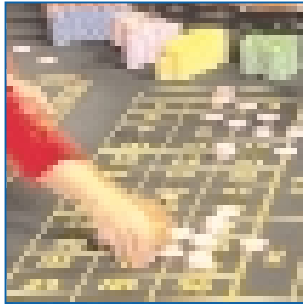


part five

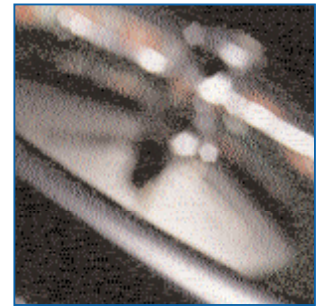
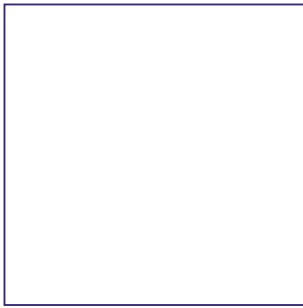
annexes



Annex A

Abbreviations and Glossary

AAAG	Amusement Arcade Action Group	GA	Gamblers Anonymous
ACM	All-cash machine	GBGB	Gaming Board for Great Britain
ACPO	Association of Chief Police Officers	HBLB	Horserace Betting Levy Board
AGIF	Amusement Gaming Industry Forum	HMCE	HM Customs & Excise
AWP	Amusement with prize machine	IBAS	Independent Betting Arbitration Service
BACTA	British Amusement Catering Trades Association	ICSTIS	Independent Committee for the Supervision of Standards of Telephone Information Services
BAGS	Bookmakers' Afternoon Greyhound Services	LBO	Licensed Betting Office
BALPPA	British Association of Leisure Parks, Piers and Attractions	NAB	National Association of Bookmakers
BBOA	British Betting Office Association	NAO	National Audit Office
BCA	British Casino Association	NCIS	National Criminal Intelligence Service
BGRB	British Greyhound Racing Board	NGRC	National Greyhound Racing Club
BGRF	British Greyhound Racing Fund	NJPC	National Joint Pitch Council
BHB	British Horseracing Board	NORC	National Opinion Research Center (University of Chicago)
BISL	Business in Sport and Leisure	ONS	Office of National Statistics
BOLA	Betting Office Licensees' Association	SFA	Securities and Futures Authority
BLRA	Brewers & Licensed Retailers Association	SIBA	Scottish Independent Bookmakers' Association
CBT	Cognitive Behaviour Therapy	SIS	Satellite Information Services
CPS	Crown Prosecution Service	SP	Starting price
DCMS	Department for Culture, Media & Sport	WMCIU	Working Men's Club & Institute Union
FES	Family Expenditure Survey		
FSA	Financial Services Authority		



Glossary of technical terms

All-cash machine (ACMs)

A gaming or slot machine with a maximum 30p stake, £15 prize. Commonly found in arcades, bingo halls, pubs and betting shops. Permitted under Section 35 of the Gaming Act 1968.

Amusement only machine

A slot machine which offers no advantage to a successful player other than the return of his money or the opportunity for further turns free of charge.

Amusement arcade

A premises or area used primarily for gaming machines, including all-cash machines and amusement-with-prize machines.

Amusement with prize machine (AWPs)

A gaming or slot machine restricted to 10p stake, £5 cash prize or £8 token prize. AWPs can sometimes refer to both amusement-with-prize machine and all-cash machines. Permitted under Section 34 & 35 of the Gaming Act 1968.

Baccarat

A card game belonging to a family of card games including blackjack, chemin de fer and punto banco. It is a house banker game.

Banker game/non banker game

A banker game involves staking against a bank held either by the house or by one of the other players. A non-banker game is one which does not. Many banker games provide the bank with an edge over the other players. All non-banker games are games of equal chance.

Better (or bettor)

Another name for a player or person who gambles.

Bingo

A game of equal chance between players in which each receives a set or sets of numbers. Each set differs as a whole from that of any other player. Numbers are then selected by chance and players eliminate from their sets the numbers selected. The winning player is the one who having eliminated all the numbers received, is the first to claim to have done so by shouting 'bingo' or by some other means.

Bingo club (or hall)

A commercial club which promotes equal chance gaming in the form of bingo. Permitted under Part II of the Gaming Act 1968.

Behaviour therapy

Treatment and modification of maladaptive behaviour by

principles based upon the theory of conditioning and learning.

Betting Office Licensees' Association Limited (BOLA)

One of the main bookmaker trade associations. Represents the big three bookmakers, among others.

(The) Big 3

The three largest bookmakers: Coral, Ladbroke and William Hill.

Bingo Association

The trade association for commercial bingo clubs.

Bookmakers' Afternoon Greyhound Services Limited (BAGS)

A consortium of bookmakers which arranges for the provision of greyhound racing primarily in the afternoons. The main purpose is to provide a betting product for betting shops.

Bookmakers' Committee (of the Horserace Betting Levy Board)

A statutory committee which recommends the levy scheme for horseracing that will operate during the next levy period. On 2 March 2000, the Home Secretary announced that the Government had decided to abolish the horserace betting levy and the Levy Board. Covered by the Betting Levy Act 1961.

British Amusement Catering Trades Association (BACTA)

One of the main trade associations representing the gaming machines industry including operators, manufacturers and suppliers.

British Association of Leisure Parks, Piers and Attractions (BALPPA)

A trade association representing the interests of gaming machine operators.

British Betting Office Association (BBOA)

One of the main bookmakers trade associations. Often thought to represent independent bookmakers.

British Casino Association (BCA)

The trade association for casinos.

British Horseracing Board (BHB)

The BHB is the current governing authority for horseracing with responsibility for strategic planning and policy for racing, improving racing's financial position, representing racing, the fixture list race planning, nominating racing's representatives on the Levy Board and liaison with the betting industry among other duties.



Business in Sport and Leisure (BISL)

A trade association representing the interests of major leisure companies in the sport and leisure industry. BISL commissioned a report produced by KPMG in May 2000 on *The Economic Value and Public Perceptions of Gambling in the UK*.

Caller

The person who announces the randomly selected numbers in a bingo game.

Cash bingo

Bingo played for winnings in cash.

Casino

A commercial gaming club for the provision of table games other than bingo. Permitted by Part II of the Gaming Act 1968.

Certificate of approval

A certificate issued by the Gaming Board which certain categories of employees in casino and bingo clubs are required to possess. Covered by Schedule 5 of the Gaming Act 1968

Certificate of consent

A certificate issued by the Gaming Board which allows the holder to apply for a licence. Covered by Schedule 2 of the Gaming Act 1968.

Chemin de fer

A game belonging to the baccarat family in which the bank is not held by the house but circulates among the players. Chemin de fer and pontoon are the only bank games allowed in clubs.

Chips

Tokens used to represent money in the playing of casino games. Players buy chips from the casino. The total value of the chips sold in a given time by the casino is called the drop.

Cognitive therapy

Treatment of distressing psychological conditions by teaching the patient to challenge and alter the underlying maladaptive cognitive processes (e.g. distorted beliefs, automatic patterns of thought).

Cognitive-behaviour therapy (CBT)

Treatment of distressing psychological conditions (e.g., depression, anxiety) by a combination of techniques based upon behaviour therapy (q.v) and cognitive therapy (q.v.).

Commercial clubs

Clubs run on commercial lines for the profit of the owners.

Cranes

Type of amusement machine that has a grabbing mechanism. The player wins the toy or object by grabbing, lifting and dropping it down a chute.

Craps

This is a house banker game played with two dice. It is one of the games allowed in casinos.

Credit betting

The punter operates from an account with a bookmaker. It is known as credit betting because the punter may run up a bill over a period of time, i.e. bet on credit, before paying. Also known as telephone betting.

Croupier

An employee of a casino who conduct the games e.g. by spinning the roulette wheel, collecting the chips and paying out winnings.

Dealer

The person who distributes and collects the cards in card games in casinos. In card games which are house banker games, the dealer acts as banker.

Demand test

A hypothetical test of demand for bingo, casino or betting services in a local area. It is considered by the Licensing Justices or Licensing Authority prior to granting a licence for a bingo club, casino or betting shop. They must be satisfied that other local operators do not already fulfil the local demand for that particular type of gambling establishment.

Drop

The money the players in a casino exchange for chips.

Edge

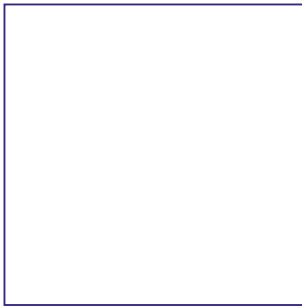
The margin by which odds in house banker games are set in favour of the house. The edge which the house enjoys in a particular game depends on the rules by which the game s are played. Rules for banker games are prescribed in regulations. Covered by the Gaming Act 1968

Expenditure

The amount spent minus winnings.

Family entertainment centre

A centre with a variety of rides and games including amusements machines and skills games. They often have funfair style rides, food and refreshments. Typically found at the seaside.



Features

Devices on a gaming machine such as hold, nudge and gamble which may give a player an increased chance of winning a prize.

Fixed odds betting

A bet where the odds are agreed prior to the bet being made, e.g. 2:1, 7:3 etc.

Football pools

A pool competition based on the result of football matches. The competitions are organised on a weekly basis.

Forecast bet

A forecast or straight forecast is a bet naming in correct order the first two dogs (or horses) to finish. A forecast double is a bet naming the correct order of the first two dogs to finish in two races.

Free competition

A prize competition which can be entered without payment.

Fruit machine

Another name for a gaming machine, jackpot machine, amusement-with-prize machine or all-cash machine. It is used because the combinations determining whether the player wins or loses are displayed on revolving reels in the form of symbols often depicting fruit.

Gambling Commission

Term used in this report to refer to a single, regulatory authority for gambling.

GamCare

A gambling neutral charity. GamCare has a commitment to promote responsible attitudes to gambling and to work for the provision of proper care for those who have been harmed by a gambling dependency.

Gaming

The playing of a game of chance (or a chance and skill combined) for winnings in money or money's worth.

Gaming Board for Great Britain (GBGB)

A statutory board with a duty of maintaining a general oversight of the extent and character of gaming in Great Britain. It has responsibility for the licensing and regulation of casinos, bingo clubs, some gaming machines and some lotteries.

Gaming duty

This duty administered by Customs and Excise is the principal form of taxation of casinos. It is levied on the drop.

Gaming machine

A game of chance machine which requires coins or tokens to be activated. A generic term used to refer to jackpot machines, AWP's and ACMs.

Gross gaming yield

The amount of money staked minus the amount paid out in winnings.

Hard gaming

A term used to describe those forms of gaming considered to carry greater potential risks than others because of the high or rapid re-staking associated with them, and the ability for the punter or player to chase his or her losses.

Hedging

A bet made by a bookmaker acting in effect as a punter. It is often done with the intention of offsetting the liability the bookmaker would incur if the same bet which has been made with him in his bookmaker capacity were to prove successful.

Horserace betting levy

A charge made by the Horserace Betting Levy Board on off-course bets on horse racing.

Horserace Betting Levy Board (Levy Board)

The Levy Board is a statutory body. Its function is to raise an annual levy on betting on horseracing and spend it on the improvement of horseracing, the improvement of breeds of horses and the advancement of veterinary science. The Board also has the power to grant certificates of approval to racecourses. In March 2000, the Home Office announced its intention to disband the Levy Board.

Horserace Totalisator Board (the Tote)

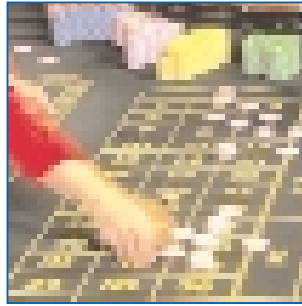
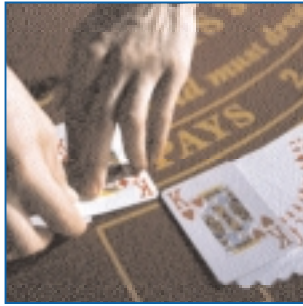
A statutory body with a monopoly of pool betting on horseraces both on and off course. The Home Office has announced its intention to sell the Tote to racing.

Internet gambling

Term used to refer to both internet betting and internet gaming.

Internet betting

The act of making bets using the internet as a conduit to place a bet. The gambling event takes place off-line and the result is independently verifiable ie. the on-line system does not generate the result, it is used simply for communicating information. The internet is often an alternative to other means of entry such as the post or telephone.



Internet gaming

A form of on-line gaming where the gambling event takes place via the internet and is probably based on a random number generator. The games may appear as virtual-casino style games, slot machine games or interactive lotteries.

Jackpot machine

A gaming or slot machine with a prize of £250 in clubs, £500 in bingo halls or £1000 in casinos. Also known as a club machine. Permitted under Section 31 of the Gaming Act 1968

Jai alai

A game that involves players hurling a hard ball against a wall and catching it with curved baskets in a venue called a 'fronton'. It accounts for less than 2% of pari-mutuel betting in the United States.¹

Jockey Club

A private club whose members are co-opted which has been responsible for the Rules of Racing since the 18th century. The club is largely responsible for running and controlling racing including such matters as discipline, determining fixtures, the registration of owners and others and the promulgation of regulations governing the conduct of the sport.

Licensed Betting Office (LBO)

In order to accept bets on premises and operate as a betting shop, section 9 of the Betting, Gaming and Lotteries Act 1963 prescribes that the premises must have a betting office licence.

Licensed clubs

Commercial clubs licensed to provide gaming which in a casino may include the authorised games of unequal chance but in bingo clubs is restricted to varieties of that game. Covered by Part II of the Gaming Act 1968.

Local authority lottery

A lottery run by and for a local authority. Currently required to register with the Gaming Board. It is different to lotteries which must register with the local authority.

Local authority licensing board or licensing justices

The authorities responsible for licensing clubs to promote commercial gaming; the licensing of betting offices; the granting of bookmakers permits and betting agency permits. In England and Wales, the authority is a committee of licensing justices. In Scotland, it is the licensing authority. Gaming is covered by Schedule 2 of the Gaming Act 1968. Betting is covered by Schedule 1 of the Betting, Gaming and Lotteries Act 1963.

