



National Gambling Board
South Africa

a member of **the dti** group

The Social Impact of Gambling in South Africa

Qualitative perspective
2013



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Qualitative perspective

2013

Study commissioned by the
National Gambling Board

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EXCLUSION OF CLAIMS

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FOREWORD

Chairperson of the
National Gambling Board (NGB)
Prof Linda de Vries



One of the main responsibilities of the board is to conduct research on the socio-economic impact of gambling on South Africa. It is required to ensure a balanced approach to regulation taking into account the social and economic factors to enforce the regulations of the African government.

NGB conducted several socio-economic impact of gambling studies in the past, mainly from a quantitative perspective. The need arose to build on research findings published in 2009 based on a limited number of focus groups that were conducted amongst regular gamblers who participated in legal gambling modes regulated by the board. The scope of this report is much broader and includes the gathering of in-depth understanding and insights around the moods, feelings, attitudes and values that drive gambling behaviour in South Africa. Specialist insights are also provided into various aspects of illegal gambling, as well as the examining of new forms of gambling. In addition, this report includes valuable supplements to previous qualitative studies, as well as those conducted by other gambling institutions.

The findings of this report will inform policy and activities relating to the promotion of responsible gambling, protection of gamblers, assistance to problem gambling, eradication of illegal gambling, as well as educating the society about the nature, risks and odds of gambling, amongst others.

The board would like to extend its appreciation to Prof Philip Frankel and Dr Stephen Louw for the dedicated way in which the project was executed, finalised and the findings presented to the board.

Prof Linda de Vries
Chairperson: National Gambling Board

CONTENTS

TABLES

TABLE 1: FOCUS GROUPS BY DEMOGRAPHIC CRITERIA, 2013.....	16
TABLE 2: FOCUS GROUPS BY GAMBLING MODE, 2013.....	17
TABLE 3: FOCUS GROUPS – MISCELLANEOUS, 2013.....	18
TABLE 4: STANDARDISED INTERVIEWS-BREAKDOWN BY PROVINCE, 2013.....	19
TABLE 5: MOTIVATION - UNDERAGE GAMBLING, 2013.....	29
TABLE 6: MOTIVATION-GENDER, 2013.....	36
TABLE 7: MOTIVATION – NATIONAL LOTTERY, 2013.....	39
TABLE 8: REASONS FOR PURCHASING NATIONAL LOTTERY TICKETS, 2013.....	40
TABLE 9: MOTIVATION-BETTING, 2013.....	42
TABLE 10: MOTIVATION – CASINOS, 2013.....	45
TABLE 11: ATTRACTION OF CASINO GAMBLING, 2013.....	45
TABLE 12: MOTIVATION-LPMS, 2013.....	47
TABLE 13: SOCIAL IMPACT-FRIENDS, 2013.....	71

ACKNOWLEDGEMENTS 1

EXECUTIVE SUMMARY 6

INTRODUCTION..... 6

KEY FINDINGS..... 7

General..... 7

Social impacts..... 8

Recommendations..... 9

THE SOCIAL IMPACT OF GAMBLING 11

1. INTRODUCTION AND RESEARCH OBJECTIVES 11

1.1 *Social impact*..... 12

1.2 *Terms of reference*..... 14

2. RESEARCH OVERVIEW AND METHODOLOGY..... 15

2.1 *Methodology*..... 15

2.2 *Structure of the report*..... 19

3. RESEARCH FINDINGS: ATTITUDES 20

3.1 *General attitudes to gambling*..... 20

3.2 *Gambling as leisure activity*..... 22

3.3 *Perceptions of the gambling industry: Fairness*..... 24

3.4 *The rural gambler*..... 26

3.5 *The underage gambler*..... 27

3.5.1 *The standardised interviews*..... 29

3.5.2 *Conclusion*..... 29

4. GAMBLING BEHAVIOUR AND MOTIVATION 30

4.1 *Recruitment into gambling*..... 30

4.2 *Motivational dimensions: Withdrawal or escapist gambling*..... 31

4.3 *Non participation: Abstention from gambling*..... 33

4.4 *Gender and gambling*..... 35

4.5 <i>Gambling and social grants</i>	36
5. GAMBLING MODALITIES	37
5.1 <i>Regulated (legal) gambling</i>	38
5.1.1 The National Lottery.....	38
5.1.1.1 Results from standardised questionnaires (the National Lottery).....	39
5.1.2 Horse racing and betting	40
5.1.2.1 Findings from standardised interviews (horse racing and betting)	42
5.1.2.2 Integrity and the horse racing industry: A vignette.....	42
5.1.3 Casinos	44
5.1.3.1 Results from standardised questionnaires (casino gambling)	44
5.1.4 Limited payout machines (LPMs).....	46
5.1.4.1 Findings from standardised interviews (LPMs)	47
5.1.5 Bingo	47
5.1.5.1 Results from standardised interviews (bingo).....	48
5.2 <i>Unregulated (illegal) gambling</i>	48
5.2.1 Poker	48
5.2.2 Cards, dice and fahfee.....	50
5.2.3 Internet gambling.....	51
5.2.4 General awareness about internet gambling	52
5.3 <i>The Dynamics of Gambling Action</i>	52
5.3.1 Skills, risk and luck	53
5.3.2 The “slots player-machine” relationship	53
6. THE SOCIAL IMPACT OF GAMBLING	54
6.1 <i>Leisure and recreational gambling</i>	54
6.2 <i>Problem Gambling</i>	58
6.2.1 The nature of problem gambling	59
6.2.2 The entrapment process (and its consequences)	60
6.2.3 Gender and problem gambling.....	66
6.2.4 Mitigating the impacts/rehabilitation	67
6.2.5 Results from the standardised questionnaire (problem gambling)	70
7. A CULTURE OF RESPONSIBLE GAMBLING	71
7.1 <i>Public communication and education</i>	71
7.2 <i>The way forward</i>	74
8 CONCLUSION	77
8.1 <i>What has stayed the same</i>	77
8.2 <i>What has changed</i>	77
8.3 <i>What are the regulatory implications?</i>	78
REFERENCES	80

APPENDIX TO THE REPORT	83
APPENDIX 1: STANDARDISED INTERVIEW SCHEDULE.....	83
<i>BACKGROUND.....</i>	<i>83</i>
<i>BREAKDOWN OF PEOPLE INTERVIEWED</i>	<i>84</i>
<i>INTERVIEW SCHEDULE</i>	<i>86</i>
APPENDIX 2 – THE FOCUS GROUPS.....	91

EXECUTIVE SUMMARY

Introduction

The National Gambling Board (NGB) commissioned a study in 2013 with the main aim to examine the social impact of gambling on South Africa using a purposive qualitative methodology.

This involved the use of 29 focus groups based on a demographic sample reflecting the diversity of gambling population in South Africa, the main modalities they use and a number of “special” groups such as problem gamblers, non-gamblers, addiction psychologists etc.

The 29 focus groups, which were conducted nation-wide, were supplemented by a 500-person standardised questionnaire survey conducted at or near various gambling outlets, as well as 50 semi-structured interviews with punters and other stakeholders.

The study was divided into a number of parts which variously examined the attitudes towards gambling extracted from our sample, their behaviours, and the range of modalities from the regulated to the unregulated as essential precursors to the analysis of social impact.

The dynamics of gambling action were also examined, looking at such factors as skill, luck, risk, and the relationships developed between gamblers and the modalities they use as an essential precursor to the analysis of social impacts.

The following social impact section focused on both positive and negative aspects of gambling impacts through an examination of leisure-oriented recreational gambling, problem gambling, and the impact of gambling on under-age gamblers. In mitigating undesirable social impacts, the rehabilitative opportunities available to problem gamblers were also evaluated.

The final sections of the study look at the possibility for a culture of responsible gambling and make a number of recommendations to policy-makers in the sector.

Key Findings

General

1. Gambling has become “normalised” behaviour in South Africa. Very few participants in the study raised serious moral concerns about gambling, and nobody called for a comprehensive ban.
2. The social demand for gambling is relatively stable, despite the development of new gambling products. South Africans, it appears, are able to manage their gambling behaviour in a relatively mature fashion.
3. Due to the development of new gambling modalities based on internet and mobile technology platforms, it will be necessary to rethink current views on land-based, mainly destination-type gambling operations.
4. Scepticism was displayed by many participants towards the integrity of gambling operations in South Africa. Many regular players believe the industry should be more accountable even though they continue to play.
5. The difference between urban and rural gamblers is often over-stated, and there is little evidence of a proliferation of gambling in the rural areas. This is largely because of the absence of discretionary funding.
6. Under-age gambling is widespread, shaped by class, culture and geographic location. Whatever the form, it needs to be seriously monitored and, at very least, controls over access to limited payout machine (LPM) venues needs to be improved.
7. There is a strong correlation between class, location and gambling preferences. The lower the income or class status, the more likely are gamblers to favour unregulated or informal community-based games such as dice cards or fahfee (in some areas of the country).
8. LPMs are emerging as a distinct gambling modality in South Africa while electronic bingo terminals (EBTs) are beginning to capture a slice of the “impulse” market due to their location in public shopping centres.
9. Cash game or tournament poker is growing massively, in line with international trends.
10. Internet gambling, especially poker and blackjack, is highly favoured because it transcends time and space. Most people are, however, uncertain whether this type of gambling is legal or illegal.

Social impacts

1. The majority of South African gamblers are best described as “recreational gamblers”, and are able to manage their expenditure and time in a relatively responsible way. This is not to deny that there is a small category of “problem gamblers” in South Africa, or to underplay the potential significance of problem gamblers to gambling revenues in South Africa.
2. Most people in the study felt that gambling had no particularly discernible impact on their lives, and many felt that the experience of gaming had enriched or otherwise positively contributed to their social relationships outside the workplace.
3. The tendency of casinos and horse racing facilities to offer a complex of entertainment of which gambling is only a single component – destination-style gambling – has transformed gaming in many cases into a family activity, where the main objective is to obtain pleasure rather than to win money.
4. Gambling can, ironically, have a positive social impact, insofar as it creates space for people to withdraw from the pressures of normal life. This is especially important for women who have to deal with stress arising from domestic circumstances.
5. High-risk gambling with negative impacts can nonetheless occur, inter alia, where people develop an exaggerated sense of self-confidence (especially in poker), under peer pressure (among adolescents) or when gamblers believe in the efficacy of certain culturally ingrained symbols and rituals (ancestor-blessing in the traditional sectors).
6. Problem gambling in South Africa displays similar generic features to problem gambling in other societies. It also has the same social meaning in both rural and urban areas although the language used to express the phenomenon is different.
7. Problem gambling contains both cultural and class (economic and political) components. Many upper-edge South African gamblers do not get into severe trouble because they have sufficient disposable income to finance their gambling habits.
8. Problem gambling has impacts on family, particularly wives, partners and children, which requires more focus than on the immediate victim. Many families suffer worse psychological disruption than do the problem-gamblers themselves.
9. The dynamics of addictive gambling are different for each gender. Female addicts are attracted to gambling opportunities largely because of social isolation while men seek the opportunity for self-definition and social projection. Both agree that mood is more important than money.

10. Efforts to mitigate social impacts ultimately require structural action beyond the capability of the gaming industry. Alleviation of poverty in the rural areas is, for example, critical to reducing the number of people forced into so-called “survivalist” gambling, especially in the illegal gambling sector.
11. At the more micro level, there are far too few facilities to deal with rehabilitation outside the main urban concentrations. Far more needs to be done to communicate and expand the work of the National Responsible Gambling Programme (NRGP) in areas such as public education and addiction management among the young.

Recommendations

1. The following key findings and issues warrant immediate consideration, and should be considered further by the appropriate regulatory bodies:
 - a. In terms of general regulation, the public clearly appreciates the opportunity to gamble (or not). There is, however, a continued need to support existing educational initiatives aimed at enhancing player understanding of risk, odds, and fate.
 - b. There is a need to support and extend programmes that reach out to underage gamblers. Clearly, people under 18 gamble, usually on LPMs or the National Lottery. One way to do this would be to conduct longitudinal studies of underage participation in these two gambling modes, much as has been done with under-16 lottery gamblers in the UK.
 - c. Access control at LPM venues needs to be improved in order to prevent underage gambling.
 - d. The growing presence of EBTs in public spaces (shopping centres, rather than clearly defined gambling destinations) needs to be debated.
 - e. There is a need for regulators to examine carefully perceptions surrounding the integrity and fairness of horse racing. This impacts negatively on both the underlying sport and the associated gambling industry.
 - f. New forms of land-based gambling, particularly poker, pose significant challenges. Regulators need to address this, perhaps by licensing limited types of games and ensuring that these comply with strict rules and procedures. Cash games are particularly risky.
 - g. New forms of online gambling are particularly difficult to understand, and it is important to develop methodologies to assess their impact. This impact includes both the potential negative impact on gamblers and the impact on the

extant gambling industry. Neither of these problems are properly understood at present.

- h. In terms of problem gambling, it is necessary to supplement the support services offered by the NRGP. Telephonic support is not always appropriate. As a first step, there needs to be greater coordination between the NRGP and other support services, including Gamblers Anonymous.
- i. In the long term, there needs to be greater coordination between various addiction-related support services. Comorbidity is extremely common, and treatment programmes need better to address this.
- j. Finally, most studies of high-frequency gambling have sought to quantify the number of “high risk” and “problem gamblers”. It is important to include other dimensions in this research in future, particularly the contribution problem gamblers make to gambling revenues. Studies in Canada and Australia suggest that this contribution is vastly disproportional to the prevalence of such gamblers.

THE SOCIAL IMPACT OF GAMBLING

1. Introduction and research objectives

This report focuses on the results of a *qualitative* study of gambling in South Africa conducted by the Agency for Social Reconstruction in 2013 on behalf of the National Gambling Board (NGB). The study focuses on the *subjective* dimensions of the gambler's universe, i.e. the moods, feelings, attitudes, and values that drive gambling behaviour. These perceptions assist to understand the details and complexities of different types of gamblers, and to consider why they do the things that they do (or which they do not do)? Why gamblers prefer certain gambling modalities (games)? What gamblers believe about luck, chance, and fate, and how such beliefs impact gambling behaviour? What women, underage gamblers and problem gamblers feel about gambling? Finally and most importantly, various issues about how gambling impacts on individuals and social groups were investigated. This, as many other reports leads into a discussion about impacts that involve problem gambling.

The report disaggregates these attitudes, behaviours, and impacts, according to class, gender, population group (culture) and preferred forms of gambling (casino, National Lottery, limited payout machines (LPMs), bingo, horse racing and sports betting, and illegal internet gambling).

In so doing, the report differs from earlier studies of socio-economic impact in South Africa, including those conducted by the NGB (2005, 2009) and the National Responsible Gambling Foundation (NPS 2001, 2003, 2006, 2009), in that it does not seek to *quantify* levels and socio-economic impact of gambling. Rather, it provides *qualitative* insight into what different types of gamblers feel about the peculiar forms of gambling that they engage in, and why they behave in the ways that they do.

Methodologically, the report is in line with the qualitative approach taken in the seminal "Inquiry Report" conducted by the Australian Government Productivity Commission in 2010 (AGPC 2010).

The advantage of qualitative research is that it allows for the in depth exploration of gambling experiences and gambler perceptions, however, it is not able to quantify these experiences and perceptions. For example, the study below discusses some of the reasons why underage gamblers generally prefer LPM gambling, but it is completely unable to quantify the number of underage gamblers involved in LPM or any other form of gambling.

1.1 Social impact

The spread of legalised gambling in the past thirty years can be attributed as much to changes in public morality as to governments seeking to raise revenues without having to raise taxes (Clotfelter and Cook, 1989: 215-34). This has raised numerous concerns about the both the positive and negative impacts that casinos, lotteries, horse racing, and other gambling outlets have on society at large.

In their seminal edited text, *Gambling: Public Policies and Social Sciences*, Eadington and Cornelius (1997: xxi) began by noted that “understanding what gambling does when it is permitted or when it is prohibited is the foundation for good public policy”. They then set out to explore an ambitious range of factors that government’s should take into account when so doing, including the spread of gambling and new jurisdictions; Indian gambling (in North America); the economic and social impacts of commercial gambling; government planning and gambling expansion; the history and culture of gambling; lotteries; and various legal and regulatory issues.

Stimulated in large measure by this work, a wide variety of academic studies of the economic, policy, and social consequences of legalised gambling have been conducted. For general reviews of this literature, see Thorne (2012); CRP (2010) and PGS (2013). In one way or another, these all seek to identify positive and negative impacts of gambling, and recommend ways in which these can respectively be enhanced and/or controlled.

In terms of South African gambling, the sources that have most directly impacted on this study are the 2010 Gambling Review Commission (GRC 2010); Peter Collins’ (2003) study of *Gambling and the Public Interest* and National Prevalence Studies commissioned by the National Responsible Gambling Programme (NRGP). Furthermore, in South Africa, the most sophisticated attempts to study gambling frequency generally, and to identify problem gambling behaviour, are the National Prevalence Studies conducted at various intervals by the NRGP (NPS: 2003, 2005, 2007, 2009, 2010). These provide a relatively comprehensive overview of gambling frequencies and preferences in urban South Africa, as well as the best available estimates of problem gambling behaviour.

The 2010 Gambling Review Commission (GRC) is the successor to the 1995 Wiehahn Commission, which originally made recommendations for the controlled liberalisation of the gambling industry. The GRC was established by the Department of Trade and Industry (**the dti**) to review the economic and social impact of this liberalisation over the past decade and a half, and to consider the potential for the further liberalisation of gambling, especially in light of the development of new internet gambling technologies.

A central finding of the GRC report was that the South African regulators appeared to have done a good job in restricting/curtailing demand for gambling, and that the level of

problem gambling appeared to be within international norms. However, the GRC report noted with some concern the proliferation of illegal gambling in certain parts of the country, and the inability of Provincial Licensing Authorities (PLAs) to curb this potentially negative phenomenon. The GRC also pointed to the unknown dangers posed by the spread of new gambling technologies, particularly electronic bingo terminals (EBTs), which allowed for the mass roll-out of slot machines outside of casinos or LPM venues, and internet gambling.

Collins' (2003) study reflects on the regulatory and social implications of legalised gambling in complex modern economies, underpinned by changing conceptions of "public morality" and the need to develop ways to effectively regulate and where necessary mitigate the harmful impact of gambling. Collins' work is perhaps the only substantive academic analysis of gambling produced by someone involved with regulation in South Africa, in his case, the South African Responsible Gambling Foundation.

Casinos have understandably received special attention in the literature, as they are the largest single contributors to gaming revenues in most jurisdictions. This study has been informed by the work of Mallach (2010) and Morse and Goss (2007) in particular, both of which point to the extraordinary complexity involved in seeking to quantify both the positive and negative impacts of gambling. In terms of positive impacts, the fixed capital spend entailed in casino investment is relatively easy to determine – and in most cases, regulators link this to license conditions. However, casino contribution to the local and national fiscus is much more complex, in large part due to the uncertain displacement effect involved. It is not always clear whether casinos stimulate local economics, or simply shift revenues away from other service sector and entertainment concerns.

Although not considered in any detail in this report, Jeffrey Sallaz's (2009) *The Labour of Luck: Casino Capitalism in the United States and South Africa*; deserves a brief mention here. In a detailed ethnographic study of the "casino capitalism" in South Africa and the United States, Sallaz considers in considerable detail the impact of casinos on labour markets. Much like service industries generally, Sallaz concludes that the broader socio-political cleavages in South Africa are reflected and reproduced in casino labour markets, in ways that mitigate against social and economic transformation and help to perpetuate extant class and racial privilege. This needs to be considered carefully when evaluating the growth of the gambling industry.

The impact of state lotteries on society at large has attracted considerable scrutiny, not least of which because of their explicitly revenue maximising objectives, which run the risk of over-stimulating demand, especially amongst poor and vulnerable communities (Clotfelter and Cook, 1989; Garrett 2001). This danger was noted in the GRC report, which called for closer scrutiny of lottery-related advertising in particular as a way to contain this danger.

Assessing the negative impact of gambling has proven no less complex. Whilst a variety of screens have been devised to test for problem gambling, these are at best a general guide. Critical reviews have shown that these regularly produce false positives, and that many problem gamblers are sophisticated enough to give misleading answers when questioned. In the past three decades, these screens have generally improved though, and have generally moved away from a strongly medical focus, which saw problem gambling largely as a pathology, to a more sociologically informed approach that seeks to place gambling behaviour on a spectrum, and to identify various degrees of at risk behaviour (Lesieur and Rosenthal 1991; Blaszczyński and Nower 2002; and Ferentzy and Turner 2012).

Drawing on these insights, this study offers a very modest supplement to the review of social impact, understood here to include both the impact on gamblers (players) and people who do not play or seldom play, but who are effected either positively or negatively by the gambling industry in South Africa. In particular, the study of social impact here focuses on:

1. Player perceptions of the gambling industry, and how such perceptions impacts player behaviour;
2. Motivations to gamble, and the consequences of gambler belief systems;
3. Problem gambling; and
4. Responsible gambling initiatives and treatment.

1.2 Terms of reference

The Terms of Reference (ToR) for this study identified eight core issues or themes, which are listed below.

In addition, a number of secondary areas of interest (e.g. underage gambling) were identified in consultation with the Project Steering Committee. As such, the report goes substantially beyond the Terms of Reference in many places.

