market” options than those who had reported spending less on gaming activities. There is a strong similarity between the viewpoints of those who had reported spending the most money on gaming activities with those who had played the most number of gaming activities as is illustrated by comparing Figure 4.2 with Figure 4.1.

**Figure 4.2 Ratings of important factors that government should use when reassessing gaming activities, by amount reported spent on gaming activities**



- Those who had said they spent the most amount of money were more likely to favour:
- Ensuring fairness for players (52% of those who said they spent more than \$350 compared to 41% of those who said they had spent under \$350)
  - Generating tourism (24%; 19%)
  - Giving players more choice (21%; 14%)
  - Generating gaming jobs (21%; 13%)
  - Supporting the racing industry (13%; 6%)

Compared to those who said they spent under \$350 on gaming activities, those who said they spent more were more likely to favour gaming activities being treated similarly to ordinary business or sporting activities (27% compared to 14% of those who said they spent under \$350).

### 4.3 Worthy causes

This sub-section explores people’s sense of the purpose(s) gaming activities should be run for, whether as a business or as a fund-raiser for worthy causes. It also examines what types of organisations should be considered “worthy causes” for receiving gaming profits and who should distribute this money to them.

People were asked whether or not they favoured gaming activities being run for a variety of reasons, the first of which was as “**fund-raising for worthy causes**”. Virtually all of those asked were in favour of gaming activities being run to raise funds for worthy causes. There was little difference by any variable except by the number of gaming activities a person had done in the last 12 months. All of those who had done 10 or more gaming activities<sup>65</sup> were in favour of gaming activities being run to fund-raise for worthy causes while only 80% of those who had done no gaming activities concurred. Overall, these results are similar to those from the 1995 survey. However, there are some differences from the 1985 and 1990 surveys (Table 4.3).

**Table 4.3: Q81, Attitudes towards gaming activities being run for the following reasons 1985, 1990, 1995, and 2000**

Response option	In favour				Not in favour				Don't know			
	1985	1990	1995	2000	1985	1990	1995	2000	1985	1990	1995	2000
Fund-raising for worthy causes	94	93	94	92	4	6	6	7	2	1	-	1
A means of raising government revenue	38	26	25	25	54	68	72	71	8	6	3	4
Sales promotion	47	56	50	55	45	39	46	41	7	6	4	4
Business enterprise	22	26	32	31	72	67	63	65	7	6	5	4
Profit sharing between a promoter and a worthy cause	n/a	n/a	71	69	n/a	n/a	26	27	n/a	n/a	3	4

*Showcard*

Respondents were also asked whether they were in favour of gaming activities being run as “**a means of raising government revenue**”. Again, the results were similar to those from 1995, with the majority of people against this. People who had done no gaming activities were particularly against gaming activities being run for this purpose (76% compared to 70% of those who had done gaming activities). Māori were also against this option, while Pacific peoples were somewhat more in favour (79% of Māori were against while 35% of Pacific peoples were for and 56% against

<sup>65</sup> n=22

this option). The General population was also against gaming activities being run for this purpose (72%).

The majority of people were in favour of gaming activities being run for “**sales promotion**”<sup>66</sup>, though this support was considerably lower compared to the level of support for worthy causes (Table 4.3). There has been some increase in the proportion of people in favour of this option since 1995. People more likely to be in favour of gaming activities being run for sales promotion were typically:

- In the younger age groups (72% for those under 25 years compared to 51% for the others)
- Students (70% for students compared to 53% for the others)

They were also more likely to have done ten or more gaming activities (74% compared to 55% for the others).

The majority of people were not in favour of gaming activities being run as a “**business for commercial profit**” (e.g. casinos). However, those more likely to be in favour were:

- Male (37% of males were in favour compared to 26% for females)
- In the younger age groups (44% of those under 25 years were in favour compared to 28% for the other age groups)
- In households with an income of \$60,000 or more (39% were in favour compared to 28% for lower income households)
- Students (44% of students were in favour compared to 29% for other occupations)

They were also more likely to have done ten or more gaming activities (67% were in favour compared to 31% for those with less gaming experience).

Most people were in favour of the profits from gaming activities being “**shared between a promoter and a worthy cause**”. People who were less likely to agree with this were typically:

- Aged 65 years and over (53% were in favour compared to 72% of all other age groups)
- Pacific peoples (58% compared to 70% of the rest of the population)
- Living in the upper North Island (66% compared to 72% of the rest of the country)
- Living in a household with an income under \$30,000 (58% compared to 73% in higher income households)
- Retired (58% of retired people were in favour compared to 71% of other occupations)
- University graduates (56% were in favour compared to 70% of others)

They were also more likely to have done no gaming activities (52% compared to 72% of others with some gaming experience).

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<sup>66</sup> Sales promotion includes prize competitions

People were asked to choose, from a list provided, the groups they considered **worthy causes to receive gaming profits**. There were eight groups that the majority of people agreed were worthy causes, three of which had over 80% support - Welfare, Rescue, and Health Research organisations (Table 4.4).

**Table 4.4: Q87, Worthy causes for receiving gaming profits**

Response option	%
Welfare organisations e.g. IHC etc.	88
Rescue organisations	87
Health research e.g. cancer	84
Educational groups	75
Amateur sports	67
Community/recreational groups	66
Amateur arts & culture groups	58
Science research e.g. forestry	52
Professional arts & culture groups	37
Professional sports	20
Racing industry	11
Business enterprises	11
Political parties	3
None of these	1
Don't know	<1

*Multiple response  
Showcard*

People were asked to decide **which of the various types of organisations mentioned should distribute gaming profits to worthy causes** (Table 4.5). This question was also asked in 1995.

The main preference is for community representatives to distribute the profits, followed by local councils and government departments. However, support for the first two options has declined since 1995, while support for government departments has remained relatively static.

**Table 4.5: Q88, When profits go to worthy causes, who should they be distributed by? 1995<sup>67</sup>, 2000**

Response option	1995	2000
	%	%
Community representatives	57	49
Local Council	38	34
Government departments	23	24
People who operate gaming activities	25	22
Don't know	4	3
Special trust/board/independent/neutral group	-	2
Others	-	<1
None	-	<1

*Multiple response*

<sup>67</sup> n=1,200

The “Other” responses given by respondents were:

- Lottery Commission/Board (n=5)
- Lion Foundation (n=2)
- “Charitable organisation”
- “Salvation Army”
- “Churches”
- “Police”
- “Internal Affairs”
- “Regional organisation e.g. Sports Trust”

#### **4.4 Further analysis of worthy causes information**

##### **Sex**

Although the support was fairly minimal overall, males were more likely than females to consider the racing industry as a worthy cause (14% compares to 9% for females). They were also more likely to regard amateur sports as a worthy cause (71%; 63%). Females were more likely to regard health research (89%), educational groups (79%), community/recreational groups (68%), and science research groups (55%) as worthy causes compared to males (78%, 70%, 63% and 49% respectively).

Females were also more likely to favour the profits from gaming being distributed to worthy causes by the operators who run gaming activities (25% compared to 19% for males).

##### **Age**

The younger the person, the more likely they were to feel that the following groups were worthy causes for receiving gaming profits:

- Health research (92% for those under 25 years compared to 82% for older age groups)
- Educational groups (80%; 73%)
- Science research (61%; 50%)
- Professional arts and culture (46%; 35%)
- Professional sports (29%; 18%)
- Business enterprise (20%; 9%)

People below the age of 25 years were the least likely to favour profits being distributed by community representatives - the main choice of the older age groups (31% compared to 53% for the older ages). Instead they favoured local councils and people who operate gaming activities (40% and 32% respectively compared to 32% and 20% for the older age groups).

##### **Ethnicity**

Māori were more likely to feel that community/recreational groups were worthy causes for receiving gaming profits than the rest of the population (70%; 65%), while Pacific peoples were more likely to favour professional sports (29%; 20%). Amateur sports (69%), science research (54%), and the racing industry (13%) were more likely to be considered a worthy cause to receive gaming profits by the General population compared to Māori and Pacific peoples (they were favoured by 55%, 43% and 6% of Māori and Pacific peoples combined).

Support for the people who operate gaming activities to distribute the profits from gaming was highest amongst Māori and Pacific peoples (both 30%), compared to the General population (21%). Pacific peoples were less likely to prefer community representatives to distribute gaming profits compared to the rest of the population (34%; 50%).

#### *Location*

People in the South Island were more likely to favour local councils distributing the profits from gaming to worthy causes than people living elsewhere in the country (46%; 30%). However, they were less likely to support government departments distributing the profits (15%; 26%).

#### *Household income*

The higher the household income the more likely respondents were to feel that the following groups were worthy of receiving gaming profits:

- Amateur sports (75% with incomes over \$60,000 compared to 64% of households with income under \$60,000)
- Community/recreational groups (72%; 63%)
- Amateur arts and culture (65%; 56%)

People in lower income households were more likely to regard health research as a worthy cause (86% compared to 78% of households with income of over \$60,000).

The higher their household income the more likely a person was to favour local councils distributing the profits from gaming to worthy causes (37%; 32%).

#### *Occupation*

Students were more likely to regard science research (68% compared to 50% for other occupations), professional arts and culture groups (51%; 35%), professional sports (35%; 18%), and business enterprise (27%; 9%) as worthy causes to receive gaming profits than people in other occupations. People on home-duties were more likely to regard educational groups as worthy causes.

Retired people were the least likely to support gaming operators distributing the profits from gaming activities to worthy causes (16% compared to 23% for other occupations), while students were the least likely to support community representatives (28%; 52%).

#### *Number of activities*

The more gaming activities a person had done the more likely they were to regard amateur arts and culture (75% of those who had done 4 or more gaming activities compared to 62% of those who had done less than 4 activities), and the racing industry (15%; 9%) as worthy causes to receive the profits from gaming activities. They were also more likely to favour people who operate gaming activities distributing the profits, compared to people who had done fewer gaming activities (26%; 20%).

#### *Amount reported spent on gaming activities*

The more money a person had said they spent on gaming activities the more likely they were to regard the racing industry (17%) and amateur sports (72%) as a worthy cause to receive the profits from gaming activities (compared to 9% and 65% respectively of those who said they spent under \$350).

### **4.5 Distribution of gaming profits**

This sub-section examines how much of the profits from a variety of gaming activities people think actually goes to worthy causes. People were asked to say how much of the profit from each of the eight gaming activities listed goes to worthy causes - not counting prizes and administration costs.

There was a high level of uncertainty amongst respondents as to what proportion of profits from gaming activities actually goes to worthy causes, particularly for Internet-betting, housie and TeleBingo. According to popular belief, a higher proportion of the profits from Lotto goes to worthy causes, particularly when compared to horse or dog racing, and sports-betting (Table 4.6 and Figure 4.3).

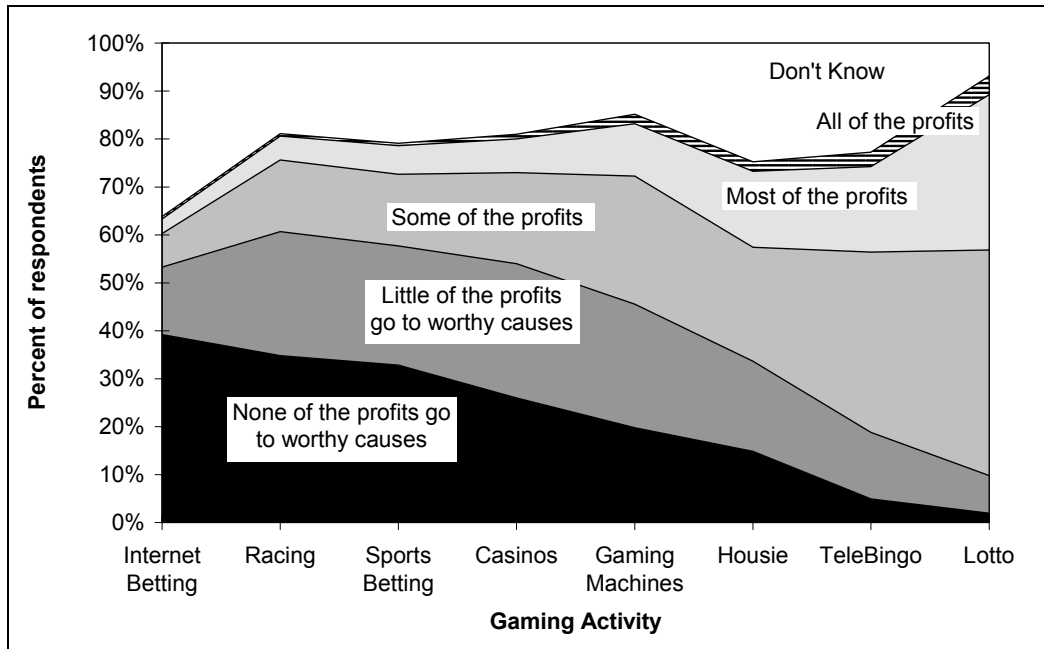
Knowledge of where the profits go is loosely related to how many people play the particular activity. The exception to this is TeleBingo, which despite having a relatively high proportion of people who play, has fewer people who feel they know what proportion of the profits actually goes to worthy causes compared to most other gaming activities.

**Table 4.6: Q89, Proportion of the profit from gaming activities respondents believe goes to worthy causes**

<b>Response option</b>	<b>Internet Betting</b>	<b>Housie</b>	<b>TeleBingo</b>	<b>Sports Betting</b>	<b>Racing</b>	<b>Casinos</b>	<b>Gaming Machines</b>	<b>Lotto</b>
	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
None	39	15	5	33	35	26	20	2
A little	14	19	14	25	26	28	26	8
Some	7	24	38	15	15	19	27	48
Most	3	16	18	6	5	7	11	33
All	<1	2	3	<1	<1	1	2	4
Don't know	36	25	23	21	19	19	15	7
% of population who have played activity	1	4	20	8	17	16	18	75

*Showcard*

**Figure 4.3: Q.89, Proportion of the profit from gaming activities that respondents believe goes to worthy causes**



## 4.6 Further analysis of the distribution of gaming profits

### Sex

Males were more likely than females to feel that none of the profits from gaming machines went to worthy causes (23%; 17%). Females were less likely to feel that they knew what proportion of the profits from racing (21% compared to 16% for males), sports-betting (25%; 17%), and Internet-betting (40%; 32%) go to worthy causes.

### Age

The younger the person, the more likely they were to feel that none of the profits from gaming machines went to worthy causes (29% of those under the age of 35 years compared to 14% of those 35 years or over). The older the person, the more likely they were to say that they did not know how much of the profits from housie (28% of those aged 35 years and over compared to 21% of those under 35 years), TeleBingo (26%; 17%), racing (22%; 13%) and sports-betting (27%; 13%) goes to worthy causes.

### Ethnicity

Pacific peoples were more likely to believe that a high proportion of the profits (“most” or “all”) from casinos goes to worthy causes (24% compared to 7% for the rest of the population). They were more likely to feel that a higher proportion of the profits from sports-betting goes to worthy causes compared to the rest of the population - 52% felt some, most or all of the profits go to worthy causes compared to 19% of the rest of the population. They were also more likely to feel that some, most, or all of the profits from Internet-betting go to worthy causes (29%; 10%).



### *Household income*

People from lower income households were more likely to say they did not know what proportion of the profits from TeleBingo (26% compared to 20% of higher income households), sports-betting (28%; 17%), and Internet-betting (45%; 31%) went to worthy causes.

### *Occupation*

Students were more likely to believe that none or little of the profits from gaming machines (61% compared to 44% for other occupations) and TeleBingo (26%; 18%) goes to worthy causes. They, along with white and blue-collar workers were more likely to say that little or none of the profits from casinos (59% compared to 45% for other occupations), racing (66%; 51%), and Internet-betting (58%; 41%) goes to worthy causes. Most retired people could not say what proportion of the profits from Internet-betting (57% compared to 32% of other occupations), TeleBingo (33%; 20%), and sports-betting (26%; 18%) went to worthy causes.

