The Society for the Study of Gambling Newsletter

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The Editor welcomes unsolicited manuscripts, correspondence, book review and other items which are of interest of SSG members. Books and book reviews should be sent to the editor.

The Society holds regular meetings twice a year in London. Further details are available from the Honorary Secretary.

The Society for the Study of Gambling was formed in 1977 to provide a forum for those concerned with research into gambling, to promote its scientific study especially as far as the psychological, social and economic aspects are concerned, and to inform the public about these matters.

The membership of the Society is drawn from a wide circle of people who have an interest in various aspects of gambling. They range from social workers and psychiatrists who deal with 'compulsive gamblers' to members of the commercial gambling industry. It is a condition of the Society that there should be freedom of opinion and practice among its members, so that the Society does not take any particular stance in relation to gambling.

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EDITORIAL

These are stirring times in the gambling world. The government, whose policy is still in the process of gestation, is sponsoring an explosion of gambling in this country, which has already produced National Lottery revenues beyond anyone's expectations, and which will no doubt also produce an explosion of sad by-products. Perhaps the victims of the "lottomania" reported in *The Times* on 15 June 1995 would have suffered from some other form of mania if the Lottery had not existed, but there has already been at least one bizarre tragedy which seems more directly tied to the Lottery. A man committed suicide because he had forgotten to renew his weekly numbers and believed himself to have missed a win of £2m, only for it to be discovered later that the true amount was £27. It will be strange if the Lottery, and the more recently introduced scratch cards, do not continue to produce their share of undesirable and even tragic side-effects.

That thought underlay the very constructive discussion that followed the papers on the current proposals to relax aspects of the regulation of commercial gaming, in particular as it affects casino gaming and bingo, which were given at the Society's meeting in May 1995 and which are reproduced here. Home Office representatives took a full part in the debate; they could not reveal a great deal of their Ministers present thinking, in part because the consultation process was still going on, but the more research-minded members of the audience left them in no doubt that they deplored the government's failure to commit itself to a programme of research into the many aspects of gambling that demand it.

As well as keeping up the pressure for a well thought-out policy, by direct submissions to the Home Office, and by addressing letters to the press, I am sure that those of us who have an interest in research should be thinking out projects which would be candidates for funding from the proceeds of the Lottery. Such private enterprise will, however, not fully meet the bill. The Home Office will eventually need to set up its own gambling research centre, which would produce a programme of necessary research projects and put them out to tender. An example of the kind of research that is badly needed is that currently being conducted by Faith Freestone on the bingo industry. This is the first major piece of empirical research in this area for some 10 years; it more than justifies the call made by the Rothschild Commission in 1978 for national research into gambling. We look forward to seeing the full results of this research, which is being supported by the Bingo Association of Great Britain.

In this, my first editorial, I must thank Dr Mark Griffiths, our outgoing Editor, for promising me his help in the future: I am sure I will need it! The Society's membership, and therefore the *Newsletter's* readership, is still small, but it is growing and commands an impressive array of expert and influential people. My first hope is that members will write to me, either with the intention of having their letters or views published, or to suggest material for publication: book reviews or books for review will be gratefully received. Previews and abstracts of materials in preparation or not yet published would also be welcome. I emphasise that from our perspective, authors who have material published here are entirely free to seek its publication elsewhere. We will also be pleased to carry announcements or advertisements in the *Newsletter.*

Finally, may I draw to readers' attention the following AGM decision. Where a member wishes to attend a meeting but is not able to obtain reimbursement from an employer, the Society will be prepared to waive the fee for the meeting. If you wish to avail yourself of this opportunity, please write to the Treasurer.

HOME OFFICE POLICY ON GAMBLING

Jeremy Johnston

Home Office, D Division

I am a comparative newcomer to gambling. Prior to January this year, when I began working in D Division, I had never been in a casino, a bingo club or a betting shop, and I had never bought a lottery ticket. I had never heard of the policy of unstimulated demand and I didn't know what AWP stood for. Quite how this qualifies me to be speaking to you here today, I am not sure, but it serves perhaps to underline the fact that as civil servants we are very dependent on information and advice from experts such as yourselves.

As I am sure you are aware, gambling policy in this country has been, until recently, a fairly settled area of policy. Most of the governing legislation dates from the 1960s and has not changed substantially since then. It is evident, however, that we are now going through a process of significant change. The most notable development has been the introduction of the National Lottery. It has had a significant impact on public attitudes to gambling and it is a subject on which everyone has an opinion. These opinions range from those who say it's a harmless flutter and look what good things we can do with the money, to those who say it's been a disaster for charitable giving and a whole generation is being brought up to see gambling as a normal family activity. But I am not here to talk about the Lottery.

Some people may think that the deregulation exercise on gambling is as a result of the National Lottery, that the Government is happy to see gambling promoted as an activity and to benefit from the revenues which an expanded gambling industry would bring. I should make it clear that that is not way we approach the review of gambling controls. Our aim is not to help any particular industry, or to promote gambling or to raise revenue, but to remove unnecessary restrictions on business and on personal choice. The difficulty of course is to decide what is 'unnecessary' - because I am sure that everyone in this room would agree that some regulation is essential - the crucial issue is where the balance between regulation and freedom should be.

It may be helpful to explain briefly where we have got to. The process of review started when Kenneth Clarke was Home Secretary, well before the National Lottery was launched. The debate on evening opening of betting shops drew his attention to the policy of unstimulated demand. He thought that some of the rules relating to betting shops were petty and asked D Div to review the restrictions. The process was then given momentum by the Government's Deregulation Initiative. There may be criticism that we have taken a piecemeal approach to deregulation and that the Government lacks a clear strategy and policy basis. We would argue that we have tried to be consistent in our approach.

There are a number of key threads which underpin our approach. First is a desire to ensure that gambling is free from criminal involvement and is conducted fairly and honestly. Second is a desire to ensure that punters are fully aware of what they are letting themselves in for when they gamble and that they are not exploited. Thirdly there is a need to discourage socially damaging excesses and to protect the vulnerable. Readers of the Gaming Board's annual reports will recognise the essence of these principles and I understand that they are not unique to this country. These key principles need to be applied flexibly and in a way which reflects the risks posed by a particular form of gambling. The softer forms of gambling can be regulated with a lighter touch; harder forms of gambling require closer regulation.

But going back to the piecemeal approach, one advantage of a step by step approach, consulting as we go, is that it avoids having to wait for an immense gambling Bill - for which sufficient Parliamentary time may not be found for some time. There are rules on the statute book which are ripe for review and in such cases we believe we should take opportunities for legislation when they are presented to us. The National Lottery Bill was an opportunity to modernise the law relating to the football pools and to allow greater freedom for small lotteries to operate. Then came the Deregulation Bill and Mr Paice's amendment on Sunday betting. Without Mr Paice and the campaign by the British Horseracing Board we would not have had Sunday racing this year or even next year. Without this we probably would have waited for Sunday trading to be safely on the statute book before going out to consultation to see whether people wanted Sunday racing and whether there were any strong feelings against betting shops being open on Sundays. As it was, the amendment went through on a free vote in the Commons, and in the Lords, not one voice was raised against it. It is notable too that when the betting shop Order was debated recently in Committee in the Commons and on the floor of the Lords, to remove some of the restrictions on the betting shop facilities, again, not one word was said against it. In fact, the criticism was, why did we not go further.

We have also begun to test the new deregulation order-making power in relation to gambling controls. In fact as I indicated earlier, this is what my colleagues are doing as I speak. This procedure allows certain deregulatory changes to be made to primary legislation without recourse to a Bill. Whether that power is held to be suitable for making deregulatory changes to the law on gambling remains to be seen. As you will know, we have also gone out to consultation on AWP machines and the removal of tokens. Our consultation period ends on 31 May after which we will review the position. Anyone who particularly wishes to discuss these proposals is welcome to contact us at Queen Anne's Gate.

That brings us up to date. I would just say that, we are very conscious that the process of removing restrictions on gambling is not like removing restrictions just on any industry. Removing restrictions on gambling carries particular social risks and we need to take full account of these. But perhaps what interests most of you here today, is what we do next in relation to advertising, casinos and bingo. I should like to spend a few minutes on the issues which we hope to address in a consultation paper in the near future.