The original Terms of Reference are dealt with in the following sections of the report:

CORE THEME	LOCATION IN REPORT
Attitudes and perceptions of gamblers	Section 3
Sources of funding for gambling activity	Section 4.5 (and portions of Section 7). Both Section 4 and the following section (Section 5) were not called for in the TOR but were brought into the analysis as key components for any study of contemporary gambling behaviour.
CORE THEME	LOCATION IN REPORT
The impact of gambling	Section 6

Measures to assist problem gamblers	Section 6.4 and portions of Section 7
The enticement of a responsible gambling culture Attitudes towards substance abuse and risk behaviour The use of advertisements and public education around gambling	Section 7
The implications of the above for regulation	Section 8

2. Research overview and methodology

The study was conducted by the Agency for Social Reconstruction (ASR). The management team consisted of Professor Philip Frankel and Dr Stephen Louw. They were assisted by four senior researchers: Thapelo Lekgowa, an independent researcher in the North West Province; Keitumetse Letsoalo and Liziwe Tyotu, both MA students at the University of the Witwatersrand; and Mkhuseleli Sipambo, an independent researcher in the Western Cape. Together this team conducted all of the focus groups and in-depth interviews.

One of the secondary goals of the project was to develop the research capacity of previously disadvantaged researchers, with the goal of broadening the pool of researchers involved in gambling studies in South Africa.

The senior researcher and the field-researchers were trained over a period of two months during January and February 2013. A special training tool was developed by ASR to acquaint them with the state of gambling research in South Africa, the key issues normally raised in gambling analysis, how to conduct interviews according to best-practice, and the general philosophy behind the current project.

At field level, two or three field workers were recruited per province through local sources to undertake the short, standardised interviews.

The short interviews involved an open-ended standardised questionnaire, which is attached as Appendix 2.

2.1 Methodology

A two-phase approach was adopted in consultation with senior officials of the NGB at an initial meeting devoted to the development of a work plan. This was held in December 2012.

The mutually agreed work plan initially envisaged a series of 20 focus groups, which, on the advice of ASR, was then raised to 29 focus groups to accommodate the diversity in the gambling community. These were to be conducted amongst carefully selected demographic and gaming communities. This allowed us to identify key issues and to develop a questionnaire and interview protocol.

The exact focus groups were selected in consultation with the NGB including its then-CEO and some members of the Research and Ethics Committee. There were *not* intended to be nationally representative, and were biased deliberately in terms of race, class, and gaming mode dynamics deemed particularly relevant to the study.

The groups convened were divided for convenience sake into:

1. Demographic Groups x 14 which reflected various gambling “communities”;
2. Modality Groups x 11 of which focussed on different gambling modalities with particular emphasis on newly emerging forms of gaming such as EBTs and the Internet;
3. Special Groups x 4 such as non-gamblers, whose inclusion was felt important to round out the analysis.

Table 1: Focus Groups by demographic criteria, 2013

FOCUS GROUPS BY DEMOGRAPHIC CRITERIA, 2013			
	Demographic Groups	Place	No
1	Black, urban, middle income, mixed gender	Melville – Johannesburg	14
2	Black, urban, lower income, mixed gender	Thokoza – Ekurhuleni	15
3	Black underage youth, urban, lower income, mixed gender	Pimville – Soweto	8
4	Black, rural, low income, male	Newcastle – KZN-Natal	19
5	Black, rural, low income, female	Newcastle – KZN-Natal	22
6	White, urban, middle income, mixed gender	Sandton – Johannesburg	17
7	White urban, lower income, mixed gender	Melville – Johannesburg	14
8	White underage youth, urban, mixed income, mixed gender	Westdene - Johannesburg	8
9	Coloured, urban, middle income, female	Cape Town – Western Cape	8

FOCUS GROUPS BY DEMOGRAPHIC CRITERIA, 2013			
	Demographic Groups	Place	No
10	Coloured, peri-urban, lower income, mixed gender	Pniel – Western Cape	8
11	Coloured underage youth, urban, mixed income, mixed gender	Cape Town – Western Cape	9
12	Indian, urban, middle income, mixed gender	Tongaat – KZN-Natal	13
13	Indian, urban, lower income, male	Phoenix – Durban	14
14	Indian, urban, lower income, female	Phoenix – Durban	15

The focus groups composed on the basis of gambling modality (type) were:

Table 2: Focus groups by gambling mode, 2013

FOCUS GROUPS BY GAMBLING MODE, 2013			
	Modality Groups	Place	No
15	Poker and blackjack players	North–Eastern Johannesburg	8
16	Poker players	Cyrildene, Kelvin & Berea– Johannesburg	15
17	Horse racing (wagering)	KZN – Greyville	12
18	Sports betting	Gauteng – Johannesburg	6
19	Internet gamblers	Gauteng – Johannesburg	16
20	Internet gamblers	Western Cape – Cape Town	4
21	LPM players	Western Cape – Cape Town	6
22	LPM players	Western Cape – Betty's Bay	6
23	Electronic Bingo players	Gauteng – Johannesburg	6
24	Casino players	KZN – Durban	6
25	Casino players	Western Cape – Langebaan	6

The six special groups were:

Table 3: Focus groups – miscellaneous, 2013

FOCUS GROUPS – MISCELLANEOUS, 2013			
	Special Groups	Place	No
26	Problem gamblers (in therapy), mixed gender	Gauteng – Johannesburg	19
27	Problem gamblers (in therapy), mixed gender	KZN – Durban	15
28	Non-gamblers	North West – Rustenburg	8
29	Non-gamblers	North West – Rustenburg	8
30	Horse racing operators/stakeholders	KZN – Greyville	16
31	Addiction psychologists	Gauteng – Johannesburg	6

The sociological composition of these groups, as well as a brief summary of key issues raised, is provided in Appendix 1.

Phase two involved the conducting of 500 standardised short interviews, and 50 in depth, semi-structured interviews. Although these interviews were conducted in all nine Provinces, in both urban and rural areas, they were *not* intended to comprise a stratified random sample.

Rather, this study sampled for heterogeneity (or diversity), with a view to gaining insight into a broad spectrum of different gambling communities stratified according to games played as well as race/class. As with the focus groups, the intention was to understand why people like particular forms of gambling, sometimes more so than other forms, and why people played as much or as little as they did.

It must also be emphasised that the standardised interviews were conducted with people who gamble reasonably regularly. It is less than surprising to learn that they have generally positive views of the gambling industry, and particularly of the games they clearly enjoy playing. The answers given provided useful insight into the mind of particular gambling communities, not the general population.

The standardised questionnaire contained 22 questions, 4 of which contained demographic information and 18 open-ended questions (see Appendix 1).

The open-ended questions were coded thematically using a Qualitative Data Analysis Programme, Coding Analysis Toolkit (CAT), and then analysed using IBM Statistical Package for Social Scientists (SPSS) software.

The breakdown of standardised interviews was as follows:

Table 4: Standardised interviews-breakdown by province, 2013

STANDARDISED INTERVIEWS BREAKDOWN BY PROVINCE, 2013		
Province	Gambling communities involved	No
Eastern Cape	Casino, LPM, Lotto, Betting (horse racing)	45
Free State	Casino, LPM, Lotto,	45
Gauteng	Casino, LPM, Lotto, Betting (sports, horse racing), Bingo, Electronic Bingo	75
KwaZulu-Natal	Casino, LPM, Lotto, Betting (sports, horse racing)	75
Limpopo	Casino, LPM, Lotto	45
Mpumalanga	Casino, LPM, Lotto	45
North West	Casino, LPM, Lotto	45
Northern Cape	Casino, Lotto	45
Western Cape	Casino, LPM, Lotto, Betting (sports, horse racing)	80

2.2 Structure of the report

The focus of this report is on the social impacts of gambling, i.e. the social consequences of the fact that people sometimes gamble in a way which either positively or negatively affects their lives, those of others and, in some cases, the wider communities to which they belong. Gambling has social consequences and this is, in the end, the focal point of this investigation.

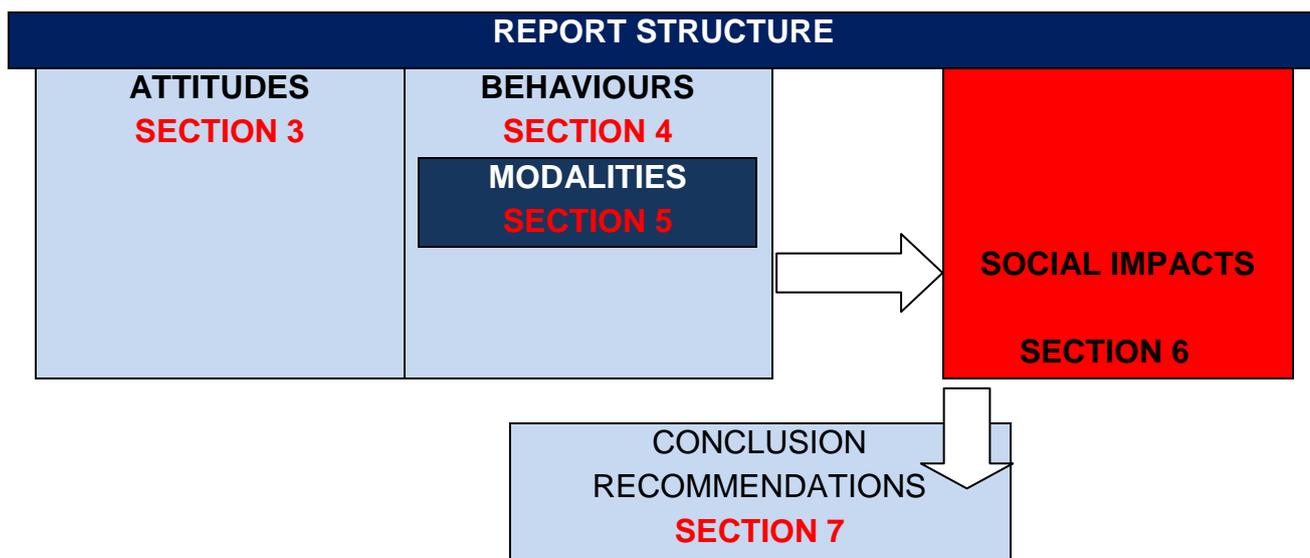
To start with, it needs to be understood how people perceive gambling and the gambling industry, and how their social circumstances shape these subjectivities. This can be influenced by the geographic space occupied by people. For example, rural people may see gambling in a different way from their urban counterparts. All of these questions are covered along with others in Section 3, which follows.

Section 4 and 5 is then concerned with how people behave i.e. act, in some manner, on their perceptions and attitudes. Attitude-based behaviour is the pre-cursor to social impacts, which are unintelligible apart from how people are drawn into gambling, why South Africans do not gamble, their gender or the finances and their disposal. People, of course, gamble in all kinds of ways which reflect such variables as luck, skill or their relationship to various gambling technologies of a higher or lower order. Some of the modalities of gambling are governed by laws, but others are unregulated.

Section 6 is specifically focussed on the social impacts which are, in a sense, the end-products of attitudes and their manifestations across a range of gambling modalities. While the emphasis in most of the literature are on the negative impacts – the problems

caused by gambling (and the severe problems sometimes caused to individuals – some of the more positive spinoffs that make gambling a pleasurable and benign recreational activity for growing numbers of South Africans of all ages, classes and different cultural persuasions), are also investigated.

The concluding sections examine a number of issues that need to be taken into particular account by policy-makers working to regulate the future, as well as some recommendations that could be considered.



The Report concludes with References and Appendixes, which covers the structured interview schedule that was used, information on the focus groups and a section on the breakdown of participants who were interviewed.

3. Research findings: Attitudes

This section provides an overview of participant’s general attitudes to gambling, as well as their preferences in terms of gambling location and mode (game). It must be emphasised that this does not purport to offer any insight at all into the mind of the “average South African”, or even the “average gambler.” As stated above, sampling was purposive: The aim was deliberately to explore the views of different types of mostly regular gamblers engaged in one or other form of gambling around the time of the interview.

This section should be read in conjunction with section four, which provides in depth commentary on each of the major regulated gambling sectors in South Africa.

3.1 General attitudes to gambling

It is clear that gambling has become “normalised behaviour” in South Africa. Very few participants raised substantial moral concerns about gambling. Nobody called for a

comprehensive ban on gambling. In this sense, our results align with Monnye's (2012: 221) observation that:

“Gambling has undergone a metamorphosis from being immoral, to becoming amoral, and from being a leisure activity, to becoming an income-generating recreational activity. In South Africa, the regulation of gambling is no longer based on morality, but on a set of principles ranging from income-generation through taxes, job creation, and economic empowerment, as well as promotion of tourism and other recreational activities”.

Regulators all over the world acknowledge this. Bluntly put, this suggests that gambling is no longer viewed contentiously as an issue of public morality but, rather, is embraced as an economic alternative to higher taxes.

This sense of “diminished fascination” with gambling correlates with other evidence of declining participation rates in almost all forms of regulated gambling in South Africa.

Many participants claimed that they were less interested in gambling now than they had been in the past. For them, “normalisation” means that the gambling industry has lost much of its mystique and fascination; it is simply one form of entertainment amongst many.

Indeed, when asked whether they considered gambling to constitute “normal behaviour”, fully 91.8% of all participants answered “yes, it is just harmless entertainment”. This sentiment was expressed across all demographic and geographical lines, although participants in Gauteng (89.3%) and the Eastern Cape (88.9%), as well as sports betting enthusiasts (87.5%), underage gamblers (15-17 yrs, 8.4%), and whites (89.2%), were very marginally more concerned than participants elsewhere.

From a regulatory point of view, this is a healthy development, as it suggests that “social demand” for gambling is relatively stable. Put differently, despite the development of new gambling products, most notably internet-based gambling, latent demand for gambling has not been unduly stimulated, and South Africans appear to be able to manage their gambling behaviour in a relatively mature fashion.

Many of the focus group participants raised concerns about the impact of gambling on their families and communities, and most had heard of or had been personally affected by someone with “a gambling problem”.

This was some evidence to suggest that this sense of concern was particularly pronounced amongst female members of the coloured community in the Western Cape, and amongst members of the Indian community generally in KwaZulu-Natal.

No evidence of widespread resistance to the growth of the gambling sector in South Africa was found. When asked whether measures should be taken to limit the spread of gambling – i.e. to curtail demand – a substantial majority (82.6%) answered “no, things are OK right now”.

It is clear, however, that, as new gambling modalities open up, particularly those based on internet and mobile technology platforms, the public will be forced to rethink some of their current views of land-based, mostly destination-type, gambling operations.

Already there appears to be some resistance to the spread of gambling operations into easily assessable public areas, including shopping centres. When asked whether they were worried about the presence of gambling in public spaces, just over a quarter of participants claimed to be slightly (22.4%) or very (6.2%) concerned about such developments.¹

In summary: Although levels of problem gambling appear to have stabilised over the past decade, regulators need to remain vigilant and continue to monitor the social impact of gambling.

3.2 Gambling as leisure activity

Distinguishing “recreational” from both “problem” and “pathological” gamblers is always problematic, and there is no clear agreement in the literature as to the best way to identify and analyse the “cluster” of gamblers who fall into the latter categories (c.f. Lesieur and Rosenthal 1991; Blaszczynski and Nower 2002; and Ferentzy and Turner 2012, for a good overview of changing approaches to this problem).

Using two of the most widely used “screens”, the most recent National Prevalence Study (NPS 2009) estimates that between 3% (PGSI Screen) and 4.7% (GA-20 Screen) of the total adult South African population can be considered “problem gamblers”.

Although the overall level of problem gambling appears to have stabilised over the past decade, it must be remembered that levels of gambling participation have declined in the same period, which suggests that a greater percentage of those that gamble can be considered “at risk”.

¹ On the relationship between problem gambling and destination style gambling generally, see Young, Tyler and Lee (2007), which reviews at length the trade off between attempts to “socially reposition the burden of harm” by locating gambling venues in more affluent areas and in designated gambling “destinations” – and which therefore run the risk of increasing problem gambling amongst the better off sectors of the community that are able to travel to and gamble in casinos; and attempts to position gambling machines in easily accessible venues that are not specifically gambling destinations and which are frequented by a wider range of socioeconomic groups, thus running the risk of problem gambling by stimulating “convenience gambling” in these new markets.

Moreover, the actual contribution of revenues from “problem gamblers” is not known. If this contribution considerably exceeds the prevalence rate – as studies conducted in Canada (Williams and Wood, 2004) and Australia (AGPC 2010) suggest – then this further complicates our understanding of negative social impact, and would suggest that problem gambling is a much bigger social challenge in South Africa than is currently known.

There is an urgent need for a serious study of the contribution of problem gamblers to gaming revenues in South Africa.

This study does not attempt to quantify problem gambling, or to administer any of the various screens to identify problem gamblers. Instead, both the focus groups and the in depth interviews asked participants to consider the impact of gambling on their lives, particularly in terms of money lost and time spent. Across the board, most participants described their gambling behaviour as a conscious recreational choice, and believed that they understood the associated costs and benefits of gambling. Most played with relatively small amounts of money, and only a minority admitted to spending considerably more than they are able to afford.²

This does not mean that the researchers did not come across people who “chased their losses”, or who were not always able to control the time and the amount of money they spent gambling. One group, of Western Cape coloured youth (under 18 year olds), stood out as particularly inclined to gamble in a conspicuous and ostentatious way, a form of social bravado that, whilst not desirable and certainly “risky”, is hardly out of character for rebellious teens seeking to assert themselves amongst peers. One member of this group went so far as to suggest that he and his classmates gambled in class when the teacher stepped out of the class.

A more representative focus group comprised middle-class Benoni housewives, who met once a week at Carnival City. Most played slots very cautiously with “extra” money rather than income deducted from household finances. Most “invested” their winnings in further gambling, or simply spent it on fun items such as clothes or jewellery. None were especially concerned about losses but obviously welcomed their wins. With one or two exceptions, none appeared to “chase-their-losses” as a regular style of play or engage in other compulsive behaviours common to problem gamblers. They did not play with money they did not have.

Significantly, this group all described gambling as a purely social activity that gave them the opportunity to put aside their responsibilities and meet “the girls” at a venue where

² In this regard, South Africa is no different to other gambling jurisdictions, where gambling operators derive a considerable proportion of their profits from the small minority that is willing and able to loose substantial amounts of money (AGPC 2010). This is the most “at risk” category of gambler.

they had come to know both the casino staff and several other gamblers. They would normally follow an hour or two at the slot machines with lunch and then depart to their respective homes and the obligations posed by husbands and children.

Generally, men were more open about the extent of their gambling, and their gambling expenditure, than women. A majority of male participants claimed to have gambled more than twice a month (bearing in mind that the interviews were conducted amongst people who indicated that they gambled).

Across gender and race, there is considerably less surreptitiousness around gambling than once there was, and very few people in any interview (or the focus group) continue to associate gaming with some sort of vice, pathology or immoral act. This appears to cut across all social divisions, with the possible exception of the older generation and some poor people who are reliant on gambling for a living.

Findings on problem gambling gleaned from the standardised interviews are discussed in section 6.2 below.

3.3 Perceptions of the gambling industry: Fairness

Levels of scepticism were displayed by many participants towards the integrity of gambling operations in South Africa. This applied equally to both men and women across all population groups, and, to a lesser extent, class (upper income participants were slightly less sceptical).

Both the focus groups and the in-depth interviews, as well as the standardised interviews, revealed a widespread perception that gambling operators are able to adjust the odds in such a way that they maximise their profits at the player's expense. This is particularly the case with slot machines. Casino table games and poker by contrast were regarded as considerably fairer. (Richer, better educated, people typically played these games.)

When asked whether they believed that gambling operators manipulated payout levels for their own advantage, fully a quarter (25.4%) answered "yes".

In order to mitigate this, many "regular" gamblers, particularly those playing slots, took elaborate measures to try and tilt the odds in their favour. This ranged from personal rituals – stories were told about how they touched the machine, what they wore, who they played with or talked to whilst playing, when they played, etc. – to more problematic

assumptions about the ability to calculate house advantage – i.e. to work out which machines had the highest pay-outs – and to adapt their playing patterns accordingly.³

There is an obvious danger in any misplaced sense of an ability to “outsmart the house”, and such beliefs are generally believed to contribute to problem gambling behaviour.

Some gamblers were suspicious of the way in which winners of the National Lottery were selected. One particularly popular theory maintained that certain balls were weighted, enabling the operator to select combinations that no-one had actually bought, and thus to retain a greater share of the “profits”. This belief was particularly common amongst black participants generally, and amongst lower income, less educated, female players. In some cases, mostly in Gauteng, some players from this latter social constituency preferred fahfee to the state lottery, claiming that fahfee was inherently fairer and that everyone had an equal chance of winning.⁴

The horse racing industry was widely believed to be manipulated by trainers and jockeys, and many of the participants, particularly young Indian men, claimed that they had migrated to other forms of gambling in response.

Some regular players, especially those who placed large bets, felt that the industry needed to be more accountable to what one elderly Indian punter described as “its investors”. Others, who had lost relatively heavily, were understandably cynical and alleged that the “system” in some or another form was rigged against them. In more abstract terms, such players were unable to distinguish between a system that is “rigged”, i.e. unfair or dishonest; and simple house advantage, in which the player is statistically less likely to win. Once again, this belief was more pronounced amongst less well-off participants.