### *Number of activities*

The more gaming activities a person has done, the more likely they were to voice an opinion on what proportion of the profits from gaming activities goes to worthy causes, possibly due to their higher levels of interest and exposure to the activities. The fewer gaming activities a person had done the more likely they were to be of the opinion that only a small proportion (“none” or “a little”) of the profits from gaming machines (47% compared to 39% of those who had done 4 or more gaming activities) and sports-betting (56%; 50%) goes to worthy causes.

### *Amount reported spent on gaming activities*

Those who had not spent any money on any gaming activities were the most likely to say they do not know whether or not the money from the following gaming activities goes to worthy causes:

- Gaming machines (21% compared to 13% who spent money on gaming activities)
- Casinos (24%; 18%)
- Housie (33%; 23%)
- Lotto (14%; 5%)
- TeleBingo (30%; 15%)
- Racing (27%; 17%)
- Sports-betting (27%; 20%)

Those who spent the most money on gaming activities were the most likely to feel that some or most of the profits from TeleBingo (67% compared to 51% of those who spent \$350 or less) and Sports-betting (24%; 19%) goes to worthy causes.

## **4.7 Public awareness of Funding Agencies**

This sub-section tests the level of public awareness of some of the funding agencies that distribute the proceeds from gaming activities. The agencies mentioned are funding agencies that distribute profits from the New Zealand Lotteries Commission. The one exception is the Todd Foundation, which was mentioned purely to enable a comparison to be made to another funding agency. The vast majority of people had heard of the Hillary Commission and the Lottery Grants Board, while less than half had heard of Creative New Zealand and the Todd Foundation (Table 4.7). However,

some of the people might still think of Creative New Zealand in its previous incarnation as the QEII Arts Council.

**Table 4.7: Q90, Knowledge of Funding Agencies**

Response option	Hillary Commission	Lottery Grants Board	Creative New Zealand	Todd Foundation
	%	%	%	%
Definitely heard of them	80	80	20	25
Have heard the name	10	12	14	21
Never heard of them	10	8	65	54

*Showcard*

People who were most likely to have never heard of each of these funding agencies are listed in Table 4.8 with a cross in the column of each agency they are less likely to have heard of (i.e. those who were most likely to have said in Table 4.7 that they had never heard of that particular funder).

**Table 4.8: Q90, People less likely to have knowledge of Funding Agencies**

Those who were most likely to have <u>never</u> heard of each funding agency were more likely to be:	Hillary Commission	Lottery Grants Board	Creative New Zealand	Todd Foundation
	%	%	%	%
• Female			x	x
• Under 25 years of age	x	x		x
• Pacific peoples	x	x	x	x
• Māori			x	x
• From Upper North Island	x	x	x	x
• From South Island			x	x
• Low income household	x	x	x	x
• Student	x	x		x
• Beneficiary/unemployed	x	x		x
• Home-maker			x	
• Have done no gaming activities	x	x		x

People living in the upper North Island, people from low-income households, and Pacific peoples were less likely than the rest of the population to have heard of any of these funders.

#### 4.8 How many gaming operators should there be?<sup>68</sup>

Respondents were asked, out of a list mentioned by the interviewer, what the ideal number of casino, sports-betting and lottery operators should be in New Zealand.

For **casinos**, most felt that the number of casinos should be as it is now (a maximum of six) - few felt it should be higher (Table 4.9). The proportion of people who felt

<sup>68</sup> Questions in this section were asked of all 1,500 respondents where applicable, unless otherwise noted

that there should not be any casinos was down slightly compared to 1995 (Table 4.10).

In 2000, support for having **no** casinos was strongest amongst:

- Females (31% compared to 24% of males)
- Older people (35% of those aged 35 years and over compared to 17% of people under the age of 35 years)
- Lower income households (34% compared to 25% of households with an income of \$30,000 or more)
- Retired people (44%) and homemakers (35%) - compared to 26% of other occupations
- People who had no educational qualifications (33% compared to 26% of those with formal qualifications)
- People who had done few or no gaming activities (34% compared to 17% of those who had done 4 or more activities)
- People who had not spent any money on gaming activities (49% compared to 23% of those who said they spent money on gaming activities)

**Table 4.9: Q102, Ideal number of casinos**

Response option	%
None	28
Up to six - as it is now	60
Seven or eight	4
Eight or more	4
Don't care/don't mind	1
As many as needed/market should dictate	<1
Not sure/don't know	3

**Table 4.10: Ideal number of casinos, 1995 (n=1,200)**

Response option	%
None	32
Two (Auckland and Christchurch)	36
More than two	28
Don't know	4

When asked how many **sports-betting organisations** there should be in New Zealand, the majority of people supported the current situation of having only one organisation, although support for the status quo was lower than for casinos. Less people were against sports-betting than casinos (28% of people wanted no casinos in New Zealand compared to 18% for sports-betting). However, in the previous survey in 1995, only 33% of people supported the legalisation of sports-betting. There was support for an increase in the number of sports-betting organisations in New Zealand, with about a fifth of people wanting two or more sports-betting organisations in New Zealand.

**Table 4.11: Q103, Ideal number of sports-betting organisations**

<b>Response option</b>	<b>%</b>
None	18
One - as it is now	57
Two to four	15
Five or more	5
Don't care/don't mind	<1
As many as needed/market should dictate	<1
Others	<1
Not sure/don't know	6

People living in the lower half of the North Island were more supportive of having two or more sports-betting organisations. The desire to have **no** sports-betting organisations was strongest amongst:

- Females (21% compared to 14% for males)
  - Older people (22% compared to 10% of people under the age of 35 years)
  - Lower income households (21% compared to 16% of households with an income of \$30,000 or more)
  - Retired people and homemakers (both 26% compared to 16% of other occupations)
  - People who had no educational qualifications (23% compared to 12% of those with formal qualifications)
  - People who had done few or no gaming activities (22% compared to 10% of those who had 4 or more activities)
  - People who had not spent any money on gaming activities (35% compared to 14% of those who said they spent money on gaming activities)
- In New Zealand there is currently only one **national lottery organisation** - the Lotteries Commission. The Commission is responsible for the management and promotion of Lotto, TeleBingo, Daily Keno, and Instant Kiwi sales. When people were asked how many national lottery organisations there should be in New Zealand, most supported having only one provider. There were few people who did not want any lottery providers.

**Table 4.12: Q104, Ideal number of national Lottery agencies**

<b>Response option</b>	<b>%</b>
None	6
One - as it is now	76
Two to four	12
Five or more	3
Others	<1
Not sure/don't know	2

Support for **not** having a national lottery organisation was strongest amongst homemakers, retired people (10% and 8% respectively compared to 5% for other occupations), people who had done few or no gaming activities (8% compared to 5% of those who had done 4 or more activities), and those who had not spent any money

on gaming activities (23% compared to 3% of those who said they spent money on gaming activities).

## 4.9 Age restrictions

People answering the survey were asked their opinion on what the minimum age should be for participating in various forms of gaming. They were given four options from which to choose - “no age restrictions at all”; “different age limits, depending on the activity”; “a common age restriction for all gaming activities”; and “all gaming activity should be illegal”. Respondents were asked what the “common age restriction” should be if they gave this option, while respondents who preferred “different age limits depending on the activity” were asked to state their preferred age restrictions for each of the ten gaming activities listed in Table 4.14.

Just over half felt there should be a common age restriction for all activities (Table 4.13). Of those who felt there should be a common age, most felt this should be 18 years of age. A large minority preferred age limits tailored to suit the particular gaming activity (Table 4.13) and very few wanted either all gaming activities illegal or no age restrictions. Those who preferred to have different age limits depending on the activity were then asked what they thought the age limits should be for a variety of gaming activities (Table 4.14). There are some differences between the suggested and actual current age restrictions. The age limits that respondents suggested for Lotteries Commission games were generally lowest, followed by housie (all of these activities except Instant Kiwi currently have no age restrictions).

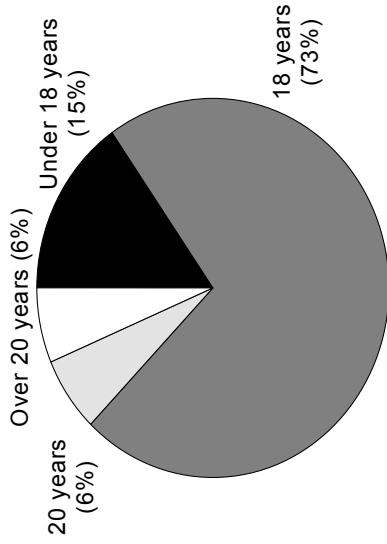
The shaded areas in Table 4.14 show the current age restrictions for each activity. “Other” responses mentioned by respondents were:

- Wage earners/till earning own money (n=2)
- Parents’ consent/parental permission unless they have own phone number (n=2)
- “When they have own telephone account”

**Table 4.13: Q105, Suggested age restrictions within the gaming industry**

Response option	%
A common age restriction for all	52
Different age limits depending on activity (see Table 4.14)	39
All gaming activity should be illegal	4
No age restrictions at all	3
Unsure	2

Showcard



**Table 4.14: Q106, Actual and suggested age restrictions, by activity (n=585)**

	Sporting Events %	Horse/Dog racing %	Casinos %	Gaming Machines %	TeleBingo %	Instant Kiwi & other scratchies %	Daily Keno %	Housie %	0900 Telephone games %	Lotto %
None	2	<1	<1	<1	12	14	11	14	3	20
16 years	18	10	2	17	46	59	48	34	15	47
18 years	65	64	47	56 <sup>a</sup>	31	20	28	32	50	25
20 years	10	19	41	21	4	2	3	8	18	3
21+ years	2	5	8	3	1	<1	1	3	5	<1
Under 16 years	<1	<1	<1	1	1	2	2	2	<1	1
Others	<1	<1	<1	<1	<1	<1	<1	<1	<1	<1
Shouldn't be available	<1	<1	<1	<1	<1	<1	<1	<1	2	-
Don't know	3	1	2	2	4	2	6	7	7	2
Median age <sup>b</sup>	18.9	19.2	20.1	19.1	17.5	17.1	17.4	17.8	19.1	17.2

<sup>a</sup> The current age restrictions are shown by shading

<sup>b</sup> Bolding highlights the age suggested by the majority of respondents

<sup>a</sup> Although there are currently no statutory age restrictions for gaming machines, the Department of Internal Affairs' licensing policy ensures that gaming machines are housed in premises licensed to serve alcohol which means there is a de-facto age restriction of 18 years on gaming machines

<sup>b</sup> Due to the limitations in calculating the median in the open age categories (e.g. under 16 years), these figures should be treated as indicative only

## 4.10 Further analysis of age restrictions

### *Sex*

Compared to females, males were slightly more likely to favour having a different age limit for each activity. When asked to suggest the age limit either for all activities or for each individual activity, males were more likely to suggest slightly younger ages than females, although, in the case of casinos the differences are more marked (a median age of 19.8 compared to 20.7 suggested by females).

### *Age*

Having different age limits depending on the activity held greater appeal for those under the age of 35 years (48% compared to 33% of those aged 35 years and over). The older the person, the more likely they were to feel that all gaming should be illegal (5% compared to 2% of those under the age of 35 years) or that there should be a common age restriction (57%; 44%). Of those who prefer gaming activity specific age limits, people in the older age groups were more likely to suggest a higher age restriction for individual activities, particularly in the case of housie (18.1 years; 17.6 years).

### *Ethnicity*

Pacific peoples were more likely to prefer all other options except having a common age restriction. Of those who preferred different age limits depending on the gaming activity, Pacific peoples suggested a higher median age limit - the biggest variations from the rest of the population were the suggested age limits for housie (19.1 years compared to a median of 17.7 for the rest of the population) and Lotto (18.2 years; 17.0 years).

### *Household income*

People from low-income households were less likely to favour having different age limits depending on the activity (31% compared to 40% of those from higher income households). Of those that did favour having different age limits depending on the activity, those from low-income households suggested higher median age restrictions for housie (18.4 years compared to 17.5 years suggested by those from higher income households).

### *Occupation*

Support for making all gaming activity illegal was strongest amongst the unemployed/beneficiaries (7% compared to 3% for other occupations). Students were most in favour of having no age restrictions (7% compared to 2% for other occupations) or different age restrictions depending on the activity (57%; 36%), whereas retired people were the most in favour of a common age restriction (61% compared to 50% for other occupations).

Homemakers and blue-collar workers were most likely to suggest a higher median age restriction for casinos (21.6 years and 20.8 years respectively compared to a median age of 19.4 years for other occupations). Retired people tended to suggest higher age restrictions for housie and Lotto compared to those in the other occupational groups. Students generally suggested the lowest age restrictions.

### *Number of activities*

A high proportion of those who had not participated in any gaming activities were in favour of making all gaming illegal (16% compared to 2% of those who had done some gaming activities), though support overall was very small. Support for having different age restrictions was highest amongst those who had done few or no gaming activities (41% compared to 36% of those who had done 4 or more activities). Conversely, support for a common age limit was higher the more activities a person had participated in (56% compared to 50% of those who had done fewer than 4 activities). People suggested lower median age restrictions the more activities they had done.

### *Amount reported spent on gaming activities*

Those who said they spent the most money on gaming activities were the most in favour of having a common age limit for all gaming activities (57% compared to 50% of those who said they spent \$350 or less). People who had not spent any money on gaming activities were the most likely to feel that all gaming activities should be made illegal (14% compared to 2% of those who said they spent money on gaming activities).

## **4.11 Desirability of gaming activities**

The vast majority of people could not think of any new gaming activities that they **wanted to see introduced** into New Zealand (Table 4.15).

**Table 4.15: Q107, Are there any other gaming activities respondents would like to see available in NZ**

<b>Response option</b>	<b>%</b>
Yes	2
No	98
Not sure/Don't know	<1

The activities that people wanted to see introduced are mentioned below. Some of the activities mentioned could be categorised as concerning “overseas lotteries”, these were:

- “A bigger lottery like the RSL in Australia”
- “RSA Lotto”
- “Lottery from overseas and you get cars, millions of dollars down to \$5,000, overseas trips. Have to buy a ticket in their currency equivalent of NZ\$300 - get 10 numbers, runs for a week, 10 chances”
- Raffles on houses i.e. Boystown (Queensland, Australia) - youth Mater hospital (Australia), supports the hospital”

Other activities suggested concerned having a greater range of sports-betting:

- “Should have more games besides currently available i.e. football, volleyball, basketball”
- Football pools as they have in England, run the same way (n=2)
- “Table tennis and soccer”



- “Want to bet on tennis, expand betting on sports activities”
- “Boxing”
- “More sports choice, e.g. drag-racing, jet sprint”
- “Professional eight ball games”

Some of the suggestions were concerned encouraging tourism:

- “Anything that encourages tourism”
- “International attraction to draw tourists, some special event”

Other activities suggested were:

- “Betting on the odds of politicians staying in power”
- “Mah-jong”
- “American machines and gambling”
- “Lottery where profits go to hospital”
- “Mid-week Lotto like in Australia”
- Power Ball - this has a big jackpot overseas (n=2)
- “Raffles for house”
- “Matching educational prizes in an instant prize game for children, young adults with parental supervision”
- Bookmakers on racecourses, not just the TAB (n=2)
- “Big overseas race meetings, make them available through the TAB locally, there should be fairness in returns, in Australia they get their original bet back as well as their winnings, here they just get the winnings when they win”
- “Community centres having games for people to enjoy”
- “As many as possible”

People were asked to choose what, if any, gaming activities they thought to be **socially undesirable**. This question has been asked in each survey since 1985, though the list of gaming activities asked about has varied depending on the activities that were available or of interest at that time.

In 2000, more than half of the people asked felt that 0900 telephone games, casinos, and Internet-based gaming were socially undesirable (Table 4.16). Increasing proportions of people are indicating they feel that gaming machines and betting on horse and/or dog races are also socially undesirable. Opposition to betting on horse and/or dog races in particular has increased continuously since 1985. However, this may possibly be due to the lack of an option to comment on the desirability of bookmakers in the 2000 survey (only the TAB option was given).