Lottery

There is no statutory definition of a lottery but it is generally accepted to mean a distribution of prizes by lot or chance in which the participants buy a stake which contributes to the prize fund.

Mechanised cash bingo

A form of bingo played for winnings in cash in which the players are located round a mechanical or electric device and block off numbers as they are called with sliding shutters or tokens on panels in front of them.

Members' clubs

Clubs managed by and on behalf of the members and not for purposes of private gain.

Multiple bets

These are bets which include doubles, trebles and accumulators. The final payout depends on the outcomes of more than one event. The subsequent stake and any winnings from the first race are regarded as the stake for subsequent events. When the bet involved two events, it is called a double, with three events, a treble and with four or more events, an accumulator.

National Association of Bookmakers Limited (NAB)

One of the main bookmakers trade associations. The NAB is often associated with the representation of on-course bookmakers' interests.

National Joint Pitch Council

The NJPC was set up by the Levy Board in October 1998 and is responsible for the administration of the betting rings on racecourses.

National Lottery

A nationwide lottery currently operated by Camelot on behalf of the Government. It is regulated by the National Lottery Commission.

National Lottery Commission

Regulatory body for the National Lottery.

Off-course betting

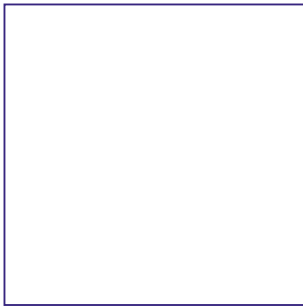
Betting conducted somewhere other than a racecourse or track where the race is being held.

On-course betting

Betting conducted at the racecourse or track where the race is being held.

One-armed bandit

Another term for a gaming machine.



Pari-mutuel

Pool betting, common in other European countries.

Payout rate

The rate of return from a gaming machine. Normally expressed as a percentage. If the rate of return, or payout is 85%, then the gaming machine pays out in winnings on average 85p in every £1 that it takes, over a period of time. As the payout rate is an average, not every player will receive an 85% return.

Permitted areas

The only areas in which casinos may be operated. There are at present 53 permitted areas. They were drawn up on the basis of former county boroughs with populations over 125,000.

Poker

An equal chance non-banker card game. Often played as a card room game.

Pontoon

A card game belonging to the baccarat family. The object is to assemble cards totalling as near as possible to 21. The bank is not held by the house but circulates among the players. Pontoon and chemin de-fer are the only two banker games allowed in clubs registered for gaming.

Pool betting

The participants in pool betting compete against each other with the promoter acting as stakeholder. The stakes are shared out among the winners after deductions to cover tax and the promoters expenses and profit. Main forms of pool betting include totes at dog tracks and horse races.

Private lottery

A lottery in Great Britain which is promoted for and in which the sale of tickets or chances is confined to either members of one society, people who work on the same premises or people who reside at the same premises.

Prize bingo

Games of bingo played for prizes.

Problem gambling

Gambling to a degree that compromises, disrupts or damages family, personal or recreational pursuits.

Proprietary clubs

Clubs with commercial ownership, rather than ownership by the members.

Punter

Another name for a player, better or person that gambles. It is the term we have chosen to use throughout this report.

Pushers

A type of amusement machine. They generally work on a basis of pushing coins along a shelf.

Raffle

A lottery in which the prizes consist of articles generally of small value and not money.

Rate of return

See payout rate.

Reel

The rotating wheel in a gaming machine, jackpot machine or AWP etc which has symbols, often fruit, on its rim.

Registered clubs

Clubs registered for equal chance gaming including pontoon and chemin de fer or for the use of gaming machines under the terms of Schedules 3, 4, 7 and 8 of the Gaming Act 1968.

Rothschild report

Report produced by the Royal Commission on Gambling in July 1978. Chaired by Lord Rothschild. The last review of gambling legislation before this Gambling Review.

Roulette

A house banker game in which players bet on which number or numbers from 0-36 are chosen at random by the spin of a roulette wheel. Players have several different sorts of bet available which pay out at different odds.

Single bet

This is a bet in which the payout to the punter depends on the outcome of only one selection.

Society lottery

A public lottery promoted on behalf of a society which is established for charitable purposes for participation in or support of athletic sports or games or cultural activities or for similar purposes not involving private gain.

Soft gaming

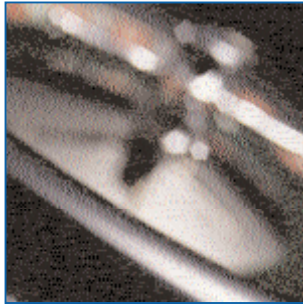
A term used to describe those forms of gaming considered to carry less potential risks than others because of the low staking associated with them, and the slow or infrequent nature of the activity.

Slot machines

Another name for a gaming machine, fruit machine, jackpot machine, amusement-with-prize machine or all-cash machine.

Spread betting

A type of betting which allows the player to bet on the variables or outcome of an event. Spread betting is typically conducted on sporting events or the future



movement of particular shares or the stock market as a whole. Different types of spread bets include total bets, supremacy bets and index bets.

Starting price

The price or odds supposedly prevailing on-course at the time a particular race begins. It is compiled by starting price reporters. It used by on-course bookmakers and off-course betting shops.

Tic-tac

A person who communicates bets, information on price changes and other betting information between bookmakers on-course.

Tote

See Horserace Totalisator Board

Tote Bookmakers Limited

Tote Bookmakers Ltd is a subsidiary company of the Horserace Totalisator Board which operates its off-course betting offices.

Track

Defined in the Betting, Gaming and Lotteries Act 1963 Act as "premises on which races of any description, athletic sports or other sporting events take place".

Twenty-four hour rule (24hr rule)

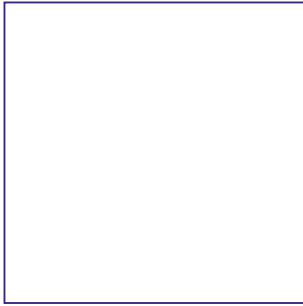
A rule whereby no-one may play in a casino or bingo hall until 24hrs have elapsed since he or she applied for membership. It was previously the 48hr rule.

Twist card

A card sold to bookmakers by tic-tacs, which contains the "code" for the tic-tac that day.

Working Men's Club and Institute Union

An association of *bona fide* members clubs.



Annex B

Our Procedures

Our recommendations are based on the following sources of information and evidence

- submitted written evidence
- plenary hearings of oral evidence
- other briefing hearings
- visits
- attendance at seminars and meetings
- studies of relevant publications

In early May 2000, the Gambling Review Body issued an open invitation to submit written evidence. We publicised this on our website and invited any individual, business or organisation with a view on the review of gambling to send us their comments. In addition, our secretariat sent letters to 230 individuals and organisations with a known interest in gambling to invite them to submit written evidence. The form of our invitation for written submissions is reproduced as *annex C*. We also prepared a leaflet along the lines of our letter, which we distributed during our visits in June and July 2000. In addition, GamCare kindly included copies of the leaflet in one of their regular mailings. We were keen to reach a wide audience.

We have received over 200 submissions. A list of those who sent written evidence is shown as *annex D*. We heard oral evidence from 23 organisations or individuals (listed at *annex E*). In addition, we had less formal meetings with other interested parties, such as Lord Condon, Mr John McCririck and Camelot. Before the Review Body's formal procedures began the Chairman met the following organisations and individuals for background briefing:

- GamCare
- British Casino Association
- British Horseracing Board
- Horserace Betting Levy Board

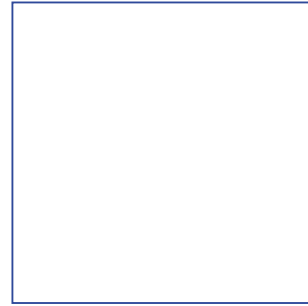
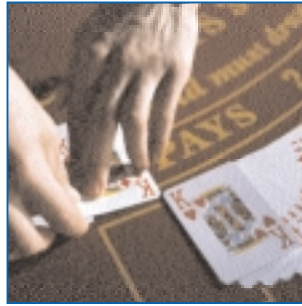
- Betting Office Licensees Association
- British Betting Office Association
- Bingo Association
- Gaming Board
- National Lottery Commission
- Roger Withers

There were 16 plenary meetings of the Review Body (between April 2000 and May 2001), and in addition we met over one weekend in November 2000. We divided ourselves into three study groups for the preparation of background material on:

- the economic structure of the gambling industry
- psychological and social aspects of gambling
- the regulatory framework.

In the early part of our proceedings we embarked on a programme of visits, to see gambling operations and to have an opportunity to talk to staff and punters. A list of our visits is at *annex F*. In addition to these visits, we have attended a number of seminars and other meetings over the last 12 months.

Annex G is a note on addiction by Professor Jeffrey Gray. *Annex H* is a note on problem gambling terminology and screens. *Annex I* provides some background on the regulations applying to clubs. A list of the publications we have studied, which are mentioned in the report, is at *annex J*. In addition, a search of the literature on problem gambling was undertaken for us by Ms Sue Chopping.



Annex C

Invitation to submit written evidence

May 2000

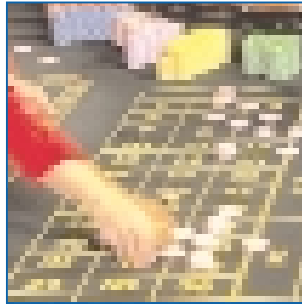
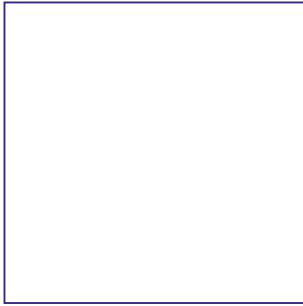
Dear Sir / Madam

The Home Secretary announced a wide-ranging review of gambling legislation in December 1999. I am now writing to formally invite you to submit written evidence to the Review Body.

The Review Body is chaired by Sir Alan Budd and has ten other members. Its terms of reference are attached for information. The Review Body would like to receive any evidence that you believe may be relevant to its work. In particular, it would welcome your views on the following twelve questions:

1. Should gambling be regulated?
2. Is gambling socially and economically important?
3. What are the social, psychological and economic costs of gambling? How could they be reduced?
4. Have attitudes changed to gambling as a leisure activity since the legislation of the 1960s? What influence should any such change have on the regulatory structure?
5. What would be the impact of increased accessibility to gambling?
6. Are there lessons from overseas which are relevant to the Review Body's work?
7. What impact does experience of gambling overseas have on the expectations of UK punters?
8. Are different age limits appropriate for different sorts of gambling? If a single age limit is appropriate, what should it be?
9. Are different levels of regulation appropriate for different sorts of gambling?
10. What influence would a relaxation of controls have on criminal infiltration, protection rackets, money laundering or other abuses?
11. What will be the impact of the Internet and new technologies on gambling? Should Internet gambling be regulated and, if so, how?
12. Should there be a unified body to licence and regulate gambling? What part should local licensing arrangements play in any revised regulatory structure?

These questions are intended to help you formulate your submission to the Review Body. They are not prescriptive: please add any other information or proposals you think may be helpful.



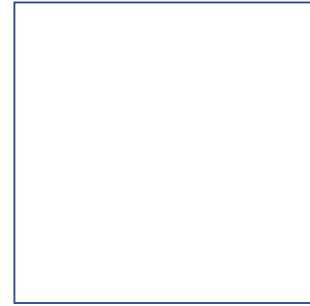
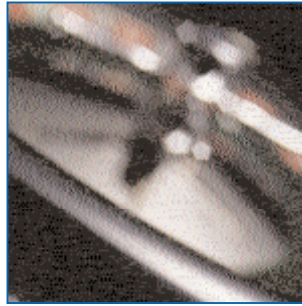
The deadline for written submissions is 21 July 2000. Thereafter, the Review Body will decide which individuals and organisations it would like to invite to give oral evidence or further written evidence.

Any submissions made to the Review Body will be assumed to be open, and may be published or placed in the Libraries of the Houses of Parliament. However, should you wish any part (or all) of your comments to be treated in confidence, you should make this clear, together with your reasons for requesting confidentiality, and we will consider treating them in confidence.

You may send your submission to us at the address at the head of this letter or, if you prefer, e-mail us at gambling.review@homeoffice.gsi.gov.uk.

More information about the Gambling Review can be found on our website: www.gamblingreview.gov.uk. It includes a list of those invited to submit evidence. If you are aware of others who might wish to make submissions, please let us know.