Advertising

When Dorothy Gonsalves attended your last session six months ago, I understand she picked up concerns about the promotion of the National Lottery and whether the Government were next going to move the restrictions on advertising of commercial gambling. Since then, we have seen the removal of the Government's ban on broadcast advertising by the football pools. The pools are in a different statutory position from other forms of commercial gambling. There have never been any statutory restrictions on advertising and the change was achieved quite simply, by informing the broadcasting authorities of the Government's decision. The ITC and Radio Authority have been out to consultation on a revised code and we have now seen the first adverts by Littlewoods. In taking this decision the Home Secretary took account of the fact that the football pools are at the softest end of the gambling spectrum - they are weekly, long odds, low stake competitions.

However, it did represent a shift in Government policy in that previously it had been held that commercial gambling should not be allowed to advertise in the broadcast media because commercial gambling, unlike lotteries, was promoted for private gain. The Home Secretary said in his statement when announcing the decision on the football pools, that he would be reviewing the policy on the other forms of commercial gambling. But that is a much bigger exercise because there are statutory restrictions which would have to be removed before we could consider whether broadcast advertising could be allowed. We hope to address the question of advertising in the consultation paper. This will be a genuine consultation and anyone here who wishes to be on the consultation list please let us know, either direct or through the Society.

On advertising generally, we are very conscious of the fact that stimulating demand for harder forms of gambling carries real risks. I am sure that Ministers would want to reflect very carefully before relaxing the advertising ban on these forms of gambling. We also recognise that television is a very powerful medium when it comes to advertising, particularly in respect of the young.

Unstimulated demand

That brings me to the principle of unstimulated demand. As you all know, this is something which underlies many of our controls on gambling. Some might think that, with the Lottery, and other changes, it is a policy which is now dead and buried. Reports of its demise, however, may be a little exaggerated. We hope to address this issue in our paper. There is, we think, scope for it to be applied more flexibly, but it is arguable that it still has an important part to play in relation to the harder forms of gambling.

Casinos

We are currently looking at the restrictions on casinos. The casino industry, more than any other aspect of gambling, has been in the deep freeze. In the last 25 years or so there have been no substantial changes in the law or in the numbers of casinos. Some may say - and quite right so. But there is we think a clear a case for reviewing some of the present restrictions. I don't want for obvious reasons to go into how our thinking is developing at this stage, but one of the more obvious issues that merits consideration is the fact that a casino - an establishment expressly set aside for hard gaming - is only entitled to a similar provision of gaming machines as a social club. Another is the fact that casinos - despite being open until 4 in the morning - are prevented from serving alcohol beyond midnight.

I would like to stress that in looking at the controls on casinos, we pay particular attention to the fact that the type of casino provision in Great Britain is unique. No other county we are aware of has a nationwide network of over 100 casinos sited in all the main population centres. Most jurisdictions confine casinos to certain areas or to one or two developments. A very large proportion of the British population is within 10 miles of a casino and on the face of it British casinos would appear more accessible to the population then anywhere else. But British casinos are not like casinos in other countries. The geographical accessibility is balanced by the fact that casinos are not places the public can just wander into - they are private clubs - and they are not able to stimulate custom. It is clearly important that this equilibrium should not be destroyed.

Bingo

We are also reviewing the restrictions on commercial bingo. I think it is fair to say that bingo is towards the soft end of the gambling spectrum in that, in traditional card bingo, stakes are limited by the nature of the game and it is not possible to chase your losses. It is also far more popular than casino gaming. Figures from the bingo industry suggest that on average about 500,000 people go to bingo clubs every day. Bingo is subject to a similar, although a little less rigorous, package of controls as casino gaming. Thus system has been very successful in ensuring that the bingo industry is stable and well run. But the basic legislation governing Bingo is now also over 25 years old and there is a case for looking at some of the present controls in the light of the principles I outlined earlier. I should stress that we believe therefore that there will continue to be a need for controls to keep bingo free from criminal involvement and to protect participants from exploitation.

But, we believe, there is scope for relaxation. If we apply the principles of regulation logically, the need for some rules may not be sustainable. Is it necessary for instance for bingo halls to be clubs and impose a 24 hour waiting period for new members? Is it necessary for prospective bingo operators to have to demonstrate to licensing justices that there is sufficient demand for bingo? I think most people agree the 1992 amendment to section 42 of the Act has not worked very well and we are looking at that. Broadcast advertising is another question we will consider.

Conclusion

If I am not to encroach any further on other speakers' time, I will have to stop there. I have outlined some of the considerations which we have in mind in approaching gambling policy. I would emphasise that Ministers have yet to take a decision on a consultation paper on advertising, casinos and bingo and it may be a little while before we see anything published. There are important issues here which require careful consideration. The discussion today will be a very useful contribution to that process and I am grateful for the opportunity to address this forum.

RELAXING GAMING CONTROLS:
THE GAMING BOARD'S VIEW

Bill Galston

Chief Inspector, Gaming Board for Great Britain

For my contribution to this session I would like to approach this firstly by talking very briefly about the National Lottery and the consequences of it to other forms of gambling in Britain. However this will be only a brief overview. I would then like to address the Board's stance on deregulation which the Chairman of the Board has expressed and I suspect will continue to do so publicly. Finally I would like to spend a little time looking at the practical issues which might arise from a number of the proposals for deregulation being sought by the casino and bingo industries.

The National Lottery

The introduction of the National Lottery is really why we are all discussing the issue of deregulation here today. It is largely this linked to the deregulatory stance of Government that has led to what some might say is the irresistible clamour for deregulation in other gambling fields.

The National Lottery on line weekly draw started with a massive publicity drive on 14 November 1994. The first ‘instant' scratchcard was launched on 21 March 1995. In the 4½ months to 31 March 1995 sales were equivalent to an annual turnover of some £3½ billion a year. £562 million was paid in prizes to over 22 million prize winners. £142 million has been paid in duty, £60 million to retailers and £311 million to good causes. It is perfectly clear that both OFLOT and Camelot are determined to see the lottery grow and grow quickly. The original justification for the lottery - that it was not really gambling because it was for good causes - was never really sustainable. It is gambling and subject to due propriety and protecting the players interests, from the regulators point of view its remit is to provide as much revenue as possible for good causes. The Lottery is and will be an aggressive competitor to all other forms of gambling.

It has had two main effects on other gambling. Firstly it has made substantial inroads on the leisure pound and no doubt other retail expenditure. It is simply impossible to believe that by taking £3½ billion to £5 billion a year out of the economy for the National Lottery that the spend elsewhere will not suffer. Football pools, ordinary lotteries, betting shops, gaming machines, arcades and bingo all believe that they are to a greater or lesser extent feeling the pinch and are now looking for concessions to enable them to compete and maintain their position in the market place. Even casinos who I do not believe can be said to be suffering as much are nevertheless joining their voices to the others.

Secondly the Lottery, and particularly 'instant' games, has directly challenged the theoretical basis on which gambling has been regulated so far. The biggest single gambling opportunity in the UK is massively advertised on television. Eventually there will be some 39,000 outlets - approved but unlicensed - where tickets are sold to the public. Children of 16 are allowed to buy tickets. £1 is now regarded as a "harmless flutter" and the concept of what is an attractive and worthwhile prize has been transformed. The 'instant' games encourage people to chase their losses. Camelot itself which is a private sector operation is likely to come up with substantial profits. It is against this background that it is difficult to explain say to an arcade owner why the Gaming Board is concerned about keeping an all-cash AWP machine for whatever cash prize to an adult-only environment; or indeed to a bingo operator that the Board is concerned about controls on participation fees.

However overall there is one factor which is emerging even now and that is that the lottery itself has brought about concerns about gambling addiction to the forefront. There are two other issues which must be linked to the situation I describe. They are the deregulation initiative and the pressure for increased government revenue.