Despite these widespread concerns – and, perhaps, because of these – people still gambled. Although players often attributed their choice of gambling mode to their sense of its relative fairness, nobody in either the focus groups or the long-interviews cited that they did not gamble because the industry was inherently unfair. Instead, whilst many took steps to try and tilt the odds in their favour, the vast majority simply resigned themselves to the fact that they were unlikely to “win big” but would have a good time trying to do so.

From a regulatory point of view, the need continually to combat the belief that it is possible to outsmart the house, and to ensure that players understand just how unlikely they are to ever win, needs to be reinforced.

³ As numerous studies show, slot machine players all over the world tend to believe that they can anticipate payback percentages, but in actual fact are seldom if ever able to do so (see Lucas and Singh 2011). Casino customer loyalty and retention strategies deliberately play on this belief.

⁴ For detailed studies of fahfee in South Africa, see Louw (2013), Krige (2011), and Dugmore (1990).

3.4 The rural gambler

In our view, much of the gambling literature overstates the distinction between rural and urban gamblers, and understates the ability of poor (mostly black) people to understand the consequences of their economic decisions and to gamble in a controlled and deliberate manner. In this sense, our results accord with Dellis et. al.'s (2012) study of rural and peri-urban voters in KwaZulu-Natal.

To this end, focus groups were held with both male and female rural gamblers in KwaZulu-Natal. Both groups (and here there were no significant gender differences) suggest that the psychology of rural gamblers is no different to their urban counterparts. Essentially the same thing motivates both: A sense of excitement stemming from the combination of “controlled risk” and the prospect of striking it lucky and “winning big”.

The National Lottery is by far the most accessible and widely embraced form of gambling in rural communities where gambling is limited to low-level games such as dice, cards, informal betting or a number of other traditional practices. For many rural people the National Lottery offers a connection to a wider aspirational (fantasy) world, a dream that is consciously and perhaps irresponsibly manipulated by National Lottery's advertising campaigns.

Dice and card games are the next most widely played games, although, according to the focus group participants, rural communities usually associate such “corner-street card games” with township tsotsi's. This was a very specific concern about a particular gambling modality, which did not spill over into a moralistic condemnation of other forms of gambling.

The overwhelming majority of rural gamblers do not gamble in casinos, although many have waged small amounts at LPM's. Casinos are almost universally seen as too expensive, particularly because of associated transport costs. Many small towns have LPM's, which are far more accessible to rural gamblers. The highest levels of rural gambler LPM participation were encountered in the Western Cape.

Rural gamblers generally lack information about the risks of gambling, partially because of high rates of illiteracy. Most of the rural participants seemed uncertain about which games were legal, or at what age one could gamble legally.

Very few rural gamblers in any part of the country felt that gambling should be banned, or advocated firmer controls. This was especially the case among younger people, and confirms the extent to which gambling has become “normalised behaviour” in South Africa.

The majority of rural participants in the two focus groups felt strongly that there should be more “official” or “organised” gambling outlets in the areas that they lived in. In large measure, this reflected a broader concern for the development of infrastructure in their communities rather than latent demand for gambling.

A significant number of rural gamblers were concerned that gambling in urban townships was often linked to other social vices, particularly drugs and alcohol. In both the long-interviews and focus groups, the facilitators were assailed with a variety of personal accounts of moral failure, the inevitable degradation of “some other person” into drug-addiction, crime and poverty.

In summary, there is little evidence that gambling is a major social problem in rural areas. What limited gambling there is, is limited as much by financial constraints as by conscious limits that rural and poor people generally placed on their discretionary expenditure. Rural gamblers generally did not associate gambling with major social ills in their own communities, but were concerned about the impact of some forms of gambling (mostly dice and cards) in urban mostly township settings.

3.5 The underage gambler

Most South African’s, regardless of colour, population group, or class, are exposed to gambling before the age of 18. In most cases, this exposure is through parents and elder siblings, but it would be naïve to ignore the extent to which people gamble at this age.

Three focus groups with underage gamblers were held. These comprised coloured, white, and black gamblers, between the ages of 15 and 17. Of all the focus groups, these were the most difficult to moderate. Most participants were proud of the fact that they gambled, and went to some length to emphasise this point; an act of social bravado that moderators needed to take seriously when interpreting responses.

All of the participants were first exposed to gambling through the National Lottery. Significantly, this was due mostly to the media rather than parents and siblings. The dream of “striking it big” was widely shared, and of considerable import to this constituency.

There are clear differences between the experiences of underage gamblers across racial lines. Aside from the National Lottery, the most widely played game for white and coloured participants was LPMs. Three reasons were offered for this: the low cost of playing compared to casinos in particular; the relatively low barriers to access and certainly compared to casinos; and the fact that LPMs were located at places where they often “hanged out” with friends. In this sense, LPM-slot gambling is their first real gateway into the world of social gambling.

Participants in all groups had heard of internet-based gambling, but were not active participants. A few claimed to “play” the British Lottery on their cell phones. The two main reasons why participants did not use internet technologies to gamble were, firstly, the cost (typically linked to the need to own a credit card), and the fact that the youth gamblers we spoke to all valued the social aspects of gambling, something that is largely absent when gambling online. Again, these results need to be interpreted in the context of an inherent selection bias, and the extent to which this is true for all underage gamblers cannot be measured.)

White underage gambling was largely limited to the National Lottery and LPMs. One female participant claimed to “sneak” into casinos regularly, but, for the most part, all accepted the controls at casinos (which they often visited with parents) and were in any case aware of the fact that they could not afford to spend much time gambling at casinos. Coloured and black underage gamblers had much greater exposure to a variety of gambling modes. Whilst none played at casinos, all had personal experience with a variety of unregulated games played in their communities, particularly dice games, betting on sports events, card games, and fahfee.

Of the three groups, the coloured youth in the Western Cape stood out as by far the most active underage gambling participants. Male participants were considerably more likely to have experimented with games other than the National Lottery and LPMs. Both male and female participants stressed the fact that games organised in their communities were often associated with violence and crime.

Black participants had the most heterodox exposure to different gambling modalities. Whilst all were exposed to the National Lottery and LPMs, participants had very different levels of exposure to unregulated “township” gambling. All had heard of fahfee, but none played it.

Clearly the experiences of youth are underpinned by geography, culture, and class. Where you live matters hugely in South Africa.

Youth in all three groups associated gambling, particularly LPM gambling, with social drinking (regardless of whether they themselves drank alcohol).

Youth in all three groups took steps to ensure that their parents did not know about their LPM and other “non-Lotto” gambling. In terms of income for gambling, most claimed to use pocket money, or to “divert” money that parents had given them for other entertainment (movies, etc.).

3.5.1 Results from standardised interviews (underage gamblers)

The standardised interviews included a group of 43 (8.6% of total sample) underage gamblers of all races between the ages of 15 and 17, almost all (40) of whom were regular LPM players. Half (21) of these gambled once or twice a month, and half (21) three to five times a month or more (1).

Interestingly, almost half (46.5%) of this age-group claimed to gamble in order to “socialise” with friends. Even when considered in conjunction with “fun-relaxation” as a motivational factor, this social aspect is clear central to the underage gambling experience, much more so than for other age groups.

It is worth noting how few (14%, half the average for gamblers of all ages) saw gambling as a way to get rich.

Table 5: Motivation - underage gambling, 2013

MOTIVATION – UNDERAGE GAMBLING, 2013		
REASONS FOR GAMBLING	Underage gamblers	All ages
Fun-relaxation	23.3%	30.8%
“Get rich”	14.0%	28.0%
Escape problems	16.3%	15.4%
Socialise with friends	46.5%	25.8%
Total	100.0%	100%

3.5.2 Conclusion

It is clear that underage youth in South Africa are experimenting with a variety of unregulated (illegal) as well as regulated (but only legal for adults) forms of gambling. Foremost amongst the former are internet-based games as well as a range of township dice and card games.

In terms of the regulated gambling sector, underage youth are most likely to experiment with the National Lottery and LPMs. These are both relatively affordable, and, for the most part, easy for underage gamblers to access.

Above all, LPM gambling is popular because it offers youth from a variety of racial and economic backgrounds the chance to combine general recreational activities with some gambling.

Early exposure to gambling needs to be taken seriously and watched carefully. At the very least, access controls to LPM venues need to be improved.

4. Gambling behaviour and motivation

This section considers various sociological aspects that influence the behaviour of gamblers, including their first exposure to gambling, their decision to participate or not participate, and gender.

This discussion should be considered in the context of a distinction that is usually drawn in the gambling literature between two broad categories of gamblers: Recreational and problem. Neither of these categories is completely clear-cut, and it makes sense to place these on opposite ends of a spectrum of possible behaviour rather than unique behavioural clusters.

The recreation gambler is mainly attracted to gambling because it is seen as a sociable and pleasurable activity that can involve friends, family or acquaintances. This sentiment is most notably encouraged by the casino industry, which offers a wider variety of entertainment options, but is increasingly central to the marketing of horse racing as well.

Problem gamblers, by contrast, tend to participate in much more individual or solitary ways, and to spend considerably more time and money gambling than they are able to afford. For this category of gambler, gambling constitutes destructive behaviour, which is likely to impact negatively on their personal and their families' lives.

Some of the social dynamics that underpin both healthy (recreational) and destructive (problem) gambling behaviour are considered below. The discussion draws almost entirely on the focus groups and the long-interviews.

It must be emphasised that none of these motivational experiences are understood as uniquely “good” or “bad”, or directly suggestive of either problem or recreational gambling. Human behaviour is complicated and multi-faceted. The discussion here is meant to enrich the understanding of this complexity, and to provide insight into the multiple different experiences that shape the behaviour of South African gamblers.

4.1 Recruitment into gambling

A common theme in the focus groups and interviews was to explore how and why people gamble. International research suggests that many under age gamblers are first exposed to gambling through members of their own family. Gamblers are often the sons or daughters of a previous generation that had also gambled, and whose behaviour had impressed itself on their offspring. In a well-known review of adolescent gambling in Wales and England, Sue Fisher (1998: 5-6) concluded that:

“Research shows that children who gamble are more likely than other children to come from home backgrounds where at least one parent is a

regular gambler. Moreover, retrospective studies have shown that adults who are problem gamblers are significantly more likely than other people to have started gambling in childhood or adolescence and to have a parent/step-parent who is/was a problem gambler.”

In South Africa, many recreational gamblers visit casino complexes with their families. Although gamblers are excluded from the gambling areas in casino complexes, this “role-modelling” would appear to underpin an intergenerational “normalisation” of gambling behaviour, understood as part of regular, legitimate, recreational activity.

In-depth interviews and focus groups with coloured youth in Cape Town, in particular, confirmed very close behavioural links between children and their adult role models. Whilst most children in the 15-17 year range felt that their parents would not approve of their gambling at their age, they all pointed to their parent’s own behaviour as support for their own involvement in gambling. Amongst this group, exposure to LPM’s through parental influences was especially significant.

Interviews suggest that “inherited gambling” normally begins very early in life with the occasional bet on a social game of dice or cards. This was particularly evident in the case of males who, irrespective of socio-economic status, had been habituated to gambling in their teens. Others, particularly women, had no particular interest in gambling until being invited to a casino or bingo hall much later in life.

Progression into the more dangerous forms of gambling is also often the result of older family members condoning gambling behaviour.

4.2 Motivational dimensions: Withdrawal or escapist gambling

People gamble for many reasons, and there is a vast literature on the factors influencing the decision to gamble (or not to gamble). One particularly useful study identified five motivational traits, namely “the dream of hitting the jackpot and transforming one’s life, social rewards, intellectual challenge, mood change induced by playing, and – the fundamental motive for all gambling – the chance of winning” (Binde 2012, 81).

Different games appeal to this combination of factors in different ways: Poker and slot machines, for example, offer quite different possibilities for intellectual reward.

Of particular concern to regulators tasked with monitoring the social impact of gambling is an excessive appeal to life-changing dreams (the big win) and associated mood changes. This is often described as “withdrawal” or “escapist” gambling, and implies a desire to isolate oneself from the rigours of daily life. In itself there is nothing particularly unique or

dangerous about this behaviour. People often attend plays or read books with the same goal in mind. That is the nature (indeed the value) of the entertainment industry.

The danger, however, is one of degree. For a small category of gamblers, gambling is much more than a temporary “fantasy”, and offers a dangerous shield from the mainstream events of personal or social life. For such players, “escapism” is a disproportionately significant motivational dimension of gambling behaviour, more so than other factors such as the chance of winning or intellectual challenge. In various ways, the screens used to identify problem gamblers pay particular attention to this trait.

The focus groups suggest that South African gamblers value the escapism and the general fantasy associated with gambling, but that this is regulated consciously, and only a few take this to extremes and immerse themselves in their gambling in order to shield themselves from other life experiences and responsibilities. Other motivational dimensions, in particular social and financial rewards, are prominent determinants of this behaviour.

Similarly, the standardised interviews suggest that a sizable minority (15.4%) of participants gamble to “escape their problems”. This sentiment was significantly more prevalent amongst underage males (18.8%) than females (14.8%).

Here a key differentiator is the nature of the games played, and the venues at which the games were played. Games played in an individual way, particularly slots (including casino slots, LPMs and EBTs), and most internet games, provided a significant “withdrawal” experience, whereas other games involved a much more social experience, in which players competed with and alongside each other.

The focus groups and in-depth interviews suggest that “escapist withdrawal” is a particularly important motivational dimension amongst older female gamblers. Many women described casinos as a place in which they could “turn off the pressures of life” and, through slot machines in particular, engage with a technology that made no intellectual demands on them whatsoever. In one focus group in Gauteng, a high-frequency middle-aged female participant was encountered whose spouse did not gamble at all, but who was happy to accompany his wife to the casino. Here he spent the evening in the bar while she happily played slots.

Participants in a focus group with low-mid income women in Langebaan in the Western Cape displayed the same escapist tendencies, and clearly saw the casino as temporary respite from what one participant described as her husband’s “behavioural problems”. For the group, generally, slots provided a refuge from the perceived pressures and boredom of everyday life, in which they, as mothers and housewives, were forced to juggle multiple responsibilities with scant support or recognition from their male partners.

The gambling modality that most obviously and controversially appeals to the prospect of a “big win” and associated life changes is the National Lottery. Unlike other forms of gambling, playing the Lottery is deliberately advertised as a chance to accumulate wealth and prestige. Advertising campaigns clearly appeal to this sentiment and seek to stimulate demand for the National Lottery. This kind of advertising is not allowed with other forms of gambling.

As mentioned previously, there is a correlation between class, education, and the “lottery dream”. In the focus groups with rural and poor gamblers, as well as both the standardised and semi-structured interviews, the National Lottery were regularly describes as a means to affect a substantial alteration in opportunity and life style, rather than a form of recreation.

As noted above, the fact that the National Lottery so obviously seeks to stimulate demand for its product by presenting itself as a means to an end, a chance to strike it big, is of significant concern to regulators.

It bears repeating that neither the focus groups nor the interviews suggested that poor people were unable to manage their gambling expectations, or that they had particular lottery-induced gambling problems.

From a regulatory perspective, this suggests that the motivation for gambling varies significantly, and that, rather than simply try and distinguish between recreational and problem gambling, much more complex motivational models should be delineated, and, most importantly, develop intervention and treatment programmes appropriate to each.

4.3 Non participation: Abstention from gambling

Understanding why some people do not gamble is as important as understanding the motivational dimensions for participating in gambling. This is especially important, given the fact that the latest NGB (2013: 1-2) “tracking research” suggests that, whilst 77% of the adult population played the National Lottery, only 14.3% of adults gambled on one of the other regulated games in November 2012.

Two focus groups were held with people who claimed to “not gamble at all”.⁵ Again, it must be remembered that this was not a representative sample of South African opinion: The group comprised a professed group of “non-gamblers”. These were not simply the part of the population who only gambled occasionally.

⁵ This was defined here as, either “have never gambled” or “have not gambled at all over the past 12 months”. This is a much stronger definition of “abstention” used in previous NGB studies.

Within the group, two related motivational traits dominated. The first was a reaction to personal experiences with gambling; the second, a staunchly moralistic condemnation of all forms of gambling.

Some of the more outspoken participants described in some detail problems that they themselves had experienced when they had gambled as youngster. Others spoke of family members and friends who suffered because of gambling. For this group, gambling was clearly viewed as an inherently subversive, even evil, activity, rather than a legitimate form of entertainment. There were no significant gender differences here.

Religious convictions were not deeply delved into, but it appears that some participants in these groups were of a strong Christian persuasion. Certainly, references to friends who had been “brought down” by gambling were underpinned by a strong sense of righteous morality.

When spoken of recreational habits in general, many of the males pointed to their active involvement in various sporting codes. This was described as a healthy alternative to gambling, which required skill rather than mere luck. One participant added that, “with sport, you stand no probability of losing everything”.

Significantly, participants emphasised the fact that sport, at least in their experience, helped promote healthy social interaction with others, in which all were better off regardless of the outcome of the game. Gambling, by contrast, was seen as an activity that pitted individuals against “uncontrollable odds”, in which there were clear winners and losers.

Expressed differently, sport was said to promote positive-sum outcomes, which contrasted with the zero-sum nature of gambling.

It appeared that the participants were simply “not interested in gambling”, but positively hostile to the idea of gambling itself. This is difficult to explain, although the zero-sum character of gambling is part of the answer.

In summary, the percentage of people who “don’t gamble at all”, or who “only gamble occasionally”, is rising slowly in South Africa. In most cases, this is simply because of a declining fascination rather than a reaction to gambling. This underpins the “normalisation” of gambling discussed earlier, and helps to explain why, despite serious reservations, none of the “non-gamblers with conviction” called for an outright banning of gambling.

4.4 Gender and gambling

The in-depth semi-structured interviews and the focus groups suggest that there are distinctly gendered motivations for gambling. On the whole, male participants claimed to gamble more extensively, with some bravado in the case of younger males, and to spend more money gambling; whilst female participants were typically at pains to point out that they put a lot of thought into their gambling behaviour and controlled their expenditures more carefully than the male gamblers in their circle of acquaintances.

The significance of these claims, which are not easily verified, lies in the fact that so many male and female participants deliberately choose to emphasise these particular traits dovetails with gendered stereotyping elsewhere.

Factors given by male and female participants to explain their choice of gaming modality were equally significant. Male gamblers tended to emphasise their partiality to what were often described as “games of skill”, such as poker or betting. These, we were told, offered the chance to variously beat “others”, “the system” (i.e. the house) or, in one case, “the world”. Clearly, many male gamblers are attracted to gambling as a form self-validation as much as a social projection of masculine identity.

Women gamblers, by contrast, were far less concerned with the social projection of a gendered identity, and tended to emphasise the significance of gambling (as a recreational experience) for them as individuals.

This sentiment, itself a form of the “escapism” discussed above, came through very strongly amongst a group of lower income white women from blue-collar working class backgrounds that lived on the Johannesburg East Rand. Their husbands were tradesmen, sales representatives or artisans. They themselves were not the indulgent counterparts of wealthy women from Northern Johannesburg, but lower-income wives seeking some temporary respite from the multiple responsibilities imposed by their partners and families.

Like all gamblers, the women in this group shared the dream of striking it lucky and winning big. However their inputs in the group discussion suggest strongly that this is not the primary reason why they gamble at all. Rather, they are attracted to the social aspects of gambling, and the fact that the casino allowed them to define and spend “their own time” in a safe and secure environment.

Clearly women are not a homogeneous group, and there are considerable differences amongst women of different racial, class and cultural backgrounds. The intention in this section is not to reduce this complexity at all. Rather, and this is the value of qualitative work, the discussion serves to give a human face to this complexity, and to point to some

of the gendered ways in which participants presented themselves and explained the reasons for their gambling (as individual bravado, as social participation, as self-realisation, escapism, etc.).

In the standardised interviews, male and female participants cited roughly similar motivational factors to explain their gambling. The one small difference being the slightly higher significance of socialising with friends for males, perhaps reflecting the relative ease with which men are able to openly gamble without evoking public sanction.

Table 6: Motivation-gender, 2013

MOTIVATION – GENDER, 2013			
REASONS FOR GAMBLING	Male	Female	All gamblers
Fun-relaxation	29.3%	32.2%	30.8%
“Get rich”	28.1%	27.9%	28.0%
Escape problems	15.3%	15.5%	15.4%
Socialise with friends	27.3%	24.4%	25.8%
Total	100%	100%	100%

Men and women gambled polled in this study gambled with almost the same frequency.

4.5 Gambling and social grants

Regulators often raise concerns that pensions and social grants are misspent, and that recipients allocate disproportionate amounts of their available income to alcohol or gambling. To test this, a series of in-depth interviews were conducted with mostly female grant recipients at a pay point in Soweto. (The study did not disaggregate pensions and grants, as recipients typically treated these as a single source of “income”).

None of the interviews suggested that pensioners or grant recipients were systematically targeted by unscrupulous (illegal) gambling operators. Certainly evidence was found of card games being played near one pay point, but such games are played all over Soweto, and no evidence was encountered that this particular game targeted pensioners or grant recipients.