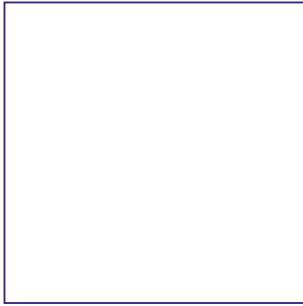
GAMBLING REVIEW BODY SECRETARIAT



Annex D

List of those who submitted written evidence

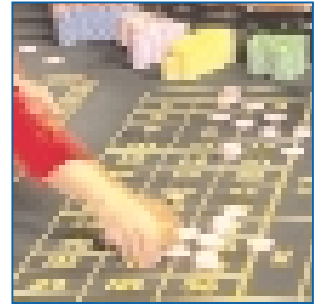
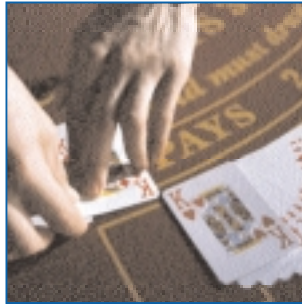
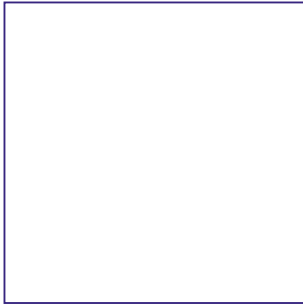
- A & S Leisure Group Ltd
- Advertising Association
- Advertising Standards Authority
- All-Party Betting & Gaming Group
- Amusement Arcade Action Group (AAAG)
- Amusement Gaming Industry Forum
- Arena Leisure Plc
- Associated Newspapers Ltd
- Association of Chief Officers of Probation
- Association of Chief Police Officers (ACPO)
- Association of Chief Police Officers in Scotland
- Atlas Property Consultants
- BALPPA
- BASS Taverns
- Bell-Fruit Games Ltd
- Better Regulation Task Force
- Betting Office Licensees Association (BOLA)
- Biddle
- Bingo Association
- Bingonet Limited
- Birchall, James
- Blackpool Borough Council
- Blackpool Challenge Partnership
- Blackpool Combined Association
- Blackpool Hotel & Guest House Association Ltd
- Brady MP, Graham, on behalf of Mr J Hatton
- Brewers & Licensed Retailers Association (BLRA)
- British Actors Equity Association
- British Amusements Catering Trades Association (BACTA)
- British Betting Office Association (BBOA)
- British Casino Association
- British Greyhound Racing Board
- British Greyhound Racing Fund
- British Horseracing Board (BHB)
- British Institute of Inn Keeping
- British Resorts Association
- British Tourist Authority
- Brooks, Derek A
- Bruce, Margaret
- Bunn, Nick
- Business in Sport & Leisure Limited (BISL)
- Butler MP, Christine
- Byrne, Peter
- Camelot Group plc
- Castle Leisure Limited
- Cherwell District Council
- Christiansen Capital Advisers, LLC & Gemini Research Ltd
- Church in Wales Social Responsibility
- Church of England Board for Social Responsibility
- Churches Together in Britain and Ireland
- City of Gloucester
- City of Westminster - (Planning & Transportation)
- Clelland MP, David
- Community Health (Sheffield) NHS Trust



- | | |
|--|--|
| Coral Eurobet plc | Gaming Board for Great Britain |
| Coupe, Karen | Gardner, Tim |
| Crockford, DA | Gibb MP, Nick |
| Crown Leisure | Gill-Donald, R |
| Cutts, Fred | Gittins, Peter |
| Davies, G K | Good Gambling Guide |
| Davis, Dr Paul E | Gordon House Association |
| Department for Culture, Media & Sport (DCMS)
(Tourism Division) | Greene, Jennie |
| Dillon, David | Greyhounds UK |
| Directory of Social Change | Guild Appleton & Co |
| Donohoe MP, Brian H | Hancock MP, Mike |
| Dundee City Council | Harpers Leisure International Limited |
| East Renfrewshire Council | Highland Council |
| Elliott, Keith | Hopkins MP, Kelvin |
| Ellis, Ian | Horserace Betting Levy Board |
| English Tourism Council | Horserace Totalisator Board (the Tote) |
| Essex Leisure | Huddersfield Town AFC Limited |
| Evangelical Alliance | ICSTIS |
| Evans & Co | IG Index plc |
| Federation of Licensed Victuallers Associations | IGT - UK Limited (submitted by Barcrest) |
| Fife Council | Independent Betting Arbitration Service (IBAS) |
| Financial Services Authority | Independent Television Commission |
| Finers Stephens Innocent | Inner London Magistrates Courts Committee |
| Football Association | Interactive Gaming Council |
| Foss, Michael | International Casino Club |
| Friends of Blackpool Ltd | Jago, Charles |
| Gala Leisure Limited | Jennens, Anthony |
| Gam Anon | Jockey Club |
| GamCare | Justices' Clerks Society |



Kunick
Ladbrokes Limited
Lancashire County Council
Lee, Archie
Lefley, John
Leisure Link Group Limited
Leisure Parcs
Licensed Victuallers (Wales) Limited
Littler, Lady
Littlewoods Promotions Limited
Llywd MP, Elfyn
London Clubs International
Lotteries Council
Magistrates Association (The)
Maygay Machines Limited
McLaren, Craig
Metropolitan Police Service
Middlesbrough Council
Miers, Professor David
Milton Keynes Council
Morrill, John T
National Association of Bookmakers
National Canine Defence League
National Council on Gambling
National Criminal Intelligence Service (NCIS) - UK Division
National Debtline
National Joint Pitch Council
National Lottery Commission
North and South Westminster Betting and Gaming Committees
North Lincolnshire Council
Nottingham Trent University
Nottinghamshire Magistrates Courts Service
O'Callaghan, Terence
P J Booth Partnership
Page MP, Richard
Patak, Lee
Perth and Kinross Council
Police Federation of England & Wales
Pool Promoters Association
Popleston Allen (on behalf of Allied Leisure plc)
Punch Group Limited
Racecourse & S.P. Bookmakers Association Ltd
Racing Post on behalf of R. Hayter
Rails Bookmakers Association Ltd
RAL Services Limited
Rank Group plc
Rapson BEM, MP, Syd
Renfrewshire Council
Ritz Hotel Casino Limited
Rotary Club of the Nene Valley
Rowley, G
Royal Society for the Prevention of Cruelty to Animals (RSPCA)
Sanders MP, Adrian
Scottish & Newcastle Retail Limited
Scottish Independent Bookmakers Association
Shepway District Council
Singer, Michael & Mr Andrew Grocock
South Ayrshire Council



Southampton City Council

Speakman, Ken

St Giles Hospice (Promotions) Limited

Stanley Leisure

State of Guernsey - Gambling Control Committee

Stephenson Harwood

Swambo, Matthew

Taylor MP, Sir Teddy

Tendring District Council

Thomas Estates Limited

Topham, Neville

Transport & General Workers Union (TGWU)

Union of Muslim Organisations of UK & Eire

University of Birmingham

University of Plymouth

University of Salford

VIP Club

VPA Entertainment Technology

W. Underwood Amusements Ltd

West Dunbartonshire Council

West Lothian Council

Westcliff Casino Ltd & Waterfront Casino Club Ltd

Weston-Super-Mare Pier Company Limited

Whitbread plc

Wilson MP, Brian

Woodland Trust (The)

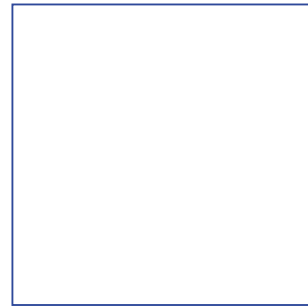
Working Men's Club & Institute Union Limited

World Trade Centre London

www.londoncasinoguide.com

Yorke, Stephen

(and two anonymous submissions from members of the public.)



Annex E

List of those who gave oral evidence

Association of Chief Police Officers (ACPO)

Amusement Arcade Action Group (AAAG)

Betting Office Licensees Association (BOLA)

Bingo Association

Brewers and Licensed Retailers Association (BLRA)

British Amusements Catering Trades Association (BACTA)

British Association of Leisure Parks, Piers & Attractions (BALPPA)

British Betting Office Association (BBOA)

British Casino Association (BCA)

British Greyhound Racing Board (BGRB)

British Horseracing Board (BHB)

Business in Sport & Leisure (BISL)

Churches Together in Britain & Ireland

GamCare

Gaming Board for Great Britain

Independent Betting Arbitration Service (IBAS)

Jockey Club

Lotteries Council

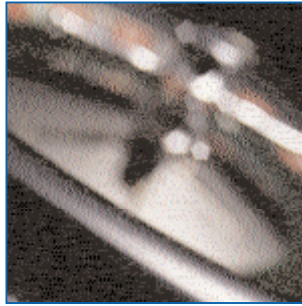
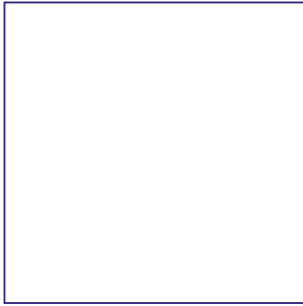
Metropolitan Police

National Criminal Investigation Services (NCIS)

National Joint Pitch Council (NJPC)

Professor J Orford, University of Birmingham

Transport & General Workers Union (TGWU)



Annex F

List of Gambling Review Body Visits

(Names in brackets are those bodies which helped with arrangements for the visit)

The visits listed here are those made officially by members of the Gambling Review Body or its Secretariat. In addition, we made a large number of other (private and unannounced) visits to gambling establishments around the country.

Arcades & Family Entertainment Centres

Brighton Palace Pier (BALPPA)
Blackpool – Various amusement arcades (Leisure Parc and Blackpool Challenge Partnership)
Harbour Park, Littlehampton
Jackpot Amusements, Newquay
Quiksilver Arcade, Clapham, London (BACTA)

Betting

Morrisons Betting shop, Loanhead, Scotland (Scottish Independent Bookmakers' Association)
Stan James Racing, Abingdon, Oxon
William Hill, London (BOLA)

Bingo

Beacon Bingo, Cricklewood, London (Bingo Association)
Gala Bingo, Tooting, London (Bingo Association)
Leo Leisure, Eastleigh, Hants (Bingo Association)
Lucky Numbers Bingo Club, Harrogate, North Yorks (Bingo Association)
Majestic Bingo Club, Middlesbrough (Bingo Association)
Mecca Bingo, Edinburgh (Bingo Association)
Mecca Bingo, Hayes (Bingo Association)

Casinos

50 St James (LCI), London (BCA)
China Palace, Birmingham (BCA)
Clermont Club, London (BCA)
Ladbroke's, Birmingham (BCA)
Ladbroke's, Cardiff (BCA)
Ladbroke's, Piccadilly, London (BCA)
Maxims, London (BCA)
The Rendezvous, London (BCA)
The Ritz, London (BCA)
Stanley Luton Casino, Luton (BCA)
Victoria Sporting Club, London (BCA)

Greyhound Racing

Manchester Greyhound Stadium (BGRB)
Poole Greyhound Track, Dorset (BGRB)
Romford Greyhound Track (BGRB)
Walthamstow Greyhound Track (BGRB)
Wimbledon Greyhound Track (BGRB)

Horseracing

Ascot Racecourse (BHB co-ordinated)
Ascot Racecourse (Tote)
Brighton Racecourse (BHB co-ordinated)
Cheltenham Racecourse (BHB co-ordinated)
Newbury Racecourse (BHB co-ordinated)
Newton Abbot Racecourse (BHB co-ordinated)
Sandown Racecourse (BHB co-ordinated)

On-Line Gambling

Open, London

Spread Betting

IG Index, London

Clubs

Bettws Social Club, Bridgend, Wales (WMCIU)
BMC club, Edinburgh (WMCIU)
Cardiff West End Club, Cardiff, Wales (WMCIU)

Overseas Visits

Atlantic City, United States (as part of a private visit)
Foxwoods Casino
(Division of Gaming Enforcement, State of New Jersey)

Jericho (as part of a private visit)
Jericho Casino

Sydney, Australia (as part of a private visit)
Star City, Sydney, NSW
Canterbury Leagues Club, Belmore, NSW
Empire Hotel, Leichardt, NSW
(Australian Casino Control Authority)
(NSW Gaming & Racing Dept)

Holland
Hommerson Arcades, Holland Casino Schveningen
(Netherlands Gaming Control Board)

Las Vegas, United States
Aladdin Casino (LCI)
Bellagio Casino
(Nevada State Gaming Control Board)



Melbourne, Australia (as part of a private visit)

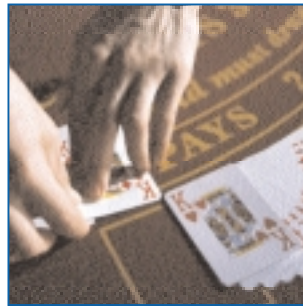
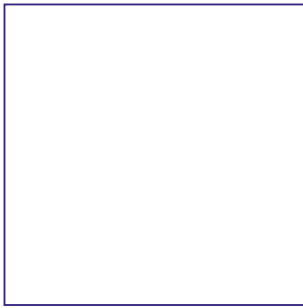
Victorian Casino

(Victorian Casino & Gaming Authority)

New Zealand (as part of a private visit)

Department for Internal Affairs

[Note: Of the overseas trips, the visits to Holland and to Las Vegas were funded by the Review Body. The other visits were made during private trips abroad.]



Annex G

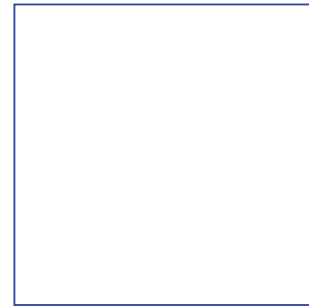
The Concept of Addiction

Note by Professor Jeffrey Gray

This essay is directed at the question: is it useful to apply the vocabulary of addiction to problem gambling?

Reinforcement

1. Prior to analysis of the concept of addiction, one needs to take on board some of the things that are known about how ordinary rewards, such as food, water or sexual partners, work. These and similar "primary positive reinforcers" ("primary" because all members of the species find them rewarding without additional learning; "positive" for reasons given in the next section) all act via a common neural pathway which organises behaviour directed to their attainment (termed "approach" behaviour, though much more may be involved than simply spatial approach). Primary reinforcers may confer upon initially non-reinforcing stimuli with which they are associated (by the process of classical or Pavlovian conditioning) the power to act as "secondary reinforcers". These act to produce approach behaviour via the same pathways upon which primary reinforcers act. Most approach behaviour, in animals as well as human beings, is directed towards secondary reinforcers, which then ultimately lead the individual to the relevant primary reinforcer. One secondary reinforcer can confer further secondary reinforcing properties on another, associated with the first, leading to long chains of responses followed first by one secondary reinforcer and then another and so on. It is typical for such long chains of behaviour to run off with the primary reinforcer being attained only occasionally. In human beings, the process of secondary reinforcement becomes even more important; and money is the strongest and most generalised secondary reinforcer known.
2. The pathways in the brain upon which reinforcers, primary and secondary, work are relatively well known. They include a step, important for the understanding of how drugs of abuse work, in which one particular set of neurones (nerve cells) release one particular neurotransmitter in one particular region of the brain: to wit, the mesolimbic pathway releases dopamine from its neuronal terminals in a structure known as the nucleus accumbens. Activation of this pathway is associated with an increase in the level of "arousal" (excitement plus energetic behaviour, often involving in animals forward locomotion) and may very well be associated with feelings of pleasure, euphoria or hopefulness (although it is difficult both conceptually and experimentally to make this kind of leap from neural activity to subjective sensation). To avoid the leap, the scientific terminology prefers the phrase for this kind of arousal, "incentive motivation".
3. At the behavioural level much is known about the parameters which influence the effectiveness of both primary and secondary reinforcers. A particularly important parameter is the interval between the making of a behavioural response (in a typical animal experiment, a pigeon pecking at a key or a rat pressing a bar: the similarity - it is much more than an analogy - with the behaviour of a punter on a slot machine will be obvious) and the delivery of the reinforcer. This has been demonstrated in experiments on electrical self-stimulation of the brain, in which e.g. a rat presses a bar to stimulate electrically the mesolimbic dopamine pathway mentioned above. If the interval between the bar-press is set at zero (the conduction time down the wire to the brain), such high rates of response are obtained that the animal will ignore all other reinforcers (food, water etc) and eventually starve itself to death. If the interval is very slightly increased (to half a second or so), rates of response fall off steeply and, unless this interval is filled with salient secondary reinforcers (lights, sounds etc), electrical self-stimulation of the brain will not be learnt at all. From this observation, there are two important lessons to be learnt. First, the mode of delivery of a reinforcer is of much greater importance in determining its power as a reinforcer than is its intrinsic nature. Second, to maintain behaviour, it is critical to have salient secondary reinforcers occur rapidly after the response you are trying to maintain. The razzmatazz of the fruit machine is a brilliant piece of behavioural engineering for this purpose.