The Deregulation and Contracting Out Act 1994

The Government's general commitment to deregulation can now be implemented more easily. The Deregulation and Contracting Out Act 1994 provides new powers to introduce relatively uncontroversial deregulatory changes. However there are limits to what can be done under these powers: there has to be full consultation and the procedures are fairly cumbersome. As we already know the consultation document proposing the all-cash AWP machine and more jackpot machines for casinos, bingo clubs and other clubs proposes this route for their introduction.

Pressure for Increased government revenue

We understand from the Home Office that the initiative to deregulate gaming is not linked to a change of policy in respect of Government revenue from the activity. However we have already seen the increase in and new duties on gaming and other machines in the last budget. It may be therefore that Treasury considerations will enter more largely into regulatory policies on gaming and gambling and that in itself could have implications for our style of regulation.

The Gaming Board's Stance on Deregulation

Over the last year or so the Board has emphasised the underlying objectives of what it believes to be an effective system of gaming regulation and has emphasised the absolute necessity for effective regulation. These are:

- Permitted forms of gambling should be crime-free (both in terms of those who operate them and the players they attract), conducted in accordance with Regulation and honest.

- Players should know what to expect and be confident that they will get it and should not be exploited.

- There should be some protection for children and vulnerable persons.

We believe Government has accepted these points and the Board has I think been helpful rather than obstructive about various deregulatory changes consistent with the 1968 Act. In fact it has been ahead of Government in some instances. The Board has emphasised the need for widespread consultation if Government wishes to change the structure of the Act and the need to look at any package as a whole and I will return to this later. Thus from the Board's point of view there is an absolute priority to be sure that Government proposals meet the objectives of regulation and are capable of being effectively regulated in terms of the Board's powers and resources. We do not believe that there are any proposals coming forward to reduce the Board's powers. On resources we think it has been accepted that derestriction would call for more not less resources to maintain an effective regulatory system. The Board will need to give a great deal of thought to this and what I would like to do now is to look briefly at the Industry's proposals which if implemented might lead to the need for effective controls being introduced.

I must emphasise that these are issues the Board has not yet discussed. Therefore I am afraid my comments must only be regarded as being made from the point of view of a practitioner in the regulation of gaming. However I believe I can qualify my position as someone who had some experience of gaming prior to the 1968 Act when as a serving Police Officer I saw the difficulties which arose then at first hand and having been with the Board for the past 25 years can claim to know something of the operation of gaming in Britain since then. I should add that in recent years I have seen a great deal of gaming regulation throughout many parts of the world and am currently Chairman of an international forum of gaming regulators.

Gaming in Great Britain is unique in many ways particularly so far as casinos are concerned and to a lesser extent with bingo. So far as gaming by means of machine is concerned it is less easy to make comparisons. For example throughout the world different approaches by Government to the regulation of gaming have brought about differing role models. As we all know at the one extreme the State of Nevada depends almost entirely for its revenue on gaming and as a consequence is keen to see it promoted as the resort destination of the world for that activity. In other jurisdictions notably Australia exclusive licenses allow one or perhaps two casino developments to be located. In Europe models range from state run to commercially run casinos in towns resorts or spa areas. By comparison Paris has no casinos whilst London as we know has 21. European countries apart from France have much fewer casinos than Britain; all have easier access, provide slot machines in varying numbers and can advertise. By comparison in Britain we have some 120 casinos located in every major centre of population and almost 1,000 bingo clubs spread throughout the whole country. Promotion by means particularly of advertising is limited. Both casinos and bingo must operate as clubs and casinos may only operate two club gaming machines with a £200 prize limit.

Not surprisingly therefore it is the restrictions on promotion which the Industry seeks to have lifted, together in the case of casinos with the proposal to introduce traditional casino-style slot machines, which are at the forefront. Let me now turn to them individually and say just a little about the consequences relaxation might mean to regulation. In doing so I will separate casinos and bingo, dealing with casinos first.

(a) Casinos

The “relaxations" or removal of restrictions which is what I prefer to call them that are being contemplated fall really into 3 categories. Firstly, easier access for players. As we know casino gaming is restricted to permitted areas and these have not been looked at since 1972. It is illogical to expect any review of the legislation not to embrace permitted areas. The Board has already indicated that it would oppose the complete removal of this restriction; however there are anomalies and obviously the inclusion of new permitted areas is a possibility. A more controversial change might be the removal or revision of the 48 hour rule. Not surprisingly the industry complains bitterly that the restrictions which require would-be players to make written application on the premises in question 48 hours before they can game disadvantages them against competitors in Europe and elsewhere and against other leisure activities here.

Secondly are the proposals to make casino gaming more attractive to players. Britain is unique in the style of gaming machine the law permits and the introduction of more traditional style "slots" with larger and possibly linked jackpots is a possibility. Licensing hours which currently restrict the supply of alcohol within normal pub hours also seem to be anomalous given that casino gaming is conducted in a controlled environment until 4am and that in nightclubs licensing hours permit alcohol to be consumed until 2am. Therefore the proposal to extend liquor licensing hours in casinos is an issue on which the Board has already indicated its support.

Finally there are proposals to relax restrictions on both advertising and credit. Dealing only with advertising I believe it is this which along with proposed changes to the 48 hour rule and the introduction of slot machines will result in great pressure being placed on the whole "demand" criteria which underpins the current legislation as a means of effectively limiting the number of casinos in Britain. The essential difference between 1960s casino gaming and that of today is that permitted areas, the demand criteria combined with the prohibition on live entertainment effectively controlled the number of casinos to a manageable level. But even without removing these restrictions I do see the cumulative effect of the proposals I have mentioned bringing about an increase in the number of casinos and their size simply because the player base itself will increase.

To compensate for the increase in player base and the size and number of casinos which might well be of a different 'style' to those currently operating, adequate regulation and control will be essential. The sort of controls speak of might be on advertising, door controls, junket operations, slot machine testing and validation with possible extensions to certification controls by the Board in of these areas. The Board will I know make it clear that these will be essential if it is to maintain its current success in keeping the industry crime free.

(b) Bingo

So far as bingo is concerned I believe the proposals to deregulate this part of the industry are more problematic. I question whether today bingo really can be described as a small neighbourly game as was envisaged by the legislators in 1968. Already we have £250,000 National Game prizes and bingo clubs commonly referred to as "green field" or "purpose built" sites with 8,000 plus admissions per week producing large prizes and free draws for substantial amounts. So what deregulation proposals are being made? Easier access by the removal of the 24 hour rule, larger prizes by removing current limits on link and donated prizes, further relaxation of advertising and the possible removal of limits on charges. We have just heard that the retention of the demand criteria for bingo is also being questioned.

If that is the case and the relaxations which I have mentioned were effected then in my view this would lead to a further escalation in the number of "green field" sites and the distinct possibility of new style outlets such as public houses and arcades turning to cash bingo as a facility. The overall effect on the industry is difficult to predict. I believe that inevitably the player base will again increase and the whole scenario proposed does raise the question of how effectively the activity could continue to be regulated. The removal of the 24 hour rule would amount to public gaming and this would be a fundamental change. These are questions which will need to be addressed. However I can say that the cumulative effect of these proposals bears a striking resemblance to bingo as it was played in the 1960s. If I am right then change needs to be approached with great care.

Overall then where do I believe the industry might be as a result of change? I have little doubt differing views will exist dependent upon where the prophesy comes from. Above all we must avoid placing at risk the whole structure of gaming in this country simply to compensate those whose business is being affected by the National Lottery or because of deregulation for deregulation sake. I think the industry will be larger and that the player base could increase dramatically. I also believe if gaming is to remain crime free then an increase in resources and controls to regulate it will be essential. The 1968 Gaming Act has been and is a very successful piece of legislation. Perhaps it does need to be reviewed but a balanced reform is essential if we are not to slip back into the problems seen in the 1960s which after all came about through ineffective and sometimes unenforceable legislation.

DEREGULATION OF THE UK CASINO INDUSTRY

Nigel Kent-Lemon
Independent Casino Adviser
TJH Group, London

Deregulation of the gaming industries in the UK is part of an overall policy by the British government to simplify many aspects of UK laws. The purpose of deregulation is to make the management of UK businesses less complicated by removing unnecessary rules, regulations and laws. In the gaming field it is interesting that the UK National Lottery was introduced by primary legislation - the National Lottery Bill enacted in the summer of 1993. It was not achieved by deregulation of the 1976 Lotteries and Amusements Act. It is my firmly held view that deregulation should not be used in the gaming or any other field to achieve fundamental change.