The activities that have decreased in their perceived undesirability over time were sports-betting and Lotteries Commission run activities - Lotto and Instant Kiwi. These activities may have a tendency for higher levels of disapproval when they are first introduced and then develop higher levels of acceptance over time. The proportion of people who believe that none of the activities are socially undesirable has halved since 1985. This may be due to changes to the range and types of gaming activities they were asked to comment on.

**Table 4.16: Q108, Activities that are socially undesirable 1985, 1990, 1995 and 2000**

Response option	1985 %	1990 <sup>a</sup> %	1995 <sup>a</sup> %	2000 %
0900 telephone games or competitions	n/a	n/a	67 <sup>b</sup>	56
Casinos	n/a	n/a	38	54
Internet-based gaming	n/a	n/a	n/a	53
Gaming machines	38	30	36	45
Betting on horse and dog racing <sup>c</sup>	10	21	26	35
Sports-betting	n/a	n/a	35	26
Housie	9	14	17	15
Daily Keno	n/a	n/a	16	12
Lotto	19	13	12	12
TeleBingo	n/a	n/a	n/a	11
Instant Kiwi	n/a	16	12	10
Raffles	3	8	9	9
All/any depending on the person	n/a	n/a	n/a	1
Others	n/a	n/a	n/a	<1
Don't know	-	1	3	<1
None of these	35	29	13	17

*Multiple response*

*Showcard*

*n/a = this option was not asked about or available at the time of the survey*

<sup>a</sup> *n=1,200*

<sup>b</sup> *Initial high disapproval may be linked to widely publicised cases of children running up large bills in the period prior to the survey in 1995*

<sup>c</sup> *Wording used prior to 2000 was "Betting on horse/dog racing with the TAB" and there were two options allowing for differences in desirability of TAB and bookmakers*

## 4.12 Further analysis of the desirability of gaming activities

### Age

In general, people between the ages of 15 and 24 were the least likely to view any gaming activity as socially undesirable. However, with horse or dog racing, the younger the person, the more likely they were to regard the activity as socially undesirable (39% compared to 34% of those over the age of 35 years). In 1995, those in the youngest age groups were also the most likely to say that horse or dog racing was socially undesirable (28%; 25%). The continued increases in people's perception of the undesirability of horse or dog racing since 1985 may be being driven by age factors. If this were the case, then it would be expected that there would be continued increase in the perceived undesirability of this activity amongst the younger age groups, contributing to an overall increase in the perceived undesirability of this activity.

The age groups that had the greatest familiarity with the Internet (i.e. younger) were the least likely to view Internet-based gaming as socially undesirable (48% compared to 57% of those over the age of 35 years). People between 35 and 44 years of age were more likely to say Lotteries Commission-run games were socially undesirable (e.g. 16% felt Daily Keno was undesirable compared to 11% of all other age groups).

### *Ethnicity*

Māori and Pacific peoples are more likely to feel that housie (24% compared to 13% of the General population), casinos (66%; 51%), and betting on horse or dog races (41%; 34%) are socially undesirable activities compared to the rest of the population. Fewer Pacific people view 0900 telephone games (44% compared to 58% for the rest of the population), Internet-based betting (32%; 54%), and sports-betting (17%; 27%) as socially undesirable compared to both Māori and the General population. By comparison, the views of Māori and the rest of the population are relatively similar. There is one exception: a higher proportion of Māori feel gaming machines are socially undesirable (52% compared to 44% of the rest of the population).

### *Household income*

People from households with an annual income of \$60,000 or more were the most likely to say that none of the activities were socially undesirable (21% compared to 15% of other households).

### *Occupation*

Blue-collar workers were the most tolerant of gaming activities compared to other occupations. They had the highest proportion of people who felt that none of the activities were socially undesirable and homemakers had the lowest (22% of blue-collar workers, 10% of homemakers compared to 16% of other occupations). Beneficiaries were the most likely to feel that Lotto (20% of beneficiaries compared to 11% of other occupations), housie (24%; 15%) and raffles (19%; 8%) were socially undesirable compared to other occupations.

Students and retired people were the main groups that felt sports-betting (both 30% compared to 25% of other occupations) and betting on horse or dog races (48% of students, 44% of the retired compared to 35% of other occupations) were socially undesirable. Retired people were also more likely to feel that gaming machines (54% compared to 43% of other occupations) and Internet-based gaming were socially undesirable, although homemakers were also likely to say the same about Internet-based gaming (61% of retired people, 60% of homemakers compared to 50% of other occupations).

### *Educational qualification*

People with a tertiary or university qualification were the most likely to say they felt Lotto (14% compared to 9% of people with lower qualifications) and raffles (11%; 6%) were socially undesirable.

### *Number of activities*

There is a strong link between the number of gaming activities a person has done and their views on the social undesirability of such activities. The more gaming activities a person has done the more likely they are to say that none of the activities listed are undesirable (21% said none of the activities are undesirable compared to 16% of those who have done less than 7 activities).

### *Amount reported spent on gaming activities*

Those who had not spent any money on gaming activities were the most likely to say that each gaming activity was socially undesirable.

### 4.13 Advertising of gaming activities

Respondents were asked whether they could remember seeing any gaming advertising in the past 12 months. They were asked to name any and all types of gaming activities they could remember being advertised and were not prompted by the interviewer.

Most New Zealanders could remember seeing or hearing some form of gaming advertising in the last 12 months (Table 4.17). Of those who had seen gaming advertising, most could recall seeing Lotteries Commission-funded adverts, especially those advertising Lotto. The number of people who recalled Lotto advertising was virtually identical to the number of people who had played the game.

However, people’s recollection of Daily Keno and TeleBingo advertising was considerably higher than the number who had actually participated. Those who had played gaming machines (not in a casino) far exceeded the number of people who remembered seeing advertising for this activity.

**Table 4.17: Q109a, Respondents recollection of gaming advertising of any sort in the last 12 months**

Response option	%
Yes (see Table 4.18)	89
No	11

**Table 4.18: Q109b, Types of gaming activities seen advertised in the last 12 months (n=1,329)**

Response option	%
Lotto	84
TeleBingo	62
Daily Keno	49
Instant Kiwi (scratchies)	35
TAB	32
Sports-betting	28
Horse/dog racing	26
Sky City Casino - Auckland	19
0900 telephone games	13
Raffles/lotteries	5
Casino - Christchurch	4
Internet gaming	2
Housie	2
Gaming machines (unspecified)	2
Casino - Dunedin	1
Casino (unspecified) /overseas casino	<1
Casino - Queenstown	<1
Casino - Wellington	<1
Telephone gambling/ betting (unspecified)	<1
Casino - Hamilton	<1
None	<1
Can't remember	2
Others	<1

The “Other” gaming activities that respondents had seen advertised were:

- “Sweepstakes”;
- “Centre-bet”;
- “0800 games on TV”
- “Americas Cup”

*Multiple response*

## **4.14 Further analysis of the advertising of gaming activities**

### *Sex*

Males were slightly more likely to have seen gaming advertising than females (90% compared to 88% for females). Males had a higher recollection of advertising for sports-betting (33%; 23%), horse or dog racing (28%; 23%), the TAB (35%; 29%), and Sky City Auckland (22%; 16%). However, females were more likely to recall seeing TeleBingo (64% compared to 59% for males) and 0900 telephone game advertisements (15%; 11%) than males.

### *Age*

The younger the person, the more likely they were to have seen gaming advertising (93% of those under 25 years compared to 76% of those 65 years and over). Generally, people in the 15 to 54 year age groups were the most likely to recall seeing all forms of gaming advertising.

### *Ethnicity*

Māori were most likely to remember seeing some form of gaming advertising (94%), followed by the General population (89%) and Pacific peoples (77%). Of those who could recollect seeing gaming advertising, Māori were the most likely to recall seeing adverts for horse or dog racing (30% compared to 25% of the rest of the population). However, Pacific peoples were generally the most likely to remember seeing advertising for other forms of gaming, especially advertising Sky City Auckland (32% compared to 19% of the rest of the population), although this may be influenced by the high-concentration of Pacific peoples within the Auckland region.

### *Household income*

Households with an income of under \$30,000 per annum are less likely to have seen any gaming advertisements. Generally, the higher their household income, the more likely people were to recall seeing advertising for any of the gaming activities.

### *Occupation*

Retired and unemployed persons were the least likely to recall seeing any gaming advertising especially compared to students and those in paid employment (77% compared to 92% of students and those in paid employment). Of those who could recall seeing gaming advertising, retired people were the least likely to recall seeing advertising for any of the activities. Students were generally the most likely to recall seeing advertising for all of the other forms of gaming, with the exception of TeleBingo (e.g. 48% for Instant Kiwi compared to 33% of those in other occupations). Unemployed or beneficiaries had the highest recollection of adverts for TeleBingo (69% compared to 61% of other occupations).

### *Educational qualification*

People with no qualifications and those with School Certificate only were less likely to have seen advertising for gaming activities (83% compared to 93% of others with qualifications). Of those who had seen gaming advertisements, people with no educational qualifications were the least likely to recall seeing advertising for most of the gaming activities (e.g. 22% for Instant Kiwi compared to 39% of others). There was an exception; university graduates were less likely to remember seeing sports-betting advertising (16% compared to 29% of others). However, university graduates

had significantly higher recollection of advertising for Sky City casino Auckland (35% compared to 18% for others).

#### *Number of activities*

As expected there is a link between participation in gaming activities and recall of gaming advertising. Those who had done few or no gaming activities were less likely to report having seen gaming advertisements (83% compared to 93% of those who had done four or more activities).

Of the people who could recall seeing gaming advertising, those who had done more than four gaming activities had higher recollection of all types of gaming advertising, (e.g. 41% for Instant Kiwi compared to 31% of those who had done fewer than four activities). The one exception was for TeleBingo, where those who had not done any activities had the highest recollection of advertisements for this activity (69% compared to 60% of those who had done one or more gaming activities). The greater recollection of those who had the most gaming activities is most likely due to their greater interest and participation in gaming activities.

#### *Amount reported spent on gaming activities*

Those who said they spent the most on gaming activities were the most likely to recall advertising for horse or dog racing (32% compared to 23% of those who said they spent \$350 or less on gaming activities) and the TAB (37%; 30%).

### **4.15 Gambling problems**

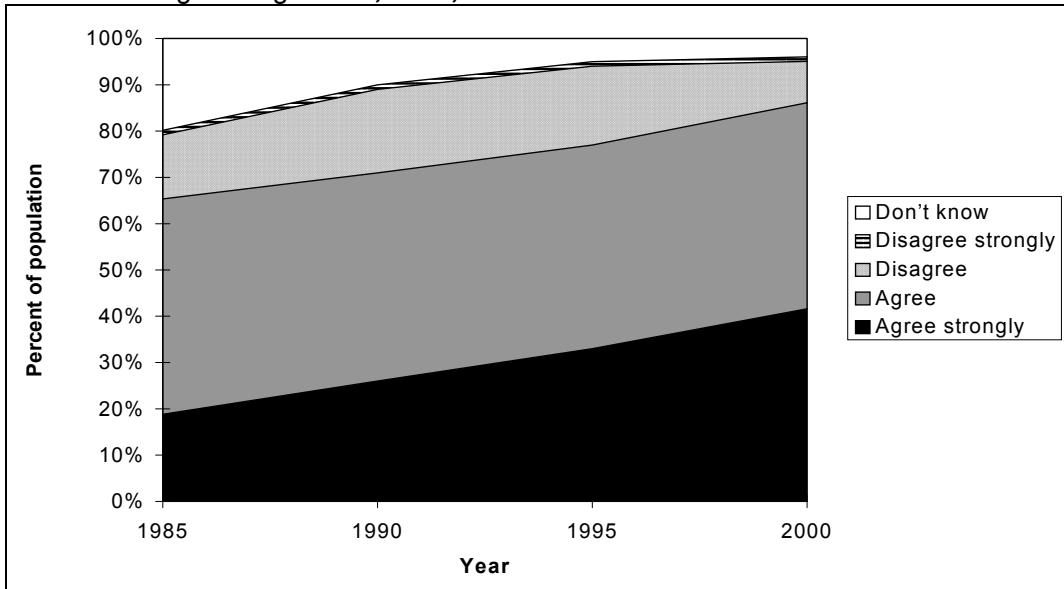
This sub-section provides details about awareness of problem gambling, whether special support is needed, who should pay for it, and whether warnings about problem gambling would make any difference to participation.

An increasing number of New Zealanders agree strongly that there is a problem with people being heavily involved in gambling. The majority of people when asked in 1985 felt there was a problem, but this opinion has hardened since then. This is primarily due to an increasing proportion of people forming an opinion on the matter - 20% of people did not know in 1985 compared to only 4% in 2000 (Table 4.19 and Figure 4.4).

**Table 4.19: Q110, How strongly respondents agree/disagree with the following statement... There is a problem in NZ with people being heavily involved in gambling - 1985, 1990, 1995 and 2000**

<b>There is a problem in NZ with people being heavily involved in gambling</b>	<b>1985 %</b>	<b>1990 %</b>	<b>1995 %</b>	<b>2000 %</b>
Agree strongly	19	26	33	42
Agree	47	45	44	45
Disagree	14	18	17	9
Disagree strongly	1	1	1	1
Don't know	20	10	5	4

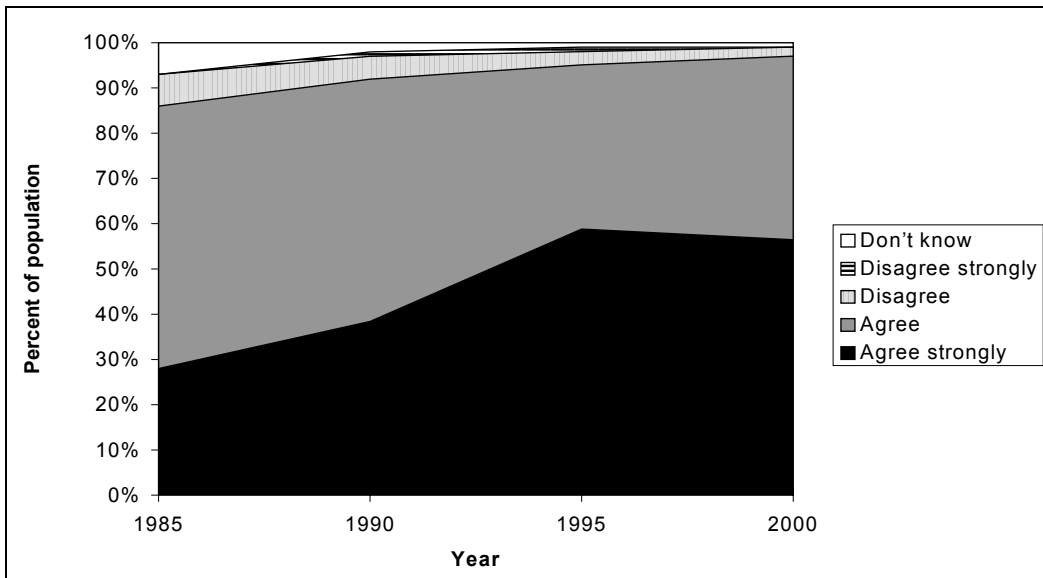
**Figure 4.4: Q110, How strongly respondents agree/disagree with the following statement. There is a problem in NZ with people being heavily involved in gambling - 1985, 1990, 1995 and 2000**



Showcard

The proportion of people who felt very strongly that there should be special help and support available to those who want to give up gambling has increased since 1985 to represent the majority of opinion in 2000 (Table 4.20 and Figure 4.5).

**Figure 4.5: Q110, How strongly respondents agree/disagree with the following statement. There should be special help and support available for people who want to give up gambling - 1985, 1990, 1995 and 2000**



Showcard

**Table 4.20: Q110, How strongly respondents agree/disagree with the following statement...** There should be special help and support available for people who want to give up gambling - **1985, 1990, 1995 and 2000**

	<b>1985</b>	<b>1990</b>	<b>1995</b>	<b>2000</b>
	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
Agree strongly	28	38	60	57
Agree	58	53	37	41
Disagree	7	5	3	2
Disagree strongly	-	1	1	-
Don't know	7	2	1	1

Respondents were also asked to decide who should provide money to help people give up gambling. This question was first asked in 1990. Respondents were given a show-card with three options to choose from and they could choose as many as they wished.