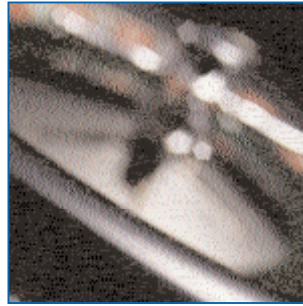
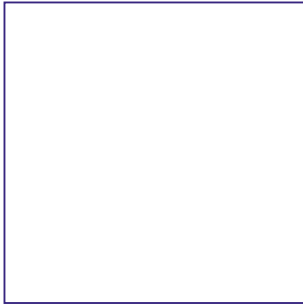
4. The size and quality of the reinforcer (a bigger or better piece of food, say) is of much less importance than these design features in determining the vigour and persistence of the reinforced behaviour. To be sure, other things being equal, the bigger the reinforcer, the stronger will be the behaviour and the greater the power to confer secondary reinforcing properties upon associated stimuli. However, if the reinforcer is primary, it is normally accompanied by a process of satiation (so that food, water and sex lose their attractions after one has had a certain amount of them), and the bigger the reinforcer, the sooner this happens. Secondary reinforcers have the great advantage that they do not undergo this kind of satiation.
5. A further important principle is that of intermittent reinforcement. One first establishes a response by following it rather regularly and rapidly by a relatively substantial reinforcer, but this is largely to let the animal know what it is that it must do. After that, you make delivery of the reinforcer less and less predictable and more and more sparse. A bar-press may be followed once every hundred times on average, but randomly within that constraint, by a light that has been associated with a tone, which is itself delivered, contingent still upon bar-pressing, once in every ten times on average (again, unpredictably) when the light occurs, with food being delivered only once every five times that the tone occurs. So the animal has to press the bar 5000 times for every small piece of food - and does so.
6. It is very easy, applying these principles in the laboratory (using the occasional delivery of a tiny piece of food, interspersed with the unpredictable delivery of a range of secondary reinforcers) to produce a rat or a pigeon (a standard one will do - no need to pick "an addictive personality") which will work for hours without stopping, for reinforcers of trivial value, to the extent that the animal's energetic balance from the behaviour is negative and (as in the electrical self-stimulation experiment, but using conventional reinforcers like food) it will gradually starve itself to death. The parallel - again, more than an analogy - with responding on slot machines is obvious. By the same criteria that one might describe an obsessive slot machine player as "addicted", so might one describe a pigeon trained in this way.

Drugs of Addiction: Heroin

7. The paradigmatic case of addiction is that of drug addiction, especially to opiates such as heroin. The trouble is that the heroin case is, in fact, a highly complex case. It involves at least the following features:
 - The drug acts as a primary positive reinforcer; in particular, it causes (rapidly after intravenous administration or smoking) the release of dopamine in the nucleus accumbens without prior learning. Subjectively, it causes a feeling of euphoria, the "high".
 - Tolerance develops to this reinforcing effect. In consequence, there is dose escalation as the user attempts to regain the initial "high".
 - After a few consecutive administrations of the drug, the user begins to feel in its absence unpleasant "withdrawal" symptoms (overall, rather like a particularly severe flu). These represent homeostatic attempts by the user's brain and body to counteract the direct effects of the drug. When the drug is present, these homeostatic changes are seen as tolerance (see above); when the drug is absent, they are felt as withdrawal symptoms. In consequence, the drug now acts like a "negative" reinforcer - that is, it is sought in order to alleviate an unpleasant state of affairs, as distinct from (or in addition to) being sought for its pleasant effects.
 - The need for heroin now becomes so great and so constant that the user is often driven into debt, crime etc.

Other Drugs of Abuse

8. The common public stereotype of addiction and addicts is based upon all of these features of the heroin case. But not all of them apply even to other drugs of abuse, let alone to purely behavioural obsessive behaviour such as gambling. For example, it is common at present to refer to cigarette smoking as an addiction and to the nicotine obtained from cigarettes as an addictive substance. If we run nicotine against the above bullet points, this is the result:
 - Nicotine does act as a primary positive reinforcer and does elicit dopamine release (without prior learning) in the nucleus accumbens (the latter is true of all drugs of abuse so far investigated). Note that, like gambling (see below), the capacity of nicotine to act as a strong reinforcer depends very much on the way in which it is delivered. Delivered rapidly contingent upon a response, as



in smoking, it is a powerful reinforcer; delivered slowly, as in nicotine skin patches, it is a very poor reinforcer. In either case, it does not cause a subjective feeling of euphoria or "high".

- Tolerance and dose escalation are much less prominent than in the heroin case.
- There is much less in the way of withdrawal symptoms (this is true also of cocaine). The symptoms most commonly described are consistent rather with absence of, and craving for, the positive reinforcing effects of smoking (triggered in particular by cues associated with smoking) than with strong negative reinforcement.
- It is rare for smoking to be associated with debt or crime.

Application of the Drug Addiction Model to Gambling

9. We can now run the same bullet points against gambling behaviour.
 - Gambling is, I suppose by definition, reinforced by money. Money, clearly, is a positive reinforcer, but secondary rather than primary. Since the relevant experiments have only been carried out in animals, no-one knows whether money elicits dopamine release in the nucleus accumbens. However, other secondary reinforcers studied in animals do have this effect (after appropriate learning experience has taken place); so (under the right circumstances, which gambling may very well provide) perhaps money does too.
 - I have not gained a clear sense from the literature or the submissions as to whether tolerance and "dose escalation" are features of gambling - that is, whether gamblers find it necessary to gamble for ever higher stakes.
 - In the effort to draw parallels between gambling and drug addiction, it has been alleged that, when deprived of gambling opportunities, gamblers suffer withdrawal symptoms. If so, they are certainly not like the withdrawal symptoms experienced by heroin users, either in kind or intensity, nor can they be caused by similar homeostatic mechanisms. Most commonly mentioned are feelings of depression, craving and agitation. These resemble the "withdrawal symptoms" described

for abstention from cigarettes. This is a personal hypothesis, but I suspect that this type of withdrawal symptom reflects only the absence of an accustomed source of positive reinforcement.

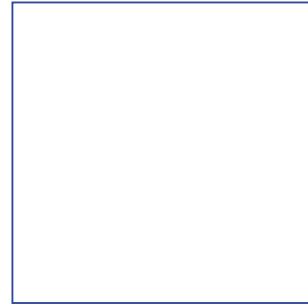
- Gambling is associated with debt, crime, divorce etc.

Conclusion

10. Is it useful to apply the vocabulary of "addiction" to gambling? Yes, if by this is meant obsessive behaviour directed towards a source of positive reinforcement (first section above); no, if it is intended to draw a parallel with drug addiction. Much of the research literature uses the term "addiction", and in order to use a consistent vocabulary, we have also used this term in our report. We would, however, wish to emphasise the point that it is used to cover the "driven" aspects of gambling behaviour.

Coda: Risk Factors

11. The above analysis, with its stress on the engineering of positive reinforcement, may be helpful in understanding the risk factors for problem gambling.
 - i. Reinforcers can work only after the relevant behaviour has first been emitted, and followed by the reinforcer. So there should be a positive correlation between the likelihood of the behaviour being emitted in the first place, and the subsequent generation of obsessive behaviour controlled by the reinforcer. We would therefore expect problem gambling to increase with the availability of gambling opportunities.
 - ii. Similarly, we can see the associations between problem gambling and both family history and friends who gamble as increasing the likelihood that a history of appropriate reinforcement will start up.
 - iii. The lack of strong personality influences upon problem gambling (in the data appearing in the literature review commissioned by the Review Body) is consistent with the ubiquity of the principles of reinforcement considered above.
 - iv. The effectiveness of a reinforcer is reduced if it has to compete with other reinforcers. This may account for the greater extent of gambling and problem gambling in lower socio-economic groups.



Annex H

Terminology and Problem Gambling Screens

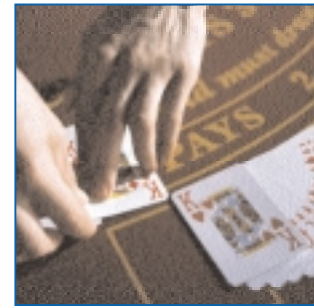
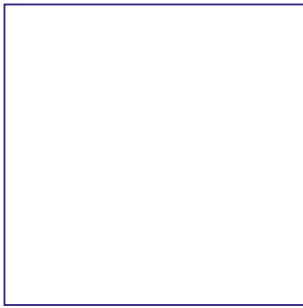
Terminology

1. *Compulsive gambling*
 - Gamblers Anonymous tends to use the term **compulsive** gambling, but this term is not generally used by professionals assessing gambling problems.
2. *Problem gambling*
 - The Prevalence Survey adopted the term **problem gambling**¹. People scoring five or more on the South Oaks Gambling Screen (SOGS) or three or more on questions based on the DSM-IV screen are collectively called problem gamblers in this survey.
 - "Problem gambling" is the term adopted in this report. However, where research results are reported, and the research has differentiated between problem gambling and pathological gambling, both terms are quoted.
 - The Prevalence Survey defines problem gambling as "gambling to a degree that compromises, disrupts or damages family, personal or recreational pursuits".
2. *Pathological gambling*
 - The American Psychiatric Association uses the term **probable pathological gambler** to apply to people scoring five or more on questions based on the DSM-IV screen, and the term **problem gambler** to apply to people scoring three or more. Thus US studies frequently use the terms "problem" and "pathological" gambler.
 - Pathological gambling was first included as a mental health diagnosis by the American Psychiatric Association in 1980, and recognised by the World Health Organisation in 1984. Pathological gambling was described as "a chronic and progressive failure to resist impulses to gamble, characterised by undesirable outcomes ranging from borrowing money from family or friends and losing time at work, to being arrested for offences committed to support gambling".²

Problem Gambling Screens

4. The screening instruments identified to measure "problem gambling" are the South Oaks Gambling Screen (SOGS, Lesieur and Blume 1987) and the DSM-IV (Diagnostic and statistical manual of mental disorders, 4th edition) by Lesieur and Rosenthal (1993).
5. The SOGS consists of 20 questions on gambling behaviour, such as "chasing losses", "lying to family or friends about the extent of gambling", and "feeling guilty about gambling". While the original thresholds for classification on the SOGS to indicate a "problem gambler" are three or four points, and five points or more to indicate a "probable pathological gambler", there has been recent consensus that these cut-offs are too low. Nevertheless, some studies continue to use a threshold of three or more to identify problem gamblers. The recent Australian Productivity Commission Report concluded that five or more is the most appropriate cut-off to indicate a problem gambler. The British Prevalence Survey follows the threshold advocated by the Australian Productivity Commission Report, with those who scored five or more being classified as problem gamblers. This has the advantage of allowing direct international comparisons, since it is the most commonly used cut-off in existing studies.³
6. The SOGS is the only screen for problem gambling evaluated with help-line callers, Gamblers Anonymous and clinic referrals as well as with the general population.⁴ We understand from Dr Rachel Volberg that only one of the screens based on the DSM-IV criteria – the NODS – developed for the US National Opinion Research Centre survey, was tested with a clinical sample before being used in the general population.⁵
7. The DSM-IV consists of ten diagnostic criteria, and a person meeting five or more of the ten criteria is classified as a pathological gambler.⁶ The cut-off used for the British Prevalence Survey is the same as that advocated by the American Psychiatric Association and Lesieur and Rosenthal: that is,

1- Sproston K., Erens B. and Orford R. (2000) Gambling Behaviour in Britain: Results from British Gambling Prevalence Survey, London: National Centre for Social Research, page 43
2- National Research Council: Pathological Gambling - a Critical Review, published by the National Academy Press (1999), pages 2 and 24 3- Sproston K., Erens B. and Orford R. (2000) Gambling Behaviour in Britain page 43 4- National Research Council: Pathological Gambling - a Critical Review page 43 5- Volberg R. Contribution to review of Chapter 17
6- National Research Council: Pathological Gambling - a Critical Review page 49



meeting three or more of the criteria represents a problem gambler.⁷

8. It is well-known that there are problems with these screens, among which are:

- It is not clear what one has identified unless the purpose for which one is attempting to identify problem gambling is made clear.
- There are substantial differences in the answers that problem gamblers give to questions about gambling problems at different points in time. The New Zealand longitudinal study established that even lifetime SOGS-based prevalence estimates are probably extremely low, given the rate at which problem and pathological gamblers deny behaviours which they acknowledged some years earlier. Many former problem gamblers claim that they would have lied to conceal their problems if surveyed, and dismiss such surveys as worthless. They may therefore under-estimate the prevalence of problem gambling.
- There is little agreement about the appropriate thresholds for problem gambling.
- Most early surveys used the "lifetime" version of the SOGS test.⁸ Critics have claimed that the "lifetime" SOGS gives misleading results, although recent evidence from New Zealand indicates that "lifetime" estimates may be low relative to "true" prevalence. It is true that the results of surveys using the "lifetime" SOGS cannot be compared with the "last 12 month" version of the SOGS test. Only the national surveys in Australia and Britain have been limited to the past year SOGS – in comparison, most US state-level surveys as well as the recent national surveys in New Zealand and Sweden have used the SOGS –R which includes both "lifetime" and past year items and permits comparisons of both life time and current problem gambling rates.