A Brief History of the Casino Industry Worldwide

In order to indicate the likely results of deregulation in its extreme form it is worth tracing the history of casino gaming. In the early 19th century there were two types of casinos - illegal city centre casinos and legal resort casinos. The city centre casinos were typified by the industry in London in a book written anonymously entitled "Crockfords, or Life in the West" published in 1828. The illegal casinos were listed in considerable detail. Since the casinos were unregulated many obvious problems arose such as the extensive use of credit and free alcohol at the gaming tables. Problem gambling was a topic of discussion including this passage from the author:

> "The career of a gambler is very shortly summed up. He loses, from time to time, all the money at command, which commences his difficulties, and throws him upon his resources. These soon after fail, with increased difficulties, and he then resorts to his credit. Of credit he is soon bereft, with difficulties still multiplying, with less power of extrication, and he is then put to his shifts. When, having lost all the money raised various ways, and being completely shorn of all ability, by proper means, to get more, he is finally driven to acts of desperation and ruin."

Whilst these illegal casinos were operating in London, the legal model was represented in places such as Spa in Belgium, Homburg and Baden Baden in Germany. These were resort casinos positioned away from large areas of population. Local people were not allowed to play, so the casinos relied on visiting aristocracy and other wealthy individuals for their income. The success of this industry in Germany and Belgium was noticed by the Grimaldi family in Monaco. At that time, Monaco was a bankrupt principality virtually inaccessible to neighbouring France and Italy. The Prince believed that by introducing a casino, his fortunes could be revived. The casino opened in 1858 and was an immediate failure. The combination of poor management and inaccessibility was lethal. In 1863, the Prince recruited Francois Blanc to operate the casino. Blanc had built up his reputation in Homburg and despite his previous history as a convicted fraudster was a commercial genius. The casino was so successful that he was able to build up an impressive infrastructure of hotels, an opera house, a country club, museums and even a cathedral. He was also able to improve road access into Monaco and introduce an underground railway. All of this was paid by the profits of the casino.

By 1870, the number of visitors to Monaco reached 150,000 people, but this put a strain on local resources. On the feast day of St. Devote, there were riots caused by the importation of cheap labour, the increasingly erratic water supply; and an aging and inadequate sewerage system. This early example of environmental impact problems was cured by the principality removing all taxes on Monacan citizens and by the casino paying for an improved water supply and a new sewerage system. The forward thinking of Francois Blanc in using modem techniques to promote his casino was surprisingly complimented by a sensitivity to problem gambling. In a guide published in 1886, by the casino, there was some interesting advice:

> "Large sums have been and can be gained with the very smallest capital, but the "bad days" must come, when if the player's loss can be limited not much harm can accrue; but if the loss be un-limited and self-control be lost, very large sums can be played away. Play is a passion that requires to be kept "well in hand," and this can be done solely by determining never to risk more than a fixed amount. The player should never borrow for playing."

It seems a shame that some modem casino industries have difficulty in coming to terms with issuing the same sort of advice.

The State of Nevada demonstrated the next advance in the casino industry. Casino gaming had been illegal outside the US for most of the early part of the 20th century, but Nevada in particular was plagued by illegal casinos. The state broke ranks with the rest of the country by legalising its casino industry in 1931. As an early historian of Nevada gaming (Joseph F. McDonald) put it: "The best way to strike down an evil being to get it out in the open and control it." The principal difference between Nevada and Monaco was that in Nevada the local people were allowed to gamble. The phenomenal success of casino gaming in Nevada was also due to a combination of very liberal laws, low casino taxes, a monopoly on casino gaming in the US until the late 1979s and perhaps most importantly, close proximity to the prosperous Californian market. These advantages have been exploited ruthlessly by the entrepreneurial owners of casinos, particularly in Las Vegas. As a result, by the end of 1994, there were some 373 casinos in Nevada with 5,248 table games and 156,837 gaming machines bringing in total gross gaming revenues of just under $8 billion.

Today, the Nevada casino industry is not the most up to date model. The state still relies on visitors from the rest of the United States and elsewhere for most of its revenues. The newest model is now found in city centre casinos catering principally to a local market. Examples of such casinos can be found all around the World. In Australia there are now casinos in Perth, Adelaide, Darwin, Brisbane, Canberra and Melbourne. A casino in Sydney will soon open. Other examples can be found in Christchurch, New Zealand; Montreal, Canada, Amsterdam and Rotterdam in the Netherlands and Copenhagen in Denmark. Even in the US, with the opening of the casino in New Orleans, city centre casinos will become a feature there.

***Worldwide Experience of Deregulation*.**

Deregulation is not unique to the UK. There are examples of it in many casino jurisdictions. 1988 saw partial deregulation of the French industry. Casinos in France had seen little change since their creation in 1908, and the industry had become unprofitable and uncompetitive. Deregulation then allowed the casinos a monopoly of the gaming machine market in France and for them to introduce more modem table games such as American Roulette with one zero and Punto Banco. In the Netherlands, deregulation was similar. Gaming machines were introduced into the casinos in 1986 and now account for 40% of the casino win, although there are also some 45,000 machines with lower jackpots in arcades and bars around the country. Atlantic City in New Jersey has also demonstrated deregulation, as a result of pressure from an industry which was becoming unprofitable. The city allowed the casinos to introduce 24 hour gaming, new casino games such as Red Dog, Sic Bo and Pai Gow, casino staff were allowed to play in the casinos - they were previously prohibited - and perhaps, most importantly, the area set aside for gaming machines has been increased. There has even been deregulation in the UK, including the recent introduction of the new casino games of Casino Stud Poker and Super Pan 9. There had previously been some relaxation in the rules for accepting cheques.

Is Casino Deregulation Sensible in the UK?

Before looking at some specific topics for deregulation, it is worth summarising the general feeling within the industry. It is perceived that casinos and other gaming industries are at the end of a deregulation chain started by the introduction of the National Lottery and already evidenced by some changes in the laws for off-track betting shops and the pools industry. It is also generally accepted that the Gaming Act of 1968 is becoming dated and requires review. This has been brought into focus by the change in casino industries elsewhere. Finally, since deregulation is government policy, the casino industry has reason to expect some action. A variety of specific topics have been indicated by the Home Office as being open for possible deregulation and I want to look at each one in turn.

- Under the Gaming Clubs (Permitted Areas) regulations 1971, 52 towns and cities in the UK were specified where casinos could be introduced. The main qualification was a population of more than 125,000 people with some tourist areas such as the Isle of Wight and Great Yarmouth also included. Only a small area of central London qualified. These permitted areas were frozen by the Local Authorities etc. (Miscellaneous Provision) (No. 2) Order 1974. As time has passed it has become obvious that there are gaps and illogicalities within the regulations. For instance Swindon is now a significant area of population with its nearest casinos being in Reading and Bristol. There also seems little logic in allowing casinos in the outlying areas of Manchester and Birmingham, but not in the suburbs of London.

1. The infamous and unique 48 hour rule requiring pre-registration by members followed by a two day wait is an obvious candidate for reform. Casinos do not display warning notices outside explaining this archaic system and yet there is no sign of hoards of aspiring but disappointed gamblers visiting them, only to be turned away.

2. Only two gaming machines are allowed, soon, perhaps, to be increased to six but the whole structure of gaming machine industry needs to be reviewed. It is extraordinary that at one end of the

spectrum children are allowed to play arcade machines, but at the other end, regulated casinos can only have the same type of gaming machines as golf clubs!

3. Another illogicality appears in the liquor licensing field. In most licensed outlets, liquor can be served whenever they are open. Surely the same should apply in casinos, as long as alcohol is not permitted at the gaming tables.

4. It has been suggested that live entertainment should be allowed, but there is some real difference between a pianist and a Frank Sinatra concert. The law presently only allows non-gaming facilities within casinos to cater to the obvious needs of the members - restaurants, bars, etc. It would be a major government policy change to include attractions for non-players.