At the same time, it is likely that these grant recipients were more likely to gamble on the day that they received their grant than they were during the rest of the month, usually by buying a National Lottery ticket or placing a larger than normal fahfee bet. Again, this is not unusual or especially unhealthy behaviour. It is not uncommon for people from all walks of life to spend more money on entertainment around payday than they would during the course of the month.

When asked about gambling and discretionary expenditure, participants all claimed that they budgeted carefully and did not spend more than they were able to afford. When better off urban people were interviewed, stories of an acquaintance or family member who spent too much time or money gambling, and suffered accordingly, were invariably shared. Although most South African gamblers are not high-risk or problem gamblers, most seemed to have heard of or have some relationship with someone who was. By contrast, no participants shared stories of grant recipients spending too much money or diverting grant money from household necessities in order to gamble. If anything, this group appeared to budget more carefully than better off people with jobs.

The findings here correlate with the observations about rural gamblers above, and reinforce the need not to simply view poor people as vulnerable subjects in special need of protection (in this case, from the “horrors” of gambling).

Similar findings have been reported in van Wyk (2012) and Dellis (2012), both of which point to the complex ways in which “poor” people understand and manage their limited budgets in the face of competing recreational and household demands.

5. Gambling modalities

This section considers in some detail gamblers’ views of the various gambling modalities (forms) that they participated in. The section considers why gamblers play particular games, and identifies some of the benefits and potential shortcomings that they attribute to these modalities. In most case, people played more than one game.

In addition, the section speaks to the important debate on the relative social impacts particular types of gambling, as well as the implications of particular gambling locations.

In South Africa, regulators have taken a relatively conservative approach in order not to over stimulate latent demand for gambling. With the very important exception of the National Lottery, regulators have tended to prioritise “destination-type gambling”, on the assumption that this is less likely to recruit new gamblers or encourage impulsive gambling behaviour. The majority of all licences for slot machines are allocated to destination casinos for this reason.

Three trends are working against the emphasis on destination-type gambling. Firstly, some of the smaller casino complexes are being integrated into public spaces in shopping complexes with easy walk-in access. Secondly, the slow but gradual rollout of LPM machines which are typically located in neighbourhood bars and taverns. Finally, electronic bingo in Gauteng shopping centres which, from the punter’s perspective, are effectively indistinguishable from traditional slot machines.

Generally, there is a strong correlation between class, location, and gambling preference. The higher the income or class status, the more likely gamblers are to favour formal and more expensive destinations. The lower the income or class status, the more likely gamblers are to favour unregulated or informal community-based games, typically dice, cards and, in parts of the country, fahfee.

5.1 Regulated (legal) gambling

This section draws mostly on the results of the focus group and in-depth interview research. Where appropriate, statistics have been generated from the standardised interviews.

5.1.1 The National Lottery

The National Lottery is by far the most commonly played game in South Africa. There are very few locations in South Africa where a lottery outlet cannot be found. Locational proximity combined with the low cost of playing mean that even the poorest sectors of the population are able easily to place a lottery bet. Regulators have consistently raised concerns about the potential for this ease of access to stimulate latent demand for gambling in poor communities.

The standardised questionnaire was administered to a total of 104 (or around a fifth of the total sample) regular National Lottery players, at least 10 in each Province. This group was selected on the basis of their proclaimed preference for Lottery gambling, although most of the group played other games “at least occasionally”. It was not possible to identify a distinct sub-set of “regular lottery only” gamblers.

Of the group interviewed, just under half were male (47 out of 104) and over half female (57). The majority were over 30 years of age. The majority were African (60), although all population groups were included in the sample.

Although the standardised interviews were only administered to 2 under age National Lottery players, the detailed interviews with players and stakeholders, as well as the focus groups dealt with underage gambling and the National Lottery in depth. These latter confirmed that the National Lottery is the most widely played *regulated gambling game* amongst under 18-year olds in South Africa. In this regard, South Africa is in line with trends in other developed gambling markets, where the National Lottery typically constitutes the first pre-adult exposure to gambling.⁶

⁶ In the UK, ambitious longitudinal studies have sought to track the long-term impact of this exposure on under-16 year old children (c.f. Fisher 1998; Ashworth and Doyle 2000; Mori 2006).

Clearly, there are relatively low barriers to accessing the National Lottery. In all three focus groups with underage gamblers, participants were completely blasé about purchasing National Lottery tickets (and Scratch cards) from local café's, and no one reported being turned away on the grounds of age.

Perhaps the greatest attraction of the National Lottery to players of all ages was the sheer size of the possible winnings, and the potential for the National Lottery to change their life. As one coloured female participant in a focus group in Langebaan in the Western Cape put it, "I go to the casino [Mykonos] to have fun with my friends. I play the lottery to win a better life (sic)."

Most of the participants who spent time and money gambling in other gambling modalities bought occasional National Lottery tickets. For them, this was simply a casual "add on" rather than a distinct, regular, activity. Again, the lure of a massive win, as opposed to social or personal benefits from playing, was the main motivation for playing the National Lottery.

As mentioned above, many participants believed that the selection of winning numbers was easily manipulated by the National Lottery operator. This belief appears to correlate inversely with class and education.

5.1.1.1 Results from standardised questionnaires (the National Lottery)

The standardised questionnaire asked two questions to test motivation: Why participants liked to gamble generally, and why they like to gamble on the lottery in particular. It is useful to consider each of these in turn.

Table 7: Motivation – National Lottery, 2013

MOTIVATION – NATIONAL LOTTERY, 2013		
REASONS FOR GAMBLING	Lottery gamblers	All gamblers
Fun-relaxation	23.1%	30.8%
"Get rich"	38.5%	28.0%
Escape problems	9.6%	15.4%
Socialise with friends	28.8%	25.8%
Total	100%	100%

In terms of motivation to gamble generally, regular National Lottery gamblers are importantly different from other gamblers and, as table 5 below suggests, are considerably more likely to gamble in pursuit of a "big win" (to "get rich") and less likely to gamble for social reasons or to "escape problems". (This distinction is true when comparing the National Lottery with all other gambling modes in South Africa.)

Unlike other modes of gambling, state lotteries are overtly revenue maximising instruments (Garrett 2001), and are legally entitled to try and maximise public demand for their product. Advertising campaigns stimulate demand by appealing precisely to this desire to “get rich”, selling dreams of instant millions through the purchase of a single lottery ticket. Studies confirm the extent to which players are susceptible to prize size, which is often exaggerated through rollover effects (Rogers 1988).

The second motivational question asked regular National Lottery players only, why they bought National Lottery tickets. The answers given are in keeping with the sentiment above.

Table 8: Reasons for purchasing National Lottery tickets, 2013

REASON FOR PURCHASING NATIONAL LOTTERY TICKETS, 2013	
Chance to win big	52.9%
Contribute to good causes	20.2%
Play for fun only	26.9%
Total	100%

The lure of the big win is typical of lottery gambling, and is in keeping with findings elsewhere (Binde 2012: 81). This is very different from other forms of gambling – destination type casino gambling in South Africa, for example – where both the law and, the results of the interviews suggest, player demand prioritises the social experience of gambling over the solitary and somewhat unrealistic dream of a “big win”.

This has considerable social consequences, not only in terms of demand stimulation, especially in poorer communities, but also because this fetish of the “big win” is one of the key factors that distinguishes problem gamblers (and high frequency gamblers more generally) (c.f. Lam 2007). Advertisers know this, and market state lotteries accordingly. Regulators need more fully to take cognisance of this danger.

5.1.2 Horse racing and betting

A total of 45 standardised interviews were conducted with horse racing enthusiasts in the Eastern Cape, Gauteng, KwaZulu-Natal, and the Western Cape. In addition, focus groups were held with horse racing and sports betting enthusiasts in Greyville and Johannesburg respectively. (There is a considerable overlap between these two categories of punters). An additional focus group was held with horse racing stakeholders and operators, which was supplemented with a meeting with representatives of Golden Circle Racing and Gambling Group, which runs horse racing and sports betting operations in KwaZulu-Natal.

Although horse racing involves destination gambling (“a trip to the races”), the industry relies increasingly on revenues from off-course betting. Both sets of punters claim to enjoy the entire racing experience, which typically involved studying formbooks and careful deliberation before placing a bet. This, as participants were quick to point out, offers a very different gambling experience to simply pushing buttons at a slot machine, a social rather than individualistic activity that (in their opinion) requires a considerable degree of skill rather than pure luck.

The focus group with horse racing enthusiasts in KwaZulu-Natal suggests that, although proximity to racecourses is a key factor in deciding whether to attend race meetings or place off-course bets, the allure of the racetrack has clearly lost a lot of its shine. This applied equally to the Indian and white participants in the groups.

Younger more affluent participants occasionally made a trip to the racecourse, but generally preferred to place bets at the TAB or tote. Increasingly, punters made use of licensed sports betting outlets that enabled them to wager on a wider range of games. No participant expressed any concern about the location of horse racing tracks.

Most of the horse racing punters in the focus groups saw themselves as regular gamblers. That is to say they gambled at least once and usually several times a month, and regularly spent large amounts of time and money studying form books, placing bets, and attending race meetings.

Many warned of the dangers associated with horse racing, and told stories of how they themselves had first started to play the horses as adolescents, invariably in the company of their own parents, and how this had grown into an adult passion with betting on horse races and, increasingly, sports events.

Gold Circle representatives indicated that horse racing, at least in KwaZulu-Natal, is heavily dependent on the Indian community. Although big races attract relatively large numbers of affluent white and black South Africans who see horse racing “events” as part of a fashionable life-style, they are not major punters. The bulk of revenues, at the track, TAB and tote, come from lower and middle class Indian punters. By contrast, sports betting revenues were disproportionately dependent on the white and black community.

The focus group with sports betting enthusiasts in Johannesburg highlighted the extent to which technology had transformed the betting environment. Punters relished the opportunity to bet on a wide variety of sporting events – both legally, through licensed operations and by various online betting platforms. One participant claimed to have placed a substantial bet on the outcome of the 2012 US elections.

In the interviews, a small minority raised concerns about the location of sports betting outlets, which are generally close to where people live and work. Typically, these participants were concerned that people who would not otherwise bet or who would only occasionally make a trip to a casino would be tempted to start betting on races or sports games.

5.1.2.1 Findings from standardised interviews (horse racing and betting)

Horse racing players are motivated by essentially the same reasons as all other types of gamblers, although are less likely to see this as a way to get rich or escape problems.

It is interesting to compare the results for participants who bet on horses and sports. Not surprisingly, sports betters were less likely to cite socialising with friends as a motivation, and more likely to gamble in the hope of getting rich. (The sports betting sample comprised a total of 40 punters in Gauteng, KwaZulu-Natal and the Western Cape.)

Table 9: Motivation-betting, 2013

MOTIVATION – BETTING, 2013			
REASONS FOR GAMBLING	Horse racing	Sports	All gamblers
Fun-relaxation	31.1%	30.0%	30.8%
“Get rich”	22.2%	30.0%	28.0%
Escape problems	20.0%	20.0%	15.4%
Socialise with friends	26.7%	20.0%	25.8%
Total	100%	100%	100%

5.1.2.2 Integrity and the horse racing industry: A vignette

The focus groups with punters and interview with Golden Circle operators were held against the background of a scandalous event the previous Saturday that coloured the reactions of all concerned. This event involved a horse, Sanctuary, which was the favourite for the race, but had become injured in the starting stalls at race outset. Despite damage to both the horse and the starting stall, the race proceeded and Sanctuary finishing third.

A number of punters believed that the race should not have been allowed, and that it had only gone ahead because of the large amount of money staked on Sanctuary by influential members of the horse racing industry. In retaliation, several punters stormed the track, effectively ending any further racing for the rest of the day.

The totalisator rejected any claim that the race was fixed, or that unnamed “outside interests” played any role in deciding whether Sanctuary or any other horse participated in or won sporting events under their control.

This is not the view of the newly formed Punters Association (PA), some of whose leadership participated in the punters focus group. Established a week after the Sanctuary incident, the primary concern of the PA is to promote “transparency, fairness, and honesty” on the part of the owners and breeders who dominate the industry. Describing themselves as big-time “investors”, the PA believes that the horse racing industry in KwaZulu-Natal is dominated by a small, elite, clique that dominates the National Horse Racing Association (the NHRA), and which works to protect their own interests at the expense of the sport as a whole. In particular, the PA called for more sophisticated technology to be used to determine the outcome of races, and called for a standardisation of the rules governing racing in each Province.

Focus group participants were similarly unconvinced. One younger male Indian participant suggested that the industry was not “accountable” to punters, whilst others simply stressed that they did not always trust the results of races, and felt that “corruption” in the sport was undermining their betting experience.

Equally, participants in the Johannesburg sports betting focus group were quick to point to problems with other forms of sports betting, particularly soccer and cricket, again claiming that their concerns about the underlying sporting event affected their enjoyment in betting on the outcome of the event in question.

While punters are satisfied with rules that disallow jockeys from betting on races, participants in the focus groups believed that this did not stop jockeys from placing bets through their friends and families, which further increased the temptation for jockeys to collude in “fixing” the outcome of particular races. Participants claimed to have witnessed races in which jockeys deliberately failed to “ride-out” and held horses back for personal advantage.

Claims of this nature helped reinforce a *perception* that it was impossible to win at horse racing without considerable insider knowledge, even in major events on the racing calendar.

The research team is not in a position to comment on the validity of any of these claims. Their significance is that they reflect strongly held perceptions that impact both the horse racing industry and the nascent sports betting industry. Clearly, the perceived lack of accountability of Gold Circle (or Phumelela in other Provinces) – who have a potentially conflictual stake in both the management of horse racing and the betting operations that depend on the outcome of horseraces – is a factor that regulators need continually to assess.

5.1.3 Casinos

Casino gamblers are well represented in the study. A total of 136 standardised interviews were conducted with regular casino gamblers in all nine provinces. In addition, two focus groups were held specifically with casino gamblers – in Langebaan and Durban. In addition, most of the general focus groups included casino gamblers.

For the most part, middle and higher income participants preferred to gamble in established gambling venues, with casinos the firm favourite. In our focus groups and in-depth interviews we found this to be partially related to security concerns: Single women participants in particular favour the safety and “mood” of the casino as opposed to socialising in a public bar or restaurant.

Reasons given for this casino-gambling preference in the long-interviews and focus groups included safety, accessibility, and the fact that casino gambling offered a wide variety of associated recreational activities, ranging from restaurants to theatres. Significantly, almost all of the casino gamblers we spoke to appreciate the fact that a trip to the casino was an “outing”, which had to be planned and budgeted for.

The “look” and “feel” of casinos was appreciated enormously by many casino goers. In some cases, for example, where a casino outlet is almost part of a shopping complex, e.g. the Boardwalk Casino in Port Elizabeth, the lines between casino and local shopping-entertainment complex were significantly blurred, with the public enjoying general walk-in access to the casino from public spaces. Although this goes against the principle of destination-type gambling, no objections to this were encountered, and participants generally felt that the casino was good for the city and for the rejuvenation of the waterfront area.

5.1.3.1 Results from standardised questionnaires (casino gambling)

Amongst regular casino goers, the primary motivational factor was simply “fun” or “relaxation” (35.3%), followed by the prospect of “getting rich” (27.9%), “to escape problems” (19.1%), and to “socialise with friends” (17.6%).

Table 10: Motivation – casinos, 2013

MOTIVATION – CASINOS, 2013		
REASONS FOR	Casino	All gamblers
Fun-relaxation	35.3%	30.8%
“Get rich”	27.9%	28.0%
Escape problems	19.1%	15.4%
Socialise with friends	17.6%	25.8%
Total	100%	100%

A second question was asked to further explore casino gambling motivation. Here all 500 participants (i.e. not only the regular casino gamblers) were asked why/whether they visit casinos, and what they most enjoyed about these visits. The answers are instructive, and in keeping with this “entertainment-centered” motivational sentiment.

In line with the destination gambling approach, the bulk of the gamblers surveyed were most likely to visit casinos due to the mix of gambling and other entertainment (restaurants, movies etc.) offered at casino complexes. When the results for the 136 casino-preference gamblers were separated from the results for all 500 regular gamblers surveyed, this seems to be the case for all categories of the gambling population. Unsurprisingly, regular casino gamblers were significantly more likely to visit casinos simply to gamble than other regular gamblers who did not.

Table 11: Attraction of casino gambling, 2013

ATTRACTION OF CASINO GAMBLING, 2013		
REASONS FOR GAMBLING	Regular casino gamblers	All gamblers
Visit: gamble only	39.0 %	23.6 %
Visit: other entertainment only	8.8 %	18.4 %
Visit: mix of gambling and other entertainment	52.2 %	31.6 %
Don't visit	n/a	26.4 %
Total	100 (136)	100 (500)

As noted above, “escaping problems” is understood here to imply a general retreat into a world of fantasy, rather than a “real world abdication” symptomatic of problem gambling.

5.1.4 Limited payout machines (LPMs)

Limited Payout Machines (LPM's) are emerging as a distinct gambling modality in South Africa, although they have only been rolled-out in limited numbers and do not influence the behaviour of ordinary South African's in the same way that casinos and the National Lottery clearly do.

A total of 150 standardised interviews were conducted with regular LPM players in all nine provinces. In addition, two focus groups were held with adult LPM gamblers. Approximately 20 percent of participants in the short interviews had previous experience with LPM machines. Some, but by no means all, were attracted by the momentum of the game and its accessibility to other recreational facilities offering food, sports or drink. In some cases, however, participants complained about too few machines at particular venues, and that clients had to wait in line in order to use the machine. The relatively low pay-outs also prejudiced people against LPM's in relation to other modalities of gambling.

Those participants who were familiar with LPM's appreciated the fact that they were integrated into their regular entertainment venues, and could be combined with a typical night out with friends. Younger participants, in particular, enjoyed LPM's, as much because of location as because of the low barriers to entry, both in terms of the cost of games and access to venues. There is a general perception that it was far easier to bypass the controls intended to preventing under-age gamblers from playing LPM machines.

At the same time, the presence of LPM's was an issue of significant concern in certain communities. Many participants were willing to accept casino gambling as a legitimate form of entertainment, but were concerned about the impact of LPM's in their neighbourhood. Many women, in particular, raised concerns that LPM's would encourage their partner's to spend even more time in local drinking establishments. Interestingly, this was seldom expressed as a gambling-specific concern. Rather, the concern related to the attractiveness of what an elderly female interviewee in Betty's Bay described as "a cocktail of vices", gambling, alcohol and (in her opinion) "loose women".

No concerns were encountered about crime and LPM gambling, although many participants were concerned more generally about the implications of carrying large amounts of cash home should they strike it lucky. As can be expected, this concern tended to be location specific. In other words, the area itself, rather than the presence of LPM machines, was seen to correlate with higher or lower levels of associated risks.

5.1.4.1 Findings from standardised interviews (LPMs)

It is interesting to compare the motivational factors cited by regular LPM gamblers with those for casino's. Both involve mostly slots play, in venues that combine gambling with other forms of entertainment, and represent quintessential convenience gambling.

Table 12: Motivation-LPMs, 2013

MOTIVATION – LPM, 2013			
REASONS FOR GAMBLING	LPM	Casino	All gamblers
Fun-relaxation	33.3%	35.3%	30.8%
“Get rich”	22.7%	27.9%	28.0%
Escape problems	12.0%	19.1%	15.4%
Socialise with friends	32.0%	17.6%	25.8%
Total	100%	100%	100%

Casino gamblers were much more likely to gamble in the hope of getting rich. Given that LPM payments are fixed at a much lower rate, this is hardly surprising.

It was surprising to find that considerably fewer LPM gamblers gambled to escape problems than casino gamblers.

5.1.5 Bingo

Bingo outlets are typically located in shopping centres. Unlike casino's they are not really destination venues, and capture a far larger share of the “impulse gambling” market.

A total of 10 standardised interviews were conducted with regular traditional/paper bingo players, and 15 with electronic bingo terminal (EBT) players. (In practice, most of the former played EBTs, whilst very few of the latter played traditional bingo).

In addition, a focus group with electronic bingo terminal (EBT) players was held in Gauteng. From this, it would appear that players appreciate electronic bingo because of the fact that it offered the chance to play slots in a convenient location without having to make a deliberate (and often expensive) trip to a casino venue.

There were no significant differences between male and female perceptions of electronic bingo.

It is difficult to assess the general public's attitude to the situation of EBTs in shopping centres. Very few of the people interviewed had experience with EBTs.

Only a very small number of punters play traditional bingo. Those that did participate in traditional bingo saw it as a fun, social experience, which they contrasted with the individualistic experience of an EBT or casino slots. Typically, traditional bingo players claimed to play “the odd game on the machine”. This was not a reciprocal relationship. Very few electronic bingo terminal players played traditional bingo.

5.1.5.1 Results from standardised interviews (bingo)

The total sample for both traditional bingo (10) and EBTs (15) is too low to extract any meaningful conclusions.

5.2 Unregulated (illegal) gambling

This section draws entirely on the focus group and in-depth interview research. The standardised interviews did not deal with unregulated gambling.

5.2.1 Poker

The popularity of poker (and to a less extent blackjack) has increased massively across the world since the millennium. (Wilson, 2007) South Africa has followed this global phenomenon in that it has become a fashionable and widespread form of card playing, especially among affluent young people.

