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ISSUE ONE

INTRODUCTION

The National Gambling Board has pleasure in publishing its first Research Bulletin to inform stakeholders and the public about the latest gambling trends and patterns amongst the South African population.



This Bulletin will be updated regularly with the latest tracking research findings on the incidence of gambling, the prevalence of different forms of gambling, the profile of gamblers, as well as problem gambling.

The existing trended research will serve as a baseline for an extensive socio-economic research study that the Board has recently embarked on.

This study will cover various other social elements e.g. the social and financial impact of gambling on individuals, households, as well as the South African economy.

A dynamic qualitative phase will provide the Board with in-depth analysis and insight about gambling behaviour, patterns and perceptions amongst the South African public.

This Bulletin is the first in a series that will be published after the completion of any research project relevant to share with stakeholders and the public.

The content of these research bulletins will hopefully be found useful by all stakeholders and role players in the gambling industry and the public. The aim is to stay abreast of the latest trends in gambling behaviour and to assist in policy-making and strategic decision making. This is a direct outcome of the mandate of the NGB as described in the National Gambling Act (Act no 7 of 2004).

This summary presents highlights from the tracking research commissioned by the National Gambling Board in its effort to understand patterns and incidents of gambling in South Africa.

The National Gambling Board (NGB) conducts tracking research aimed at monitoring gambling behaviour in South Africa. This report is based on data from a nationally representative survey conducted in April 2011, November 2011 and April 2012.

Overall, trends in gambling behaviour remained stable between March and November 2011, with April 2012 survey revealing a downward trend in the incidents of gambling.

More than three-quarters, 80.3% of South Africans did not gamble at all, while only 19.7% reported that they have gambled in the last 12 months.

The shift between March 2011 and April 2012 is significant given the increase in between waves. In-depth analysis revealed that males are more predisposed to gambling than females; that whites, coloureds and Indians are gambling disproportionately more than black South Africans. Gambling is more prevalent in the age groups 25-54 years.

Gambling is more prevalent amongst the middle to higher income groups; those with some secondary or higher qualification and persons with a job. People segmented as LSM 6 and higher are more likely to gamble than those in the LSM1-5 segments; less so in deep rural and semi rural areas.

Tracking gambling incidence over time



100

80

60

40

20

0

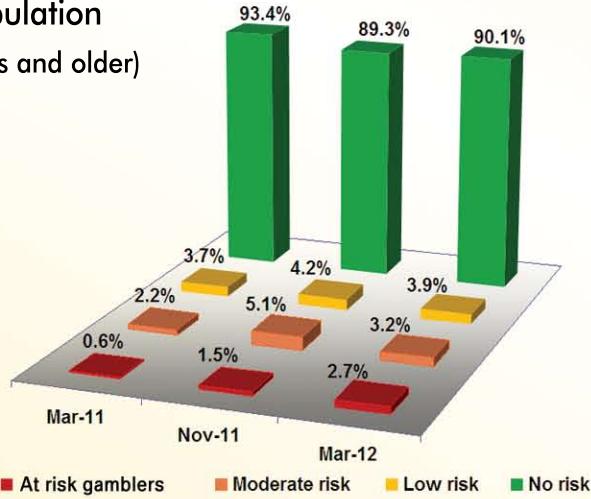
Playing the national lottery remains the most popular form of gambling with 87% of all gamblers participating in it.

While 19.7% of the total population (18 years and older) reported that they have participated in any form of gambling, 12.4% of all South Africans play the Lotto



In addition to lotto, scratch cards (12.4%), Fafi/iChina (8.2%), slot machines at casinos (7%) and lucky draws (6.8%), complete the list of top 5 most preferred gambling formats. Gambling on Limited Pay Out Machines does not feature in the top ten popular gambling formats. Between November 2011 and April 2012, data reveals a significant increase in people who have not gambled, up 4.4% from 75.9% to 80.3%, a nett gain from those who have gambled.

Level of at risk gambling in the total SA population (18 years and older)



The drop in the number of those who reported to have gambled is a positive indicator that the country is not over gambled.

The NGB also tracks the prevalence of at risk gambling in South Africa. By applying a globally accepted standard measure for at risk gambling, it has been established that roughly 2% (an average over 3 surveys) of the South African population of 18 years and older could be classified as at risk gamblers.

An at risk gambler is defined as a person who has experienced undue social or financial stress as a result of their gambling activities. This translates into approximately 700,000 adults out of a population of 35 million South Africans whom are 18 years and older and is in line with similar readings in Australia and other countries.

About the survey and detailed report:

The National Gambling Board included a section of questions on the Ipsos omnibus survey. This survey is a nationally representative probability sample of 3,500 adults. Personal interviews were conducted with respondents in the language of their choice. The margin of error is between 0.6 and 1%.

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Winners know when to stop

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