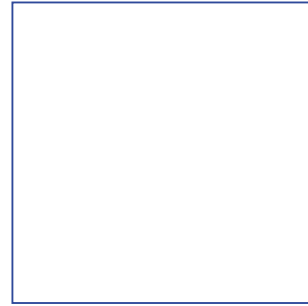
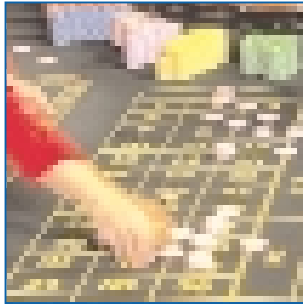
In brief conclusion, the existing tests may serve some purposes, but it is unsafe to place too much reliance on them.

The SOGS – South Oaks Gambling Screen⁹

9. The SOGS comprises the following set of questions (reproduced from the Prevalence Survey).

1. When you gamble, how often do you go back another day to win back money you lost?

2. Have you ever claimed to be winning money gambling when in fact you lost?
3. Do you spend more time or money gambling than you intended?
4. Have people criticised your gambling?
5. Have you felt guilty about the way you gamble or what happens when you gamble?
6. Have you felt like you would like to stop gambling but didn't think you could?
7. Have you hidden betting slips, lottery tickets, gambling money or other signs of gambling from your spouse or partner, your children or other important people in your life?
- 8a. Have you argued with people you live with over how you handle money?
- 8b. If yes, have these arguments centred on your gambling?
9. Have you missed time from work, school or college due to gambling?
10. Have you borrowed from someone and not paid them back as a result of your gambling?
11. Have you borrowed from household money to finance gambling?
12. Have you borrowed money from your spouse or partner to finance gambling?
13. Have you borrowed money from any other relatives or in-laws to finance gambling?
14. Have you borrowed money from banks, building societies, loan companies or credit companies for gambling or to pay gambling debts?
15. Have you made cash withdrawals on credit cards to get money for gambling or to pay gambling debts?
16. Have you received loans from 'loan sharks' to gamble or to pay gambling debts?
17. Have you cashed in stocks, bonds or other securities to finance gambling?
18. Have you sold personal or family property to gamble or to pay gambling debts?



19. Have you borrowed money from your bank or building society account by writing cheques that bounced to get money for gambling or to pay gambling debts?
20. Do you feel you have a problem with betting money or gambling?

In the British Gambling Prevalence Survey, the threshold for being classified as a "problem gambler" was a score of 5 or more positive responses to the above questions.

- For question 1 the positive answer options were: "every time I lost", "most of the time I lost" or "some of the time (less than half the time I lost)".
- For question 2 the positive answer options were: "yes most of the time" or "some of the time (less than half the time I lost)".
- For questions 3-20 the answer options were yes or no.

The DSM-IV - (Diagnostic and Statistical Manual of mental disorders 4th edition)

10. Reproduced below are the survey questions, based on the DSM-IV criteria, which appear in the British Gambling Prevalence Survey. The criteria themselves are also reproduced, as they appear in the Survey.

Questions

1. How often have you found yourself thinking about gambling (that is, reliving past gambling experiences, planning the next time you will play, or thinking of ways to get money to gamble)?
2. Have you needed to gamble with more and more money to get the excitement you are looking for?
3. Have you felt restless or irritable when trying to cut down on gambling?
4. Have you gambled to escape from problems or when you are feeling depressed, anxious or bad about yourself?
5. Have you lied to your family, or others, to hide the extent of your gambling?
6. When you gamble, how often do you go back

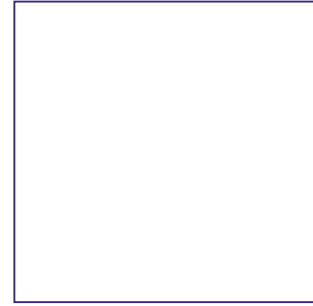
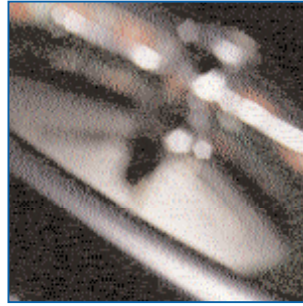
another day to win back money you lost?

7. Have you made unsuccessful attempts to control, cut back or stop gambling?
8. Have you committed a crime in order to finance gambling or to pay gambling debts?
9. Have you risked or lost an important relationship, job, educational or work opportunity because of gambling?
10. Have you asked others to provide money to help with a desperate financial situation caused by gambling?

The threshold for "problem gambling" was a score of 3 or over positive responses to the above questions. The positive response options were "very often", "fairly often" or "occasionally". The questions covered behaviour in the past year.

Criteria

1. A preoccupation with gambling
2. A need to gamble with increasing amounts of money
3. Being restless or irritable when trying to stop gambling
4. Gambling as escapism
5. Having tried to fail to cut back or to stop gambling
6. Chasing losses
7. Lying to people to conceal the extent of gambling
8. Having committed a crime to finance gambling
9. Having risked or lost relationship/job/educational opportunity because of gambling
10. Reliance on others to help a financial crisis caused by gambling



Annex I

Background information on gaming in clubs and miners' welfare institutes

1. The Gaming Act 1968 allows a club or miners' welfare institute to offer gaming, subject to restrictions, as long as it is registered. Registration under Part II of the Act allows clubs to offer gaming other than by way of machine. Registration under Part III of the Act enables the club to offer gaming by way of machine. The restrictions apply as follows:

- Members' clubs (not for profit) may register to offer gaming (Part II) or machines (Part III);
- Miners' welfare institutes may register to offer gaming (Part II) or machines (Part III);
- Proprietary clubs may only register to offer machines (Part III).

(Registration under part II brings an automatic right to three jackpot machines)

Eligible clubs and institutes

2. The word "club" is not defined in the Gaming Act 1968, but to be eligible for registration, the club must be a members' club and comply with the requirements set out in the Act. It must be:
 - i. a permanent, bona fide members' club
 - ii. have not less than 25 members, and
 - iii. gaming must not be the principal purpose for which the club is established or conducted (unless the gaming is restricted exclusively to the playing of bridge and or whist).¹
3. Miners' welfare institutes had to be identified separately in the legislation. Whilst they have many points in common with members' clubs and are regarded as synonymous with members' clubs for the purposes of the Act, they are not in fact members' clubs since they are run by committees of management.² Miners' welfare institutes are defined in the Act as:

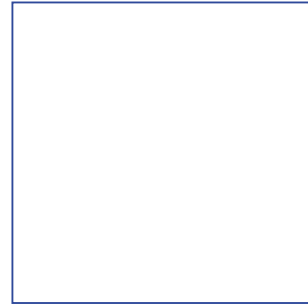
An Association organised for the social well-being and recreation of persons employed in or about coal mines', managed by a committee or board (composition

specified), or the premises are held on trust for charitable purposes.³

4. The limited charges that clubs and institutes can impose on members must be used to the benefit of the premises.⁴
5. Proprietary clubs (clubs with commercial ownership rather than ownership by the members) may only be registered under Part III of the Gaming Act. Following amendment to section 40 of the Act by the 1973 Gaming Amendment Act, they may also offer games of equal chance, such as bingo, and impose small charges to members for admission sufficient to recover the costs of the gaming. But they may not promote equal chance gaming at entertainments to which the public are admitted under section 41.
6. Clubs not registered under the Gaming Act 1968 may offer games of equal chance, such as bingo and impose small charges sufficient to recover the costs of gaming under the terms of section 40. Clubs can currently charge no more than 60p for admission to the gaming. Stakes and prizes are unlimited and all stakes must be returned in prizes.

Gaming permitted (Part II)

7. Clubs and institutes registered under Part II are able to offer to their members equal chance non-banker games. The only bankers' games permitted are pontoon and chemin de fer; the bank must either pass in turn among the players or is won and lost in the course of the game.⁵ No other bankers' games are permitted.
8. One of the most popular games offered is cash bingo. The advantage of registering under Part II is that clubs can charge higher participation fees than those permitted under section 40 (up to £2 a day in addition to the amount of up to 60p which can be levied under section 40).⁶
9. Higher charges can be prescribed for specialist whist and bridge clubs – currently up to £15 a day.



10. Section 41 enables members' clubs (but in this case not proprietary clubs) and miners' welfare institutes nor registered under Part II to promote equal chance gaming at entertainments to which the public are admitted and to take from each player £4 in participation charges and stake money combined, on condition that the money remaining after prizes have been distributed and costs recouped, goes to purposes other than private gain. Prizes are capped at £400 per entertainment.

Machines permitted (Part III)

11. Part III applies to "slot-machines which are constructed or adapted for playing a game of chance by means of machine".⁷ Clubs may install up to three jackpot machines with a maximum stake per play of 50 pence and a £250 prize.

Registration under Parts II and III

12. The licensing authority is the magistrates' court in England & Wales and the sheriff in Scotland.⁸

Part II

13. The registration process for Part II is laid down in Schedule 3 (England & Wales) and Schedule 4 (Scotland). There are detailed requirements for the advertisements of applications, the notification of the Gaming Board and the police, the public hearing of objections, which are modelled on those which apply to casinos and licensed bingo clubs, and the same right is given to the Gaming Board to appeal to the Crown Court if the justices have granted or renewed a certificate of registration against its advice. The object of the hearings is to establish that the club meets the requirements (the fitness of the secretary or other officers of the club is not at issue). In 1999-2000, the fees for registration were £195 and £95 for renewal.⁹

Part III

14. Registration under Part III is prescribed in Schedule 7 (England & Wales) and Schedule 8 (Scotland). The procedure for registration for the use of gaming machines is much simpler than in the case of registration for general gaming. An application may be made at any time by sending the prescribed form duly completed to the clerk to the justices. There is no requirement that the applications must be advertised; only the police have to be notified and they alone are given rights of objection. Registration can be refused if irregularities have occurred in the use of the machines. The provision for appeal against refusal and cancellation of registration is broadly similar to those applying to registration for the other types of gaming. The fees for 1999-2000 were £105 for an initial registration and £62 for renewal.¹⁰

Number of clubs

15. The keeping of a record of registration of clubs and institutes is one of the duties imposed on clerks to the licensing authorities under the Gaming Act. A survey of licensing authorities undertaken by the Gaming Board indicates that at 31 March 2000 there were 1,100 clubs registered under Part II of the Gaming Act and nearly 16,000 registered under Part III. The Gaming Board has no information as to how many clubs, which are not registered under Parts II and III of the Act, organise equal chance gaming with nominal charges for their members under the terms of section 40 of the Act, or promote equal chance gaming at entertainments to which the public are admitted under section 41, because there is no notification requirement.



Annex J

ONS Report commissioned by the Gambling Review Body

Attitudes to Gambling in Great Britain January 2001

A report by Social Survey Division for the Gambling Review Body using data from the National Statistics Omnibus Survey

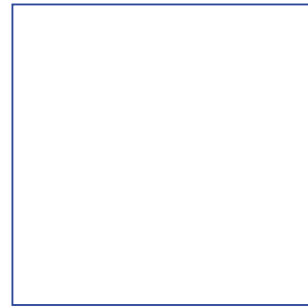
Summary

- Overall, 45% of respondents thought that there should be no fruit machines in places such as cafés, take-away food shops or minicab offices, 33% felt that the number of such machines was about right, whereas 21% felt that fewer machines would be more acceptable.
- 42% of survey respondents disapproved of children playing on fruit machines, with a similar proportion only giving approval if adults were with the children. With 13% of the population undecided, only 4% endorsed the activity of unaccompanied children playing on fruit machines.
- Nearly all respondents thought that horseracing, greyhound racing and gaming in a casino was a form of gambling. In addition, about 8 in 10 people thought that doing the National Lottery, buying scratch cards and spread betting was a form of gambling. About three quarters of the sample believed that doing the football pools was gambling and two thirds regarded bingo as a form of gambling. However, the proportion of people who thought that buying: premium bonds, raffle tickets, and stocks and shares were forms of gambling ranged from 44% to 55%.
- 36% of people thought that all the 11 listed activities were forms of gambling. Conversely 11% people thought that less than four of the listed activities were a form of gambling.
- 9 in 10 people had participated in at least one of the listed gambling activities over the last 12 months. Playing the National Lottery was the most popular activity (73%) followed by buying raffle tickets (58%). The least popular activity was spread betting; only 1% of people had participated in spread betting over the last 12 months.

- In the last year, over half of people had participated in one (25%) or two (27%) activities; around one fifth (19%) had participated in three activities, 11% in 4 activities and only 8% had participated in 5 or more gambling activities.
- Seventy-three per cent of adults played the National Lottery in the last 12 months.
- Despite the introduction of the National Lottery, most people (80%) said that they had not changed their attitude towards gambling over the past 10 years: 6% said that their attitude towards gambling had become more positive and 15% said that their attitude towards gambling had become more negative over the last 10 years.

Notes to Tables

1. Very small bases have been avoided wherever possible because of the relatively high sampling errors that attach to small numbers. In general, percentage distribution are shown if the base is 30 or more. Where the base is smaller than this, actual numbers are shown within square brackets.
2. A percentage may be quoted in the text for a single category that is identifiable in the tables only by summing two or more component percentages. In order to avoid rounding errors, the percentage has been recalculated for the single category and may differ by one percentage point from the sum of the percentages derived from the tables.
3. The row or column percentages may add up to 99% or 101% because of rounding.
4. Unless otherwise stated, changes and differences mentioned in the text have been found to be statistically significant.



1. Background and aims

This report is written on behalf of the Gambling Review Body. The Gambling Review Body was established in February 2000 by the Home Secretary to review the gambling legislation in Great Britain today, and is due to make recommendations on the nature and extent of regulation for gambling activities by summer 2001.

To feed into this Review the Gambling Review Body commissioned the National Statistics Omnibus Survey to measure public attitudes towards gambling. Specifically, the survey aimed to:

- Measure public attitudes to the availability of fruit machines in places not usually associated with gambling;
- Measure public attitudes to allowing children to play on the type of fruit machines commonly found in seaside areas;
- Measure attitudes towards gambling and participation in certain gambling activities;
- Identify whether people considered playing the National Lottery to be a form of gambling.

Demographic profiles of the responding sample are presented in tables, which enable the reader to examine the influence of socio-demographic characteristics.