Two variants of poker are played: cash games and tournaments. These are seen to require different skillsets, and are played in different ways. Cash games – most famously those hosted by the late Lolly Jackson – require a lot more money, and players face the risk of being raised to the point where they are forced to bid (or loose) very large amounts of money on a single hand. These games are widely regarded as especially risky, and stories of players being violently assaulted when they were not able to meet their obligations are widely shared amongst the poker fraternity.

The second poker variant is called tournament poker, typically involving between 20 and 2,000 players. This is growing very rapidly in South Africa, not least of which because players are able to understand and budget for their potential losses. Players buy into the tournament for a certain amount, and have occasional opportunities to “re buy”. But that is the most that they could lose.

This form of poker is disproportionately (and in many cases almost entirely) played by younger, middle and upper income, white males.

One of the people interviewed, a young white graduate student who claims to have made his living from poker for the past decade, summarised the difference between the two types of games accordingly: “With tournament poker, I can pay R10,000 and that’s the most I can lose. In cash poker, I can be forced to bid up to R30,000 on a single hand.”

Two focus groups were held with poker players. Participants were both cash and tournament poker players.

The first group was convened at a high-income private club in Johannesburg, where researchers interacted with affluent professional people (successful doctors, accountants and lawyers of white and Indian background) who meet regularly on Sunday nights to play high-stakes cash poker, as well as blackjack.

The second group comprised “professional” gamblers who met regularly at a series of poker tournaments played at Johannesburg restaurants.

All the participants saw poker as recreational activity, although clearly some, particularly those who played tournament poker, believed that they could make a living from playing poker as well. One player clearly makes a very good living playing poker and, perhaps uniquely, bridge (mostly outside of South Africa).

Although all were relatively affluent, cash poker clearly attracted an elite upper-income niche. Tournament players came from a wider social background, and in many ways were not dissimilar to the type of players at tables in casinos.

Although most (not all) felt that they had probably lost more than they had won over several years, they did not appear to resent this, and claimed that they were sufficiently affluent to fund their “hobby”. One participant captured this sentiment nicely, when he suggested that he had “adapted poker to my life-style”, and that had not “been faced with the problem of adapting my life style to poker”.

Although it is impossible to verify this, the content as well as the general tone of the discussion suggested that players often understated their losses, and were far more “at risk” as players than they imagined themselves to be. Certainly, tournament players appear to gamble more frequently and to spend more time practicing for big events than players involved in other forms of gambling.

All of the poker players encountered had some experience with other gambling modes, but everyone insisted that poker was fundamentally different in that the game depended on skill, and that, because the house did not care who won, the most skilled players would, over time, always be allowed to triumph.

Most of the poker players had flirted with online poker games, either with the now defunct Pigs Peak or Silversands, the giant PokerStars, or one of several smaller European based sites. None preferred online poker to the “face to face” variant, although they welcomed the introduction of online games as this gave them a chance to practice their game for relatively small amounts of money.

While admitting that gambling took up a considerable amount of time, none of the participants felt that this interfered with their job or family life. Clearly, this is unlikely.

5.2.2 Cards, dice and fahfee

Card playing is possibly one of the oldest forms of gambling. Cards in all kinds of forms have a long history and their use for both recreational and moneymaking purposes is a universal phenomenon. In South Africa cards are similarly played by all kinds of people across the demographic range, from the very poor in the rural areas, their counterparts in both urban formal and informal settlement, in casino’s and even among the upper income groups, both black and white.

The main forms of gambling in the townships and rural areas where focus groups were held, are the National Lottery, fahfee, call-a-card, finder-finder, bottle tops, jack dice and amongst younger children, marbles. Public gambling is clearly visible on a visit to any historically disadvantaged area. In lower class areas in every large South African city gambling of this order by both sexes and people of all ages is clearly explicit on street-corners, at taxi ranks, grant and pension pay-out points, shops, shebeens and various sports bars and other places where there are also licensed LPM facilities. Due to the vigilance of the authorities in, for example, KwaZulu-Natal, there are few readily observable illegal slots and fruit machines other than a scattering that are old and largely redundant.

Card playing or every description is clearly discernible and a major source of leisure activity when played with, or without money. Township children play alone together or sometimes join adult games, which regularly bring together men and women in informal conversation. As is also the case in the rural areas visited, this cuts across income levels and may, on occasion, extend outwards to include friends, family and even nearby communities. This occurs largely on the weekends when card playing becomes a major form of social interaction and mutual bonding.

In many communities near Newcastle and Ladysmith in rural KwaZulu-Natal, card playing takes place on a daily basis, especially when people have more ready access to cash. This includes payout days for pensions and state grants.

5.2.3 Internet gambling

Internet gambling is difficult to research, both because it is illegal and because individuals play most of the games in the privacy of their own homes. Two focus groups were conducted with mostly upper-income internet gamblers (in Gauteng and the Western Cape), as well as an analysis of discussion on two internet gambling “forums” or chat sites: Streak Gambling⁷ and Casino Advisor.⁸

The focus groups suggest strongly that, for players, the primary advantage of internet based gambling is the fact that it is not tied to any fixed location. Gamblers could choose between a wide variety of games, from high-stakes card games to various casino-type games to sports betting, offered by a wide variety of gambling operators all over the world.

Participants in the focus groups were unsure as to whether these games were illegal or not. Most seemed to believe (or at least, claimed) that the games were legal if they were offered by operators based in countries where internet gambling was legal. (In our discussion, no distinction was made between the place where the operator was based, and the place where the server was hosted, as this debate was deemed too complex to meaningfully discuss in a focus group setting.)

Although participants played a variety of different online games, the majority were attracted to either the sports betting or the card-based games. Most had tried their hand at online slots, but did not view this as the main attraction of online gambling.

Sports betting players were in large measure simply engaged in a technologically savvy variant of licensed land-based betting operations. The main difference lay in the range of sports that internet based participants were able to bet on.

The most widely played online card games were poker and blackjack. Participants in the focus groups included both players who only played these games online, and players who played these in various card games and tournaments. These groups saw internet gambling in subtly different ways. The online-only card players clearly valued their gambling experience, and saw this as an individual activity, something to do to pass the time or for mental stimulation. The players who combined internet and online card games all saw synergies between the two. Online card games, they claimed, offered a useful chance to practice, and to compete with other, usually anonymous players in preparation for “real” card games with face-to-face competitors.

⁷ <http://www.streakgaming.com/forum/>

⁸ <http://www.casinoadvisor.com/forum/>

It is not known how much money these people spent on online gambling, but certainly the focus group discussion suggests that all internet gamblers spend a considerable amount of time pursuing their hobby.

All participants were concerned about the integrity of the operators who ran the internet gambling sites that gambled on. Although they were generally impressed with the sites that they frequented, they knew that there was little they could do if a problem arose. Without exception, all of the participants claimed that they would migrate to particular online sites if they knew that these sites were “definitely legal” and that the sites were compliant with South African law.

This view was echoed in some of the online gambling forum discussion about the recent legalisation of online poker in Nevada.

5.2.4 General awareness about internet gambling

In the standardised questionnaire, we asked people whether internet gambling was illegal or not. Under half (44.4%) agreed that it was illegal, whilst the remainder either claimed that internet gambling was legal (38.2%) or did not know whether it was legal or not (17.4%).

Clearly there is considerable confusion in the public’s mind as to whether it is permissible to gamble online or not, despite efforts by the Gauteng Gambling Board in particular to clarify this point. This is a major barrier to effective regulation that needs to be addressed.

5.3 The dynamics of gambling action

This section focusses on the gambling experience, be it regulated or unregulated: How people feel about gambling in general, and the games they play; the machines that they play games on, and the people they play games with? When and why do gamblers sometimes feel that they can win? What do gamblers understand by luck, skill and chance?

As cautioned above, it is important to remember that the focus groups and all of the interviews deliberately sampled people involved in the spectrum of different games. The aim was not to comprise a representative sample of the South African public, or even of South African gamblers. As such, the perceptions discussed here *do not* represent the “average” South African. They reflect the views of a variety of different types of gamblers involved in a variety of different (and usually several) gambling modalities.

5.3.1 Skills, risk and luck

Gambler beliefs in the role played by skill and luck are important, and point to a critical motivational dimension that underpins gambling behaviour.

Although there was widespread agreement that slots required no skill to play, many committed players believed that, as pointed out above, with practice it was possible to distinguish “loose” from “tight” machines, and in so doing tilt the odds in your favour.

5.3.2 The “slots player-machine” relationship

Many players developed very personal relationships with slot machines. This is particularly the case at casinos and electronic bingo venues, where players spend most of their time engaging with slot machines, as opposed to LPM venues, where players typically spend a small amount of time and money gambling between drinks or whilst waiting for a meal.

In a number of groups, participants, particularly middle-aged and elderly women of all races, spoke about “their slots” or “their machines”, as if they had some personal bond with the slots. An elderly black patron interviewed at Mykonos referred to her favourite slots machine as “blessed”, as these more likely to favour her than the other machines on the casino floor.

Other players told us that they did not “trust” certain machines on the casino floor, as these paid out lower amounts than others (so-called “tight” rather than “loose” machines). In other cases, “slots” appeared to function as a form of emotional displacement. A female participant (in a mixed gender focus group) went so far as to claim jokingly that the slots machine were “more responsive” than her husband.

Clearly, this is not an attempt to overstate this discussion of the “slots player-machine” relationship, or imply that this applies equally to all slot-machine players. It is important, however, to emphasise that the highly personal relationships that many regular slot-machine players develop with their preferred machines has relevance for the understanding of gambling behaviour, and the factors that can translate into problem gambling. A player who trusts the machine, or who prefers certain types of machines, is a player that is willing to spend more time losing money on the casino floor.⁹

⁹ Casino's understand the financial importance of player psychology, and put considerable thought into where they locate particular machines in an effort to attract and retain customers. In his advice to the casino industry, Scoble (2010) suggests humorously that “Slot players are always looking for their one true love. Unlike in affairs of the heart, they want that one true love to be loose”. To this end, casinos are often advised to place “loose” machines near casino entrances, in an effort to encourage people onto the floor, and “tight” machines near the table games, in an effort to keep players at the tables.

Slot gambling does not simply involve the use of a machine for a particular purpose (to decide whether the player won or lost). Rather, engagement with the machines is, for many players, itself a part of the entertainment, and the fantasy-like relationships established with “my machine” is itself a component of what needs to be understood as gambling-entertainment. In most cases, this is harmless, escapist and fun.

6. The social impact of gambling

There is no universally accepted and reliable way to measure the social impact of gambling because of the difficulties involved in aggregating the huge complex of variables into a unified body of thought that includes financial consequences, community impacts, and the effect of gambling psycho-dynamics and behaviour on both an individual and collective basis. An “ideal” social impact study would involve not only the impact of multiple forms of gambling, but also and simultaneously the role of gambling in accumulating government revenue, creating employment, social problems, bankruptcy rates, the incidence of crime, non-gambling business revenue, infrastructure costs, socio-economic inequality, personal income, recreational activity and, perhaps most problematic of all, the quality of life. There is no reliable way of doing this and, in the final analysis, the overall positive or negative nature of gambling will always be a subjective determination.

The following section nonetheless examines what was encountered and observed in focus groups and in-depth interviews.

6.1 Leisure and recreational gambling

Most South African gamblers are recreational gamblers who are able to manage their expenditure and time in a relatively responsible way. The majority of our participants in the focus groups and survey were quick to emphasise this point, even when it was evident that they were high frequency participants in gambling activity. Almost everyone insisted that gambling did had no discernible, or no especially negative impact, on their private or family lives, their work or their social relationships in general. This may or may not have been true.

In many cases, families seeking a social and pleasurable activity would spend time together at casinos where gambling would be accompanied by eating, drinking and shopping in which a typically good time is had by all, one of the main advantages of the destination-type gambling approach adopted in South Africa. This is typically encouraged by casinos and horse racing facilities which specifically offer a complex of entertainment of which gambling may only be a single activity. Gambling, in other words, is integrated with other very ordinary and respectable aspects of social life.

Gambling is nonetheless still associated in many minds with some kind of sinister activity. Despite the fact that culture has changed the image of gambling modes such as poker or bingo, much of the research on social impacts, certainly that in South Africa, is still dominated by negative stereotypes which persist in the view that gambling is a malignant vice which almost inevitably results in personal degradation, moral decay, social exclusion, sexual perversion, dire consequences for families, criminal behaviour and poly-addiction (i.e. addiction not only to gambling, but to narcotic substances, alcohol and a variety of other behaviours that are undesirable, delinquent or pathological.)

The overwhelming majority of South African gamblers are, in fact, recreational gamblers who even when they play regularly do so with small amounts of money. Only a handful of participants in the survey are likely to fall into the “problem gambling” category. Overall, our analysis leads us to concur with various international studies that claim that problem gamblers make up a tiny percent of the overall population, typically around 3-5%. (More seriously, recent studies suggest that problem gamblers account for a disproportionate percentage of casino revenues (Williams and Wood 2004; AGPC 2010). This aspect of problem gambling has not been explored in a South African context.)

Gambling of all types can be empowering, especially when accompanied by tangible monetary reward. In rural KwaZulu-Natal, the unemployed, pensioners and disenfranchised youth face a tedious situation, a mixture of boredom and frustration which produces hordes of men and women who gamble as a natural facet of daily existence. In these places gambling is, for better or worse a way of life that many people regard as “entrepreneurial” in an environment that lacks many other opportunities. This is certainly the view of clusters of elderly women encountered near Ladysmith who run bingo clubs among friends and family as a perfectly normal way to eke out an existence.

Disempowered rural youth generally see gambling as an important form of self-expression that “breaks the rules of society” and assists with the formation of adolescent masculine identities. Some teenagers in the rural areas proudly refer to themselves as “gambler kings” and “Mr Gambler”. Many rural youth spoke of the “rush” of gambling in an otherwise innervating life of unemployment, township crime and family breakdown. Similar but somewhat different processes are at work when older men congregate in the urban areas to play high-stakes card games such as poker, either privately or in casinos. Both involve masculine rituals, particularly in small poker games where men interface around prolific quantities of liquor, cigar smoking and money in a mutual bonding cowboy-type “Western” narrative.

Even in the absence of money gambling is also as a means to socialise, meet new people, friends and attract partners from the opposite sex. Gambling, alcohol and prostitution exist inter-dependently at many locations where gaming takes place in both the rural and big metropolitan areas, from street corner cards to the market casinos and

this is no doubt problematic. Many pensioners interviewed nevertheless see small-scale gambling, especially slots, as a social opportunity to make friends and acquaintances that fill an otherwise isolated existence. Gambling, in short, can make people feel more personally recognised and useful in conditions where they would otherwise remain isolated and anonymous.

Recreational gambling can also create space for people to wind-down and relieve themselves from daily stress. As inferred, so-called “withdrawal gambling” involves an uncertain proportion of South Africans to whom the value of gambling lies in its ability to provide isolation from the mainstream events of personal or social life. These are characteristically people who need a “break” from domestic and work responsibilities who find solace and relaxation in gaming either in small groups away from the general crowd, or more preferentially, alone. While the internet gambler is probably the most typical example of solitary gambling, withdrawal gambling can also involve slots, card games of four or five people, LPM’s and, to some extent, the National Lottery.

Many of the men interviewed referred to gambling as a means to forget life-pressures. Playing poker or blackjack anonymously at the casino allowed them “to be themselves” without business or family responsibilities, to drink with occasional “buddies” and generally imbibe a casual and relaxed atmosphere. In many cases the actual card-playing was of secondary importance to the “vibe” of the environment.

Women who gambled with their friends were even more likely to signify gambling as an important form of social interaction, or as a shared recreational experience. Many middle to older-age women gravitate to casinos because of a failed marriage, domestic abuse and social restrictions on the places where a “decent” women can publicly sit alone.

A typical group, albeit during daytime, were eight women, otherwise middle-class Benoni housewives, who meet once a week at Carnival City. All the participants in the group sought relief from domestic tensions associated with what they saw as behavioural problems of their offspring or husbands. This might involve conflict over domestic finance or child discipline, obsession with sport or drinking. Some talked of their responsibilities as wives and mother, neglect or callousness on the part of their spouses which drove them to seek refuge in the safe and largely mindless environment of the local casino.

Most played slots very cautiously with “extra” money rather than income deducted from household finances. They did not play with money they did not have, nor did they give any evidence of experiencing the major mood changes associated with winning by problem gamblers. With one or two exceptions none appeared to “chase-their-losses” as a regular style of play or engage in other compulsive behaviours common to problem gamblers. All spoke of gambling as a purely social activity that gave them the opportunity put aside their cares and meet “the girls” at a venue where they had come to know the staff and other gamblers. They would normally follow an hour or two at the slot machines

with lunch and then depart to their respective homes and the obligations posed by husbands and children. Gambling they agreed, had not resolved their personal problems but it had, the concurred, positively changed the quality of their leisure and their lifestyle.

All of this does not mean that cases were not encountered where gambling ate into people's finances and free time. Or, for that matter, where people were moved by events or experiences along the spectrum from purely recreational to more dangerous types of high frequency gambling.

In some cases, this was fuelled by exaggerated self-confidence, typically in card games like poker where people falsely believed they had the superior skills and personal discipline to invest larger amounts of money. Participants in one focus group were asked to identify the most important skills and these were, in their view, the ability to track cards, to "read" opponents, and to remain calm and concentrate under all circumstances. These presumptions almost inevitably lead to higher levels of participation and risk-taking. Tournament poker players placed a lot of emphasis on the social nature of their gambling.

Players knew one another, and developed elaborate systems to advise people of regular (illegal) tournaments held in restaurants, as well as larger licensed tournaments held at casinos or in Swaziland. Peer pressure is often intense in these cases where younger men in particular are under pressure to express culturally-determined principles of masculinity that involve taking high levels of risk. Here again, participants indicated higher and more dangerous levels of participation and risk-taking.

A number of gamblers also bring superstition or ritual to their gambling, which can become obsessional and problematic if taken to extreme limits. While successful card players emphasised the role of cold calculation and tactics, the average slots and National Lottery gambler lies almost entirely on "luck". To enhance their "luck", many punters resort to mysticism of one sort or another, whether this be an appeal to God, wearing lucky clothes or touching lucky machines in a particular way, or even gambling alongside someone who is known to be "lucky".

Some older black men and women resorted to Sangoma's in an effort to mitigate risk. Interestingly, no one indicated that a Sangoma could give them the insight they needed to win *per se*. Instead, the belief was that the risk of losing was that much greater if one did not consult.

Gambling is, in the last analysis, Janus-faced. This means that under certain circumstances a certain gambling behaviour may be positive, recreational and benign, but, in others may have the serious disruptive consequences described in the more pejorative literature. Many upper-end gamblers can lose substantial amounts of money with no social impact because of their access to disposable income. For others lower

down the socio-economic ladder losing only a small proportion of these amounts is equal to social and economic catastrophe. The effect of a win can also have very different psycho-dynamic consequences to a routine person as opposed to one whose family has a transmitted history of compulsive gambling. Ultimately, much depends, as one participant put it, in adaptation of one's gambling to one's life-style - as opposed to adapting life-style to the demands of gambling.

Internet gambling, for example, involves little to no social component. Yet Internet-usage can be highly addictive and, precisely because of its "withdrawal" component, become anti-social behaviour. Many self-admitting internet gamblers were encountered whose familial relationships had been seriously prejudiced by extended bouts of "relaxation" with their computers.

The social construction of card-playing, one of the oldest forms of gambling, is also equivocal and idiosyncratic. It seems that cards and dice in rural areas are important cement in bonding families and friends, as well as ensuring community cohesion. Most card games conducted during the day are peaceful. At night-time, however, conflict breaks out as players are fuelled by alcohol or attempts to appropriate money from family or friends. Community conflict is also more likely when it involves relatively significant amounts of money or where the symmetry between players is broken with the emergence of an individual of particular skills and excellence.

Some gambling modes are more high risk than others. There are few National Lottery addicts in South Africa but many people who, if not problem gamblers, are dangerously exhilarated by winning, especially in intense, high-momentum repetitive games such as roulette or slots. Attraction, if not addiction, can also stem from long-term high-frequency exposure to a gambling more which then becomes central to life-style. Typical in this category are perennial Johannesburg and Durban punters whose engagement with the track involves not just a horse-race but the strategic pre-planning and research that precedes each race meeting. It is this, even more than winning, that fills the void in existence.

6.2 Problem gambling

There is vast international and South African literature on problem gambling, which will not be reviewed here (Lesieur and Rosenthal 1991; Blaszczynski and Nower 2002; and Ferentzy and Turner 2012). Instead, the intention is to explore the views and perceptions of people already identified as problem gamblers.

Two focus groups were held with men and women currently receiving treatment for their addiction. The majority in our focus groups were middle to upper income people with relatively high levels of functionality and different levels of addiction. Some were newly

addicted members of Gamblers Anonymous who had presented themselves to treatment in the preceding few months, but others were situated along a spectrum at whose negative end were a clutch of people – mainly men – who had been diagnosed as entrenched addicts.

All had wrestled with various forms of addiction (including but not limited to gambling addiction) over many years dating back to adolescence and had persistently engaged in various forms of very high risk behaviour in a life-long quest for the ineluctable “high”. One such participant was an investment banker who currently owed R11m to Chinese loan-sharks because of gambling debts accumulated in progressively bigger, more frequent and uncontrolled bouts of gambling activity.