The majority of people felt that the gaming industry itself had a responsibility to meet some or all of the costs. Since this question was first asked in 1990 there has been a steady increase in the proportion of people who felt that the gaming industry should provide money to help heavy gamblers quit gambling (Table 4.21).

The proportion of people who felt problem gamblers themselves had a responsibility to pay for quitting gambling had decreased between 1990 and 2000.

**Table 4.21: Q113, Who should provide money to help people give up gambling 1990, 1995 and 2000**

<b>Response option</b>	<b>1990</b>	<b>1995</b>	<b>2000</b>
	<b>%</b>	<b>%</b>	<b>%</b>
Problem gamblers themselves	26	25	19
The gaming industry (through a tax/levy)	68	74	79
Government	25	30	27
Don't know	3	2	2

*Multiple response  
Showcard*

People were asked whether **warnings about problem gambling on or with gaming activities** would affect how much they played. Most (60%) said it would make no difference to how they currently played. Interestingly, 28% said they did not play gaming activities - yet only 15% of people surveyed had not played any of the gaming activities listed in the questionnaire (see Question 1 in Appendix B). This difference may be due to the inclusion of the words “gambling” in the wording of the question. Gambling may be associated in some people’s minds only with certain types of gaming activities (most likely continuous forms of gaming such as casino games and gaming machines), which they do not play.



**Table 4.22: Q114, Level of participation if gaming activities had warnings about problem gambling on or with them**

<b>Response option</b>	<b>%</b>
Much less	3
Less	8
The same as now - no difference	60
More	<1
Much more	-
I don't play anyway	28
Don't know	<1

*Showcard*

## **4.16 Further analysis of gambling problems**

### **Sex**

Females were more likely than males to agree strongly both that there is a problem with heavy gambling (45% compared to 38% of males) and that there should be special help available to these people (62%; 51%). Though the majority of both males and females believe that the gaming industry should provide the necessary funding to help problem gamblers, females were less likely than males to choose this option (76%; 82%). They were slightly more likely to favour funding to be provided by problem gamblers themselves (20%; 17%) and by government (29%; 25%).

Warnings about problem gambling would be more likely to have an effect on females than males (13% would play less or much less compared to 9% of males), although this proportion is comparatively small.

### **Age**

The older age groups were more likely to strongly agree that there is problem with people being heavily involved in gambling (48% compared to 32% of those under 35 years of age). However, people in the youngest age groups were the most likely to strongly agree that there should be special help available for problem gamblers while those in the older age groups were less emphatic about the need for special help (60% compared to 54% of those aged 35 years or more). People under the age of 25 years were the least likely to suggest the gaming industry should provide funding to help problem gamblers (66% compared to 82% of those aged 25 years and over). They were more likely to suggest that government (34%; 25%) and problem gamblers (24%; 18%) should provide funding.

Warnings about problem gambling made little difference to most respondents, regardless of their age.

### **Ethnicity**

Māori were the most likely to strongly agree there was a problem in New Zealand with people gambling heavily and Pacific peoples the least likely to agree (51% for Māori, 35% for Pacific peoples, and 41% of the General population).

Most Pacific peoples favoured government providing funding to help people with their gambling problems (54% compared to 25% for the rest of the population). They

were also more likely to favour problem gamblers providing funding for themselves compared to other ethnic groups (28%; 18%).

Warnings about problem gambling on or with gaming activities would have a greater effect on reducing how much Pacific peoples or Māori currently play, particularly for the former group (36% of Pacific peoples would play “less” or “much less”, 17% for Māori and 8% for the General population). A relatively higher proportion of the General population stated that they did not play any gaming activities (30% compared to 19% for Māori and Pacific peoples).

#### *Household income*

People in households with incomes under \$30,000 per annum were the most likely to agree strongly that there was a problem with people being involved heavily in gambling in New Zealand (50% compared to 39% in households with incomes of \$30,000 or more). However, they were the least likely to strongly agree that there should be special help given to people with gambling problems (51%; 60%). They were also the least likely to favour a tax or levy on the gaming industry to fund problem gambling assistance programs (65%; 80%). They were more likely to favour government funding (36%; 25%).

People in households with incomes under \$30,000 per annum were also more likely to say that warnings about problem gambling would be likely to reduce how much they currently played that gaming activity (15%; 9%).

#### *Occupation*

Retired people and homemakers were the most likely to strongly agree with the view that there is a problem with people being heavily involved in gambling (51% compared to 39% of other occupations). Homemakers were also the most likely to agree that there should be special help to assist people give up gambling and retired people the least likely (64% for homemakers, 48% for retired people compared to 58% of other occupations).

Homemakers and those who were unemployed and/or on a benefit were the most likely to favour government funding of programmes to help people give up gambling (38% of homemakers and 39% of the unemployed compared to 25% of other occupations). People who were unemployed and/or on a benefit were less likely to favour placing a levy or tax on the gaming industry to fund these programmes (69% compared to 79% of other occupations).

Nearly a quarter of all beneficiaries and/or unemployed people and nearly a fifth of students felt that warnings about problem gambling on or with gaming activities would cause them to play less or much less (23% of beneficiaries, 19% of students compared to 10% of other occupations).

#### *Number of activities*

There was an inverse relationship between the number of gaming activities a person had done and their view of the extent of problem gambling in New Zealand. Those who had done few or no activities were most likely to strongly agree that there was a problem (49% compared to 41% of those who had done gaming activities). They

were also more likely to strongly agree that there should be special help available to assist people with their gambling problems.

Those who had done ten or more gaming activities were the most likely to favour government funding for problem gambling programs with almost half of them choosing this option (49% compared to 27% of those who had done less than ten activities). They were also the least likely to favour a tax or levy on the gaming industry to fund programs to help people give up gambling, though the majority of them did favour this option (67%; 79%).

Generally, the more gaming activities a person had played, the more likely they felt that warnings about problem gambling on or with the gaming activity would cause them to play less or much less, although some of those who played ten or more activities felt that it would make them play less, not much less.

#### *Amount reported spent on gaming activities*

Those who had not spent any money on gaming activities were the most likely to feel that there was a problem with people being involved heavily in gambling (50% compared to 40% of those who said they spent money on gaming activities). They were also more likely to feel that there should be help available to assist people with their gambling problems (65%; 55%).

The majority (72%) of those who had not spent any money on gaming activities reported they “don’t play” when asked if warnings about problem gambling on gaming activities would make them play any differently than currently. More than a quarter (26%) of those who said they spent up to \$350 on gaming activities also said that they “don’t play”, as too did 7% of people who spent more than \$350 on gaming activities. These people may have played gaming activities such as Lotto, which they felt may not have qualified as gambling per se.

## Section 5: Internet-based gaming<sup>69</sup>

This section covers gaming activities that are new, or have been recently introduced into the New Zealand gaming market. The 1995 survey included questions on sports-betting, prior to its introduction into New Zealand. In 2000, the focus was on Internet-based gaming. Internet-based gaming for the purpose of the current survey was described to respondents using the following activities as examples: playing casino type games for money, purchasing lottery tickets, betting on sporting events, or horse and dog races via the Internet. However, many of the activities themselves are not necessarily new gaming activities, nor are they even new to the Internet.

Many analysts see Internet-based gaming as a future growth area for international gaming operators to the possible detriment of national gaming operators. This is often the case where technology is involved, as technological advances often outstrip the ways and means to regulate the activity. Therefore, Internet-based gaming is an area of concern to policy-makers and it is necessary to evaluate the possible appeal and impact of this activity.

### 5.1 Access and knowledge of the Internet

By their own assessment, nearly half the population are not familiar with the Internet (Table 5.1).

**Table 5.1: Q91, Familiarity with the Internet**

Response option	%
Not at all	46
A little	19
Average	17
Very familiar	13
Extremely familiar	5

*Showcard*

Despite a low level of familiarity with the Internet, most people do have access to the Internet, either at work or at a school/educational facility or at home (Table 5.2).

**Table 5.2: Q92, Internet access**

Response option	%
Yes	59
No	41
Not sure/Don't know	<1

### 5.2 Participation in Internet-based gaming activities

This sub-section examines the proportion of people who have played Internet-based gaming and the reasons people gave for their non-participation.

Only a very small number of people reported that they had participated in gaming activities via the Internet in the last 12 months prior to being surveyed (Table 5.3) and

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<sup>69</sup> Questions in this section were asked of all 1,500 respondents, where applicable, unless otherwise noted

extreme caution is needed when analysing Tables that are based on such small numbers of respondents.

**Table 5.3: Q93, Participation in any Internet-based gaming in the last 12 months**

Response option	%
Yes	1
No	99

Fewer still had actually placed bets for money or on credit via the Internet. Of those few (19 people) who had placed a bet on Internet-based gaming most of this was done through an overseas betting organisation, although around a quarter of them reported they had used a New Zealand based organisation (Table 5.4). Table 5.4 to Table 5.6 list the number of respondents, not the percentage of respondents.

**Table 5.4: Q94, Use of foreign or domestic Internet-based betting organisations (n=19)**

Response option	N
NZ organisation	5
Overseas betting organisation	13
Unsure/Can't remember	1

*Multiple response*

Most people who placed bets via the Internet reported placing a bet at least once a month (Table 5.5). This includes bets where no money was involved.

**Table 5.5: Q95, Frequency of participating in Internet-based gaming activity (n=19)**

Response option	N
Four times a week or more	4
Two or three times a week	1
Once a week	1
Once every 2 weeks	3
Once every 3 weeks	1
Once a month	4
Once every 2 months	-
Once every 3 months	2
Once every 6 months	1
Once a year	1
Less frequently than once a year	1

*Showcard*

The average bet placed via the Internet was \$14.40<sup>70</sup> (Table 5.6). Most of the bets involving money were with New Zealand based betting organisations, whereas very little money was exchanged with overseas betting organisations.

<sup>70</sup> Those who bet but did not spend any money were excluded from the calculation (n=11)

**Table 5.6: Q96, Average amount spent in the average day by participants of Internet-based gaming activities (n=19)**

Response option	N
\$0	11
\$5	2
\$20	4
\$80	1
\$100	1
Mean	\$14.40

### 5.3 Non-participation in Internet-based gaming activities

Respondents were asked to state their reasons for not participating in Internet-based gaming. They were able to give multiple reasons and these responses were self-determined (they were not given a showcard). The question was asked this way to explore if security on the Internet was a major concern or if lack of access was important.

Of those (99%) who had not played Internet-based gaming, most (62%) did not due to lack of interest. Fewer than 1% of respondents gave reasons other than those listed in Table 5.7. Some of the “other” reasons for not participating in any Internet-based gaming activity were:

- Easier to use other methods - i.e. TAB/phone betting etc. (n=4)
- “It is anti-social - into social gambling”
- “Boring without other participants”
- “Chat rooms are more interesting - plus e-mail”
- “Rather deal with someone face-to-face”
- “Profits go off-shore to undisclosed sources”
- “You have no idea where the money is going - NZ? Overseas?”

**Table 5.7: Q97, Reasons why respondents haven't participated in any Internet-based gaming activity<sup>71</sup> (n=1,481)**

Response option	%
Not interested	62
Not connected to the Internet/no computer	23
Waste of time/money	13
Didn't know about them	11
Don't know how to use the Internet	10
Security/giving credit card details	7
Don't know where to look	7
Distrust of operators	6
Against it/don't believe in it	5
Too expensive/can't afford it	1
Unsure how winnings will be paid out	1
Addictive/danger of getting hooked	1
Too busy/no time	<1
Rather support NZ gaming industry	<1
Don't have a credit card	<1
Others	<1

*Multiple response*

<sup>71</sup> Answers to Question 97 were unprompted

Several of the responses given by the respondents in Table 5.7 involved issues about how the Internet is currently operated, or other issues such as access to the Internet that have the potential to be resolved in the future. Table 5.8 below excludes those who have more philosophical opposition to Internet gaming (e.g. “not interested”, “waste of time/money”) and looks solely at people who gave reasons, which if resolved, could allow their participation in this activity in the future. They represent a sizeable proportion of the population, about 26%.

**Table 5.8: Q97, Possible Internet bettors (n=391)**

Response option	%
Not connected to the Internet/no computer	46
Didn't know about them	25
Don't know how to use the Internet	20
Security/giving credit card details	13
Don't know where to look	13
Distrust of operators	8
Unsure how winnings will be paid out	2
Don't have a credit card	<1

*Multiple response*

The people featured in Table 5.8 were more likely to be:

- Female (28% compared to 24% of males)
- Māori or Pacific peoples (both 34%, compared to 24% of the General population)
- Living in a low income household (32% compared to 24% of those in households with income of \$30,000 or more)
- Unemployed/Beneficiary (37% compared to 26% of other occupations)
- Without a formal qualification (32% compared to 24% of those with qualifications)

Those featured in Table 5.8 also tend to have done more gaming activities (41% compared to 24% of those who had done less than 7 activities) and have spent the most on gaming activities (40% compared to 19% of those who have spent \$700 or less).

## 5.4 Interest in future participation in Internet-based gaming

Everybody was asked if they would be interested in participating in Internet-based gaming in the future, including those who had already played. The vast majority (91%) said that they would not participate in the future (see Table 5.9).

**Table 5.9: Q98, Intention to participate in gaming activities on the Internet in the future**

Response option	%
Yes	2
Maybe/probably	5
Unsure	2
No	91

By way of comparison, a similar question was asked about sports-betting prior to its introduction into New Zealand in the 1995 survey. Then, 79% of people said they were not interested in participating and 17% said they were interested. Since its introduction in 1996 the market for sports-betting has been fewer than 10% of respondents in each year surveyed<sup>72</sup>. This figure may well have been higher when sports-betting was first introduced due to initial curiosity surrounding the activity but this was not measured in any survey available to the Department.

However, Internet-based gaming differs from sports-betting because it has the potential if not currently then in the future, to allow New Zealanders to access all forms of gaming that are currently available in New Zealand (and some that are not) from their own homes with the added incentive of a considerably higher prize-pool. People are currently able to play casino games for money and to place money on sporting events through overseas betting organisations via the Internet.

The participation figures from this survey indicate that just over 1% of respondents bet on a sporting event and 2% bet on a horse or dog race through an overseas betting organisation in the last 12 months though it is not known how many used the Internet to do this. Overseas sites may offer better odds on events, allowing higher returns. Similarly, if current restrictions on buying lottery tickets via the Internet were lifted in some of the more significant markets (for example the UK and the USA) this would allow people to buy tickets for a far larger prize-pool than is able to be offered in New Zealand. For example, the British Lottery draws occasionally have a major prize of over 20 million pounds (over NZ\$70 million)<sup>73</sup>. The New Zealand betting dollar going off-shore could have far-reaching consequences for charitable, non-profit organisations in New Zealand that currently rely partially or solely on the proceeds from gaming.

Of the 9% of people who expressed an interest in future participation in Internet-based gaming, sporting events and lotteries/sweepstakes were the two activities that had the most appeal, followed by casinos (Table 5.10). A few of those asked were unsure or did not know what exactly they might be interested in, only that they might be interested at a future date.

**Table 5.10: Q99, Internet-based gaming activities of future interest (n=132)**

<b>Response option</b>	<b>%</b>
Lotteries/sweepstakes tickets	44
Placing bets on sporting events	44
Casino games, including all gaming machines	36
Placing bets on horse/dog racing	29
Bingo/housie type games	18
Other activities	1
Not interested in any of those suggested	18

*Multiple response*

*Showcard*

People interested in placing bets on sporting events via the Internet were prepared to spend the highest (average) amount per month of all the intended gaming activities

<sup>72</sup> 8% of people reported placing a bet on a sporting event in 2000

<sup>73</sup> <http://www.national-lottery.co.uk/>



(Table 5.11). However, it must be stressed that this information is indicative only, as people's intentions may differ from their future actions.