Results are presented from the January 2001 cycle of the National Statistics Omnibus Survey. The Omnibus survey is a multi-purpose survey carried out 8 times per year, based on a representative sample of adults aged 16 or over, in Great Britain. Further details about the Omnibus survey are given in Appendix A and the questionnaire used in this study is included in Appendix B.

2. Availability of Fruit Machines

Overall, 45% of respondents thought that there should be no fruit machines in places such as cafés, take-away food shops or minicab offices, 33% felt that the number of such machines was about right, whereas 21% felt that fewer machines would be more acceptable. Attitudes to the availability of fruit machines in places such as cafés, take-away food shops or minicab offices varied according to age and sex, educational qualification, working status and marital status. **(Table 2.1)**

Age and sex

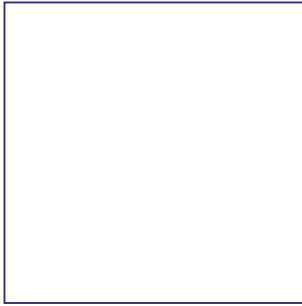
Older people were more likely than younger people to think that there should be fewer or no fruit machines available in such places. Seventy-three per cent of people aged 55 or over held this view compared with 52% of people aged 16 to 24 years. **(Table 2.1)**

Overall, women were more inclined than men to think that there should be fewer or no fruit machines available in such places (72% compared with 60%). However, the gender difference in opinion was most pronounced for the youngest age group. Forty per cent of women aged 16 to 24 years thought that there should be no fruit machines at all in cafés, take-away food shops or minicab offices compared with 22% of men of the same age group. **(Table 2.2)**

Level of educational qualification

People with no formal educational qualifications (53%) were more likely than those with a degree or equivalent (43%) to think that there should be no fruit machines at all in cafés, take-away food shops or minicab offices. **(Table 2.1)**

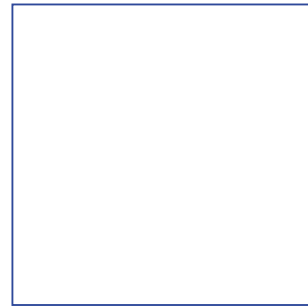
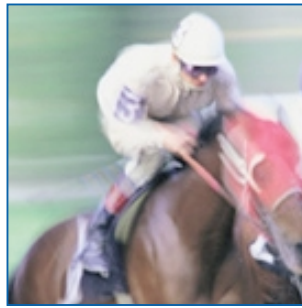
People's opinions on the availability of fruit machines did not vary significantly according to where they lived in the country, nor were there any significant differences between social class groups (non-manual/manual).



People aged 16 or over						January 2001*
Characteristic		None	Fewer	Same	More	Base = 100%
All	%	45	21	33	1	1,616
Sex						
Male	%	42	18	39	1	731
Female	%	48	24	27	1	885
Age						
16 to 20	%	31	15	46	7	64
21 to 24	%	33	25	41	1	64
25 to 34	%	38	22	39	0	280
35 to 44	%	45	23	32	0	303
45 to 54	%	46	20	34	0	264
55 to 64	%	51	23	25	0	250
65 to 74	%	54	21	26	-	251
75 or over	%	51	20	29	-	160
Region						
The North	%	50	22	27	1	394
Midlands and East Anglia	%	43	19	37	1	457
London	%	50	19	29	2	167
South East	%	38	25	37	-	227
South West	%	44	25	31	-	148
England	%	45	21	33	1	1393
Wales	%	48	25	27	-	79
Scotland	%	42	20	37	2	144
Social Classification						
Non-manual	%	45	23	31	0	901
Manual	%	45	21	33	1	608
Highest Educational Qualification						
Degree or equivalent	%	43	23	33	2	218
Below degree level	%	39	24	36	1	680
Other††	%	49	18	33	-	116
None	%	53	17	29	1	596
Working Status						
In paid work	%	41	22	36	1	883
Unemployed	%	47	16	37	-	48
Economically inactive	%	51	20	28	1	685
Marital Status						
Single	%	32	20	44	4	310
Married or cohabiting	%	48	21	31	0	923
Separated, divorced or widowed	%	49	23	28	-	383

* Weight a
† Non-manual - Professional, managerial, intermediate and other non-manual groups
Manual - Skilled, semi-skilled and unskilled manual groups
Excludes a few people in the armed forces or where there was an inadequate description
†† Includes foreign qualifications (outside UK) and other qualifications

Table 2.1: Attitudes to the availability of fruit machines in cafés, take-away food shops and minicab offices by socio-demographic characteristics



Characteristic		Attitudes to availability of fruit machines				January 2001*
		None	Fewer	Same	More	Base = 100%
People aged 16 or over	All	45	21	33	1	1,616
Men						
	16 to 24	22	15	57	6	56
	25 to 34	41	15	43	0	123
	35 to 44	42	16	41	0	144
	45 to 54	38	19	42	-	119
	55 to 64	50	26	24	1	129
	65 to 74	51	18	32	-	104
	75 or over	44	20	35	-	57
Women						
	16 to 24	40	23	33	4	72
	25 to 34	36	29	35	1	157
	35 to 44	48	28	24	0	159
	45 to 54	52	20	28	1	145
	55 to 64	54	21	26	-	122
	65 to 74	56	23	20	-	127
	75 or over	55	20	25	-	103

* Weighted

Table 2.2: Attitudes to the availability of fruit machines in cafes, take-away food shops and mini-cab offices by age and sex

3. Children Playing on Fruit Machines

The law allows people of all ages to play on fruit machines as long as the prize money is limited to five pounds. Machines of this type are most commonly found at the seaside.

People were asked whether they:

- Approved of children playing on these machines;
- Approved of children playing on these machines only if they were accompanied by a responsible adult;
- Neither approved nor disapproved of children playing on these machines; or,
- Disapproved of children playing on these machines.

Table 3.1 shows that 42% of survey respondents disapproved of children playing on fruit machines, with a similar proportion only giving approval if adults were with the children. With 13% of the population undecided, only 4% endorsed the activity of unaccompanied children playing fruit machines.

People's attitudes to children playing on fruit machines were similar to those about the availability of such machines. Although there were no gender differences, attitudes to children playing on fruit machines varied by age, region, and level of educational qualification. In

common with attitudes to the availability of fruit machines, people's opinions of children playing on fruit machines did not vary significantly between social class groups. (Table 3.1)

Age

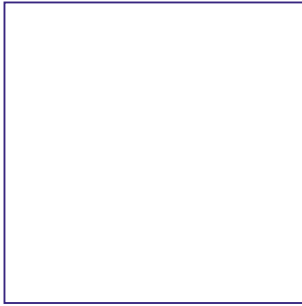
Although age differences in attitudes to children playing fruit machines was not so pronounced as for attitudes to the availability of fruit machines, those in the oldest age group (75 or over) were most likely to say that they disapproved of children playing on fruit machines (59%) compared with 24% of people aged 16 to 20 years. (Table 3.1)

Region

There were differences by region and attitude to children playing on fruit machines. People living in Scotland (56%), Wales (54%) and London (51%) were more likely to disapprove of children playing on fruit machines compared with people living elsewhere in Great Britain (39%). (Table 3.1)

Level of educational qualification

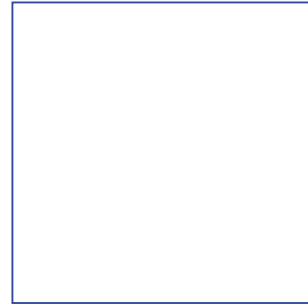
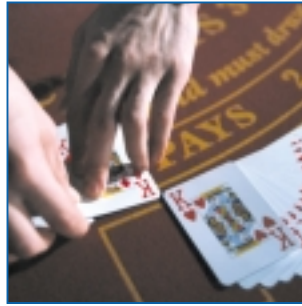
There was no clear relationship between attitude to children playing on fruit machines and level of educational qualification. People with a degree or equivalent (48%), and people with no formal qualifications (46%) were most likely to disapprove of children playing on these machines compared with people with qualification below degree level (37%). (Table 3.1)



People aged 16 or over						January 2001*
Characteristic		Approved	Approved with adult	Neither approved nor disapproved	Disapproved	Base = 100%
All	%	4	41	13	42	1,663
Sex						
Male	%	4	40	14	41	755
Female	%	3	42	13	43	908
Age						
16 to 20	%	8	49	20	24	65
21 to 24	%	4	36	14	46	66
25 to 34	%	4	43	13	40	290
35 to 44	%	5	45	11	39	312
45 to 54	%	2	39	17	42	272
55 to 64	%	2	39	13	46	255
65 to 74	%	2	46	9	42	234
75 or over	%	4	27	9	59	176
Region						
The North	%	4	44	11	42	394
Midlands and East Anglia	%	5	43	14	37	457
London	%	2	31	17	51	167
South East	%	4	47	15	34	227
South West	%	1	40	16	44	148
England	%	4	42	14	40	1438
Wales	%	2	32	12	54	79
Scotland	%	2	34	8	56	144
Social Classification†						
Non-manual	%	3	42	13	42	929
Manual	%	3	41	12	43	626
Highest Educational Qualification						
Degree or equivalent	%	3	34	15	48	218
Below degree level	%	4	44	15	37	686
Other‡	%	3	44	10	43	116
None	%	4	39	11	46	596
Working Status						
In paid work	%	4	43	15	39	911
Unemployed	%	10	35	7	48	48
Economically inactive	%	2	39	11	47	704
Marital Status						
Single	%	5	43	16	36	322
Married or cohabiting	%	3	42	12	42	946
Separated, divorced or widowed	%	3	34	14	50	395

* Weight a
† Non-manual - Professional, managerial, intermediate and other non-manual groups
Manual - Skilled, semi-skilled and unskilled manual groups
Excludes a few people in the armed forces or where there was an inadequate description
‡‡ Includes foreign qualifications (outside UK) and other qualifications

Table 3.1: Attitudes to children playing on fruit machines by socio-demographic characteristics



People aged 16 or over		January 2001*				
Characteristic		Approved	Approved with adult	Neither approved nor disapproved	Disapproved	Base = 100%
All	%	4	41	13	42	1,663
Men						
16 to 24	%	11	37	14	38	56
25 to 34	%	4	42	11	44	128
35 to 44	%	7	47	11	35	151
45 to 54	%	2	37	21	40	123
55 to 64	%	2	33	17	48	132
65 to 74	%	4	50	11	36	106
75 or over	%	2	28	11	60	59
Women						
16 to 24	%	3	49	19	29	74
25 to 34	%	3	43	16	37	161
35 to 44	%	2	43	12	43	161
45 to 54	%	2	40	14	43	148
55 to 64	%	4	45	9	43	126
65 to 74	%	1	43	7	49	126
75 or over	%	5	27	8	60	110

* Weight a

Table 3.2: Attitudes to children playing on fruit machines by socio-demographic characteristics

4. Activities considered to be a form of gambling

Respondents were shown a list of 11 activities and asked to identify which activities they considered to be a form of gambling.

- Buying raffle tickets
- Buying premium bonds
- Playing bingo
- Buying stocks and shares
- Doing the football pools
- Doing the National Lottery
- Playing on fruit machines
- Buying scratchcards
- Spread betting
- Betting on horse/greyhound racing
- Gaming in a casino

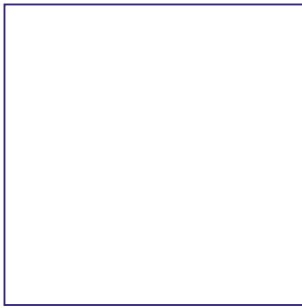
Not unexpectedly, nearly all respondents thought that horseracing, greyhound racing and gaming in a casino was a form of gambling. In addition, about 8 in 10 people thought that doing the National Lottery, buying scratchcards and spread betting was a form of gambling. About three quarters of the sample believed that doing the football pools was gambling and two thirds regarded bingo as a form of gambling. However, the proportion of people who thought that buying premium bonds, raffle tickets, and stocks and shares were forms of gambling ranged from 44% to 55%. (Table 4.1)

4.1 Types of gambling activity

As with the attitudes to the availability of fruit machines, and to children playing on fruit machines, there were differences in the proportion of people which rated each activity as gambling by socio-demographic characteristics. (Table 4.2)

Sex

Men were more likely than women to think that doing the football pools and spread betting were forms of gambling and to have considered the activities that are not immediately thought of as core gambling activities, such as buying raffle tickets, premium bonds and buying stocks and shares, as gambling.



Age

Young people aged 16 to 24 years were less likely than all other age groups to think that buying raffle tickets, premium bonds, playing bingo, buying stocks and shares, as well as spread betting, were forms of gambling.

Social class

People in professional occupations were significantly more likely than those in unskilled occupations to think that buying raffle tickets, premium bonds, playing bingo, and doing the football pools were forms of gambling. They were also more likely to think that playing on fruit machines, buying scratchcards and spread betting were forms of gambling.

Educational qualification

People with qualifications, particularly those with higher educational qualifications were more likely to have considered the non-core gambling activities as 'gambling'.

In summary, men, older people, those in professional occupations and those with higher qualifications were more likely than their counterparts to consider the non-core activities (i.e. raffle tickets, premium bonds, stocks and shares) as forms of gambling.

Looking at the variation in number of activities regarded as gambling by socio-demographic characteristics, two groups of respondents can be identified for comparative analysis: those who regarded all eleven items as gambling and those who thought that three or less activities were gambling. Results from the activity scale showed that 36% of people thought that all the listed activities were forms of gambling and that 11% people thought that less than four of the listed activities were a form of gambling. (Table 4.3)

The proportion of the sample who rated all activities as gambling was:

- Slightly higher among men than women (39% compared with 33%)
- Highest in the 55-64 year olds, 47%, and lowest among the 16-24 year olds, 18%
- Most prevalent in Wales, 46%, and the least frequent in London, 30%
- Highest among those in the "professional" social classification and lowest among those in the partly skilled and semi-skilled groups (44% compared with 28%)

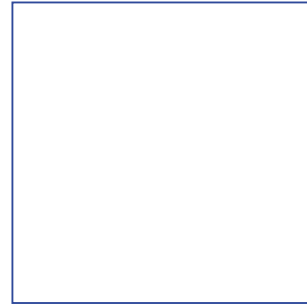
4.2 Number of activities

A scale was developed in order to investigate attitudes to these activities further. An activity score was assigned to each respondent, which represented the sum of the number of activities that they considered to be gambling.