5. Credit is another area of law that should be brought up to date, for instance to allow the use of debit cards. There is also little logic in forcing casino customers to risk visiting street cash dispensers late at night.

6. Another potentially non-controversial area for deregulation concerns advertising - presently forbidden for casinos within the UK. With increasing liberalisation of advertising for other forms of gambling, such as the lottery and football pools, why should casinos be prevented from advertising their location in hotels, airports, railway stations and other tourist locations, as long as this done for information rather than promotion?

7. Finally, the Gaming Act specifically requires new casino licence applicants to prove 'demand' before a new casino licence is granted to them. This has, on the whole, prevented the uncontrolled spread of casino gaming, allowing existing casinos to compete fairly with each other without being unduly tempted to break the very complicated and restrictive laws. It is hard to see an obvious way for this to be deregulated without resulting proliferation of casinos.

If there is Deregulation what are the Negatives?

The government could decide on almost complete deregulation, allowing live entertainment, advertising on national TV, unlimited gaming machines, no permitted areas, immediate access to casinos and no demand criteria for the granting of a casino licence. Even if only some of these aspects of the law are relaxed some problems will arise.

Protection of citizens from the possibility of becoming addicted to gambling has hitherto been dealt with through the law. Specific laws in some countries have for instance prevented local people from gambling (such as in Germany); required the casino to apply a means test for gamblers (such as in Germany and Austria) and allowed casino patrons to bar themselves for periods of time from the casino (such as in France and Malta). The problem has also been discouraged indirectly by disallowing certain practices which can promote pathological or addictive gambling such as, forbidding the use of credit, not permitting children to gamble and making casino floors alcohol free areas. If some of these restrictions are to be removed, not only will the problem gambling lobbying have some grounds for disquiet but more positively the industry will either be required to, or will have to volunteer to use modern techniques to help potential problem gamblers. This might include displaying notices with telephone help line numbers, making pamphlets on problem gambling available to casino customers and training staff to recognise the problem and offer help. The National Lottery will focus public attention on this issue. When the Beckers report was published in Holland, it was found that of the 30,000 gambling addicts, whilst 12% frequented casinos 8% were lottery players.

As well as an increased focus on problem gambling, money laundering may also become a more important topic. All governments are showing an increased tendency to care about the proceeds of the drug trade being used to buy goods and services. If it were found that much of this money was finding its way into casinos, the negative publicity resulting could set the industry back many years. The new voluntary code of conduct introduced into casinos to report suspect transactions is effective in the existing legal framework. It would be difficult to apply with a less restrictive entry system.

Perhaps the most worrying negative aspect of gaming deregulation revolves around the impact that one form of gaming has on another. The most successful casino in the US, the Indian Reservation casino at Foxwood, Connecticut, has descimated the local greyhound track at Plainfields nearby. The UK lottery appears to have had an impact on all other forms of UK gaming, most particularly football pools, but also off track betting and provincial casinos. A quote from Peter Davis, the UK Lottery Director, being interviewed about the effect of the lottery on the pools is relevant:

> "...I have no statutory obligations to look after the interests of the pools companies or anybody else, actually. I'm here to make sure the lottery runs properly and is successful."

Whilst it is not surprising that a new gaming industry already generating £100m per week gross revenues has had an impact on other forms of gaming, perhaps his attitude is!

Looking at the impacts of one gaming industry on another it seems that casinos, (particularly with slot machines), scratch lottery cards and video lottery terminals are the strongest forms of gaming in the market place. The industries with these products, therefore, have to be more sensitive than others to the deregulation issue. The possible environmental impact of larger casinos which may result from deregulation also cannot be ignored.

My Personal View

If each individual item of the eight possible deregulation topics is looked at in isolation, they might not produce a radical and fundamental change to the casino industry, but it must not be forgotten that the Gaming Act of 1968 was a balanced and well thought out piece of legislation relying, as all other forms of gaming in the UK used to do, on the principle of unstimulated demand. Some sensible small adjustments can be made by deregulation without upsetting the delicate balance, or moving the industry away from the concept of unstimulated demand. Other changes could collectively lead to such fundamental differences in the parameters surrounding the industry, that it would no longer be recognisable in its present form. I do not believe that such a massive change should even be contemplated by deregulation.

RECENT DEVELOPMENTS

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l. Gaming, bingo and machines

The Report of the Gaming Board for Great Britain 1993/94

(11 July 1994, House of Commons paper No. 465) shows the following.

Casino gaming

In 1993/94 123 casinos enjoyed a total drop of £2,230m. This was an 8% increase over 1992/93, itself an 8% increase over 1991/92 which had shown a 1% decrease over the previous year. London casinos account for 67% of the drop. The total house win was £411m (18% of the drop). American roulette is by far the most popular game (68% of the drop).

Licensed bingo

The amount staked on bingo at licensed bingo clubs between September 1992 and August 1993 was £787m. This was a 10% increase over the previous year; over the past three years there has been a 25% increase in money staked. The number of licensed clubs showed a slight decline over the previous year - 967 compared with 972 - though, as has always been the case, not all of these are open for business.

Gaming machines

The number of gaming machines was:

	1992/93	1991/92
jackpot machines	37,207	38,401
AWP machines	201,461	186,786

Proposals for Change

In March 1995 the Home Office published a Consultation Paper which invites comments on a variety of matters, all of which entail some relaxation of existing restrictions in a number of areas of commercial gambling. In the case of machines, it raises the possibility:

- of an all cash AWP paying a top prize of £10 to be available in adult gambling environments (betting offices, arcades, pubs and bingo clubs); and
- of an increase in the number of jackpot machines (now 2) in casinos (6), bingo clubs (4) and members' clubs (3).

2. Betting

Betting office licences

Statistics published in the Home Office Statistical Bulletin (Issue 26/94, October 1994) show that throughout Great Britain there were, during 1993-94, 4,658 bookmakers' permits and 9,670 betting office licences. Both figures reflect the constantly downward trend of the past ten years (in 1984 the figures were 7.226 and 10,856 respectively).

The Bulletin also shows that areas of greatest concentration of betting office licences (over 250 per million of population) are London, Merseyside, Mid Glamorgan, Cleveland and Tyne and Wear. The lowest concentrations are in the Highlands and Islands of Scotland, Cornwall, Somerset, Derbyshire and Powys.

Proposals for change

The Consultation Paper published in March 1995 contains a number of proposals affecting betting shops. These include the installation of the all cash AWP machine, the sale of racing papers and lottery tickets (but not the National Lottery), and the payment of winnings on the football pools. These proposals may be seen as a further relaxation of the rules in the 1963 Act, which has recently been amended (April 1995) to permit betting shops to advertise odds to the passing public, and to replace the dead frontage that has traditionally characterised them.

In January 1995 the Home Office published a set of proposals (under the procedures in s 3 of the Deregulation and Contracting Out Act 1994) which will extend betting agency permits and betting office licences from 1 to 3 years' duration. There are a number of consequential administrative changes:

- simplified procedures permitting the renewal of permits and licences by the justices' clerk, rather than the whole licensing committee;

- new power to cancel and forfeit licences: because they will last for three years, it is necessary that there be a power to cancel a licence or permit if the premises are run improperly; and

- notification to the Levy Board by bookmakers of change of address.

3. *Annual Report of the Department of Customs and Excise year ending 31 March 1994. (October 1994; Command Paper 2561; statistical table L2).*

The total of betting and gaming duties (rounded figures) for the fiscal year 1993-94 was £1,105.8m. This was an increase on the preceding year (£1,025.4m).

The breakdown (£m) was:	1993-94	1992-93
general betting duty	494.4	473.7
pool betting duty	346.6	318.2
gaming licence (promises) duty	82.1	55.9
gaming machine licence duty	104.4	98.5
bingo duty	77.9	79.1

4. *Proposed Changes on Greyhound Totes*

In 1994 the Home Office issued a consultation paper setting out proposed changes to the law governing greyhound totes. Some of these proposals flow from the Home Affairs Committee's Report in 1990-91 (see update in issue 21 of the Newsletter).