Following conclusion of the three groups all data was discussed with gambling addiction specialist psychologists who were also approached prior to the sessions with a view to identifying key issues and questions. The leading international literature was mined in order to check the consistency of findings but at all times. During the sessions and after, an effort was made to identify the implications of what was expressed for compulsive gambling in the indigenous South African context.

6.2.1 The nature of problem gambling

From the outset it was clear that participants were uncomfortable with the use of such derogatory terms such as “compulsive” or “pathological” gamblers. In the mind of the groups the latter term was associated with a medical as opposed to social condition. A consensus was therefore developed around the term “high risk” gamblers or, more optimistically gamblers “in a state of recovery”.

In prompting discussion and developing a frame for reference, participants were allowed to identify what they believed to be the key characteristics of problem gambling as defined by their personal experience, as well as the issues they felt needed discussion.

This clearly indicated that problem gambling in South Africa displays most, if not all, the characteristics of high-risk or compulsive gambling on other countries. Most of the motivations behind problematic behaviour were similar to those identified in the existing South African literature as were the social impacts of the excessive gambling of which participants spoke. All agreed about the importance of being able to identify problem gamblers in order to provide social and medical assistance, the need to unpack the process leading to the problem and the very serious personal and social dangers posed by high risk gambling to gamblers, their families, friends and wider society.

Most of those present were highly critical of the standard tests used by social and medical science to identify and distinguish the problem gambler from other gamblers.

The participants in the rural setting to whom we spoke at length seem to identify with the notion of “problem” gambling in the Eurocentric sense. Many talked of “obsession”, persistent thoughts about gambling, and inability to stop gambling activity. There were frequent references to the “highs” and “lows” of winning and losing, “chasing” and covert activity to hide evidence about gambling behaviour from friends and family. Stories were told of people who are currently under pressure from moneylenders to service their debts and how the “devil” of gambling has driven people into illegal activities of a petty or serious criminal nature. There is a particular poignant among many poor participants who have no particular wish to change their gambling habits because gambling is their main or sole source of income.

6.2.2 The entrapment process (and its consequences)

The “entrapment” process was fairly similar for both genders. This involved winning and a period of self-satisfaction at the outset. During this period the gamblers questioned why they had not gone into such easier money-making activity earlier. There was a sense of satisfaction and even exhilaration when substantially large amounts were made.

The bubble burst, however and, sooner or later, gamblers enter a losing, first seen as cautionary and short-term and then as more serious as “bad luck” continues. Chasing now becomes characteristic of behaviour with gambling taking up a greater proportion of the player’s time. Money is borrowed and when not repaid, reputation sinks. Family and business conflicts ensue and the gambler becomes increasingly desperate.

The final phase is one of utter hopelessness where the now addicted gambler sees nowhere to turn in resolving his problem. Criminal acts to acquire finance, bankruptcy, collapse in personal relations, self-loathing, deep clinical depression and suicide are characteristics of this end state which precedes people asking for external assistance from friends or psychologists. Most of the group were encountered entered Gamblers Anonymous under pressure from friends or family who found it impossible to live with the addict and had decided on a “tough love” course of action.

The participants in groups had experience of just about all the high-end gambling modes including casino gambling of all types, sports betting, and betting on horses. Some of the male “big-players” had played everything at hand when driven by an urge to bet, including street gambling in their youth or when the urge was uncontrollable.

However, generally they were uninterested in any small-scale game which could not guarantee “satisfaction”. This included the National Lottery whose delayed rewards were deemed unacceptable, dice, or small-time cards, with poker being a major exception. Some of the better-heeled participants were, or had been regular investors in weekly

poker games. Otherwise, roulette and black-jack were named the main vehicles for their downfall.

Almost everyone spoke of the need to chase both wins *and* losses. This meant the growing compulsion to bet progressively larger amounts in order to obtain the requisite “high”. This might involve a relatively small amount for the starter gambler on a lower income to the hundreds of thousands required by our investment banker. In either case the pursuit of pleasure bears no relationship to the size of expenditure. This is a characteristic feature of all addictive behaviour.

Several in the groups had been recommended to use Gamblock – a type of software that filters out all gambling sites on the Internet. Unfortunately this has led one or two males to switch to pornographic sites that were now compulsive. Generally, everyone had experienced poly-addiction of some sort involving drugs, sex, shopping or alcohol. This included a doctor in one group whose gambling was fuelled by over-usage of prescription drugs.

Most of the women also attributed their gambling in the short-term to other stimulants including alcohol, readily available counter-sale drugs, or abuse of prescription drugs used in countering anxiety and depression.

Virtually everyone admitted to clinical depression as either a source or consequence of heavy gambling. Some of the women in particular displayed agitation during the course of the focus group. On closer questioning evidence was found of compulsive obsessive disorder, bi-polarity, mania and in one or two cases, admitted schizophrenia. More interestingly, most others in the group led otherwise “normal” lives apart from frequent bouts with what some participants referred to as the “gambling gene”.

The consequences of excess gambling referred to by participants were those anticipated by the general literature on gambling – family breakdown, financial difficulties, unemployment and moral degeneration. All, however, emphasised that these were long-term consequences and that in the initial instances gambling had had a positive social impact insofar as it provided an effective hedge against personal problems.

The negative spinoffs from gambling are not dissimilar in both rural and urban areas. Many compulsive gamblers in large cities and isolated rural locations admit to using stolen money (or steal money to service gambling debts). In the both urban and rural areas, “successful” gamblers face severe risks from criminal gangs and taxi driver’s intent on bribery, robbery and sometimes murder. Many of the addicted gamblers interviewed talked of violent assaults outside the security of casinos where they were beaten or abused because of their inability to service usurious loans, when they were drunk after a successful gambling bout, or when they had their cash winnings extracted from them.

Quarrels with family and friends over gambling habits emerged as universal: Many people, irrespective of location, urban or rural blame their job-loss (if they once had a job) on a lethal mixture of gambling, alcohol and poor work habits. While some participants spoke of gambling as “stress relief” others, who denied being compulsive gamblers, nonetheless spoke of gambling-induced or gambling-related mental health problems (such as depression and anxiety).

In places such as Umlazi, a few interviewees added in sexually transmitted diseases contracted from sex workers and other habitués of the shebeens where gambling (mainly involving cards) takes place. In the more isolated areas of KwaZulu-Natal’s interior of the province, there were few cases of participants having lost jobs because of gambling activities - largely because many participants have been continuously unemployed or have never worked.

Three focus groups which were invaluable and exemplary in indicating the personal dilemmas, psycho-dynamics and responses of people whose social lives had been disrupted by gambling were held among the Indian community of Durban. Two of these were conducted in a primary school in the Phoenix area - in the first instance with 17 members of the Durban Gamblers Anonymous (GA) - followed by a session with the wives and partners of the men. The women make it a practice to hold a support group among themselves when the men meet on Mondays and Wednesdays of each week. The male group involved a range of people of different age and class groups ranging from young men in their twenties up to those who were compulsive gamblers in their sixties.

Irrespective of socio-economic status, it appeared that some of the men were working and lower class while others came from a more privileged background. Some had come to GA in the last few months, but others were part of the network for many years dating back to GA’s establishment in KwaZulu-Natal by one especially activist gambler.

GA, as it is in both KwaZulu-Natal and more widely throughout South Africa purposely remains a low-visibility organisation dependent on its own funding and the spontaneous bonding of people with a common problem. Literature used by the “compulsive” gamblers - the term most found comfortable - was accessed from GA and other internet web-sites. This was then compiled by one member into short manual of organisational goals and purposes. Most of the group were of the opinion that gambling addiction was a “social disease” much like alcohol or drug addiction.

The presence of an entirely Indian group was not evidence that gambling is especially pernicious among the Indian community per se. Since the group was composed of Durban inhabitants, it was natural that it would have a large if not exclusively Indian component. Most of the participants were wary of the idea that there was anything

particularly cultural in explaining the large numbers of young Indian males who have been observed in, for example, casinos nation-wide. Having said this, references were made to inter-generational transfer, as well as the political situation confronting Indians under apartheid. This disallowed most normal forms of recreational behaviour and “forced” many members of the Indian community to patronize gambling outlets as one of few forms of leisure open under the system of racial segregation.

More mundane theories were put forward in explaining why people, and Indians, in particular, participate in gambling. Most of those present were either card players or involved as punters in the local horse racing industry. Here, it was pointed out, a tolerance towards the Indian population was displayed even under apartheid with the consequence that many drifted to the track. (Local horse racing is still heavily dependent on Indian patronage and the view was put forward that if Indians theoretically withdrew from activity as punters, either at the track or at the tote the already troubled racing industry in KwaZulu-Natal would effectively collapse.)

Being Indian was not considered an especially important reason for gambling or compulsive gambling in particular. One compulsive gambler pointed to no known history of any gambling among his parents or present family although sisters had sometimes dabbled on gambling a very a small and recreational way. The ostensibly lower class participants nonetheless referred to the “magnetism” of gambling among the poor. Those who had won their monthly salaries five times over in a matter of moments at the horse racing track were inevitably astounded and returned to pursue a pattern of behaviour that could (and did) eventually become habituated.

Some referred to the origins of their behaviour to lie with poor self-image and the status (they believed) they acquired once associated in the minds of their peers with high-risk gambling behaviour. There were references to neurological aspects of compulsive gambling, but for the most part the basis of compulsive activity was seen to lie in particular set of personal and social circumstances.

Most of the gamblers dismissed the notion that it was credible, at least in the long-term, to profit financially from gambling activity. Possibly because of their involvement with GA, it was only with considerable reluctance that they accepted the fact that one could win at gambling at all! Once this was recognised, most success in gambling was attributed to “corruption” in the gambling industry. This included casinos, the National Lottery and, especially, the horse racing industry in the region. Professional gamblers were seen not as people with the ability to combine luck with strategic decision-making, but as people who had informal links to the “high rollers” in the industry.

The role of illegal money-lenders was discussed in-depth because, according to the group, they infest local casinos, the track and other gambling outlets in the province.

Everyone had been approached by persistent money-lenders in the casinos, at the bars, around the tables and in the car-parks. Many, who imposed exorbitant rates of interest, seem to have had accurate intelligence about those moving into losing mode and were quick to capitalize on their victims - either through direct personal contact or through cell phones and SMS texts at critical moments.

There was a suggestion of connivance by elements in both the casino and horse racing industry, not only in providing funding, but also in selective application of the process of banning people from casinos. Virtually everyone in the room had banned themselves, but still found themselves invited back into the casinos without restriction – or at least up until the point where they claimed their winnings and were then denied payment under the fiction that they were “banned”.

Some of those present talked of personal experiences where they had been privately interviewed by casino management with the object of self-reversing their bans and reverting to normal casino participation. This was especially the case with high-edge gamblers who had both won, and lost, substantial money as patrons.

The discriminatory application of the banning principle evokes a generally prejudicial view of the gambling industry. Almost everyone who loses in gambling does so, according to participants, because the whole system is rigged to ensure that there are only occasional winnings.

The people present, it was suggested, were only a small proportion of the compulsive gambling population in the region, because only those who have touched rock-bottom are willing to acknowledge their problem. GA receives on average about 20 calls per day from people ranging from pranksters to potential suicides and who are then referred to GA meetings. Only a small proportion actually carry-through on their commitment to do so, because of lack of courage or, in many cases, because of failure to recognise their problem.

The normal questionnaires used to identify compulsive gambling were dismissed with ridicule, partially because of the loose phraseology and partially because of the tendency of addiction gamblers, as fellow addicts on drugs or alcohol, to admit the nature of their problems even to their most intimate friends or family. Most of those at the meeting conducted their activities in secrecy from their wives and partners and were only up to conceding the existence of their problems when the situation had led to obvious behaviour change and problems of domestic financial management.

There was considerable discussion about the “invisibility” of gambling addiction relative to that of the compulsive drugs or alcohol-user. Most of the problem gamblers were adept until their most desperate moments in maintaining a “normal” public image which when confounded, produced massive feelings of remorse, guilt, and personal failure. While

many were inclined to brag about their success at the tables few spoke, until facing profound financial embarrassment - or about the losses and the compulsive forces that persistent gambling had released in their personalities.

The tendency of public opinion to associate gambling with vice reinforced their impossible situation facing the participants not only on the financial front, but in their intimate relationships with their wives and children. Most of those present admitted that their families' knew nothing of their condition until they broke under clinical depressions, threatened suicide or, in some cases, carried through an unsuccessful suicide attempt. Much of this information was confirmed in the group consisting of wives and partners who are rarely consulted when a gambling impact becomes problematic.

A common feature of this discussion was enormous under-education about compulsive gambling as an addictive condition. Virtually none of the women now attending the support group on a regular basis had ever previously heard of gambling addiction. One consequence was complete disorientation when confronted by husbands and partners when all was eventually revealed. Their normal response was incredulity and practical advice to abstain. When this failed to resonate with spouses, the wives and partners themselves were thrown into confusion.

Many of the women had in turn been "infected" with depression as their lives were disrupted and were, now, in turn, being clinically treated with much the same medication as their husbands. Many of the women had gone through experiences of anger, confusion and rejection that were, in retrospect, far worse than their partners who had fallen prey to consistent gambling. Most women and partners also expressed concern about their children who were exposed to the sins of their fathers through the internet, and, in particular, slot-like devices and machines placed at various malls and areas of popular congregation throughout the Durban area.

Some people who participated in the two groups had knowledge of media advertisements about the dangers of gambling, but had difficulty in differentiating between responsible and compulsive modes of participation. Most now seemed to believe that any gambling inevitably led to moral and personal degeneration. On the basis of their own extreme experiences, the majority of women in the group were now totally opposed to any recreational gambling at all.

Significantly, no-one in GA had any knowledge of the NRGP and there was a strong view that the rehabilitative work being done should continue on a low-visibility level without any public advocacy. All this suggests important inconsistencies in the public messaging about gambling and creative efforts to address the issues by greater public education as well as direct engagement.

6.2.3 Gender and problem gambling

The classic addictive female had typically led a boring and neglected existence. As emerged when oral histories were traced, she was characteristically frustrated in work and marriage, suffering from “empty-nest syndrome”, an often absent marital partner, divorce or bereavement. In some cases the financial impact of retrenchment or, in the older women, social isolation on retirement had led to an “innocent fling” at a casino or the tabulator. In the far greater majority of cases this simply meant an alteration of recreational patterns. In others the experience of gambling had, if slowly, led to dependency and mood alterations which could only be ameliorated by further and more intense involvement in gambling. Most, as well the men, agreed that gambling was mainly about mood change and not about money.

The male addicts were far harder to pin down. Virtually all appeared to exercise good self-control, were energetic (as opposed to the women who appeared sad), successful in their careers (or so they said), and articulate about the world in general. Hardly anyone among the males displayed an obvious problem with life-skills (or none that they mentioned). Virtually all nevertheless admitted to a high level of thrill-seeking and high risk-taking in their work, relationships or leisure environment. This intense machismo organised around danger emerged as common among all the men in all the groups.

Some participants were unmarried, divorced or had separated from their partners because of their gambling habits. One participant referred to his divorce as a direct consequence of his squandering of the family holiday money in a single night of excess. This had felt “wonderful” at the time, but had then been followed with depression and remorse. Another woman whose previous husband had been an addicted gambler had driven herself into debt by supplementing the salary of security guards at the local casino. The purpose of this exercise was to alert her to the presence of his vehicle in the public car park.

Most of the men had been in therapy for an extended period – in one case over ten years. Most conformed to the characteristics of male problem-gamblers i.e. they tended to be gregarious, intelligent and high-energy, if sensitive and troubled individuals. Most typically they saw their problem gambling as the result of a long-term process dating back to youth and were cynical about the prospects of being “cured” of what they had come to see as an entrenched condition.

The female participants on the other hand believed that they were over the worst in managing a crisis which was conceived as hurtful but transitional. This was attributed to their ability to “recognise” the problem and deal with it, the support of other women many of whom they had met during gambling activity or to the resolution of the stimulus that had introduced them to gambling in the initial instance. One woman who had begun heavy

gambling to forget an unsuccessful marriage, was well on the road to recovery once she encountered a new romantic relationship.

6.2.4 Mitigating the impacts/rehabilitation

In examining social impacts, participants were questioned on how they believe regulators should come to terms with gambling to the extent that it is a collective social problem in South Africa.

Many suggested that there needs to be more public education, especially of young people. Others emphasised that the authorities deal more proficiently with the rural areas than they do at present. Just about everyone, however, concurred with the view that it is difficult to mitigate the less desirable social impacts of gambling behaviour in South Africa because of the overall constraints on problem-management in a deeply unequal society with limited institutional capacity. Many expressions of gambling are a consequence of poverty, particularly the survivalist type of gambling experienced in the rural areas. This requires extensive policy action which goes well beyond mere gambling policy.

Direct treatment options in South Africa are also very limited as found in the interaction with problem gamblers in particular.

In KwaZulu-Natal, by way of example, there are virtually no support services for problem-gamblers outside major places such as Durban, the coast, Pietermaritzburg and Richards Bay. Even in places like Durban, organisations such as Gamblers and Alcoholics function many in the white and Indian areas such as Tongaat and Verulam. Tongaat, for example, has a youth development centre where problem-gambling counselling is offered to learners, many of whom have serious poly-addictions to gambling, alcohol and drug addiction.

While GA and NRGP counsellors at the KwaZulu-Natal's Howard campus are open to gamblers and see people of all cultures and ages, black problem-gamblers who come forward from places like Umlazi or Kwan Masha is still a (if growing) minority. This has to do with location, transport costs and a marked reluctance of black problem gamblers to move beyond denial. There is, for example, a high dropout rate of black compulsive gamblers from both GA and the Six-Session Outpatient programme run by a small group of social workers working as counsellors at the University. Neither group has capacity to move into historically disadvantaged areas of the city, least of all into the vast rural hinterland where there are probably huge number of peoples who go unclassified in the problem gambling statistics.

In general, those who have come to recognise their addiction in South Africa can either consult a private psychologist who will advise a course of therapy, the NRGP which offers

in-house or institutionalised services where necessary or, in the last limited analysis, various clinics and treatment centres scattered around the country. The NRGF will in fact cover costs of treatment in very severe cases where gambling has led to crime or extreme psychological damage that requires drug treatment and close monitoring.

For most people unfortunately the only option is the treatment centres. The very small group of specialist gambling addiction consultants cater mainly for up-market people who can afford their services or have access to medical cover for psycho-therapy. Costs per hour range from R750 upwards and are claimable under most medical aids. In addition there are the costs of expensive prescription drugs that are recommended by psychiatrists on referral from the consultant psychologist.

Interviews with gambling addiction therapists underline that for these addicts there is very little hope under present circumstances. Most have no knowledge of the meaning of their addiction or of the services offered by the NGRF.

Problem gamblers living in poor informal areas or rural settlements cannot afford the cost of transportation and mainstream psychological services and, in the end, go to the local treatment clinic. These offer addiction services but lack the specialist skills to deal with gambling addiction. The result is that gamblers find themselves in treatment with a wide range of addicts with whom they can share the base-line treatment, but nothing at a higher level of dedicated therapy.

In some regions of the country the NRGF is itself under-capacitated. Staff are not especially well remunerated and can only give a portion of their time after or during work in private practice. Many contracted NRGF staff are either overwhelmed in dealing with the large numbers of incoming cases or under-utilised when people fail to present themselves for treatment. In some cases this is the result of lethargy on the part of addicts or because of the culture in various communities where addiction, including gambling addiction is so extensive as to be “normal”.

This is very much the case in poor communities in the rural and urban areas, as well as in blue-collar groups of miners and factory workers where recreation is centered on a lethal mixture of gambling, alcohol and sexual activity. The great majority of people from these settings easily relapse through negative encouragement from their peers even after extensive treatment.

There are as a consequence sharp class differences in the treatment offered to gambling addicts similar to those in other addictions. Those higher up the social ladder can receive good professional help and can look forward to some degree of recovery except in the most damaged cases. Lower down the social ladder the prospects are far worse because of cultures of poverty, low values attributed to human life and the inability of people to

cross class barriers in pursuit of effective assistance. This works in reverse insofar as councillors come from a different universe which precludes communication – even when the councillor is proficient in a vernacular language. In the circumstances problem gamblers in informal settlements and other deprived areas tend to gravitate to traditional healers, sangomas or church leaders when requiring assistance.

Far more need to be done by the therapeutic community to reach out and educate church leaders, teachers, stokes, labour unions and other opinion leaders at community level about the risks of gambling and this requires care-givers with whom addicted people in poor communities can readily identify.

Relapse, as indicated by participants in all the groups, is very frequent among all problem gamblers, because of their continued exposure to money and temptation in modern commercial society. While making money is only the means to the “high” or “exhilaration” sought by all hard line addicts, treatment of gambling addiction can only be successful in these cases, when people are forced to abstain from using money except for the bare necessities of daily existence.

The characteristic treatment for problem gambling involves not only therapy and clinical procedures, including medication in “hard” cases, but also reducing access to cash and credit facilities. In the typical treatment, all of these financial utilities are transferred to a trusted “other” who then allots a small daily stipend to the addicted gambler. This is ideally sufficient to meet his/her needs for basic items but insufficient to generate a “rush” even if gambled.