Activity	January 2001* % **
Betting on horse/greyhound races	96
Gaming in a casino	96
Playing on fruit machines	88
Doing the National Lottery	80
Buying scratchcards	79
Spread betting	78
Doing the football pools	76
Playing bingo	68
Buying stocks and shares	55
Buying raffle tickets	54
Buying premium bonds	44
None of the above	0
Base = 100%	1,669

* Weight a
** Percentages may not add to 100% as respondents could give more than one answer

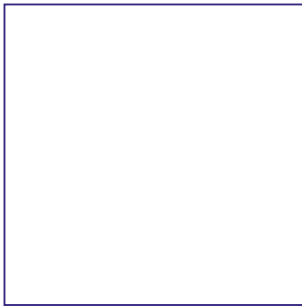
Table 4.1: Proportion of adults who considered different activities to be a form of gambling



People aged 16 or over													January 2001*
Characteristic		Horse or greyhounds	Casino	Fruit machines	National Lottery	Scratch cards	Spread betting	Football pools	Bingo	Stocks & Shares	Raffle tickets	Premium bonds	Base = 100%
Proportion who regarded each activity to be a form of gambling													
All	%	96	96	88	80	79	78	76	68	55	54	44	1,664
Sex													
Male	%	97	96	90	81	81	84	80	70	59	59	48	757
Female	%	96	95	87	79	78	74	73	67	51	50	39	912
Age													
16 to 20	%	92	94	87	82	74	69	76	57	32	46	19	65
21 to 24	%	95	95	88	79	74	72	74	55	49	37	29	66
25 to 34	%	98	97	92	77	80	84	74	68	51	50	38	290
35 to 44	%	97	96	93	84	84	82	81	74	60	58	46	312
45 to 54	%	97	97	89	78	77	83	76	70	57	55	45	272
55 to 64	%	98	94	88	80	83	77	80	73	63	62	57	259
65 to 74	%	96	97	82	80	77	75	72	66	51	51	49	234
75 or over	%	91	90	81	79	77	65	69	63	58	57	43	171
Region													
The North	%	96	96	91	80	82	78	77	68	52	53	42	408
Midlands and East Anglia	%	96	94	87	80	77	79	75	68	54	53	41	466
London	%	96	95	83	77	74	77	73	64	49	53	37	180
South East	%	97	97	92	83	81	84	77	72	61	58	51	236
South West	%	99	98	86	79	80	77	75	68	61	57	50	154
England	%	96	96	88	80	79	79	76	68	55	54	43	1444
Wales	%	97	97	93	85	85	80	83	74	59	60	51	80
Scotland	%	96	95	87	77	76	72	76	68	49	49	41	145
Social classification†													
Professional	%	99	98	92	85	89	91	86	76	61	71	55	82
Intermediate	%	99	98	92	83	85	87	81	73	65	59	49	486
Skilled non-manual	%	96	96	87	80	77	77	75	69	52	50	41	362
Skilled manual	%	96	96	90	79	80	77	76	64	54	58	44	280
Partly skilled	%	93	92	84	76	72	68	68	64	43	46	37	260
Unskilled	%	97	95	77	73	71	66	68	58	48	41	35	88
Highest Educational Qualification													
Degree or equivalent	%	100	97	94	87	90	90	86	75	62	63	52	230
Below degree level	%	97	97	89	78	78	82	76	68	54	53	41	704
Other††	%	95	96	93	87	87	77	80	70	53	57	45	120
None	%	94	93	84	77	74	69	71	66	53	51	44	614

* Weight a
† Non-manual - Professional, managerial, intermediate and other non-manual groups
Manual - Skilled, semi-skilled and unskilled manual groups
Excludes a few people in the armed forces or where there was an inadequate description
†† Includes foreign qualifications (outside UK) and other qualifications

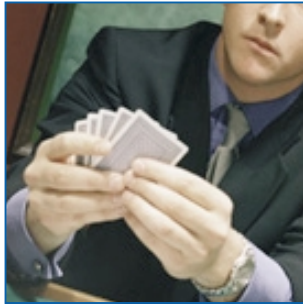
Table 4.2: Attitude to gambling related activities by socio-demographic characteristics



People aged 16 or over							January 2001*
Characteristic		11 activities	8-10 activities	4-7 activities	1-3 activities	None	Base = 100%
All	%	36	26	26	10	1	1,678
Sex							
Male	%	39	30	22	9	0	757
Female	%	33	26	30	11	1	921
Age							
16 to 24	%	18	37	36	9	0	131
25 to 34	%	32	30	30	7	1	291
35 to 44	%	38	31	22	8	1	314
45 to 54	%	39	27	25	9	1	273
55 to 64	%	47	23	17	13	-	259
65 to 74	%	37	22	27	14	0	235
75 or over	%	32	24	29	14	2	175
Region							
The North	%	35	27	28	9	1	411
Midlands and East Anglia	%	32	32	24	11	0	468
London	%	30	28	28	13	1	181
South East	%	42	28	22	8	0	237
South West	%	40	26	21	12	1	155
England	%	35	29	25	10	1	1452
Wales	%	46	20	27	5	3	81
Scotland	%	35	21	33	10	-	145
Social Classification†							
Professional	%	44	30	21	5	-	82
Intermediate	%	41	31	21	7	0	487
Skilled non-manual	%	34	28	28	9	1	363
Skilled manual	%	36	26	28	9	0	281
Partly skilled	%	28	24	31	15	2	264
Unskilled	%	28	26	23	24	-	88
Highest Educational Qualification							
Degree or equivalent	%	40	35	19	5	1	232
Below degree level	%	34	30	28	8	0	704
Other‡	%	39	26	28	7	-	120
None	%	35	23	26	15	1	620
Working status							
In paid work	%	36	31	24	8	0	914
Unemployed	%	38	27	27	6	2	48
Economically inactive	%	35	24	28	13	1	716
Marital Status							
Single	%	24	35	30	10	1	327
Married or cohabiting	%	38	26	26	9	0	951
Separated, divorced or widowed	%	40	26	20	13	1	400

* Weight a
† Excludes a few people in the armed forces or where there was an inadequate description
‡‡ Includes foreign qualifications (outside UK) and other qualifications

Table 4.3: Number of activities considered to be a form of gambling by socio-demographic characteristics



Conversely the proportions of those who deemed less than 4 activities as gambling were more prevalent among the over 65s, adults in partly skilled or unskilled occupations and those economically inactive.

Among those who considered just one activity as gambling, there was no clear consensus regarding what that activity was, however among those who considered two or three activities as gambling, 90% reported that two of those activities were betting on horse/greyhound races and gaming in a casino.

5. Participation in Gambling Activities

Respondents were shown the same list of activities that they had previously been shown and asked to identify which activities they had participated in over the last 12 months. 9 in 10 people had participated in at least one of the listed gambling activities over the last 12 months.

Playing the National Lottery was the most popular activity (73%) followed by buying raffle tickets (58%). The least popular activity was spread betting; only 1% of people had participated in spread betting over the last 12 months.

(Table 5.1)

5.1 Participation in each type of gambling activity

Table 5.2 shows how participation in gambling related activities varied by socio-demographic characteristics. There were differences in the proportion of people who participated in gambling related activities according to sex, age, region, social class, working status and marital status. There was no difference in rates of participation in gambling activities according to educational attainment.

Sex and age

There were differences in the types of activity that men and women took part in. As can be seen from Table 5.2, men were more likely than women to bet on horse/greyhound races, buy stocks and shares, play on fruit machines and do the football pools. Women, on the other hand were more likely than men to play bingo. (Young women aged 16 to 24 years, were just as likely to play bingo (23%) as women aged 65 years or over (22%) in the last year).

(Table 5.2)

Region

People living in London were less likely to play on fruit machines, play the National Lottery, play bingo, play the football pools and buy raffle tickets compared with people living elsewhere in the country.

Social class

Social class was also related to participation in gambling activities. Whilst there was no difference between manual and non-manual workers in the number of activities that they had taken part in, there were differences in what those activities were. Non-manual workers were more likely than manual workers to purchase raffle tickets, premium bonds and stocks and shares. Whereas manual workers were more likely than non-manual workers to play bingo, play on fruit machines and bet on horse/greyhound races.

5.2 Participation in the number of gambling activities

A measure of an individual's level of participation in gambling activities was developed in a similar manner to the activity scale in the previous section. A participation score was assigned to each respondent, which represented the sum of the number of activities that they had participated in over the last 12 months. Respondents could have: -

- Score of 0 (had not taken part in any activity);
- Score of 1 (had taken part in just one activity);
- Score of 2 (had taken part in two activities);
- Score of 3 (had taken part in three activities);
- Score of 4 (had taken part in four activities);
- Score of 5 (had participated in five or more activities).

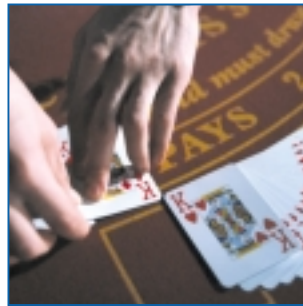
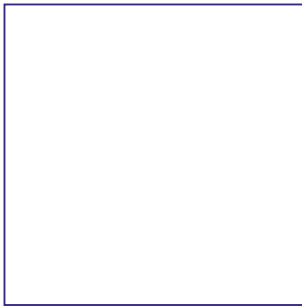
In the last year, over half of people had participated in one (25%) or two (27%) activities; around one fifth (19%) had participated in three activities, 11% in 4 activities and only 8% had participated in 5 or more gambling activities.

(Table 5.3)

Among those who participated in only one activity, 59% reported that the activity was playing the National Lottery. Among those who participated in two activities, 82% reported that these activities were playing the National Lottery and 66% buying raffle tickets.

Sex and age

Men participated in a larger number of gambling activities than women. Men were more likely to take part in 5 or more activities than women (12% compared with 5% respectively). Women were more likely than men to take part in just one gambling activity (28% compared with 22%).



People at either end of the age spectrum were less likely to have taken part in any gambling activity. One in five (20%) young people aged 16 to 24 years and 18% people aged 75 or over reported that they had not participated in any gambling activity over the last 12 months. People aged 55 to 64 years were the most likely to have taken part in some form of gambling activity (95%).

Region

People living in Wales were less likely not to gamble at all (4%) compared with people in England (10%).

Marital status

Marital status was also related to participation in gambling activities over the last 12 months. Twelve per cent of single adults had taken part in 5 or more activities compared with 8% of those who were married or cohabiting and 6% of those who were divorced, separated or widowed.

5.3 Attitude to gambling and participation in gambling related activities

Those who were most likely to have considered all 11 activities to be a form of gambling were also most likely to participate in a higher number of gambling related

activities. This was most evident in men, young people, those who live in Wales and in those who were in paid work. The opposite effect was apparent with people living in London. People in London were less likely to have considered all activities as a form of gambling and were also less likely to have taken part in gambling related activities.

5.4 Those who did not participate in any gambling activity

One in ten adults did not participate in any gambling related activity over the last 12 months. Non-gamblers were most likely to be aged 16-24 years, single and live in London.

Non-gamblers were most likely to say that they felt more negative towards gambling over the past 10 years. Twenty three per cent of those who had not taken part in any gambling activity described becoming more negative compared with 14% of those who had taken part in at least one gambling activity.

People who had not taken part in any gambling activity over the last 12 months were more likely to say that they disapproved of children playing on fruit machines (62%) than people who had taken part in at least one or more gambling activities (40%). (Table 5.3)

Activity	January 2001* % **
People aged 16 or over	
Doing the National Lottery	73
Buying raffle tickets	58
Buying scratchcards	20
Buying stocks and shares	15
Betting on horse/greyhound races	15
Playing bingo	14
Playing on fruit machines	13
Doing the football pools	7
Buying premium bonds	7
Gaming in a casino	4
Spread betting	1
None of the above 10	
Base = 100%	1,671

* Weight a
** Percentages may not add to 100% as respondents could give more than one answer

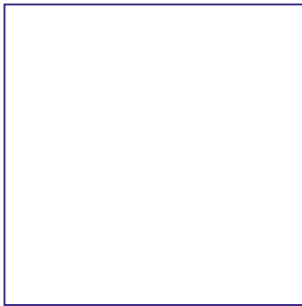
Table 5.1: Proportion of adults who participated in gambling related activities over the last 12 months



People aged 16 or over													January 2001*
Characteristic		Horse or greyhounds	Casino	Fruit machines	National Lottery	Scratch cards	Spread betting	Football pools	Bingo	Stocks & Shares	Raffle tickets	Premium bonds	Base = 100%
Proportion who regarded each activity to be a form of gambling													
All	%	15	4	13	73	20	1	7	14	15	58	7	1,671
Sex													
Male	%	22	5	18	73	21	2	10	9	20	57	7	757
Female	%	9	2	9	73	19	0	4	17	10	59	7	914
Age													
16 to 20	%	17	2	35	48	28	-	4	17	3	51	4	65
21 to 24	%	19	8	36	54	30	4	13	23	7	46	1	66
25 to 34	%	20	5	19	75	25	2	5	11	13	55	4	291
35 to 44	%	16	5	11	79	21	0	6	10	17	67	6	312
45 to 54	%	16	4	10	77	19	0	8	11	19	62	7	272
55 to 64	%	15	2	9	81	18	1	9	16	22	61	14	259
65 to 74	%	10	2	6	74	11	0	8	15	11	55	11	235
75 or over	%	8	-	2	60	13	-	4	20	8	46	7	171
Region													
The North Midlands and East Anglia	%	14	4	11	72	17	2	8	16	14	55	7	409
London	%	15	3	16	75	20	0	7	14	11	64	7	466
South East	%	20	3	8	64	16	1	3	6	17	43	8	180
South West	%	18	6	18	71	23	0	8	12	22	61	10	236
England	%	14	1	12	70	23	-	7	12	19	66	10	155
Wales	%	16	4	14	72	20	1	7	13	15	59	8	1446
Scotland	%	10	4	8	86	26	1	6	14	14	64	5	80
	%	17	3	13	79	20	2	9	20	11	46	2	145
Social Classification†													
Professional	%	12	3	9	57	8	-	6	3	40	63	12	82
Intermediate Skilled non-manual	%	16	4	13	72	18	1	7	8	24	65	10	485
Skilled manual	%	12	4	12	78	22	1	6	14	8	61	9	362
Partly skilled	%	23	4	17	79	25	1	11	14	10	53	5	280
Unskilled	%	16	2	15	72	20	1	5	18	8	48	4	262
	%	14	2	12	75	19	1	8	36	5	52	3	88
Highest Educational Qualification													
Degree or equivalent	%	17	5	10	59	14	1	5	5	32	62	10	230
Below degree level	%	16	4	18	74	22	1	7	12	16	64	7	704
Other††	%	20	3	11	66	15	2	9	15	15	49	9	120
None	%	13	3	9	78	20	0	7	19	7	50	6	616