The proposals are:

- to permit track to track tote betting;
- to permit advance betting;
- to remove the requirement for an accountant to be present when a tote is in operation
- to permit the rounding of dividend to the nearest .10 of a betting unit;
- to abolish the statutory limit on tote deductions;
- to permit track owners to have an interest in betting facilities at their own tracks; and
- to permit the use of permanent betting structures on tracks.

The consultation paper is published in accordance with the procedures set out in s 3 of the Deregulation and Contracting Out Act 1994. It sets out a draft of the provisions that will become law.

5. The National Lottery

The following reports have been published:

The Annual Report 1993-94 of the Director General of the National Lottery (1 November 1994, HC 672).

The First Report of the National Heritage Committee, The National Lottery (26 January 1995, HC 131).

The Office of the National Lottery, *Review by the Director General of the National Lottery of Arrangements for the Protection of the Anonymity of the Winner of the Jackpot Drawn on 10 December 1994* (April 1995).

The fast item is a review of the establishment of OFLOT and of the applications process. The other two concern the question of anonymity of prizewinners.

6 The Pools

The Government has agreed to reduce pool betting duty by 5% (to 32.5%) to compensate the football pool companies for the loss of revenue they have suffered since the introduction of the National Lottery. Restrictions on TV advertising are also to be lifted.

THE `RESPECTABILISING PROCESS REVISITED:

AN EXPLORATION OF CONTINUITY AND CHANGE WITHIN THE LICENSED BINGO INDUSTRY (1982 -1994)

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Introduction

This paper is concerned with an exploration of continuity and change within the Licensed Bingo Industry over the past twelve years. More specifically, it seeks to assess the effect of changes perceived to have taken place in the production and presentation of the game, upon the composition of the bingo playing population, and frequency/forms of participation. Whilst the account is based primarily upon the findings of a National Postal Survey of Bingo Players, conducted during October 1994, in comparing past with present, considerations also encompass sociological 'evidence’ presented by Dixey with Talbot (1982).

Indeed, following provision of a brief overview, exploration begins by revisiting the summary findings of Dixey with Talbot's (1982) study, wherein mention of 'a respectabilising process', (p. 169.) is found contained, before proceeding to examine certain of the main findings of the 1994 survey, during which profiles of the contemporary bingo playing population, and current frequency/form(s) of participation are compared to profiles presented in 1982. In concluding, a number of tentative suggestions are forwarded, relating both to the future of bingo within commercially licensed confines, and the recommended form subsequent sociological analysis should take.

Licensed Bingo: An Overview

Licensed Bingo is big business in 1990's Britain. Figures issued by The Gaming Board for Great Britain reveal 811 million pounds was staked on licensed bingo during the period September 1993 to August 1994, a 3% increase over the preceding twelve months. The industry currently employs some 35,000 people, and regular bingo players now number slightly more than 3 million persons, affording bingo a place as Britain's second largest individual out of the home leisure activity, surpassed only by fishing.

Yet, within sociological realms, bingo, alongside other forms of gambling, has received scant attention. It remains the case, as Downes observed more than 20 years ago, that there have been 'remarkably few sociological attempts to account for gambling - and this applies whether 'accounting' is taken in the sense of explanation, in the sense of understanding, or as covering both simultaneously' (Downes, 1976. p. 11.). Whilst mention of bingo playing, and the socio-economic composition of the American bingo playing population, features in sociological literature emanating from the United States in the 1940's (Devereux, 1949), the enforced 'privatisation' of bingo playing in Great Britain prior to the Betting and Gaming Act (1960), the passing of which permitted commercial bingo playing in public premises legally for the first time, dictated any description of the British bingo playing population remained almost absent before the latter half of the 1960's.

Amongst mentions first made, many early British accounts, even when included within texts devoted solely to the subject of gambling (e.g. Herman, 1967), are often found couched in dismissive or derogatory terms. Bingo was perceived to occupy 'the status of a joke in British social life .... epitomizing the ‘dead end' use of leisure to which a newly affluent working class had resorted in the absence of any ability to do something better with their time' (Downes et al, 1976. p. 174.). Yet, it was not the newly affluent working class 'per se', but a particular section of it, for whom bingo appeared to hold the most appeal. Unlike most other forms of gambling, bingo was observed to be 'dominated' by working class women, the majority of whom were middle-aged. Indeed, so strong was the association made between the activity and this group, that the degree of attraction was perceived by some social commentators 'to have something (usually unspecified) to do with the ‘crisis' of the menopause' (ibid. p.174.). There was, it seemed, no other more rational explanation, despite early recognition of the provision of a certain social benefit for players, substantiated both in comments contained in The Final Report of The Royal Commission on Gambling (1978, pp. 341-342.), and later in leisure studies literature of the 1980's (Dixey with Talbot, 1982; Deem, 1986; Wimbush & Talbot, 1988.). For, it was within the leisure studies domain that bingo became the central focus of a single, comprehensive analysis.

In a study entitled 'Women, Leisure and Bingo', Dixey with Talbot (1982) addressed a number of issues common to feminist leisure analyses of the 1980's. Their findings revealed not merely that women's leisure experiences were categorically different from those of men, but were also, in essence, primarily a case of ‘relative freedoms' (as the title of Wimbush and Talbot's later work suggests). As the one leisure pursuit found to attract women in large numbers undertaking an activity separately from the male, the secret of bingo's popularity resided in the fact that it was:

> the one activity which overcame the constraints facing women. It was fairly cheap, allowed flexibility and lack of commitment, was local, and husbands did not mind their wives going. (Dixey with Talbot, 1982. p.162.)

Further, bingo clubs themselves were perceived to fulfil certain valuable social functions. Women finding themselves in the majority, for the first time, in 'local and handy' public spaces where they remained insulated from unwarranted male attention, were 'making the clubs their own', using them as a place to meet, provide each other with social support, and reinforce their own and a 'moral community' identity, where 'members care for and notice the welfare of others', in an era when other community and social support networks were observed to be failing the elderly in particular (ibid. p. 166.).

The 'Respectabilising Process'

However, in a summary discussion of the future, mention is also made of a 'reaction encountered amongst players during the course of research' to the respectabilising process through which bingo seems to be going'. To quote Dixey with Talbot:

> certain bingo companies have made attempts to maximise the attractiveness of bingo by upgrading their facilities and decor, and offering large cash prizes. Some players do not like the carpets, soft lighting and potted plants image. The closure of small local clubs and the tendency for major companies to concentrate on large city centre clubs may affect the frequency of playing of the elderly and middle-aged, whilst attracting younger and wealthier players.
> (Dixey with Talbot, 1982. p. 169.)

Whilst the game itself, and the legislative framework within which the industry operates, have, in essence, remained unchanged since 1982, the 'respectabilising process', as outlined above, is seen not merely to have continued, but accelerated. In moving toward the creation of a totally integrated environment for pleasurable activity, licensed bingo owners/operators have invested billions of pounds in extensive refurbishment programmes, and the erection of new, large, 'flat-floor', purpose built clubs, the majority of which are found located on urban fringes. The 'traditional' symbols of the game, the bingo balls and blower, have been superseded by random number generators, themselves part of increasingly sophisticated computer systems which enable both the instantaneous checking of 'claims' and simultaneous display to players of numbers, and other information generated, via television screens mounted on the inner walls of the playing arena. Local and regional linguistic variations in the 'calling of play' are fast disappearing, in part due to the standardization demanded by ‘multiple' and 'linked’ bingo games. And visual stimulus now precedes oral stimulus in the generation of play. The very pace and 'tone' of the game are changed. Bingo is faster, and more vibrant, than in former days.

Furthermore, the size of large cash prizes offered has also increased dramatically, since the Gaming (Bingo) Act 1985, permitted the introduction of a computer linked ‘National Bingo Game', which was outlined in the Report of the Gaming Board for Great Britain (1986), as ‘a new daily game of multiple bingo at Licensed Bingo clubs with a National prize of up to £50,000' (p. 9.). The monetary ceiling set in 1986 has since been raised. The National prize now stands at £75,000, and on April 22nd, 1995, a new, occasional National Bingo Game, the 'Super Nova', was played, for the first time in bingo clubs throughout Great Britain, for a prize of a quarter of a million pounds. An amount that arguably could not have been envisaged in 1982. The National Postal survey of Bingo players, conducted during October 1994, was undertaken, in part, in an attempt to assess the effect of. such changes.