**Table 5.11: Q100, Amount respondents would be likely to spend on the Internet, on average per month per activity**

Amount likely to be spent	Casino games (n=47) %	Amount likely to be spent	Lotteries/ sweepstakes tickets (n=58) %	Amount likely to be spent	Bingo/Housie type games (n=24) %
Up to \$5	12	Up to \$5	22	\$0	26
\$10	22	\$10	21	\$10	24
\$15 - \$20	18	\$20	17	\$20	27
\$30+	31	\$30+	26		
Don't Know	18	Don't Know	15	Don't Know	24
Mean	\$36.60		\$23.60		\$10.20

**Table 5.11: Q100, Amount respondents would be likely to spend on the Internet, on average per month per activity (continued)**

Amount likely to be spent	Sporting events (n=58) %	Amount likely to be spent	Horse/dog racing (n=38) %
Up to \$5	16	Up to \$5	18
\$10	28	\$10	29
\$20 - \$30	16	\$20	22
\$40+	20	\$40+	14
Don't Know	20	Don't Know	17
Mean	\$44.80	Mean	\$29.70

People who expressed an interest in playing an Internet-based activity in the future were also asked whether this would be increased spending or a reduction in spending on other gaming activities. Most people interested in betting via the Internet said they would use additional money to their current spending on gaming (Table 5.12). This was particularly true of people interested in betting on horse or dog races via the Internet. Between 10% to 25% of people across most areas of interest were not sure where they would get the money to participate.

**Table 5.12: Q101, What the money likely to spend on <activity> on the Internet would previously have been spent on**

Response option	Casino games (n=47) %	Lotteries/ sweepstakes tickets (n=58) %	Bingo/ Housie (n=24) %	Sporting events (n=58) %	Horse/ dog racing (n=38) %
Other types of gaming	32	39	10	28	32
Non-gaming activity	39	43	42	47	52
Don't know	24	10	22	22	14
Not applicable	5	8	26	3	2

A considerable proportion of people (39%) who said they would be interested in buying lottery or sweepstakes tickets said they would look to reduce their current spending on (New Zealand-based) gaming activities to fund the purchase of overseas lottery or sweepstakes tickets (Table 5.12).

## **5.5 Further analysis of Internet-based gaming results**

This sub-section examines the results already presented in this section by the personal characteristics of respondents. The results covered here range from respondent's familiarity and access to the Internet through to their participation, or non-participation and future Internet-based betting intentions.

### **Sex**

Access to the Internet is relatively equal between the sexes. Despite this, males feel they have a greater knowledge/experience of the Internet compared to females (22% of males were familiar or very familiar with the Internet compared to 14% of females). However, of those who had placed bets via the Internet, males were less likely to use an overseas betting organisation (57%; 77%).

Males reported they were more interested<sup>74</sup> than females in future participation in Internet-based gaming (11%; 6%). Of those who were interested, males were less keen on buying lottery or sweepstakes tickets (41%; 50%), and bingo, or housie type games (10%; 30%). They were more interested in sporting events (52%; 31%), and horse and/or dog races (31%; 26%). On average, males intended to spend more on all activities than females (except housie, or bingo-type games).

### **Age**

Familiarity with the Internet decreases with age, with those in the youngest age group the most familiar with the Internet (27% compared to 12% of those aged 35 years and over being "very familiar"). Similarly, access to the Internet decreases with age - the majority of those under the age of 55 years have access (69% compared to 29% of those over the age of 55 years). Despite having greater access and familiarity with the Internet, those in the youngest age group did not have the highest involvement with Internet-based gaming; this was in the 35-44 year age group (2% compared to 1% of other age groups), although interest in future participation in Internet-based gaming activities<sup>74</sup> was highest in the youngest age group (14% of those under the age of 25 years compared to 7% of other age groups). This is perhaps an indication of the future potential growth for Internet-based gaming.

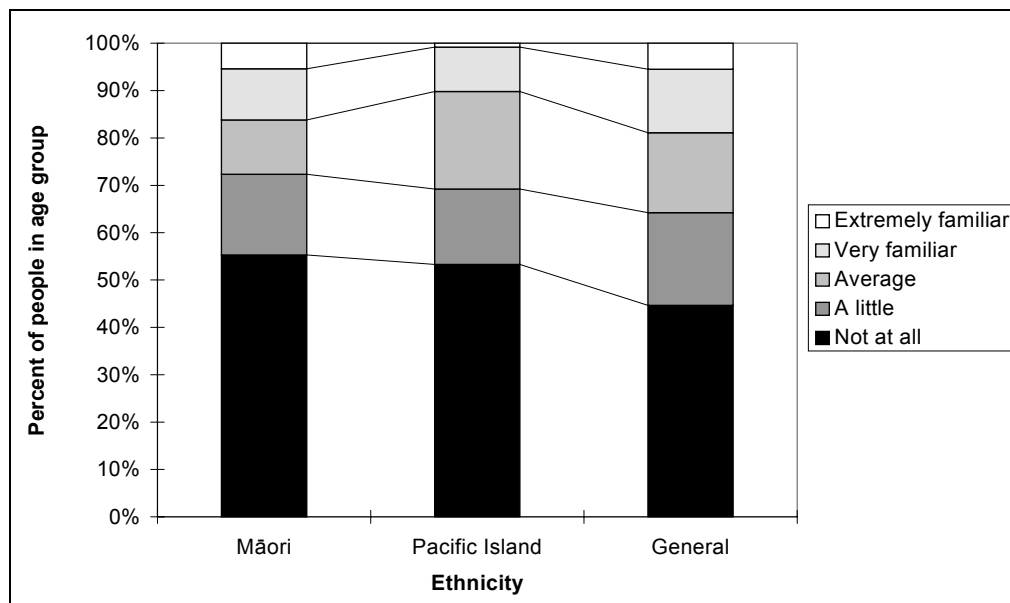
### **Ethnicity**

The majority of Pacific peoples do not have access to the Internet, whereas the majority of the rest of the population do (48% compared to 60% for the rest of the population). Pacific peoples had virtually no one in the "extremely familiar" category and were concentrated at the lower end of the scale (Figure 5.1). Māori were also concentrated at the lower end of the scale of familiarity with the Internet, although they had a higher proportion of people who were extremely familiar with the Internet compared to Pacific peoples.

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<sup>74</sup> Includes those who said "Yes"; "Maybe/Probably"; and "Unsure"

**Figure 5.1: Knowledge of the Internet by ethnic group**



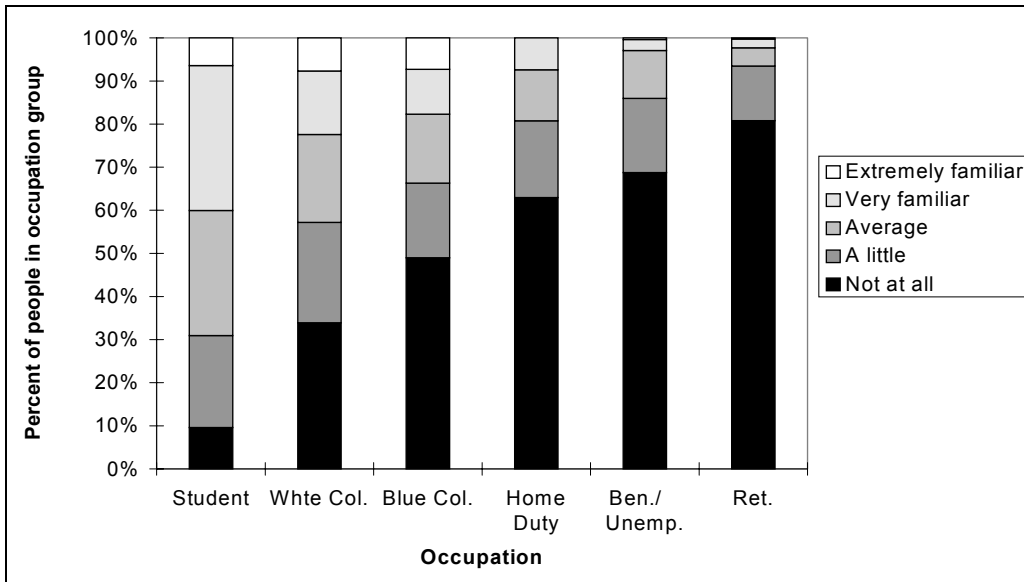
Pacific people were the most interested in participating in some form of Internet-based gaming activity in the future. Of those who were interested in participating there was little difference in the activities they were interested in trying, except that the General population were most interested in trying lottery or sweepstakes tickets, while Māori were more likely to be interested in placing a bet on sporting events or horse or dog races.

### *Occupation*

Those in paid employment or who are studying have the greatest familiarity with the Internet (Figure 5.2). The levels of access to the Internet are similar to the levels of familiarity, with virtually all students having access (92%). The majority of homemakers, beneficiaries and retired people do not have access to the Internet. Students are by far the most likely to have participated in Internet-based gaming activity (4%), followed by white-collar workers (2%).

Roughly one-in-five students (20%) said they were, or may be interested in participating in Internet-based gaming in the future. The next most interested groups were white-collar (10%) and blue-collar workers (7%) - retired people were the least interested (3%). Of those interested in participating in the future, the unemployed/beneficiaries were most interested in casino games and they were especially interested in lottery or sweepstakes, areas in which they are currently less likely to take part.

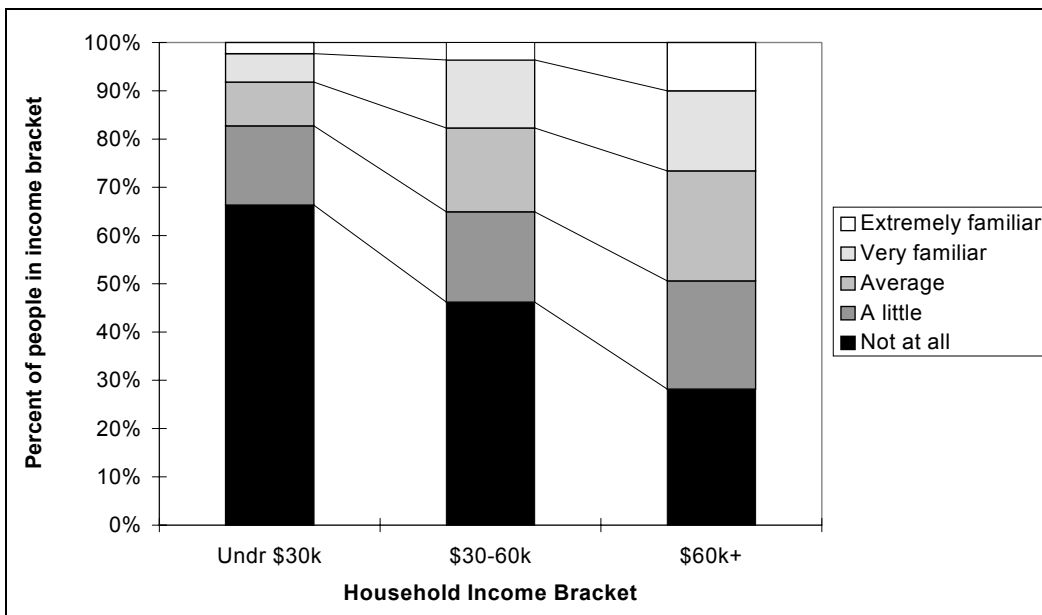
**Figure 5.2: Knowledge of the Internet by occupational group**



*Household income*

A third of people in households with an annual income of under \$30,000 had access to the Internet compared to nearly 80% of people in households with an annual income of over \$60,000. People in households with higher income also had greater familiarity with the Internet (Figure 5.3). Of the few respondents who were interested in Internet-based gaming, those from low-income households were more interested in lotteries or sweepstakes (50% compared to 42% of people from households with incomes of \$30,000 or more) and casinos (38%; 33%). They were less interested in sports-betting compared to those from high-income households (34%; 47%).

**Figure 5.3: Knowledge of the Internet by household income group**



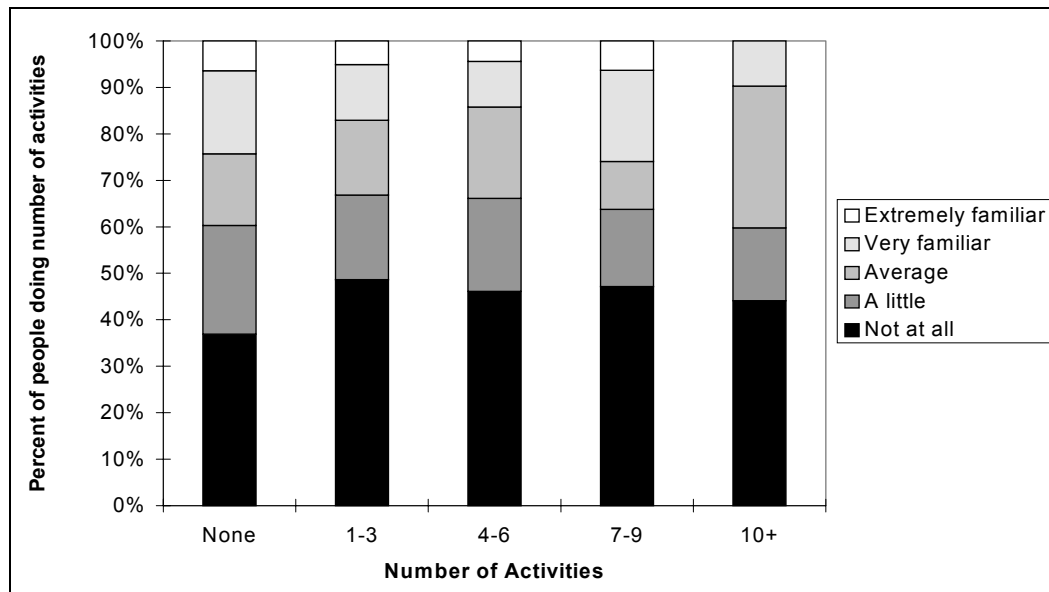
### Highest qualification

More than half of respondents who had an educational qualification had access to the Internet, whereas only a quarter of those without School Certificate had access (71%; 25%). Those most interested<sup>75</sup> in participating in some form of Internet-based gaming activity in the future were those whose highest qualification was university entrance/6<sup>th</sup> form certificate/bursary and those with a university qualification (13% compared to 8% for those with other qualifications). A high proportion of those with university entrance/6<sup>th</sup> form certificate/bursary are currently students, so it seems likely that they share similar characteristics with the people who have university qualifications. These two groups were particularly interested in trying casino (51% compared to 28% of people with other qualifications) and lottery games (49%; 42%) via the Internet in the future.

### Number of activities

People who had done the most types of gaming activities were more likely to have already tried Internet-based gaming activities. There was also a clear link between the number of gaming activities a person had done and their interest in future participation of gaming activities via the Internet - with over 40% of those who had played ten or more activities expressing interest in participating in some form of Internet-based gaming activity in the future (compared to 8% of those with less gaming experience). This group were particularly interested in the following Internet-based gaming activities: casinos (83%; 31%); lotteries (55%; 43%); sporting events (71%; 41%); and horse or dog races (58%; 28%).

**Figure 5.4: Knowledge of the Internet by number of gaming activities**



### Amount reported spent on gaming activities

People who said they spent \$25 or less annually on gaming activities were the most likely to have access to the Internet (64% compared to 57% of those who said they

<sup>75</sup> Includes those who said “Yes”; “Maybe/Probably”; and “Unsure”

spent more than \$25 on gaming activities). They were also more likely to be “familiar” or very familiar” with the Internet (21%; 17%).

Those who said they spent the most on gaming activities were the most likely to be interested<sup>76</sup> in participating in Internet-based gaming in the future (21% compared to 7% of those who said they spent \$700 or less). Those interested in trying Internet-based gaming were most likely to be interested in sports-betting (65%; 32%), horse and/or dog racing (50%; 18%), and casinos (47%; 29%).