The purpose of this key treatment is to promote renegotiation between the gambler and his money through abstention in its use, to break the dependence of the gambler on various abstracted forms of easily available money and to teach him/her new principles of value. This is generally assisted by sessions with psychologists on cognitive behaviour, as well as a “buddy” system common to both Alcoholics and Gamblers Anonymous.

Females are generally more amenable and “curable” in this process because, it seems that the greater majority are “escapist”-type problem gamblers as opposed to deeply entrenched addicts with an existential need for the “pleasures” of high-risk or dangerous activity. This is, as also noted, far more common among males in the process of developing their masculine identity within the context of patriarchal culture. Females also appear to adjust to activity abstention, particularly when it is reinforced by other women in similar conditions of prohibition.

NRPG messaging is known to some but not all participants, and is not necessarily salient in changing attitudes and, in particular, behaviours. In the rural areas where there is widespread participation in mainly illegal gambling as a means of survival, NRGP slogans

have minimal impact. In other locations, NRGP impacts depend on audiences, some of who have a strong disposition to gambling behaviour. This is especially the case with youth or under-age gamblers whose social impacts are especially difficult to manage. Very little is in fact done for the great majority of youth outside the school system. In schools the NRGP has done some sterling work, but in relation to the total number of schools in the country its own impact has been minimal. There is not very little guiding research other than that done many years ago; nor is there sufficient capacity to effectively deal with gambling or gambling-related problems in an effective and prophylactic way.

6.2.5 Results from the standardised questionnaire (problem gambling)

In the standardised questionnaire, participants were asked three questions which served as a proxy for *potential* problem or excessive gambling.

Firstly, participants were asked if they “had ever sought help” for their gambling. Only 9 (1.8% of the sample) admitted that they had done so, of which 3 were male and 6 female. (5 were African, 2 white, and 2 Indian).

Of the group that sought help, 2 sought help from their friends, 5 from family, 1 from the church, and 1 from the NRGP.

A less onerous and more realistic predictor of *potential* problem gambling is whether participants admitted to having borrowed money to fund their gambling habits. Here we found that fully 8.2% (41 out of 500) had done so, split almost equally between men (21) and women (20).

Finally, and most significantly, as this helped depersonalise the social dynamics at stake, participants were asked whether their friends ever objected to their gambling, and if so why. The result was that 7.4% of all participants (37 out of 400) admitted to this for the reasons summarised in Table 13 below.

Table 13: Social impact-friends, 2013

SOCIAL IMPACT – FRIENDS, 2013			
Complaints from friends	Frequency	Percent	Cumulative Percent
Spend too much money	18	3.6%	3.6%
Too much time wasted	9	1.8%	5.4%
Bad company-influences	6	1.2%	6.6%
Link to alcohol-drugs	4	.8%	7.4%
Not applicable – friends don't	463	92.6%	100.0
Total	500	100.0%	

Given that the standardised interviews were conducted with regular gamblers, the fact that around 37-41 exhibited some of the signs associated with excessive gambling, which may or not translate into “problem gambling” as measured on one of the statistical screens used to diagnose addictive behaviour, seems perfectly credible.

7. A culture of responsible gambling

The task of national and provincial regulators is to encourage a culture of responsible gambling in South Africa. This means steering a fine line between allowing operators to promote their product as a legitimate form of entertainment, whilst at the same time ensuring that excess demand for gambling is not encouraged.

7.1 Public communication and education

The issue of “responsible” gambling in various forms came up in just about all of the indepth interviews and focus groups. Participants across all demographic boundaries were quick to consider whether it was “responsible” to gamble at all, and to ask whether it was possible to talk about “low risk” forms of gambling.

Many players developed very personal relationships with slot machines. This is particularly the case at casinos and electronic bingo venues, where players spend most of their time engaging with slot machines, as opposed to LPM venues, where players typically spend a small amount of time and money gambling between drinks or whilst waiting for a meal.

In a number of groups, participants, particularly middle-aged and elderly women of all races, spoke about “their slots” or “their machines”, as if they had some personal bond with the slots. An elderly black patron interviewed at Mykonos referred to her favourite

slots machine as “blessed”, as these more likely to favour her than the other machines on the casino floor.

Other players stated that they did not “trust” certain machines on the casino floor, as these paid out lower amounts than others (so-called “tight” rather than “loose” machines). In other cases, “slots” appeared to function as a form of emotional displacement. A female participant (in a mixed gender focus group) went so far as to claim jokingly that the slots machine were “more responsive” than her husband.

Clearly, this is not an attempt to overstate this discussion of the “slots player-machine” relationship, or imply that this applies equally to all slot-machine players. It is important, however, to emphasise that the highly personal relationships that many regular slot-machine players develop with their preferred machines has relevance for the understanding of gambling behaviour, and the factors that can translate into problem gambling. A player who trusts the machine, or who prefers certain types of machines, is a player that is willing to spend more time losing money on the casino floor. Casino’s understand the financial importance of player psychology, and put considerable thought into where they locate particular machines in an effort to attract and retain customers. In his advice to the casino industry, Scoble (2010) suggests humorously that “Slot players are always looking for their one true love. Unlike in affairs of the heart, they want that one true love to be loose”. To this end, casinos are often advised to place “loose” machines near casino entrances, in an effort to encourage people onto the floor, and “tight” machines near the table games, in an effort to keep players at the tables.

Slot gambling does not simply involve the use of a machine for a particular purpose (to decide whether the player won or lost). Rather, engagement with the machines is, for many players, itself a part of the entertainment, and the fantasy-like relationships established with “my machine” is itself a component of what needs to be understood as gambling-entertainment.

When this was unpacked further, associations were found with various pro-activities before gambling, such as setting aside non-negotiable budgets to spend at the races, the casino or the slots, setting aside a monthly entertainment budget for the household including gambling and other recreational pastimes, or using what many gamblers describe as the “pocket principle” on entering a gambling venue. This means placing a fixed proportion of money for gambling in one pocket and exercising sufficient self-restraint not to use any other money on one’s persons whether to enhance wins or chase losses.

All of this suggests that programmes to publicise personal restraint in gambling have had some immeasurable impact on public consciousness and that they should be continued

along with additional efforts to educate parsimony and controlled risk taking on the part of gamblers.

Having said this, there were many participants who openly admitted – and even rationalised – the winner-knows-when-to-stop principle – under circumstantial pressures. This normally meant dipping into the funds in the “reserved” pocket following a series of wins or losses, chasing the odds in the time-honoured fashion, borrowing money on the spur-of-the moment to finance “temporary” gambling bets or otherwise taking unacceptable risks without adequate intelligence. In horse racing for example, many people now in recovery from addiction, spoke of how much money they invested following bets that were proverbial “dead certs” only to find that they had been misled by the bookies, the jockeys or their own miscalculations.

Casino patrons were often people who at some point find themselves short, desperate and vulnerable to any number of individuals and touts who are willing to make a quick loan on a usurious basis. This often leads to more trouble for the gambler and his family when the loan has been lost and the debt cannot be quickly repaid.

Fahfee is classis example of the latter. Nonetheless, the fact is that even highly sophisticated upper-edge gamblers who know the public messaging, behave as if they did not. This is partially because of the limitations inherent in public communication geared to changing cultures. Many participants indicated they know the message (and others) but still fail to exercise due caution in their gambling behaviour because they are never “winners” (at least not on a large scale), because they have sufficient self-control to act prudently without a reminder, or because the message does not tell them exactly when to stop. Is it when you have doubled your money, when you have the same as when you started, or when you are starting to lose dramatically. In other words, many participants interviewed do not see the message as practical and relevant to their own circumstances at the gambling table.

The problem seem to lie in the presupposition of these messages that were perceived as referring to logical, rational and calculating beings who have a clear conception of what do do, and then act upon it. Yet, as universal theories about building responsible gambling cultures clearly indicate, people in nature are risk-takers whose personalities react in very different ways when confronted with the mixture of stress, dread, mood and excitement which attracts us to gambling situations.

A simple case of gambling irresponsibility is where gambling is accompanied, as it often is, by high levels of alcohol or drug consumption. This profoundly shifts the individual’s sense of responsibility whatever the public messaging might say. Being young is almost by definition being irresponsible and dozens of cases of people were encountered being

seduced into “irresponsible” gambling by peers, narcotics, consumerism and – in the case of many young men – the need to demonstrate “machismo”.

It should be added that there is no visible sanction attached to most public advertising about gambling. “Arriving dead on time” is a powerful message against incautious driving, but “knowing when to stop” carries no discernible consequences. It is for this reason that many participants see the message as a reminder rather than an admonition which carries possible serious consequences. Risk-taking behaviour is much more likely in these circumstances, not only among the young, the uneducated or the cavalier, but especially so in communities where excessive gambling is deeply inbred into the local culture.

The recreationalisation of gambling is, in fact, a double-edged sword. On the one hand it is important as a corrective to the now redundant stereotype of gamblers as a pathological or otherwise morally retrograde portion of the population. On the other, gamble as simply recreation – it’s just a game – also trivialises the drastic consequences that can come from its being played “irresponsibly”. The public advertising like that against “irresponsible drinking” is caught on the horns of a contradiction.

Just about every participant is cynical about messages that advocate restrained gambling which is – in their opinion – counter to the financial interests of the industry. There was considerable discussion in some groups of how gambling venues, notably casinos and race tracks, take special pains to “dumb” down the risks attached to the very behaviours they encourage. One focus group in Johannesburg was almost entirely devoted to how gambling manipulates the fantasies and expectations of people in its advertising and how the atmosphere at gambling venues of specifically engineered to sensory deprivation that encourages risk-taking behaviour.

The “buzz” in these environments is specifically geared to encourage people “not to stop” but to let loose their impulses. Accessibility to slots, LPMs and the internet is similarly designed to discourage calculated decision-making around gambling. Amongst participants in the rural areas, it was cited that all the messaging in the world about gambling will have limited impact, as long as there is very little alternative entertainment.

7.2 The way forward

Considerably more effective public education is needed to deal with these deeply entrenched problems related to gambling risk, as well as far more inclusive treatment programs for people who have fallen into states of compulsion. One major problem with establishing a culture of responsible gambling is that, for most people, gambling is not taken seriously – or certainly less seriously than the social problems associated with substance abuse or the spread of sexually transmitted diseases. For example, some

school teachers who spend their lives dealing with drugs and alcohol among adolescents have never even heard of a gambling “addiction”. In some instances, wives and friends of problem gamblers who never took gambling seriously, were horrified on being informed that their loved ones were now financially embarrassed, clinically depressed and also “addicted”.

The public constituency for treatment of gambling problems is very substantial. It is unknown how many people gamble “irresponsibly” on a consistent basis, or how many of this group end up as compulsive or pathological gamblers.

What was clear from the focus groups and interviews is that the demand for treatment facilities for the gamblers far exceeds the supply. This includes not only the classifiable problem gamblers already discussed, but anyone along the range from the occasional to the regular gambler whose behaviour is a cause of concern to himself, his friends and family.

Notwithstanding the very valuable work of the NRGF and GA, there are large numbers of people both in denial or without any clear conception about how to manage their gambling problems. Either way these “proto-problem” or “irresponsible” gamblers” in their large numbers fall outside the treatment net.

Much as the case with the unmitigated problem gambler, there is very little in the way of treatment facilities for this huge group of people who have behavioural problems but fall short of gambling obsession. Much of what is available, according to participants, is largely confined to the major urban areas and then only when people “present” themselves to the small number of specialist psychologists who have any interest or skill to deal with gambling addiction.

Outside this extremely small group who normally have the education and money to deal with their problems, there are very few facilities as one moves out into informal settlements, peri-urban and rural areas. In these settings, as well as in the mines and industry, few people see the requirement for treatment, least of all seek it out, because a lethal mixture of alcohol, drugs and sex is the “normal” culture. This effectively neutralises just about the entire impact of “responsible” messaging.

A few interviews were held with delegates at GA, Gamanon, undesignated church groups and, in some cases, self-generating support groups designed to assist small groups of men and women whose gambling had crossed the boundaries of responsibility. Most participants were understandably scathing about the gambling industry, its public accountability and what they saw as its hypocritical role in protecting the more vulnerable social groups. While GA is for the most part a non-sectarian organisation, most of these small organisations use religious appeals as part of their antidote. GA makes extensive

use of the “buddy” system along the lines of its American counterpart. Both here and abroad, however, there is a high rate of relapse because of the enormous personal dedication required of people seeking rehabilitation.

A number of potentially valuable suggestions came out of these meetings where problem gamblings exist at very different levels of intensity.

The current system of self-banning in casinos is highly corrupt and need to be made more effective in the interests of a responsible gambling culture. Much of this involves developing a cadre of more alert, concerned and accountable and professional casino staff.

The majority of participants urged greater education not only of the general public, but of especially vulnerable or concerned target groups. This includes children (both in and especially out of school), parents, teachers, mine-workers, industrial and social workers.

There is also a requirement for ongoing research and monitoring to support a continuous learning environment populated with para-councillors to assist on-site at the major gambling venues.

Many people, especially problem gamblers, saw the destigmatising of gambling as a positive development. At the same time, gambling addiction is not just a transmittable disease that needs treatment as any other. Without being moralistic, the unfortunate few who become problem gamblers need to take responsibility for their often injurious behaviour. When the small handful of addiction psychologists who dedicate their skills to problem gamblers were questioned, all concurred that the key problems facing therapists are the difficulties experienced by clients in their relationships with money. This is particularly acute with male problem-gamblers whose complicated moods about identity, aggression and success in a consumer society make them far more resistant to “cure” than their female counterparts.

It is because of the complexity of gambling addiction that rehabilitation of the victims requires not only the proverbial “tough love”, but also a multi-dimensional approach involving the gambler and his immediate social circle.

There should be far more programs that deal with the spouses, friends and family of the addict who are, in many cases, more serious wounded than the addict him/herself. Because gambling therapy involves renegotiating relationships with money, the first requirement for many problem gamblers is how to settle their debt rather than their psyche. There is still a great need to deal with these financial issues as a component part of overall rehabilitation programs.

8. Conclusion

This report has attempted to unpack “the mind” of the South African gambler. It began by examining attitudes to gambling, after which it offered a comprehensive overview of gambler perceptions of all regulated-legal and several unregulated-illegal forms of gambling. Thereafter it considered select aspects of the gambling experience before concluding with a discussion of problem gambling.

By way of conclusion, it is worth commenting broadly on the state of gambling in South Africa today, and some of the regulatory implications thereof. For convenience, this discussion can be clustered into three components: what has stayed the same over the past decade; what has changed; what are the main regulatory challenges.

8.1 What has stayed the same

Public attitudes to the gambling industry have remained relatively stable over the past decade. There has been a gradual decline in participation rates, and initial moralistic concerns about the negative impact of gambling have given way to a widespread acceptance, if not an indifference towards, gambling in South African society. But other than this long-term trend, public perceptions of the gambling industry have not changed significantly in recent years, certainly not since the last major survey of gambling behaviour in 2009 (NPS 2009).

The National Lottery remains the single most widely played game, in large measure because of the low cost of a ticket coupled to the promise of a massive win.

8.2 What has changed

The single biggest change in the gambling industry has been the growth of new games and new gaming platforms that challenge gambling operations.

The single most significant of these is internet gambling. At present, only certain horse and sports betting operations are legal in South Africa. All other online gambling offerings, including “internet casinos”, various poker and other card game sites, and non-licensed betting sites, are banned. It is by no means clear how substantial the demand for internet gambling is, but this research suggests that it is huge. Land-based casinos and betting operations will need to integrate with and develop new cyber-platforms, if they are to survive.

Secondly, the controversial development of EBTs, which “look, feel and sound” like slot machines, and which this research suggests, players see as nothing other than slot machines, as well as the on-going rollout of LPM machines, have resulted in a rapid

increase in the total number of slot machines in South Africa. Not only has the total number of machines increased, with these slots located in local communities and shopping centres rather than “destinations” that are separate from public spaces.

Although this runs the risk of over stimulating demand for gambling, this research suggests that the public is overwhelmingly unconcerned about such developments. Gambling has become so normalised that there is little public reflection on or debates with the gambling industry in South Africa.

Finally, there has been a rapid expansion of unregulated illegal gambling in South Africa. This includes the expansion of illegal online offerings, as well as the proliferation of informal games in many townships. In part, this is due to a decline in state regulatory capacity, and regulators are hard pressed to take effective action against these operations.

8.3 What are the regulatory implications?

Internet gambling cannot easily be banned. Even the US has abandoned their attempt to do so, and Nevada and New Jersey have recently passed laws legalising some forms of online gambling. South Africa probably has no choice but to follow suit.

The findings suggest that there is considerable demand for online gambling, particularly for online betting and online poker. Online slots appear to be less attractive for SA punters at this stage, although clearly there is a demand.

Players find EBTs indistinguishable from casino slots, and regard electronic bingo houses as mini-casinos. This threatens the integrity of the entire casino licensing process. Effectively, by default rather than design, EBT-slots have enabled provincial regulators to get around the cap on a maximum of 40 licensed casinos in South Africa.

This research has not uncovered any significant evidence to suggest that the internet has independently increased the size of the problem gambling population in South Africa. This goes against earlier expectations, although it is something that has to be watched continuously.

Internet poker appeals to a growing, affluent, sector of the gaming market. Unless this is legalised, and unless sites are monitored for compliance, this market will simply move offshore.

The social impact of internet slots and internet card games remains unclear. However, it remains the single largest trend that needs to be monitored going forward.

Lastly, the rapid rise in unregulated gambling poses particular challenges. Illegal gaming operations can be found in any major town or big city, and authorities appear largely unwilling or unable to close these down. This is extremely unhealthy for South Africa, and is a trend that needs to be addressed.

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APPENDIX TO THE REPORT

Appendix 1: Standardised Interview Schedule

Background

In accordance with the guidelines set by the pre-Christmas meeting with individual members of the Research and Ethics Committee, the working group of Professor Frankel, Dr Louw, Ms Baby Twaya and Estelle Jonkheid agreed that the study would comprise 500 short standardized interviews with different categories of punters nationwide.

In addition, 50 punters would be selected and interviewed in depth using a semi-structured interview protocol.

It was further agreed that all 550 interviews would be conducted on a confidential basis, both for ethical reasons and, more practically, to ensure public participation. The interviews, in all provinces, were to take place at locations close to the relevant gambling modality (racetrack, casino, etc.)

For this purpose ASR constituted and trained an interview team capable of conducting interviews at the proposed targets, in all nine provinces, in the relevant languages.

The field team consisted of four core young researchers (two males and two females). All four were black. This was supplemented by 18 field workers.

Both the core team and field workers were briefed extensively on the nature of the project. The team was given an overview of how we intended to approach the key issues and a Manual was drawn up and distributed in order to reinforce the transmitted knowledge.

The field teams consisted of two or three people on site at various provincial locations where the short interview was administered. The persons in this category were given a short briefing on the purposes and methods of the project but were selected more for their congeniality and communication skills in dealing with the public rather than their expertise with key issues.

The overall response to the short survey was generally positive once people were assured of confidentiality and minimal disruption of otherwise recreational activities. While an estimated quarter of people refused to be interviewed, the official NGB letter was persuasive in the remainder of cases.

The principle behind the interviews was that the team would be deployed to known gambling locations in all provinces to examine the various modalities of gambling taking place.

Instructions were attached to each interview instrument. These emphasized that the potential respondent should be approached discreetly, presented with the introductory letter from the NGB and assured of complete anonymity in responding to the set questions contained in the interview schedule. Interviews were not expected to take longer than 20 minutes to complete.

50 people were selected for in-depth interviews. Some of these were identified directly by the four key research assistants (who were given specific themes to explore). Others were selected out of the group originally targeted for short interviews.

Breakdown of people interviewed

Province	Gambling mode	Short	Long	Gender / Pop group / Income															
EC	Casino LPM Betting (Horse)	18	6	M	F	B	W	C	I	L	MI	U							
		17	3	19	4	11	4	2	7	8	9	7							
		10		12	9	12	3	1	4	6	4	6							
		45	9	10		10	-	-	-	14									
FS	Casino LPM Lotto	14	4	M	F	B	W	C	I	L	MI	U							
		10	2	8	10	8	2	3	5	4	9	5							
		21	1	9	3	7	1	3	1	5	6	1							
		45	7	14	8	13	2	3	4	9	10	3							
GP	Casino LPM Betting (Horse and Sports) Bingo (traditional) Bingo (EBTs)	22	9	M	F	B	W	C	I	L	M	U							
		5	2	40	28	33	24	6	3	18	26	3							
		19	4	4	1	5	-	-	2	3	3	1							
		18	3	16	7	6	9	1	7	21	18	3							
KZN	Casino LPM Lotto Betting (Horses)	29	10	M	F	B	W	C	I	L	MI	U							
		11	3	22	17	19	10	-	10	3	28	4							
		13		10	4	7	-	3	7	4	10	-							
		22	21	23	-	16	4	0	3	9	10	-							
LP	Casino LPM Lotto	24	3	M	F	B	W	C	I	L	MI	U							
		9		20	7	19	4	-	4	16	9	2							
		12	3	6	3	4	4	-	1	4	5	-							
		45		11	1	7	4	-	1	10	1	1							
MP	Casino LPM	19 16	8	M	F	B	W	C	I	L	MI	U							

	Lotto	10 45	8	18	8	12	6	1	2	27	2	4	
				12	6	11	4	-	2	9	5	3	
				5	4	7	2	--	6	3	-		
NW	Casino LPM Lotto	32 7 6 45	4 1 1 6	M	F	B	W	C	I	L	MI	U	
				28	8	24	10	-	2	21	14	1	
				5	3	7	1	-	-	7	1	-	
				6	1	6	1	-	-	6	1	-	
WC	Casino LPM Lotto Betting (Sports and Horses)	30 11 5 34 80	18 3 4 25	M	F	B	W	C	I	L	MI	U	
				33	10	16	12	5	4	30	6	-	
				10	4	10	1	2	1	11	3	-	
				5		4	1	-	-	4	1	-	
				14	4	9	10	-	5	19	6	-	
NC	Casino Lotto General	16 14 14 45	2 4 6	M	F	B	W	C	I	L	MI	U	
				12	6	9	5	-	4	10	8	-	
				13	5	10	4	2	2	10	7	1	
				12	5	9	4	-	2	9	6	-	

Instructions to enumerators

The purpose of the interviews is to extract the maximum amount of information from respondents about their gambling practices in the minimum amount of time. By “practices” we mean:

- Their views, perceptions, feelings, attitudes and choices when it comes to gambling;
- Their behaviour when gambling;
- The financial and social consequences of their gambling for themselves, their families and their general social relationships.