* Weight a
† Non-manual - Professional, managerial, intermediate and other non-manual groups
Manual - Skilled, semi-skilled and unskilled manual groups
Excludes a few people in the armed forces or where there was an inadequate description
†† Includes foreign qualifications (outside UK) and other qualifications

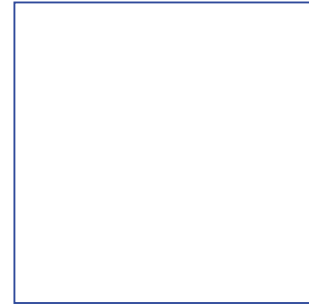
Table 5.2: Participation in gambling related activities by socio-demographic characteristics



People aged 16 or over		January 2001*						
Characteristic		None	1	2	3	4	5+	Base = 100%
All	%	10	25	27	19	11	8	1,671
Sex								
Male	%	10	22	26	19	11	12	757
Female	%	9	28	29	18	11	5	914
Age								
16 to 20	%	20	28	19	10	7	16	65
21 to 24	%	18	14	32	13	10	13	66
25 to 34	%	10	27	21	20	12	10	291
35 to 44	%	6	22	32	22	10	9	312
45 to 54	%	7	24	26	23	13	6	272
55 to 64	%	5	27	26	20	12	10	259
65 to 74	%	9	30	33	12	12	4	235
75 or over	%	18	28	31	14	5	3	171
Region								
The North	%	12	25	28	17	12	7	409
Midlands and East Anglia	%	7	25	30	18	11	9	466
London	%	17	32	21	15	7	7	180
South East	%	9	22	24	19	13	11	236
South West	%	10	19	30	20	14	7	155
England	%	10	25	27	18	11	9	1446
Wales	%	4	24	29	25	12	5	80
Scotland	%	6	31	28	23	5	8	145
Social Classification†								
Non-manual	%	8	24	29	19	12	8	929
Manual	%	11	27	26	18	10	9	630
Highest Educational Qualification								
Degree or equivalent	%	12	27	24	20	7	10	230
Below degree level	%	8	23	26	20	12	10	704
Other††	%	12	26	26	18	14	3	120
None	%	10	27	30	16	10	7	616
Working Status								
In paid work	%	7	24	26	20	12	11	912
Unemployed	%	18	18	30	19	11	3	48
Economically inactive	%	13	28	29	16	9	4	711
Marital Status								
Single	%	19	26	21	13	9	12	326
Married or cohabiting	%	6	24	29	21	12	8	947
Separated, divorced or widowed	%	14	28	29	17	6	6	398

* Weight a
† Non-manual - Professional, managerial, intermediate and other non-manual groups
Manual - Skilled, semi-skilled and unskilled manual groups
Excludes a few people in the armed forces or where there was an inadequate description
†† Includes foreign qualifications (outside UK) and other qualifications

Table 5.3: Number of gambling related activities people had participated in over the last 12 months by socio-demographic characteristics



6. Focus on the National Lottery

Seventy-three per cent of adults played the National Lottery in the last 12 months. (Table 6.1)

Age

Participation in the National Lottery was related to age. People aged 55 to 64 (81%) were most likely to buy a National Lottery ticket in the last 12 months and young people aged 16 to 20 years (48%) were the least likely to purchase a National Lottery ticket.

Region

There was regional variation in respondents' participation in the National Lottery. Those in Scotland and Wales were most likely to buy a lottery ticket (80% and 85% respectively) compared with those living in England (71%). People living in London were least likely to play the Lottery (64%).

Social class

Playing the Lottery also varied by social class. Although there was no difference between manual and non-manual workers, those in social class group 1 were less likely to play the National Lottery. Those who were unemployed (67%) or economically inactive (68%) were also less likely to play the National Lottery than those in paid work (76%).

6.1 Change in attitudes to gambling over the last 10 years

To what extent has the introduction of the National Lottery softened public attitudes to gambling and led to increased levels of participation in gambling activities? Although this survey did not attempt to directly measure this, respondents were asked whether their attitudes to gambling had changed over the past 10 years, a period which covered the introduction of the National Lottery in 1994.

The majority (80%) of people said that they had not changed their attitude towards gambling over the past 10 years. Only a small proportion (6%) said that their attitude towards gambling had become more positive and 15% said that their attitude towards gambling had become more negative over the last 10 years. (Table 6.3).

6.2 Whether people think of the National Lottery as a form of gambling

Respondents were asked whether they had played the National Lottery before they were asked about their views on gambling, so as not to prompt them into considering the National Lottery as a form of gambling.

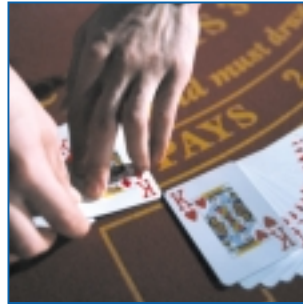
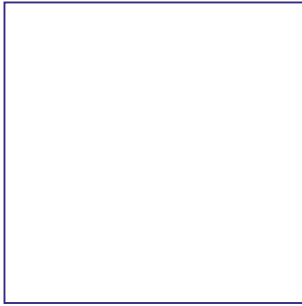
As previously mentioned there was a large group whose participation in gambling was restricted to playing the National Lottery (59%). The following analysis compared the views of people who only played the National Lottery with the opinions of people who participated in other gambling activities.

Both those who played the Lottery and those who did not play the Lottery said that they thought that the National Lottery was a form of gambling. Seventy-nine per cent of people who bought a Lottery ticket thought this compared with 82% of people who had not bought a Lottery ticket in the last year.

6.3 National Lottery and participation in other gambling related activities

People who played the National Lottery in the last 12 months were also more likely to have bet on horse/greyhound races, played on fruit machines, played the football pools, played bingo, bought raffle tickets and scratchcards than people who did not play the National Lottery in the last year. (Table 6.2)

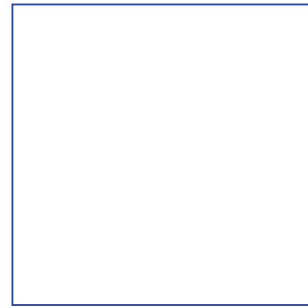
People who bought a Lottery ticket in the last year were also less likely to have disapproved of children playing on fruit machines than people who did not purchase a Lottery ticket in the last year (40% compared with 48% respectively).



People aged 16 or over		January 2001*		
Characteristic		Played Lottery	Not played lottery	Base = 100%
All	%	73	27	1,678
Sex				
Male	%	73	27	757
Female	%	72	28	921
Age				
16 to 20	%	48	52	65
21 to 24	%	55	45	66
25 to 34	%	75	25	291
35 to 44	%	78	22	314
45 to 54	%	77	23	273
55 to 64	%	81	19	259
65 to 74	%	74	26	235
75 or over	%	58	42	175
Region				
The North	%	72	28	411
Midlands and East Anglia	%	75	25	468
London	%	64	36	181
South East	%	71	29	237
South West	%	70	30	155
England	%	71	29	1,452
Wales	%	85	15	81
Scotland	%	80	20	145
Social Classification†				
Professional	%	57	43	82
Intermediate	%	72	28	487
Skilled non-manual	%	78	22	363
Skilled manual	%	78	22	281
Partly skilled	%	72	28	264
Unskilled	%	75	25	88
Highest Educational Qualification				
Degree or equivalent	%	58	42	232
Below degree level	%	74	26	704
Other††	%	66	34	120
None	%	78	22	620
Working status				
In paid work	%	76	24	914
Unemployed	%	67	33	48
Economically inactive	%	68	32	716
Marital Status				
Single	%	58	42	327
Married or cohabiting	%	78	22	951
Separated, divorced or widowed	%	67	33	400

* Weight a
† Excludes a few people in the armed forces or where there was an inadequate description
†† Includes foreign qualifications (outside UK) and other qualifications

Table 6.1: Participation in the National Lottery in the last 12 months by socio-demographic characteristics



People aged 16 or over		January 2001*	
Activity	Played Lottery	Did not play lottery	All
	%	%	%
Raffle tickets	62	46	58
Scratchcards	25	5	20
Horse/greyhound races	19	5	15
Stocks and shares	14	16	15
Bingo	16	8	14
Fruit machines	14	10	13
Football pools	8	2	7
Premium bonds	8	5	7
Gaming in a casino	4	3	4
Spread betting	1	1	1
Base = 100%	1212	459	1,671

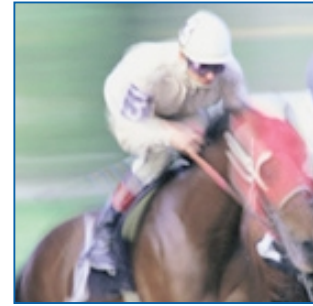
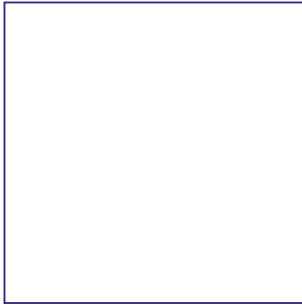
* Weight a

Table 6.2: Percentage of adults who participated in other gambling activities by participation in the National Lottery

People aged 16 or over		January 2001*
Attitude over last 10 years		% *
More positive attitude towards gambling		6
More negative attitude towards gambling		15
Attitude unchanged		80
Base = 100%		1,666

* Weight a

Table 6.3: Whether respondent's attitude towards gambling has changed over the last 10 years



Appendix A

The Omnibus Survey

The Omnibus Survey is a multi-purpose survey carried out by the Office for National Statistics for use by non-profit making organisations. Interviewing is carried out in two of the three months each quarter, and each month's questionnaire covers a variety of topics, reflecting different user's requirements.

The Sample

A random probability sample of 3,000 private households in Great Britain is selected (each month) using the small users' Postcode Address File¹ as a sampling frame. One hundred new postal sectors are selected and are stratified by region, the proportion of households renting from local authorities and the proportion in which the head of household is in Socio-Economic Groups 1-5 or 13 (that is a professional, employer or manager). The postal sectors are selected with probability proportional to size and within each sector 30 addresses are selected randomly.

Within households with more than one adult, one person aged 16 or over is randomly selected for interview. No proxy interviews are taken.

Weighting

As only one household member is interviewed at each address, people in households containing few adults have a higher probability of selection than those in households with many. Where the unit of analysis is individual adults, as it is for this module, a weighting factor is applied to correct for this unequal probability of selection. This weighting factor is referred to as 'weight a' and when applied, this is indicated in a footnote to each table and figure.

Significance

Any differences mentioned in this report are statistically significant at the 95% confidence level, unless otherwise stated.

Fieldwork

Interviews are carried out in respondents' homes, face to face, by interviewers who have been trained to carry out a range of National Statistics surveys. The Omnibus Survey uses computer assisted interviewing which has well documented effects on the quality of the data. Advance letters are sent to all addresses giving a brief account of the survey. Interviewers must make at least three or four calls at an address at different times of the day and week. As with all NS surveys, a quality check on fieldwork is carried out through recall interviews with a proportion of respondents.

Questions

The module of questions (shown in Appendix B) was developed in conjunction with the Gambling Review Body.

Response Rates

The small user's Postal Address File includes some business addresses and other addresses, such as new and empty properties, at which no private households are living. The expected proportion of such addresses, which are classified as ineligible is about 11%-12%. This figure is removed before the response rate is calculated.

The response rate for the January 2001 Omnibus Survey was 62%, as shown below:

	No.	%	%
Set sample	3,000	100	
Ineligible addresses	273	9	
Eligible addresses	2,727	91	100
Refusals	780		29
Non-Contacts	269		10
Achieved interviews	1,678		62

¹ An address which receives less than 50 items of mail each day.



Appendix B

The Questions

Have you bought a National Lottery ticket or a National Lottery instant/scratchcard in the last year?

- (1) Yes
- (2) No

Nowadays you may find fruit machines in places like cafés, takeaway food shops and minicab offices:

Do you think there should be:

- (1) More fruit machines in places like these,
- (2) Fewer fruit machines in places like these,
- (3) About the same number of fruit machines in places like these, or
- (4) No fruit machines at all in places like these?

The law currently allows children of all ages to play on fruit machines as long as the prize money is limited to five pounds. Machines of this type are commonly found at the seaside.

Do you:

- (1) Approve of children playing on these machines,
- (2) Approve of children playing on these machines only if they are accompanied by a responsible adult,
- (3) Neither approve nor disapprove of children playing on these machines, or
- (4) Disapprove of children playing on these machines?

Do you think your attitude towards gambling has changed at all over the last 10 years

Have you become:

- (1) More positive towards gambling,
- (2) More negative towards gambling,
- (3) Or has your attitude towards gambling remained unchanged over that time?

Which, if any, of the following do you consider to be a form of gambling?

- (1) Buying raffle tickets
- (2) Buying premium bonds
- (3) Playing bingo
- (4) Buying stocks and shares
- (5) Doing the football pools
- (6) Doing the National Lottery
- (7) Playing on fruit machines
- (8) Buying scratchcards
- (9) Spread betting
- (10) Betting on horse/greyhound races
- (11) Gaming in a casino
- (12) None of the above

In the last year, which of these activities have you taken part in?

- (1) Buying raffle tickets
- (2) Buying premium bonds
- (3) Playing bingo
- (4) Buying stocks and shares
- (5) Doing the football pools
- (6) Doing the National Lottery
- (7) Playing on fruit machines
- (8) Buying scratchcards
- (9) Spread betting
- (10) Betting on horse/greyhound races
- (11) Gaming in a casino
- (12) None of the above