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<sup>76</sup> Includes those who said “Yes”; “Maybe/Probably”; and “Unsure”

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## Appendix A: Calculation of response rates

The categorisation of final outcomes and their numbers is as follows:

	Number of Codes
<u>Eligible Contacts (final outcomes of contacts)</u>	<b>=2,779</b>
No reply - (No contact with anyone at address after required call backs)	=191
Not available - (No contact with eligible person on final call, broken appointment, eligible respondent ill/away temporarily)	=51
Refusal - (Refusal of information about occupants, Refusal on behalf of eligible person, Refusal by eligible person)	=868
Unavailable - (Household/respondent away/ill for survey period)	=92
Other, non-contact - (Language/hearing difficulties, infirm, senile, very elderly, other non contact)	=77
Interviews - (Successfully interviewed)	=1,500
<u>Eligibility Not Established</u> (Locked gate/ Dogs)	=71
<u>Non Eligible Contacts</u> (Businesses, under 18 households/flats, not permanent residents, addresses sampled and logged but finally unused on account of call-back regime, institutions)	=937
(Other out-of- scope like demolished/derelict/not found/unliveable, vacant, building in progress)	=53
<b>TOTAL ADDRESSES SAMPLED</b>	<b>=3,840</b>
<b>RESPONSE RATE</b>	<b>=54%</b>

**Note:** Various response rate algorithms are used by different authors. Calculating as the ratio of interviews to the total eligible dwellings, the response rate is calculated at 54%. Some authors use the interview effort rate, being the proportion of interviews achieved to the sum of interviews and refusals obtained. This rate for the survey is 63%. The refusal rate was 31%, calculated as the ratio of refusals to the total eligible dwellings.

00/097



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**GAMBLING ATTITUDES 2000**

**CONTACT SHEET**

“Good morning/afternoon/evening, I am ..... from NRB, the market research company. We are doing a survey on the public’s attitude to gaming, for the Department of Internal Affairs. Gaming includes Lotto, Instant Kiwi, raffles, housie, gaming machines, betting on races, casinos and so on. This survey is being done all over New Zealand with 1,500 people to get a national picture of attitudes to gaming. Gaming is an important social issue. We'd like your views whether you gamble or not yourselves. Your answers will make sure that Government has the right information to make decisions. Everything you say will remain strictly confidential.

Can I please speak to the male/female who normally lives in this household, is over 15 years of age and whose birthday falls next?” (ASK ACCORDING TO GENDER QUOTA REQUIRED)

IF SELECTED PERSON IS OUT OR UNAVAILABLE, ARRANGE TO CALLBACK.  
ON OBTAINING SELECTED PERSON, RE-INTRODUCE YOURSELF IF NECESSARY.

“We are doing this survey for the Department of Internal Affairs, who are responsible for regulating gaming activities such as Lotto, Instant Kiwi, raffles, housie, gaming machines, betting on races, casinos and so on. You don't have to be a gambling person - we are interested in everyone's opinions.

It is a survey on the public’s attitude to gaming and is being done throughout the country. We’re talking with over 1,500 people to get a national picture. There are no right or wrong answers and everything you say is strictly confidential.”

**GAMBLING ATTITUDES 2000 - QUESTIONNAIRE**

**SECTION A: ALL RESPONDENTS**

START TIME: \_\_\_\_\_

Q.1 (SHOW CARD A)

“Firstly, this card lists various activities. For each one listed, please tell me whether or not you have done that activity in the last 12 months.” (CIRCLE ONE FOR EACH)

	Done in the last 12 months	** Not done in the last 12 months
a. “Played cards for money (not in a casino)”	01	01
b. “Played dice games (e.g. Crown and Anchor) for money (not in a casino)”	02	02
c. “Attended a ‘gaming or casino’ evening for <u>social</u> or <u>fundraising</u> purposes”	03	03
d. “Made bets with friends, workmates, on such things as the Melbourne Cup, etc”	04	04
e. “Played an 0900 telephone game or competition”	09	09
f. “Bought a ticket in an <u>overseas</u> raffle or lottery”	10	10
g. “Bought a ticket in a New Zealand raffle or lottery”	11	11

ASK Q.3 FOR EACH ACTIVITY NOT DONE IN LAST 12 MONTHS - CHECK \*\* COLUMN ABOVE. IF NO ACTIVITIES CODED IN THE \*\* COLUMN, GO TO Q.11

Q.3 (SHOW CARD B)

“From this card, please tell me why you have not...<ACTIVITY> in the last 12 months.”  
(REPEAT FOR EACH ACTIVITY NOT DONE. CIRCLE ALL MENTIONED FOR EACH ACTIVITY IN GRID BELOW.)

	a. Not played cards	b. Not played dice	c. Not gone to casino evening	d. Not made bets with friends	e. Not taken part in 0900 telephone games	f./g. Not bought <u>any</u> raffle or lottery tickets
Too expensive	01	01	01	01	01	01
Moral or religious reasons	02	02	02	02	02	02
Not interested	03	03	03	03	03	03
Don't know anything about this activity	04	04	04	04	04	04
The chances of winning aren't very good	05	05	05	05	05	05
Waste of time, money	06	06	06	06	06	06
Not available where I live/No opportunity or access	07	07	07	07	07	07
I'm not lucky at things like that	08	08	08	08	08	08
Other (Specify): _____ _____	37	37	37	37	37	37
Don't know	45	45	45	45	45	45



**SECTION B: BOUGHT A LOTTO TICKET** (INCLUDE STRIKE, BUT NOT DAILY KENO)

INTERVIEWER: CHECK Q.11 - IF RESPONDENT HAS BOUGHT A LOTTO TICKET IN THE LAST 12 MONTHS (O1 CIRCLED IN Q.11 COLUMN), ASK Q.24, IF NOT, GO TO SECTION C.

Q.24 "You said that you had bought a **Lotto** ticket in the last 12 months." (SHOW CARD D)  
"About how often do you buy Lotto tickets, either by yourself or as part of a syndicate?"  
(CIRCLE ONE ONLY)

- Once a week 01
- Once every two weeks 02
- Once every three weeks 03
- Once a month 04
- Once every two months 05
- Once every three months 06
- Once every six months 07
- Once a year 08
- Less frequently than once a year 09

Q.25 "In the average week when you buy Lotto tickets either by yourself or as part of a syndicate, how much do you usually spend?"  
(FOR PEOPLE WHO TAKE PART LESS FREQUENTLY THAN ONCE EVERY TWO MONTHS, TAKE LAST OCCASION.)

(RECORD TO THE NEAREST DOLLAR) \$ \_\_\_\_\_

Q.26 (SHOW CARD E)

"Which of the reasons on this card best describes why you buy Lotto tickets?"  
(CIRCLE ALL MENTIONED)

- To win prizes/money 01
- For excitement/or a challenge 02
- To support worthy causes 03
- Out of curiosity 04
- To oblige or please other people 05
- As a gift for another person 06
- As an interest/or a hobby 07
- To be with people/get out of the house 08
- As entertainment 09
- Other reasons (SPECIFY): 37
- 
- Don't know 45

Q.27 "Thinking about **Lotto** in the last twelve months would you say you have ...?"  
(READ OUT ALL & CIRCLE ONE ONLY.)

"Won money overall" 1

"Broken even" 2

"Lost money overall" 3

**DO NOT READ OUT: Don't know 9**

Q.28 "Do you use any system or special skills to improve your chances of winning at Lotto?"

Yes - 01



No - 2

Don't know/Don't know  
of any such system - 03



**GO TO SECTION C**

IF YES, "Please describe:"

---

**SECTION C: BOUGHT A DAILY KENO TICKET**

INTERVIEWER: CHECK Q.11 - IF RESPONDENT HAS BOUGHT A DAILY KENO TICKET IN THE LAST 12 MONTHS (02 CODED IN Q.11 COLUMN), ASK Q.29. IF NOT, GO TO SECTION D.

Q.29 "You said that you had bought a **Daily Keno** ticket in the last 12 months."  
(SHOW CARD F)

"About how often do you buy Daily Keno tickets?" (CIRCLE ONE ONLY)

- Four times a week or more 01
- Two or three times a week 02
- Once a week 03
- Once every two weeks 04
- Once every three weeks 05
- Once a month 06
- Once every two months 07
- Once every three months 08
- Once every six months 09
- Once a year 10
- Less frequently than once a year 11

Q.30 "On the average day when you buy Daily Keno tickets, how much do you usually spend?"  
(FOR PEOPLE WHO TAKE PART LESS FREQUENTLY THAN ONCE EVERY TWO MONTHS, TAKE LAST OCCASION.)

(RECORD TO THE NEAREST DOLLAR) \$ \_\_\_\_\_

Q.31 (SHOW CARD E)

"Which of the reasons on this card best describes why you buy Daily Keno tickets?"  
(CIRCLE ALL MENTIONED)

- To win prizes/money 01
- For excitement/or a challenge 02
- To support worthy causes 03
- Out of curiosity 04
- To oblige or please other people 05
- As a gift for another person 06
- As an interest/or a hobby 07
- To be with people/get out of the house 08
- As entertainment 09
- Other reasons 37
- (SPECIFY): \_\_\_\_\_
- Don't know 45



Q.32 "Thinking about **Daily Keno** in the last twelve months, would you say you have...?"  
(READ OUT ALL & CIRCLE ONE ONLY)

"Won money overall" 1

"Broken even" 2

"Lost money overall" 3

**DO NOT READ OUT: Don't know 9**

Q.33 "Do you use any system or special skills to improve your chances of winning at Daily Keno?"

Yes - 01



No - 2

Don't know/Don't know  
of any such system - 03



**GO TO SECTION D**

IF YES, "Please describe:" \_\_\_\_\_

**SECTION D: BOUGHT INSTANT KIWI TICKETS** (INCLUDE OTHER SCRATCH TICKETS)

INTERVIEWER: CHECK Q.11 - IF RESPONDENT HAS BOUGHT AN INSTANT KIWI TICKET IN THE LAST 12 MONTHS (O3 CIRCLED IN Q.11 COLUMN), ASK Q.34. IF NOT, GO TO SECTION E.

Q.34 "You said that you had bought an **Instant Kiwi ticket** (or other **Scratch ticket**) in the last 12 months."

(SHOW CARD F)

"About how often do you buy Instant Kiwi tickets or other Scratch tickets either by yourself or as part of a syndicate?" (CIRCLE ONE ONLY)

- Four times a week or more 01
- Two or three times a week 02
- Once a week 03
- Once every two weeks 04
- Once every three weeks 05
- Once a month 06
- Once every two months 07
- Once every three months 08
- Once every six months 09
- Once a year 10
- Less frequently than once a year 11

Q.35 "On the average day when you buy Instant Kiwi or other Scratch tickets either by yourself or as part of a syndicate, how much do you usually spend?"

(FOR PEOPLE WHO TAKE PART LESS FREQUENTLY THAN ONCE EVERY TWO MONTHS, TAKE LAST OCCASION.)

(RECORD TO THE NEAREST DOLLAR)

\$ \_\_\_\_\_

Q.36 (SHOW CARD E)

"Which of the reasons on this card best describes why you buy Instant Kiwi or other Scratch tickets?" (CIRCLE ALL MENTIONED)

- To win prizes/money 01
- For excitement/or a challenge 02
- To support worthy causes 03
- Out of curiosity 04
- To oblige or please other people 05
- As a gift for another person 06
- As an interest/or a hobby 07
- To be with people/get out of the house 08
- As entertainment 09
- Other reasons 37
- (SPECIFY): \_\_\_\_\_
- Don't know 45

Q.37 "Thinking about **Instant Kiwi or other Scratch tickets** in the last twelve months would you say you have...?" (READ OUT ALL & CIRCLE ONE ONLY)

"Won money overall" 1

"Broken even" 2

"Lost money overall" 3

**DO NOT READ OUT: Don't know 9**

Q.38 "Do you use any system or special skills to improve your chances of winning with Scratchies?"

Yes - 01



No - 2

Don't know/Don't know  
of any such system - 03



**GO TO SECTION E**

IF YES, "Please describe:" \_\_\_\_\_

**SECTION E: BOUGHT A TELEBINGO TICKET**

INTERVIEWER: CHECK Q.11 - IF RESPONDENT HAS BOUGHT A TELEBINGO TICKET IN THE LAST 12 MONTHS (O4 CIRCLED IN Q.11 COLUMN), ASK Q.39. IF NOT, GO TO SECTION F.

Q.39 "You said that you had bought a **Telebingo ticket** in the last 12 months."  
(SHOW CARD D)  
"About how often do you buy Telebingo tickets either by yourself or as part of a syndicate?" (CIRCLE ONE ONLY)

- Once a week 01
- Once every two weeks 02
- Once every three weeks 03
- Once a month 04
- Once every two months 05
- Once every three months 06
- Once every six months 07
- Once a year 08
- Less frequently than once a year 09

Q.40 "In the average week when you buy Telebingo tickets either by yourself or as part of a syndicate, how much do you usually spend?"  
(FOR PEOPLE WHO TAKE PART LESS FREQUENTLY THAN ONCE EVERY TWO MONTHS, TAKE LAST OCCASION.)

(RECORD TO THE NEAREST DOLLAR) \$ \_\_\_\_\_

Q. 41 (SHOW CARD E)  
"Which of the reasons on this card best describes why you buy Telebingo tickets?"  
(CIRCLE ALL MENTIONED)

- To win prizes/money 01
- For excitement/or a challenge 02
- To support worthy causes 03
- Out of curiosity 04
- To oblige or please other people 05
- As a gift for another person 06
- As an interest/or a hobby 07
- To be with people/get out of the house 08
- As entertainment 09
- Other reasons 37

(SPECIFY): \_\_\_\_\_

Don't know 45

Q. 42 "Thinking about **Telebingo Tickets** in the last twelve months, would you say you have...?" (READ OUT ALL & CIRCLE ONE ONLY)

"Won money overall" 1

"Broken even" 2

"Lost money overall" 3

**DO NOT READ OUT: Don't know 9**

Q.43 "Do you use any system or special skills to improve your chances of winning at Telebingo?"

Yes - 01



IF YES, "Please describe:" \_\_\_\_\_

No - 2

Don't know/Don't know  
of any such system - 03



**GO TO SECTION F**

**SECTION F: PLAYED HOUSIE IN THE LAST 12 MONTHS**

INTERVIEWER: CHECK Q.11 - IF RESPONDENT HAS PLAYED HOUSIE IN THE LAST 12 MONTHS (O5 CIRCLED IN Q.11 COLUMN), ASK Q.44. IF NOT, GO TO SECTION G.

Q.44 "You said that you had played **housie** in the last 12 months."  
(SHOW CARD F) "About how often do you play a session of housie?"  
IF NECESSARY:

"One session means all the games you took part in at one time, e.g. in one evening."  
(CIRCLE ONE ONLY)

- Four times a week or more 01
- Two or three times a week 02
- Once a week 03
- Once every two weeks 04
- Once every three weeks 05
- Once a month 06
- Once every two months 07
- Once every three months 08
- Once every six months 09
- Once a year 10
- Less frequently than once a year 11

Q.45 "Can you tell me how much you would normally spend at your usual housie session?"

(FOR PEOPLE WHO TAKE PART LESS FREQUENTLY THAN ONCE EVERY TWO MONTHS, TAKE LAST SESSION.)

(RECORD TO THE NEAREST DOLLAR) \$ \_\_\_\_\_

Q. 46 (SHOW CARD E)

"Which of the reasons on this card best describes why you play housie?"  
(CIRCLE ALL MENTIONED)

- To win prizes/money 01
- For excitement/or a challenge 02
- To support worthy causes 03
- Out of curiosity 04
- To oblige or please other people 05
- As a gift for another person 06
- As an interest/or a hobby 07
- To be with people/get out of the house 08
- As entertainment 09
- Other reasons 37
- (SPECIFY): \_\_\_\_\_
- Don't know 45

Q. 47 "Thinking about **housie** in the last twelve months, would you say you have...?"  
(READ OUT ALL & CIRCLE ONE ONLY)

"Won money overall" 1

"Broken even" 2

"Lost money overall" 3

DO NOT READ OUT: Don't know 9

Q.48 "Do you use any system or special skills to improve your chances of winning at housie?"