All of the people you meet will be gamblers of some sort or another because the places where you will be conducting the interviews are gambling venues. These include casinos where various table games are played, restaurants or bars where customers use Limited Payout Machines (LPMs), locations where bets on horses or other wagers are made, racetracks or bingo halls where both traditional bingo and electronic bingo (slots) are played. All of the people you encounter are therefore likely to have views about gambling and its meaning in their lives. Your role is to tap into this information, to note it down on your interview schedules and then to return it to us as soon as possible thereafter.

You will be randomly selecting people at a gambling venue of some sort or another. People have come to this venue to have a pleasant time and not to be questioned what many people believe is sensitive and personal aspects of their social existence. You need to convince them that you are not moralistically prying into their lives, that what you are doing is legal, that it is confidential and that it is being used for the public good.

The person you approach should appear to be approachable. You will never know until you make an overture, but if the person is not enthusiastic about what you propose doing, do not try to convince them otherwise. Simply thank them and walk away.

Most people as a generalisation will not be rude or aggressive – especially if they are winning or winners at gambling. But most will be sceptical about whom you are, what you want and what you are going to do with the information. It is important that you show them the NGB letter on immediate contact and that you very quickly summarise its content in a friendly verbal form. Show them the questionnaire while pointing out that none of the questions are difficult, controversial or time-consuming. Emphasise that you do not even want to know their name but that you still value their opinions. Be friendly, well dressed and earnest without being “up-tight”. Point out that they can help other people, including those with gambling problems by giving you a moment of their time.

When you have completed the interview try to assess whether the person would like to be interviewed for a longer period of time. The respondent being interested in what you have asked will normally indicate this and he/she will have talked more than you require. Gently suggest that you have some additional questions. If they are interested you may suggest they move from the place where the short standardised interview has taken place to somewhere quieter where you would take up an additional ten minutes of their valuable time. Do not arrange to meet “later” because this will, in all probability, waste your time. Capture the moment and act on it to go directly to the longer interview.

Whether or not the interviewee agrees to a longer interview you should be consistently polite and thank them for their valuable input. Remember that you are representing the Board to the public, that this is an honour and that you need to behave appropriately under all circumstances!

Remember that these are all open-ended questions designed to accelerate the interview: you need to latch onto the first response, note it down and then move quickly to the next question before the respondent has the opportunity to launch into an extended discussion.

Interview schedule

{Demographics}

1 – LOCATION (Type of gambling location)

--

2 - GENDER (This is a very effective “ice-breaker”)?

Male	
Female	

3 - AGE? (Approximate range if need be)

--

4 - CULTURAL GROUP

Black	
White	
Coloured	
Indian	
Other	

{Motivation}

5 -WHAT IS THE MAIN REASON BEHIND YOUR GAMBLING? FOR EXAMPLE, DO YOU GAMBLE BECAUSE IT IS FUN, TO MAKE MONEY, TO RELAX, OR FOR SOME OTHER REASON?

--

{Participation}

6 - DO YOU COME HERE REGULARLY TO BET OR PLAY A GAME: IF SO, HOW MANY TIMES A MONTH ON AVERAGE?

--

{Preferences}

7 - IS THIS FORM OF GAMBLING YOUR FAVOURITE, AND IF SO WHY?

8 - DO YOU PLAY A MIX OF GAMES E.G. WAGERING ON HORSES AND ON SPORTS?

{Modalities}

9 - (Where relevant) DO YOU PATRONISE A CASINO? IF SO WHAT DO YOU LIKE ABOUT GAMING IN A CASINO ENVIRONMENT?

10 - DO YOU PLAY THE LOTTO. IF SO, WHY DO YOU ENJOY IT?

11 - IN YOUR OPINION, IS INTERNET GAMBLING LEGAL OR ILLEGAL?

12 - HAVE YOU EVER PLAYED ELECTRONIC BINGO?

13 - HAVE YOU EVER PLAYED AN LMP? WHAT DO YOU SEE AS THE POSITIVE AND NEGATIVE SIDES OF USING THESE MACHINES?

{Gambling dynamics}

14 - DO YOU BELIEVE THAT “WINNERS KNOW WHEN TO STOP” – AS THE ADVERT SAYS?

15 - WHAT DO YOU DO WITH THE MONEY YOU WIN?

16 - HAVE YOU EVER BORROWED MONEY FROM A STRANGER AT A GAMBLING VENUE?

{Consequences/Impact}

17 - DO ANY OR YOUR FRIENDS HAVE A PROBLEM WITH YOUR GAMBLING OR GAMBLING IN GENERAL - IF SO WHAT ARE THEIR MAIN OBJECTIONS?

18 - HAVE YOU EVER HAD TO SEEK HELP FOR YOUR GAMBLING ACTIVITY: IF SO, FROM WHOM AND WHERE?

{Regulatory issues}

19 - ARE YOU ESPECIALLY CONCERNED THAT CASINOS AND OTHER GAMBLING OPPORTUNITIES ARE MOVING MORE INTO PUBLIC FACILITIES LIKE SHOPPING CENTRES, MALLS, BARS AND RESTAURANTS?

20 - DO YOU THINK CASINOS AND OTHER GAMBLE FACILITIES MANIPULATE THE LEVEL OF PAYOUTS?

21 - DO YOU THINK STRONGER MEASURES SHOULD BE TAKEN TO CURTAIL THE GAMBLING SECTOR?

22 - DO YOU SEE GAMBLING AS A "NORMAL" RECREATIONAL ACTIVITY OR DO YOU BELIEVE IT IS SOMETHING DONE BY MIXED UP, TROUBLED OR STRANGE PEOPLE?

Appendix 2 – The Focus Groups

The decision to use focus groups to generate qualitative information was taken at the first meeting held between ASR and the NGB after the appointment of ASR as the service provider. This meeting, held in the last week before the 2012 Christmas break, and attended by ASR, the CEO of the NGB, and several other Board members, agreed that there would be 20 focus groups (or interactive discussions) with various demographic categories of South Africans reflecting class, culture and gender differentiations.

It was also agreed at this meeting and reaffirmed at the first working meeting between ASR and the CEO of the Board in January, that the number of focus groups would be raised to 31, and would not necessarily be conducted in all nine provinces. The focus groups dealt with specific clusters of different types of gambling participants. It would not be feasible to have focus groups all over the country examining all of these groups. Instead, the focus groups were supplemented with a series of interviews conducted in all nine provinces.

The Interview Protocol/Process

The focus groups were personally undertaken by Professor Frankel and Dr Louw at various locations, ranging from formal survey settings armed with two-way mirrors and videos, to schools, clinics, community facilities and, in one case, in a makeshift hut in a deep rural area of KZN-Natal.

In all cases, with the exception of non-gamblers, we structured each group of regular players into demographically representative “communities” with particular regard to class, culture and gender variables.

Most sessions were initiated by an intentionally provocative question to the group designed to stimulate discussion. This might be along the lines of “do you think you can win at gambling?” or “has gambling in any way improved your social, financial or familial relations”. Thereafter we encouraged a modulated but basically free-flow discussion on as many as possible of the standard battery of key issues enunciated in previous NGB studies of the South African gambling universe.

In all cases, the facilitators sought to steer the discussion around three clusters of concern and nine key issues, namely:

1. Attitudes to gambling
 - a. Why people gamble?
 - b. Do people believe they can gain (win) from gambling?
 - c. Do they see the administration of the gambling industry as honest, fair and publicly accountable?

In terms of attitudes, considerable attention was granted to the ways in which these are affected by marketing and advertising, as well as educational and problem gambling awareness programmes conducted by the NRGPA, the NGB, and other regulatory authorities.

2. Behaviour
 - a. How do people gamble: what are their preferred modalities?
 - b. Where do they gamble?

c. What proportion of their income is spent on gambling activity?

3. Impacts

- a. Does gambling impact positively or negatively on their social life?
- b. How are people induced into problem gambling?
- c. How do they manage problem gambling behaviour?

The sessions lasted between one and one-and-a-half hours each.

Before the focus groups were rolled out, two initial “test” groups were held in Johannesburg. Representatives of the NGB attended both of these and expressed their general satisfaction with the content and form of the groups.

Live streaming was made available to the NGB for two of the focus groups held in Cape Town.

There were many cases where outsiders other than the facilitators were not welcomed because of a widespread confusion about the NGB representing “government”. Participants were generally reluctant to speak about clearly sensitive issues touching on their personal lives, and facilitators had to exercise considerable empathy in order to encourage people to open up about their gambling experiences. It is a measure of the success with which this process was conducted that many sessions “took-off” after an initial 10 to fifteen minutes. Thereafter, some were difficult to stop.

Our overall impression is that, relative to years ago when we were engaged in similar work, people were less distrustful of our motives and considerably more forthright with their opinions on what was, until recently, considered a “taboo” subject. This aligns with our findings that in the overall study that gambling is decreasingly associated with vice or morally questionable behaviour and has been taken into the mainstream of recreational activity right across the board.

At the initial meetings between ASR and the NGB it was agreed that 20 focus groups would be conducted. These would be divided between demographic communities of gamblers, various gambling modalities, and a number of “special” groups including the non-gambler population.

These were supplemented by a number of speciality groups, conducted on our own initiative, with punters, specialists in the gambling field, and addiction psychologists who provided us with penetrating insights into the unique world of problem gamblers. These added value to the project, even though not specifically requested.

In total, there were 14 “demographic” focus groups; 11 “modality” focus groups, and 6 “specialty” groups. This constitutes a total of 31 groups (Roughly a third more than was initially contracted.)

The groups, the issues raised in each, the location and date of sessions follow. In each case we have provided detail – but with due respect for the confidentiality of the participants.

Groups 1-14: Demographic

Group 1: Black, urban, middle-income, mixed gender

Composition	5 males, 9 females, all black
Location	Melville, Johannesburg – Vibrand Market Research Offices , 19th February @15.00
Key issues discussed	Transparency in the gambling industry Increased role of Internet gambling Poker playing among the young Is it possible to always win: the case of horse racing Modality preferences, and why

Group 2: Black, urban, lower income, mixed gender

Composition	6 males, 9 females, all black
Location	Thokoza, Ekurhuleni – Elim Clinic, Kempton Park, 20th February @ 10.00
Key issues discussed	Is gambling worth it Different types of “township” gambling Fahfee and illegal gambling Gambling and crime Sources of finance

Group 3: Black underage youth (15-17), urban, lower income, mixed gender

Composition	4 males, 4 females, all black
Location	Pimville, Soweto – Private house, 22 February @18:00
Key issues discussed	Views on gambling: different generations Gambling and getting-ahead in life Why people gamble Access to gambling facilities Sources of finance Gambling and crime Regulated and unregulated gambling preferences and experiences

Group 4: Black, rural. Low income, male

Composition	19 males, all black
Location	Newcastle – KZN-Natal – Community Centre, 27th March @ 10.00
Key issues discussed	Gambling as a social problem for the young Casinos and job-creation What gambling does to communities Illegal gambling in rural areas Modality preferences, and why

Group 5: Black, rural. Low income, female

Composition	22 females, all black
Location	Newcastle – KZN-Natal – Community Centre, 28th March @ 10.00
Key issues discussed	Gambling and poverty in rural society How girls “get into trouble” through gambling Problem gambling Job-creation not gambling Modality preferences, and why

Group 6: White, urban, middle income, mixed gender

Composition	8 males, 9 females
Location	Sandton – Johannesburg – Automobile Club, Lower Houghton, 22nd January @ 14.00
Key issues discussed	The role of Internet gambling among children Can one win by gambling: risk, skills and luck Additional forms of regulation Is the industry honest? Modality preferences, and why

Group 7: White urban, lower income, mixed gender

Composition	6 males, 8 females
Location	Melville – Johannesburg – Vibrand Market Research Offices @ 16.00
Key issues discussed	Differences between men and women gamblers Recreational gambling: the “joy” of casinos Poker playing among men New types of gambling – LPMs and EBT's Modality preferences, and why

Group 8: White underage youth, urban, mixed income, mixed gender

Composition	4 males, 4 females – Dros Restaurant, Campus Square, Melville, 8 March @ 15:00
Location	Westdene – Johannesburg
Key issues discussed	Views on gambling: different generations Gambling and getting-ahead in life Why people gamble Access to gambling facilities Sources of finance Gambling and crime Regulated and unregulated gambling preferences and experiences

Group 9: Coloured, urban, middle income, female

Composition	9 female
Location	Cape Town – Western Cape. The Quantitative Consultancy, Green Point, 12 April @20:00
Key issues discussed	Gambling versus other social problems The Lotto and luck in gambling Gambling and recreation Should there be less gambling Modality preference, and why

Group 10: Coloured, peri-urban, lower income, mixed gender

Composition	4 males, 4 females
Location	Pniel – Western Cape, community centre. 13 April @10:00.
Key issues discussed	Gambling among the poor Youth gambling (and pensioners) Social grants and gambling Is the industry honest? Modality preference, and why

Group 11: Coloured underage youth, urban, mixed income, mixed gender

Composition	4 males, 5 females. The Quantitative Consultancy, Green Point, 12 April @16:00
Location	Cape Town – Western Cape
Key issues discussed	Views on gambling: different generations Gambling and getting-ahead in life Why people gamble Access to gambling facilities Sources of finance Gambling and crime Regulated and unregulated gambling preferences and experiences

Group 12: Indian, urban, middle income, mixed gender

Composition	Tongaat – KZN-Natal
Location	10 males, 3 females – Tongaat Boystown Centre, 29th March, 16.00
Key issues discussed	Luck and skill in gambling The dynamics of poker Honesty in the gambling industry The “good side” of gambling; recreation and fun Modality preference, and why

Group 13: Indian, urban, lower income, male

Composition	14 males
Location	Phoenix – Durban – Phoenix Secondary School, 1st April @ 18.00
Key issues discussed	Problem gambling Racing and gambling in KZN-Natal Winning and losing Why people gamble Modality preference, and why

Group 14: Indian, urban, lower income, female

Composition	15 females
Location	Phoenix – Durban – Phoenix Secondary School, 1st April @ 20.00
Key issues discussed	Problem gambling Support for spouse who gamble The work of the NGRB in KZN Can gambling addiction be “cured” Modality preference, and why

Groups 15-26: Gambling Modalities

Group 15: Poker and blackjack players

Composition	6 whites, 2 Indians; all male; mid-upper income
Location	North–Eastern Johannesburg – Private residential venue, Cyrildene, 15th April @ 19.00
Key issues discussed	Skills and characteristics of the professional player Luck in Poker-Blackjack Cash games vs. tournaments The stress and strain of professional gambling Should blackjack/poker in various formats be legalised

Group 16: Poker players

Composition	12 male, 3 female; 5 white, 5 black, 5 Indian; low-mid income
Location	Cyrildene, Kelvin & Berea– Johannesburg – Private residential venues, 17th to 19th April
Key issues discussed	The expansion of the poker industry Cash games vs. tournaments Poker on the Internet Poker playing among youth The “joy” of poker Should cash games and/or tournaments be legalised

Group 17: Horse racing (wagering)

Composition	12 males; 11 Indian, 1 white; mid-upper income
Location	KZN – Greyville/Tongaat – Greyville Race Course, 19th April @ 15.00
Key issues discussed	The role of racing in KZN The Indian community and horse racing Challenges facing the industry Accountability Betting – synergies with sports betting Betting – track versus tote

Group 18: Sports betting

Composition	6 males; 3 black, 3 white; mid income
Location	Gauteng – Johannesburg (Melrose Arch), Prima Forma, 2 April @18:00
Key issues discussed	Overview of sports betting (what sports, etc.) Location of sports betting outlets Other betting (inc horse racing) Internet vs. land-based operations

Group 19: Internet gamblers

Composition	9 males, 7 females; 10 white, 6 Indian; mid-upper income
Location	Gauteng – Johannesburg (Melrose Arch), Prima Forma, 10 April @18:00
Key issues discussed	What games What sites Understanding of legality of internet gambling Expectations from a legal site Relationship to other gambling

Group 20: Internet gamblers

Composition	4 males; all white; mid-upper income
Location	Western Cape – Cape Town (Muizenburg), The Corner Surf Shop Restaurant, 5 April @13:00.
Key issues discussed	What games What sites Understanding of legality of internet gambling Expectations from a legal site Relationship to other gambling

Group 21: LPM players

Composition	6 males; 5 white, 1 black; low-mid income
Location	Western Cape – Cape Town (Muizenburg), The Corner Surf Shop Restaurant, 5 April @17:00.
Key issues discussed	Where are games played (no. machines) Likes and dislikes Suggestions for improvement Relationship with casinos

Group 22: LPM players

Composition	2 males, 4 females; 5 coloured, 1 white; lower-income
Location	Western Cape – Betty's Bay/Kleinmond, Gringo's Restaurant, 6 April @18:00.
Key issues discussed	Where are games played (no. machines) Likes and dislikes Suggestions for improvement Relationship with casinos

Group 23: Electronic Bingo players

Composition	3 males, 3 females; 4 white, 2 black; mid-upper income
Location	Gauteng (Sandton) – Seattle coffee shop, Mandela Square, 17 Feb @18:00
Key issues discussed	Where are games played Likes and dislikes Advantage/disadvantage of EBTs vs. casino slots Traditional bingo

Group 24: Casino players

Composition	3 males, 3 females; 4 Indian, 2 white; lower-middle income
Location	KZN (Durban) – Edward Hotel, Marine Parade, 23rd April @ 18.00
Key issues discussed	Attendance at casinos Mashonisas – money-lenders Roulette & blackjack Casinos and development Safety Entertainment at casino complexes

Group 25: Casino players

Composition	4 males, 2 females; 5 coloured, 1 white; mid-income.
Location	Western Cape – Langebaan, Driftwoods, 27 April @20:00.
Key issues discussed	Attendance at casinos Mashonisas – money-lenders Roulette & blackjack Casinos and development Safety Entertainment at casino complexes

Groups 26-31: Speciality groups

Group 26: Problem gamblers (in therapy), mixed gender

Composition	12 male, 7 female; 14 white, 5 Indian; wide income range
Location	Gauteng – Johannesburg – St Mungo's Church Bryanston, 25th February @ 18.00
Key issues discussed	The nature of problem gambling Becoming an addict Treatments and therapies Incidence and what can be done Problem gambling among the youth Problem gambling among the poor Treatment and recovery

Group 27: Problem gamblers (in therapy), male

Composition	15 Indian males; low class
Location	KZN – Durban – Private residential venue, Westville, 9th April @ 18.00
Key issues discussed	The nature of problem gambling Becoming an addict Treatments and therapies Incidence and what can be done Problem gambling among the youth Problem gambling among the poor Treatment and recovery

Group 28: Non-gamblers

Composition	8 black males; low income
Location	North West – Rustenburg – Lonmin Mine Recreational Centre, 11th April, 16.00
Key issues discussed	Personal objections to gambling Family attitudes Religion and gambling Sport and gambling Should gambling be more controlled

Group 29: Non-gamblers

Composition	4 white females; 4 black females
Location	North West – Rustenburg – Mooinooi Church, Mooinooi, 12th April, 14.00
Key issues discussed	Personal objections to gambling Family attitudes Religion and gambling Sport and gambling Should gambling be more controlled

Group 30: Horse racing operators/stakeholders

Composition	16 males; 4 white, 3 Indian, 9 black; low-midincome
Location	KZN – Greyville – Greyville Race Course, 16th April @ 14.00
Key issues discussed	Development in the industry Diversification and Change Issues of public accountability The role of the regulator Links between horse racing and other sports betting

Group 31: Addiction psychologists

Composition	6 white females; mid-upper income
Location	Gauteng – Johannesburg – Elim Clinic, Kempton Park, 23rd April 16.00
Key issues discussed	The incidence of problem gambling Addictive gambling and other addictions New (and standard) means of treatment Gambling, recreation and social existence Assessment of treatment options available Gambling vs other addictions

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South Africa

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