The National Survey

(a) Methods

The aim, in conducting the survey, was to gather data from a representative sample of the bingo playing population throughout Great Britain. The unit of analysis chosen in sample selection was not, however, the individual bingo player, but the single club/site. The underlying rationale guiding this decision was that distribution of questionnaire forms to all players present upon a pre-determined number of given occasions at a representative sample of bingo clubs throughout Great Britain, would yield data from a representative sample of the current British bingo playing population.

The sample of 40 clubs chosen was deemed representative according to the following list of criteria: geographical location within Great Britain, proportional to the number of clubs licensed and operational within each of eleven named regions, category of ownership, based upon a three-fold divide (National Companies, Small Companies - holding between 11 and 35 licences, and Independent Operators - holding between 1 and 10 licences) proportional to the overall market share in terms of licences held by clubs in each category, and also proportional to the percentage of admissions in each ownership category within the overall admissions total, size/seating capacity, proportional to the total of operational clubs within each size grouping, average weekly attendance figures, opening times, and number of bingo sessions played weekly.

The distribution schedule was arranged in order that: regionally, clubs representative of each ownership category would distribute forms during both weekday (Monday to Thursday) and weekend (Friday to Sunday) bingo sessions, within a given 3 : 7 ratio of daytime/evening sessions. Over all regions, distribution would cover each day of the week within a seven day period, commencing mid-week, in order to allow collection of completed questionnaires within a maximum period of 48 hours following distribution.

The survey took place between the 12th and 26th October, 1994. The requisite number of questionnaire forms, together with written instructions for distribution, collection and return, and a form requesting an admissions total for the session specified, was despatched to each site not less than 10 days before the date given for distribution. Questionnaires were distributed to all persons presenting themselves at the point of admission to the club, prior to commencement of the specified bingo session.

Questionnaires were completed at 35 sites, in 11 different regions of Great Britain. The number of questionnaires completed at each session varied from 22, during a quiet daytime session in the Midlands, to 246, at two evening sessions in differing regions of the country. On average, 51% of bingo players present at specified sessions completed and returned the questionnaire. The final total of completed forms was 3989. Data gathered was analysed using SPSS (Statistical Package for Social Surveys).

In the final analysis, the survey was not without its problems. Five of the forty clubs selected, ultimately chose not to participate. Limits imposed upon time dictated these could not be replaced. Indeed, bias is acknowledged to exist in data obtained from certain regions, specifically Scotland, where there is an absence of data for daytime sessions; and the North, where a poor response rate at certain sites affected the overall totals. Despite this, data gathered is deemed sufficient to provide an adequate 'picture' of the contemporary bingo playing population.

(b) The Main Findings

Examination of the main findings is, of necessity, here confined to a comparative analysis of certain facets of the composition of the bingo playing population: sex, age, and socio-economic grouping; and major trends in the frequency and form of current participation. Generally, whilst 1994 population profiles may be seen to display a high degree of continuity with profiles presented in 1982, findings also provide indication of a number of areas where compositional change is perceived to have taken place over the past twelve years.

The Composition of the Bingo Playing Population

The bingo playing population remains predominantly female. However, 17.1% of players in the 1994 survey sample were male, representing an increase of 2.3% over the rate of male participation in 1982; most of which may be attributed to a higher percentage of male players in the 56-65, and 66+ age groupings. Although there were significant differences in the percentage of male players in each region, ranging from slightly less than 12% in Wales and the South West, to more than 23% in East Anglia, the rate, and form, of increased male participation was found to be almost uniform across all regions of Great Britain.

Examination of the age structure of the current population revealed more than half the sample (55.5%) were aged 56 years or over, and participation in licensed bingo increased proportionately with age. The largest sector of players remain drawn from the 66+ age grouping. Approximately a third of men, and over a quarter of women are now encompassed within this group, representing an increase of almost 5% since 1982; whilst only 11% of men, and 16% of women are currently found aged less than 36 years, a 3% decline in percentages given 12 years ago. Although at first sight, it would appear that younger players now find bingo less appealing than formerly, whilst older players, far from being deterred, are attracted in ever increasing numbers to the game, two additional points merit consideration, before any attempt at generalisation may be made.

First, Britain continues to have an ageing population (Social Trends 25, 1995. p.17.). Thus, it may well be the case that, in part, the rate of increase in the percentage of players aged 66 years and over, is merely a mirroring of the changing age structure of the general population of Great Britain as a whole. Second, and more significantly, an examination of findings regionally, and individually, club by club, reveals a range of differing age profiles, e.g. data gathered from the Greater London region displays an almost total reversal of the overall national trend. Only 27.3% of the Greater London sample were aged 56 years or over, approximately half the national average, whilst almost a third of players were aged less than 36 years. It is suggested here that provision of national averages serves, in some measure, to mask the current diversity apparent in both regional, and local, age profiles. In sum, although upward change in the age structure of the bingo playing population is perceived to be taking place generally, any downward movement in age profiles currently appears confined to certain localities and regions of Great Britain.

In an attempt to assess the socio-economic groupings present within the current bingo playing population, players were asked two questions specifically relating to occupation: their own occupational position/status, and the occupation of the main wage earner in the home. In terms of occupational status, most players remain 'drawn from a population which is in a relatively disadvantaged economic position' (Dixey with Talbot, 1982. p. 163.). Only 36% of the total sample stated they were in paid employment, either full, or part time. The remainder comprised full time homemakers (13.3%), retired (42.8%), or unemployed (7.9%) persons. Whilst there are considerably more retired persons, and employed women of working age within the bingo playing population, than within the British population as a whole, the reverse is true of persons of working age currently without employment. Only 7.9% of the sample population were unemployed, compared to a national average of 9.3% (Social Trends 1995, p. 20), suggesting unemployment leads to a lesser, rather than greater degree of participation in bingo. Indeed, a measure of substantiation for this view was provided in reasons given by players for playing bingo more or less often than a year ago. Almost a third of respondents cited positive or negative change in occupational status as the reason for any relative increase or decrease in their former frequency of attendance.

Examination of the occupational categorization of main wage earners in the home reveals areas of both continuity and change. Although it remains the case that very few 'professionals' play bingo, and the majority of the bingo playing population are drawn from the skilled manual occupational category (33.9%), the percentage of persons encompassed within both the skilled manual, and the unskilled occupational groupings has declined, whilst the percentage of players in managerial/technical occupations has almost doubled. Overall, with the exception of professional occupations, findings indicate a general upward trend in the occupational categorisation of bingo players since 1982. Though this may be attributed in part to changing patterns in the percentage of the British working population in each occupational category, and/or amendments to the classificatory system. Neither changing patterns, nor shifting categorisations alone account for this apparent compositional change in the socio-economic groupings of the British bingo playing population. Bingo may be perceived as now attracting a wider audience. Attention is given next to an assessment of the ‘importance' of the activity in the 'leisure lives' of contemporary bingo players; and the identification of major trends in players' utilization of additional provided facilities.

Frequency and form(s) of participation.

Overall, findings support a belief that whilst bingo forms an important, routine element in many players' lives, only a small minority, 6% of the total sample, have made bingo a focal point of their daily existence. Most commonly, across all regions, the largest groups of players, almost 71%, are those who play either twice, or between 3 and 6 times per week, more than three-quarters of whom attend the 'same sessions', at the same times, weekly. An examination of age groupings reveals both frequency and regularity of playing bingo increase steadily with age. Almost 52% of those in the oldest age group, 66+, stated they played bingo more than three times per week, whilst more than 60% of those in the youngest age group (18 - 25) are found to play bingo once a week, or less frequently. The greatest number of weekly admissions to bingo clubs are therefore drawn from players encompassed within upper age groupings.