Yes - 01



No - 2

Don't know/Don't know  
of any such system - 03



GO TO SECTION G

IF YES, "Please describe:"

\_\_\_\_\_

**SECTION G: BET MONEY ON A HORSE OR DOG RACE IN THE LAST 12 MONTHS**

INTERVIEWER: CHECK Q.11 - IF RESPONDENT HAS BET MONEY ON A HORSE OR DOG RACE IN THE LAST 12 MONTHS (O6 CIRCLED IN Q.11 COLUMN), ASK Q.49. IF NOT, GO TO SECTION H.

- Q.49 “You said that you had bet on a **horse or dog race** in the last 12 months.”  
 (SHOW CARD F)  
 “About how often do you place money on a horse or dog race at a racetrack? This does not include TAB bets.” (CIRCLE IN Q.49 COLUMN IN GRID BELOW)
- Q.50 “About how often do you place money on a horse or dog race through the NZ TAB, other than at a racetrack? (Don't include bets made at a racetrack)”  
 (CIRCLE IN Q.50 COLUMN IN GRID BELOW)
- Q.51 “About how often do you place money on a horse or dog race through an overseas betting organisation?” (CIRCLE IN Q.51 COLUMN IN GRID BELOW)

	Q.49 Racetrack bets	Q.50 NZ TAB bets	Q.51 Overseas bets
Four times a week or more	01	01	01
Two or three times a week	02	02	02
Once a week	03	03	03
Once every two weeks	04	04	04
Once every three weeks	05	05	05
Once a month	06	06	06
Once every two months	07	07	07
Once every three months	08	08	08
Once every six months	09	09	09
Once a year	10	10	10
Less frequently than once a year	11	11	11
Never	45	45	45

- Q.52 “On the average day that you place money on a horse or dog race, about how much do you bet. Include all bets including those made at a racetrack, TAB or placed through an overseas betting organisation.”  
 (FOR PEOPLE WHO TAKE PART LESS FREQUENTLY THAN ONCE EVERY TWO MONTHS, TAKE LAST OCCASION.  
 (RECORD TO THE NEAREST DOLLAR.) \$ \_\_\_\_\_

- Q.53 (SHOW CARD E)  
 “Which of the reasons on this card best describes why you place money on horse or dog races?”  
 (CIRCLE ALL MENTIONED)

- To win prizes/money 01
- For excitement/or a challenge 02
- To support worthy causes 03
- Out of curiosity 04
- To oblige or please other people 05
- As a gift for another person 06
- As an interest/or a hobby 07
- To be with people/get out of the house 08
- As entertainment 09
- Other reasons 37
- (SPECIFY): \_\_\_\_\_
- Don't know 45



Q. 54 "Thinking about **betting on horses/dogs** in the last twelve months would you say you have...?" (READ OUT ALL & CIRCLE ONE ONLY)

"Won money overall" 1

"Broken even" 2

"Lost money overall" 3

DO NOT READ OUT: Don't know	9
-----------------------------	---

**SECTION H: BET MONEY ON SPORTING EVENTS IN THE LAST 12 MONTHS**

INTERVIEWER: CHECK Q.11 - IF RESPONDENT HAS BET MONEY ON A SPORTING EVENT OTHER THAN A HORSE OR DOG RACE IN THE LAST 12 MONTHS (07 CIRCLED IN Q.11 COLUMN), ASK Q.55.

IF NOT, GO TO SECTION I.

Q.55 “You said that you had bet on a **sporting event** in the last 12 months.” (SHOW CARD F)  
 “About how often do you place money on sporting events through the NZ TAB other than on horse or dog races? Don't include bets made overseas.”  
 (CIRCLE IN Q.55 COLUMN IN GRID BELOW)

Q.56 “About how often do you place money on sporting events through an overseas betting organisation?” (CIRCLE IN Q.56 COLUMN IN GRID BELOW)

	Q.55 NZ TAB bets	Q.56 Overseas bets
Four times a week or more	01	01
Two or three times a week	02	02
Once a week	03	03
Once every two weeks	04	04
Once every three weeks	05	05
Once a month	06	06
Once every two months	07	07
Once every three months	08	08
Once every six months	09	09
Once a year	10	10
Less frequently than once a year	11	11
Never	45	45

Q.57 “On the average day that you place money on sporting events, about how much do you bet. Include both NZ and overseas bets?” (FOR PEOPLE WHO TAKE PART LESS FREQUENTLY THAN ONCE EVERY TWO MONTHS, TAKE LAST OCCASION.)

(RECORD TO THE NEAREST DOLLAR)      \$ \_\_\_\_\_

Q.58 (SHOW CARD E)  
 “Which of the reasons on this card best describes why you place money on sporting events?”  
 (CIRCLE ALL MENTIONED)

- To win prizes/money 01
- For excitement/or a challenge 02
- To support worthy causes 03
- Out of curiosity 04
- To oblige or please other people 05
- As a gift for another person 06
- As an interest/or a hobby 07
- To be with people/get out of the house 08
- As entertainment 09
- Other reasons 37
- (SPECIFY): \_\_\_\_\_
- Don't know 45

Q.59 “Thinking about **betting on sports events** in the last twelve months, would you say you have?” (READ OUT ALL & CIRCLE ONE ONLY)

- “Won money overall” 1
- “Broken even” 2
- “Lost money overall” 3

DO NOT READ OUT: Don't know 9

**SECTION I: PLAYED GAMING MACHINES NOT IN A CASINO**

INTERVIEWER: CHECK Q.11 - IF RESPONDENT HAS PLAYED GAMING MACHINES NOT IN A CASINO IN THE LAST 12 MONTHS (08 CIRCLED IN Q.11 COLUMN), ASK Q.60. IF NOT, GO TO SECTION J.

Q.60 "You said that you had played **gaming machines** in the last 12 months. By gaming machines I mean slot, poker, fruit machines, or one armed bandits," (SHOW CARD F)  
"About how often do you play gaming machines (**don't include those in a casino**)?"  
(CIRCLE ONE ONLY)

- Four times a week or more 01
- Two or three times a week 02
- Once a week 03
- Once every two weeks 04
- Once every three weeks 05
- Once a month 06
- Once every two months 07
- Once every three months 08
- Once every six months 09
- Once a year 10
- Less frequently than once a year 11

Q.61 "On an average day when you play gaming machines, how much of your money do you usually spend?"

(FOR PEOPLE WHO TAKE PART LESS FREQUENTLY THAN ONCE EVERY TWO MONTHS, TAKE LAST SESSION.)

(RECORD TO THE NEAREST DOLLAR) \$ \_\_\_\_\_

Q. 62 (SHOW CARD E)

"Which of the reasons on this card best describes why you play gaming machines?"  
(CIRCLE ALL MENTIONED)

- To win prizes/money 01
- For excitement/or a challenge 02
- To support worthy causes 03
- Out of curiosity 04
- To oblige or please other people 05
- As a gift for another person 06
- As an interest/or a hobby 07
- To be with people/get out of the house 08
- As entertainment 09
- Other reasons 37
- (SPECIFY): \_\_\_\_\_
- Don't know 45

Q.63 "Thinking about **machines** (NOT in casinos) in the last twelve months, would you say you have...?"

(READ OUT ALL & CIRCLE ONE ONLY)

"Won money overall" 1

"Broken even" 2

"Lost money overall" 3

DO NOT READ OUT: Don't know 9

Q.64 "Do you use any system or special skills to improve your chances of winning at gaming machines?"

Yes - 01

No - 2

Don't know/Don't know  
of any such system - 03

GO TO Q.65

IF YES, "Please describe:" \_\_\_\_\_

Q.65 "If gaming machines had a warning that in the long run the house always wins, what difference do you think this would make to how you play? Would you play...?" (SHOW CARD G)

"Much less" 1

"Less" 2

"The same as now - no difference" 3

"More" 4

"Much more" 5

"I don't play anyway" 6

DO NOT READ OUT: Don't know 9

Q.66 "If you could programme the gaming machine to alert you after you had played for a set time, or to show you how much money you had spent in a session, what difference do you think this would make to how you play? Would you play...?" (SHOW CARD G)

"Much less" 1

"Less" 2

"The same as now - no difference" 3

"More" 4

"Much more" 5

"I don't play anyway" 6

DO NOT READ OUT: Don't know 9

Q.67 "If winnings of \$50 or more were paid **by cheque** instead of in cash, what difference do you think this would make to how you play the machines? Would you play...?" (SHOW CARD G)

"Much less" 1

"Less" 2

"The same as now - no difference" 3

"More" 4

"Much more" 5

"I don't play anyway" 6

DO NOT READ OUT: Don't know 9

**SECTION J: CASINOS**

INTERVIEWER: CHECK Q.11 - IF RESPONDENT HAS PLAYED GAMING MACHINES, OR OTHER GAMES AT A CASINO IN THE LAST 12 MONTHS (09 OR 10 CIRCLED IN COLUMN IN Q.11), ASK Q.68.  
**IF NOT, GO TO SECTION K**

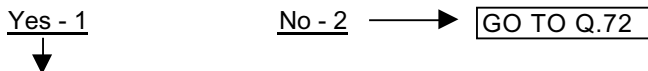
Q.68 "You said that you had played gaming machines or other games at a casino in the last 12 months." (SHOW CARD F)

"About how often do you go to a casino?" (CIRCLE ONE ONLY)

- |                           |    |                                  |    |
|---------------------------|----|----------------------------------|----|
| Four times a week or more | 01 | Once a month                     | 06 |
| Two or three times a week | 02 | Once every two months            | 07 |
| Once a week               | 03 | Once every three months          | 08 |
| Once every two weeks      | 04 | Once every six months            | 09 |
| Once every three weeks    | 05 |                                  |    |
|                           |    | Once a year                      | 10 |
|                           |    | Less frequently than once a year | 11 |

Q.69 "On the average day, when you go to a casino about how much do you usually spend on gaming activities?"  
(FOR PEOPLE WHO TAKE PART LESS FREQUENTLY THAN ONCE EVERY TWO MONTHS, TAKE LAST VISIT.)  
(RECORD TO THE NEAREST DOLLAR) \$\_\_\_\_\_

Q.70 "Did you make a trip to another town especially to go to a casino in the last 12 months?"



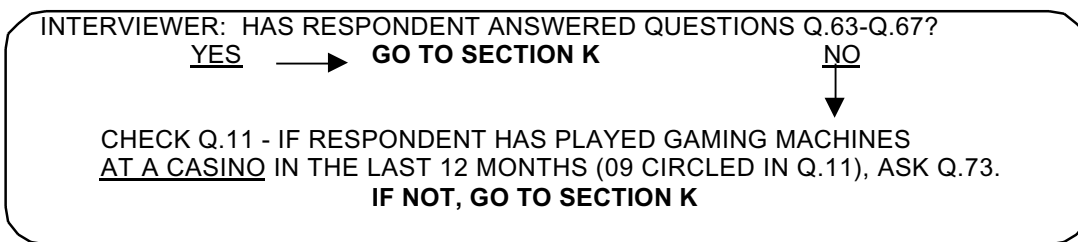
Q.71 "Would you do so again?" (CIRCLE ONE)

- Yes - 1
No - 2
Don't know - 3

Q.72 (SHOW CARD E)

"Which of the reasons on this card best describes why you go to the casino?"  
(CIRCLE ALL MENTIONED)

- |                                        |    |
|----------------------------------------|----|
| To win prizes/money                    | 01 |
| For excitement/or a challenge          | 02 |
| To support worthy causes               | 03 |
| Out of curiosity                       | 04 |
| To oblige or please other people       | 05 |
| As a gift for another person           | 06 |
| As an interest/or a hobby              | 07 |
| To be with people/get out of the house | 08 |
| As entertainment                       | 09 |
| Other reasons                          | 37 |
| (SPECIFY): _____                       |    |
| Don't know                             | 45 |

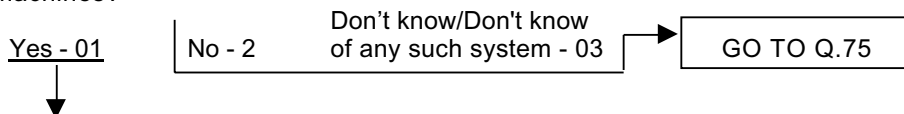


Q.73 "Thinking about gaming machines **at a Casino**, in the last twelve months would you say you have...?" (READ OUT ALL & CIRCLE ONE ONLY)

- "Won money overall" 1
- "Broken even" 2
- "Lost money overall" 3

DO NOT READ OUT: Don't know 9

Q.74 "Do you use any system or special skills to improve your chances of winning gaming machines?"



IF YES, "Please describe:" \_\_\_\_\_

Q.75 "If gaming machines had a warning that in the long run the house always wins, what difference do you think this would make to how you play? Would you play...?"

(SHOW CARD G)

- "Much less" 1
- "Less" 2
- "The same as now - no difference" 3
- "More" 4
- "Much more" 5
- "I don't play anyway" 6

DO NOT READ OUT: Don't know 9

Q.76 "If you could programme the gaming machine to alert you after you had played for a set time, or to show you how much money you had spent in a session, what difference do you think this would make to how you play? Would you play...?" (SHOW CARD G)

- "Much less" 1
- "Less" 2
- "The same as now - no difference" 3
- "More" 4
- "Much more" 5
- "I don't play anyway" 6

DO NOT READ OUT: Don't know 9

Q.77 "If winnings of \$50 or more were paid **by cheque** instead of in cash, what difference do you think this would make to how you play the machines? Would you play...?"

(SHOW CARD G)

- "Much less" 1
- "Less" 2
- "The same as now - no difference" 3
- "More" 4
- "Much more" 5
- "I don't play anyway" 6

DO NOT READ OUT: Don't know 9

**SECTION K: ALL RESPONDENTS**

“Now we have some general questions about gaming in New Zealand.”

(IF NECESSARY: “Gaming activities are such things as casino games, Lotto, Instant Kiwi, raffles, housie, gaming machines, competitions and race betting.”)

Q.78 “Occasionally Government has to reassess the regulation of gaming activities. From the following cards, please choose the four most important factors that you think should guide Government in their decision making.” (HAND OVER SHUFFLE CARDS TO RESPONDENT)

CARD:	
A	Generating gaming jobs
B	Limiting the harm gaming can cause people
C	Allowing the market to decide how much gaming is available
D	Preventing criminal activity
E	Giving people more choice
F	Generating tourism from gaming
G	Ensuring profits fund worthy causes
H	Encouraging competition within the gaming industry
I	Restricting opportunities to gamble
J	Supporting the racing industry
K	Limiting the size and numbers of groups running gaming activities
L	Ensuring fairness for players

Q.79 “Now sort these four cards in order of importance, from highest to lower importance”  
(WRITE IN CARD LETTER IN ORDER OF IMPORTANCE)

1. \_\_\_\_ 2. \_\_\_\_ 3. \_\_\_\_ 4. \_\_\_\_

Q.80 “Currently there are a range of laws about gaming that do not apply to other ordinary business or sporting activities. In your opinion, should there be special laws controlling gaming activities or should gaming be treated in a similar manner to other ordinary business or sporting activities?” (CIRCLE ONE)

Special laws controlling  
gaming activities - 1

Should be treated in a similar manner to other  
ordinary business or sporting activities -2

Don't  
know - 3

Q.81 (SHOW CARD H)

“Looking at this card, I would like you to tell me for each of these things, whether you are **generally in favour** or **generally not in favour** of gaming activities being run for these purposes.” (CIRCLE ONE FOR EACH)

	Generally in favour	Generally not in favour	Don't know
“Fundraising for worthy causes”	1	2	9
“A means of raising Government revenue (i.e. through government receiving the profits from gaming)”	1	2	9
“Sales promotion (e.g. prize competitions to promote products)”	1	2	9
“Business enterprise (i.e. for commercial profit, e.g. casinos)”	1	2	9
“Profit sharing between a promoter and a worthy cause”	1	2	9

Q.87 "Which of the following should be considered worthy causes for receiving gaming profits? You can choose as many as you like." (SHOW CARD I) (CIRCLE ALL MENTIONED)

- Welfare organisations (e.g IHC, Red Cross) 01
- Racing industry 02
- Amateur sports 03
- Professional sports 04
- Business enterprises 05
- Professional arts and culture groups 06
- Amateur arts and culture groups 07
- Educational groups 08
- Community/Recreational groups 09
- Political parties 10
- Rescue organisations 11
- Science research (e.g. forestry research) 12
- Health research (e.g. cancer research) 13
- Don't know 45
- None of these 37

Q.88 "When gaming profits go to worthy causes, which of these do you think they should be distributed by...?" (READ OUT AND CIRCLE ALL MENTIONED)

- Yes
- "Local council" 1
- "Community representatives" 2
- "Government departments" 3
- "The people who operate gaming activities" 4
- "Other (Specify)" \_\_\_\_\_ 5

DO NOT READ OUT: Don't know 6

Q.89 "Looking at this card please tell me how much of the profits from each of these gaming activities you think actually goes to worthy causes - not counting prizes and administration costs:" (SHOW CARD J) (READ DOWN LIST & CIRCLE ONE FOR EACH)

	None	A little	Some	Most	All	Don't know
Gaming machines (not in casinos)	1	2	3	4	5	6
Casinos	1	2	3	4	5	6
Housie	1	2	3	4	5	6
Lotto	1	2	3	4	5	6
Telebingo	1	2	3	4	5	6
Racing	1	2	3	4	5	6
Sports betting	1	2	3	4	5	6
Internet betting	1	2	3	4	5	6

Q.90 "Which of the following funding bodies have you heard of...?" (SHOWCARD K) (READ OUT AND CIRCLE ONE FOR EACH)

- |                        | Definitely heard<br>of them | Have heard<br>the name | Never heard<br>of them |
|------------------------|-----------------------------|------------------------|------------------------|
| "Hillary Commission"   | 1                           | 2                      | 3                      |
| "Lottery Grants Board" | 1                           | 2                      | 3                      |
| "Todd Foundation"      | 1                           | 2                      | 3                      |
| "Creative New Zealand" | 1                           | 2                      | 3                      |

**SECTION L: INTERNET BASED GAMING (ALL RESPONDENTS)**



READ OUT: "Now we have some questions about the Internet."