The importance assigned to bingo by elderly players is underlined when one explores the main reasons given for playing bingo. For it is this group who are most often found to prioritise sociability over winning, comfort, enjoyment, or any other reason. Whilst the question most often asked by non-players is 'why do people play bingo?, results obtained confirm that the answer to this question is neither a simple, nor straightforward one. Although bingo playing may not obviously be attributed by players to any particular reason, the question 'what is your main reason for playing bingo?' was included in the questionnaire in an attempt to 'encourage' players to identify their main reason for participation.

Slightly more than half the sample population stated their main reason for playing bingo was to 'win some money', a further quarter prioritised enjoyment, underlining that bingo is seen first and foremost, by many players, as a pleasurable activity. 'Socialising', and ‘relaxation' were given as main reasons by a further 17% of the sample. Less than 10% of players attributed playing bingo to seemingly less positive reasons, e.g. 'something to do', or ‘nowhere else to go'. A soft form of gambling bingo may be, but its primary attraction remains the chance to win some money.

However, a differing picture emerges when players are asked their main reason for playing bingo at a particular club. Whilst ‘winning' is the main reason given for playing bingo ‘per se', the proximity of the club to the player's home was found to be the most common reason given for playing bingo at a particular club. Almost a third of the sample population gave this answer. 'Good prizes/prize money' ranked second, with almost a quarter of players choosing this response. The friendliness of staff was also found of importance to players, especially amongst the elderly, and was placed third in the ranking, above the attendance of family/friends. A pleasant and friendly relationship between staff is seen as an integral element of the enjoyment provided. Many comments contained on the questionnaire forms referred by name to club managers, and other members of staff.

Yet, neither the importance assigned to winning, or 'good prizes/prize money', nor differences in the rate and form of participation in one form of gambling, bingo, appear to show any direct correlation with utilization of alternative forms of gambling: interval games and fruit machines, now routinely provided within licensed bingo clubs as 'additional facilities'. The 1994 survey explored players' use of four main types of additional facility: buffet/catering provision, licensed bar, interval games, and fruit machines. Aside from buffet and catering facilities, which are used by approximately three quarters of the playing population, additional facilities provided were found utilized by only a minority of persons within the sample (and a slightly lesser minority than in 1982). Further, each facility was found to be used most by a differing minority of the bingo playing population.

In brief, whilst licensed bar facilities, and to some extent fruit machines, are patronized more by men than women, interval games, i.e. mechanised cash bingo and prize bingo, appeal mostly to female players, primarily those aged between 26 and 55 years. It is believed that both the speed of interval games, and limits on income, are factors affecting the rate of participation amongst elderly players. The utilization of fruit machines, unlike twelve years ago, now displays a clear age related trend: as age increases, utilization of fruit machines decreases. One third of those in the youngest age grouping (18 - 25) were found to play fruit machines, compared to less than one fifth of the population in the highest age grouping (66+), Arguably, the widespread availability of fruit machines to adolescents in other social contexts (see Fisher, 1993), must be considered as a factor involved in the emergence of such a trend.

When examined in concert, findings suggest the existence of two major sub-groups of players, with differing orientations and patterns of behaviour, co-existing within a single bingo playing population. The first group, hereafter referred to as 'traditional' comprises, in the main, female persons situated within upper age groupings who have been playing bingo for more than 10 years, many of whom are now without full, or part-time employment. This group of players are found to attend frequently, usually between 3 and 6 times per week, and regularly, but spend less on each occasion than those in younger age groups, which is attributable to their lesser use of additional facilities provided. Such persons are also found to form the 'core' of the daytime bingo playing group.

The majority of 'traditional' players also display a high degree of 'loyalty' to the particular which they attend, stating that they would not change to another club if one opened nearby. Additional comments made on questionnaire forms, contribute to a view that ‘traditional' persons are indeed 'attached' to 'their bingo club'. Whilst the focus of current 'concerns' resides in some measure upon the cost of bingo, most commonly comments made illuminate 'domestic issues', e.g. the quality of a cup of tea, or the standard of 'chips' served, aspects relating to the comfort of the surroundings, and 'friendliness', both between players themselves, and also relationships between players and staff/management. 'Traditional players' are seen to align closely with members of the bingo playing population examined in Dixey with Talbot's (1982) study.

However, a second group of persons, hereafter referred to as 'new era' players, were found to display a number of characteristics which together served to differentiate them from players encompassed within the 'traditional' group. The 'new era' playing population is found to consist predominantly of individuals encompassed within lower age, but higher socio-economic groupings, who state that they have been playing bingo for less than 10 years (and in many cases for less than 5). ‘New era' individuals attend bingo sessions somewhat sporadically, often once a week or less, but spend more, on average, on each occasion than players in the 'traditional' group, which is attributed to their greater use of certain of the additional facilities provided. The vast majority display little, or no allegiance, to any particular club, which is demonstrated both by their propensity to currently play bingo in more than one venue, and responses given on the questionnaire forms which indicate they would readily change to another club, if one opened nearby, either if it offered 'larger prizes', or was cheaper. Winning money, and, from comments made, the excitement, or ‘buzz', of the activity were the main reasons given for playing bingo by persons within this group.

The provision of an increasing body of evidence which indicates that continuation of 'the respectabilising process' has indeed wrought changes, which may now be perceived as culminating in the creation of a basic divide within the bingo playing population, carries implications both for the future of bingo within commercially licensed confines, and the recommended form subsequent phases of sociological analysis should take.

Looking toward the future: some concluding remarks.

(a) The future of licensed bingo.

In almost its first report, the Gaming Board for Great Britain, stated 'It seems clear that bingo has come to stay in Britain' (1970. p.12.). The statement is perceived as true today as when it was first uttered a quarter of a century ago. Bingo has demonstrated 'a greater resilience in the recession compared to other forms of gambling' (Mintel Leisure Intelligence, Volume 2, 1993. p. 14.). The size of the bingo playing population is seen to have increased yearly since the beginning of this decade. More people now play licensed bingo, but they do so in a steadily declining number of bingo clubs. The figure for clubs licensed and operational stands today at approximately 910, compared to 1,451 in 1982, the year when Dixey with Talbot compiled their report.

Given that more than half the 1994 sample population were found aged over 56 years, and Britain will continue to have an ageing population, the short term future of bingo seems secured. Yet, long term success appears dependent not merely upon retention of 'traditional' players, but also upon 'harnessing', and 'keeping' the interest of a growing number of 'new era' players, now being attracted toward the game. Preliminary identification of a basic divide between two broad groups of players is perhaps a 'signal' that in the future, a form of 'product differentiation' may arise as a consequence of bingo club owners/operators targeting provision specifically toward the 'needs' of either the ‘traditional' or ‘new era' market for the game.

Whilst in terms of sex, age, and socio-economic groupings, comparisons reveal bingo is now appealing to a wider audience than it did twelve years ago, there is, at present, no way to determine how far, or fast, this transition will spread. Whilst changes in the production and presentation of bingo are perceived to have had an effect both upon the composition of the bingo playing population, and frequency and form(s) of participation, further progress is perceived influenced not merely by internal forces directing the form of current, or future, bingo provision. It also rests upon wider legislative, and structural, forces impacting upon the game.

(b) The future of sociological analysis.

The implications of survey findings for subsequent phases of sociological analysis are, in the main, two-fold. First, given the apparent 'multi-dimensional nature' (Fisher, 1993. p.471.) of contemporary bingo playing, there is now a perceived need to explore more fully, through progression to a more detailed ethnographic analysis of bingo players' experiences, the range of meanings attached to the activity by bingo players themselves. As Smith and Preston (1984), following Lindesmith (1977), observe: 'researchers in search of causes who ask someone "what motivates your behaviour" are in a sense asking an erroneous and misleading question', answers given may have 'very little to do with (any) so-called underlying cause' (p.331). Second, in as much as identification of the 'new era' group suggests existing definitions are now both insufficient and inadequate, future work should, in part, focus on the provision of a 'new' typology of bingo players, which will both enable the construction of definitions that more adequately encapsulate the experiences of contemporary bingo players/gamblers, and provide a foundation upon which others may, hopefully, in the future, choose to build.

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