Q.91 "How familiar do you feel you are with the Internet?" (SHOWCARD L)  
Not at all - 1    A little - 2    Average - 3    Very familiar - 4    Extremely familiar - 5

Q.92 "Do you have Internet access either at home, work, or educational institution e.g. University, High school? "  
Yes - 1    No - 2    Not Sure/Don't know - 3

**READ OUT:** "We would like to know your experience with and attitudes towards Internet-based gaming even if you have not placed a bet on the Internet before. Internet-based gaming includes playing casino type games for money, purchasing lottery tickets, betting on sporting events or horse and dog races through the Internet."

Q.93 "Have you participated in any Internet-based gaming in the last 12 months?"

Yes - 1    No - 2    **GO TO Q.97**

Q.94 "Did you use a New Zealand organisation like the New Zealand TAB, lottery organisation or an overseas betting organisation to do so?" (CIRCLE ALL MENTIONED)

NZ organisation - 1    Overseas betting organisation - 2    Unsure /Can't remember - 3

Q.95 "About how often do you participate in Internet-based gaming activity?"  
(SHOW CARD F -CIRCLE ONE ONLY)

- |                           |    |                                  |    |
|---------------------------|----|----------------------------------|----|
| Four times a week or more | 01 | Once a month                     | 06 |
| Two or three times a week | 02 | Once every two months            | 07 |
| Once a week               | 03 | Once every three months          | 08 |
| Once every two weeks      | 04 | Once every six months            | 09 |
| Once every three weeks    | 05 |                                  |    |
|                           |    | Once a year                      | 10 |
|                           |    | Less frequently than once a year | 11 |

Q.96 "On the average day when you have placed bets on the Internet, how much do you usually spend?"  
(FOR PEOPLE WHO TAKE PART LESS FREQUENTLY THAN ONCE EVERY TWO MONTHS, TAKE LAST OCCASION.)

(RECORD TO NEAREST DOLLAR)    \$ \_\_\_\_\_    **GO TO Q.98**

Q.97 "Why haven't you participated in any Internet-based gaming activity?"  
(UNPROMPTED QUESTION - **DO NOT READ OUT. CIRCLE ALL MENTIONED**)

- |                                |                                                        |
|--------------------------------|--------------------------------------------------------|
| Don't know where to look - 01  | Security/worried about giving credit card details - 02 |
| Not connected to Internet - 03 | Don't know how to use the Internet - 04                |
| Not interested - 05            | Rather support NZ gaming industry - 06                 |
| Distrust of operators - 07     | Waste of time/money - 08                               |
| Didn't know about them - 09    | Unsure how winnings will be paid out - 10              |

Other (SPECIFY): \_\_\_\_\_  
\_\_\_\_\_

Q.98 "Would you be likely to participate in gaming activities on the Internet in the future?"

Yes - 1    Maybe/probably - 2    Unsure - 3

No - 4    **GO TO SECTION M**

Q.99 "Which of the following kinds of activities on the internet might you be interested in?"  
(SHOWCARD M. CIRCLE ONE FOR EACH)

	Yes	No
Casino games, including all gaming machines on the Internet	1	2
Lotteries/sweepstakes tickets	1	2
Bingo/housie type games	1	2
Placing bets on sporting events	1	2
Placing bets on Racing (horses and dogs)	1	2
Other activities (Specify): _____	1	2

IF THEY ANSWERED YES TO ANY OF THE ACTIVITIES IN Q.99, ASK Q.100.  
OTHERWISE SKIP TO SECTION M.

Q.100 "About how much would you be likely to spend on the Internet, on average per month for<ACTIVITY>?" (READ OUT EACH ACTIVITY CODED 1 AT Q.99 AND RECORD TO THE NEAREST DOLLAR IN Q100 COLUMN IN GRID. IMMEDIATELY ASK Q.101 AND CIRCLE RESPONSE. REPEAT FOR EACH ACTIVITY CODED 1 ABOVE)

Q.101 "Would this be money that you would have previously spent on other types of gaming or would you have spent it on a **non-gaming** activity?"  
(CIRCLE RESPONSE AT COLUMN Q.101 IN GRID BELOW)

	Q.100	Q.101		
	Expenditure \$	Spent on other types of gaming	Spent on a non-gaming activity	Don't know
Casino games, including all gaming machines on the Internet	\$_____	1	2	3
Lotteries/sweepstakes tickets	\$_____	1	2	3
Bingo/Housie type games	\$_____	1	2	3
Placing bets on sporting events	\$_____	1	2	3
Placing bets on racing (horses and dogs)	\$_____	1	2	3
Other activities	\$_____	1	2	3

**SECTION M: NEW ZEALAND GAMING INDUSTRY (ALL RESPONDENTS)**

"Now we have some questions about the size of the gaming industry in New Zealand"

Q.102 "Ideally, how many casinos would you like to see in New Zealand?"

(CIRCLE ONE ONLY)

- "None" 1
- "Up to six - as it is now" 2
- "Seven or eight" 3
- "Eight or more" 4

DO NOT READ OUT: "Other" (Specify) \_\_\_\_\_  
Not sure/Don't know 9

Q.103 "Ideally, how many sports betting organisations would you like to see in New Zealand?"

- "None" 1
- "One - as it is now" 2
- "Two to four" 3
- "Five or more" 4

DO NOT READ OUT: "Other" (Specify) \_\_\_\_\_  
Not sure/Don't know 9

Q.104 "Ideally, how many national Lottery agencies, such as the Lotteries Commission (i.e. the organisation that runs Lotto), would you like to see in New Zealand?"

- "None" 1
- "One - as it is now" 2
- "Two to four" 3
- "Five or more" 4

DO NOT READ OUT: "Other" (Specify) \_\_\_\_\_  
Not sure/Don't know 9

**READ OUT:** "Within the gaming industry in New Zealand there are different age limits in place, depending upon the gaming activity. For example - you must be aged 16 years or over to play Instant Kiwi and over the age of 18 to place a bet on a racing or sporting event, while currently there are no age limits on playing Lotto."

Q.105 Which of the following options do you think there should be?" (SHOW CARD N)  
(CIRCLE ONE ONLY)

- "No age restrictions at all" - 1 → GO TO Q.107
- "Different age limits, depending upon gaming activity"- 2 → GO TO Q.106
- "A common age restriction for all gaming activities" - 3 → "What age should this be?"  
RECORD AGE: \_\_\_\_\_ YEARS  
GO TO Q.107
- "All gaming activity should be illegal" - 4 → GO TO Q.107
- "Unsure" - 5 → GO TO Q.107

Q.106 "What do you think the age restrictions should be for each of the following gaming activities?" (READ ALL ACTIVITIES & CIRCLE ONE FOR EACH)

	None	16	18	20	Don't	Other:
		years	years	years	know	(specify)
"Sporting events"	01	02	03	04	09	_____
"Racing (horses and dogs)"	01	02	03	04	09	_____
"Casinos"	01	02	03	04	09	_____
"Gaming machines"	01	02	03	04	09	_____
"Telebingo"	01	02	03	04	09	_____
"Instant Kiwi (& other scratchies)"	01	02	03	04	09	_____
"Daily Keno"	01	02	03	04	09	_____
"Housie"	01	02	03	04	09	_____
"0900 Telephone games"	01	02	03	04	09	_____
"Lotto"	01	02	03	04	09	_____

Q.107 "Are there any **other** gaming activities you would like to see available in New Zealand?"  
(CIRCLE ONE)

Yes - 1

No - 2 →

GO TO Q.108

PLEASE SPECIFY AND PROBE UNTIL CLEAR

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Q.108 (SHOW CARD O)

"Please look at this list closely and tell me any of these activities that you think are socially undesirable."

IF NECESSARY: "By socially undesirable I mean likely to cause damage to people in general." (CIRCLE ALL MENTIONED)

- Lotto 01
  - Instant Kiwi 02
  - Daily Keno 03
  - Telebingo 04
  - Raffles 05
  - Housie 06
  - Betting on horse and dog racing 07
  - Sports betting 08
  - Casinos 09
  - Gaming machines 10
  - 0900 telephone games or competitions 11
  - Internet-based gaming 12
  - Other: (please specify): 13
- 
- None of these 45

Q.109a "Have you seen any gaming advertising of any sort in the last 12 months?"  
(CIRCLE ONE)

Yes - 1

No - 2 →

GO TO Q.110

Q.109b What gaming activities were being advertised?"  
(DO NOT READ OUT - CIRCLE ALL MENTIONED)

- None - 01
- Horse racing - 03
- Lotto - 05
- Telebingo - 06
- Sports betting - 07
- Other: \_\_\_\_\_
- Can't remember - 02
- Daily Keno - 04
- Casino (which): \_\_\_\_\_
- Instant Kiwi (scratchies) - 08
- TAB - 09

Q.110 (SHOW CARD P)

"Do you agree strongly, agree, disagree, or disagree strongly that...?" (READ OUT BOTH STATEMENTS & CIRCLE ONE FOR EACH)

	Agree strongly	Agree	Disagree	Disagree strongly	Don't know
"There is a problem in New Zealand with people being heavily involved in gambling"	1	2	3	4	5
"There should be special help and support available for people who want to give up gambling"	1	2	3	4	5

Q.113 (SHOW CARD Q)

"Who should provide money to help people give up gambling?"  
(CIRCLE ALL MENTIONED)

Problem gamblers themselves	1
The gaming industry (through a tax or levy)	2
Government	3
Don't know	5

Q.114 "If gaming activities had warnings about problem gambling - on or with them, do you think you would play...?" (SHOW CARD G)

"Much less"	1
"Less"	2
"The same as now - no difference"	3
"More"	4
"Much more"	5
"I don't play anyway"	6

DO NOT READ OUT: Don't know	9
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**DEMOGRAPHICS**

"Finally, some questions about yourself."

Q.116 CIRCLE GENDER: Male - 1 Female - 2

Q.117 (SHOW CARD S)

"Which of these age groups are you in?" (CIRCLE ONE)

- |               |   |
|---------------|---|
| 15 - 24 years | 1 |
| 25 - 34 years | 2 |
| 35 - 44 years | 3 |
| 45 - 54 years | 4 |
| 55 - 64 years | 5 |
| 65+ years     | 6 |

Q.118a "How many people usually live in this household, including yourself, any boarders and any children?" (CIRCLE 10, IF 10 OR MORE USUAL RESIDENTS)

01 02 03 04 05 06 07 08 09 10

Q.118b "And how many of these are aged 15 years or more? Please include yourself" (CIRCLE 10, IF 10 OR MORE USUAL RESIDENTS)

01 02 03 04 05 06 07 08 09 10

INTERVIEWER: CHECK THAT ANSWER AT b. IS LESS THAN OR EQUAL TO ANSWER AT a.

Q.119 (SHOW CARD T) "Would you please look at this card and tell me which of these groups best describes your own occupation." (CIRCLE ONE ONLY)

- |                                                          |    |
|----------------------------------------------------------|----|
| Home duties (not otherwise employed)                     | 01 |
| Retired/Superannuitant                                   | 02 |
| Social Welfare Beneficiary/Unemployed                    | 03 |
| Student                                                  | 04 |
| Clerical or Sales Employee                               | 05 |
| Semi-skilled worker                                      | 06 |
| Technical or skilled worker                              | 07 |
| Business Proprietor or Self Employed                     | 08 |
| Business Manager                                         | 09 |
| Teaching/Nursing/Police and other trained Service Worker | 10 |
| Professional or Senior Government Official               | 11 |
| Labourer, Manual, Agricultural or Domestic Worker        | 12 |
| Farm Owner or Manager                                    | 13 |

Q.120 (CIRCLE 1 WITHOUT ASKING, IF LIVING ALONE)  
 "Are you the main income earner in this household?" (CIRCLE ONE)

Yes - 1

No - 2

Q.121 (SHOW CARD U)  
 "Which of these groups best describes your own personal **gross** income from all sources before tax?"  
 (CIRCLE ONE)

Up to \$10,000 01

Between \$10,001 and \$20,000 02

Between \$20,001 and \$30,000 03

Between \$30,001 and \$40,000 04

Between \$40,001 and \$50,000 05

Between \$50,001 and \$60,000 06

Between \$60,001 and \$70,000 07

Between \$70,001 and \$80,000 08

Over \$80,000 09

Q.122 (SHOW CARD U)  
 "Which of these groups best describes the total gross **household** income from all income earners and all other sources before tax?" (CIRCLE ONE ONLY)

Up to \$10,000 01

Between \$10,001 and \$20,000 02

Between \$20,001 and \$30,000 03

Between \$30,001 and \$40,000 04

Between \$40,001 and \$50,000 05

Between \$50,001 and \$60,000 06

Between \$60,001 and \$70,000 07

Between \$70,001 and \$80,000 08

Between \$80,001 and \$100,000 09

Over \$100,000 10

Q.123 (SHOW CARD V)  
 "Which of these groups was the **last** level you completed in your formal education?"  
 (CIRCLE ONE ONLY)

Primary School 01

Secondary School - No School Certificate 02

School Certificate 03

U.E./Matric/6th Form/Bursary 04

Technical or Trade Qualification 05

Other Tertiary Qualification 06

University Graduate 07

Q.124 (SHOW CARD W)

"Can you tell me which of these ethnic groups you belong to...?" (CIRCLE ALL MENTIONED)

- NZ European/Pakeha 01
- Other European 02
- NZ Maori 03
- Pacific Islander 04
- Asian 05
- Or another ethnic group 06
- Don't know 07
- Refused 08

"May I please have your name and home phone number in case my Supervisor wishes to verify this interview?"

Name: \_\_\_\_\_ Phone No. \_\_\_\_\_

Interview Duration:  mins Finish time \_\_\_\_\_

"Thank you very much for taking part in this survey. We do appreciate your help. As I mentioned I am Xxx from NRB."

**HAND OVER THANK YOU CARD.**

CERTIFICATION: I hereby certify that this is a true and accurate record of an interview conducted by me at the time and place specified. TICK WHEN CHECKED:

Interviewer Name (*please print*): \_\_\_\_\_ Date: \_\_\_\_\_

Supervisor Sign: \_\_\_\_\_ Audit: \_\_\_\_\_