

Changes in Gaming and Gaming Participants in the United States

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Abstract

Public interest and acceptance of casino gaming as a recreational activity has resulted in a proliferation of gaming locations. The spread of gaming locations and the acceptance of gaming as a legitimate leisure activity may be explained from a marketing perspective through diffusion theory. Gaming could see continued revenue growth and participation or, like lotteries, it could face saturation and even decline. To avoid the potential problems associated with maturation, gaming operators may need to review the experiences of state lotteries which have faced and dealt with the problems of maturation and saturation. **Keywords:** Gaming, casinos, marketing, demographics, social class, diffusion theory

Introduction

Casino gaming has witnessed an explosive growth in popularity and availability across the United States during the past few years. What began as a means to raise tax revenues or spur development in a few depressed communities dependent on tourism expenditures and on a handful of Indian reservations has now exploded into one of the largest components of the entertainment industry in the United States. When gaming was legalized in Nevada in 1931 to attract tourists during the depression (Worsnop, 1990), few would have envisioned that gaming would become a national entertainment pastime. Recent statistics indicate over fifty percent of the adult American population spends some of their entertainment dollars inside casinos (Clines, 1993).

By the end of 1993, lotteries were available in 37 states; "limited stakes" (hybrid) casino-style gaming was available in South Dakota and Colorado; riverboat casinos were in operation in several states along the Mississippi River; and traditional high stakes, Las

Vegas-style land-based casinos were planned for Chicago and New Orleans. In addition, spawned by the passage of the Indian Gaming Regulatory Act of 1988, casino-style gaming and high stakes bingo could be found in 225 locations on Indian reservations. This increasing availability and ease of access has resulted in more Americans visiting casinos than attending major league baseball games in 1993 (Harrah's, 1994).

Five basic factors combine to explain the current success and future prospects of the gaming industry. First, electorates have been increasingly willing to approve new gaming alternatives because these activities have come to be viewed as a "voluntary tax" (Worsnop, 1990) while politicians have been unwilling or unable to pursue new taxes (Kleinfeld, 1993). Second, more people than ever before are choosing casino gaming as an acceptable leisure activity (Dandurand, 1982 and Vallen, 1993): three out of four adults now report that they consider casino gaming to be a "fun night out" (Harrah's, 1994). Third, affluent retirees comprise the single largest segment of both the casino and lottery markets (Withiam, 1988), and their numbers within the population are burgeoning. Fourth, casinos have devised marketing programs to attract the previously ignored "low roller" (Kristof, 1985); and fifth (and possibly the most influential factor), the expanded availability of gaming opportunities is attracting many individuals who have never before visited casinos for entertainment (Troy, 1994).

In this article, we discuss the growth and diffusion of gaming in the United States and the changing demographics/segments of the gamers of the 1990s. We conclude by offering some implications concerning the future of gaming and provide some suggestions for tourism policy makers, marketing strategists and researchers.

The spread of gaming locations and the acceptance of gaming as a legitimate leisure activity may be explained from a marketing perspective.

Evolution in Gaming Activities

The public's interest and acceptance of gaming as a recreational activity has shifted dramatically over the years. "Of all the factors that rolled back the bias against gambling, the steady growth of mass-market state lotteries may be most influential if least flamboyant in making gambling more accepted as middle-class recreation" (Clines, 1993, p. 32). Some type of games of chance, ranging from church bingo and pull tabs to full scale casino gambling, can now be found in every state except Utah and Hawaii. The proliferation of gaming locations and venues and changing moral standards have made gambling accessible and acceptable to millions of Americans who have never before participated in legalized gaming activities.

The spread of gaming locations and the acceptance of gaming as a legitimate leisure activity may be explained from a marketing perspective through diffusion theory. In explaining diffusion theory, Rogers (1983) suggests five innovation characteristics that determine the pace at which individual society members will adopt a new concept and the rate at which the idea will diffuse throughout a society. These five determinants are: relative advantage, compatibility, complexity, trialability and observability.

The expansion of casino gaming can be analyzed using these five characteristics. Traditional casino gaming was not adopted by a majority of Americans because, until the early 1990s, Americans needed to travel to Atlantic City, New Jersey or Nevada to participate in legal gaming. This made gaming relatively unattractive as a leisure time activity compared to more proximate tourism options. This inaccessibility reduced gaming's relative advantage as a leisure activity, decreased its compatibility with most Americans' lifestyles and made it seem more complex and remote due to the inability to try the activity or observe others while they participated in gaming.

Recently, the characteristics of gaming as a leisure time activity have changed. The explosion in gaming locations and new gaming technologies have greatly improved the adoption characteristics of gaming. The proliferation of easily accessible locations has improved its relative advantage as a leisure activity and increased the ability of a neophyte to sample the experience and observe others enjoying the variety of games. Newer games such as video poker have also greatly reduced the complexity of these games, tempting new gamers to discover how easy it is to learn these high tech/low pressure games. And, as mentioned previously, gaming has become an acceptable component of the American life-style because state lotteries have been accepted as a form of harmless fun that benefits the state coffers.

As previously stated, some form of gaming is readily available throughout the United States. Presently, there are four broad categories of gaming alternatives: 1) traditional full scale casino gaming, including the well-established locations in Nevada and Atlantic City as well as soon to be developed operations in Chicago and New Orleans; 2) historic, limited stakes operations such as those in Colorado's mining towns; 3) "dockside" casinos, such as those operating on the Mississippi; and 4) reservation gaming that runs the gamut of limited stakes small scale operations to large scale Vegas style operations such as Foxwood's on the Mashantucket Pequot reservation in Connecticut. Table 1 highlights some of the key dates and events in the growth and availability of gaming activities.

Table 1. Milestones In Gaming's History and Growth

Year	Event
1931	Gambling Legalized in Nevada
1964	State Lottery Began in New Hampshire
1978	Gambling Legalized in Atlantic City
1988	Indian Gaming Regulatory Act
1989	Limited Stakes Gaming in Deadwood, SD Limited Stakes Gaming in Three Mountain Communities in Colorado (Central City, Cripple Creek, and Black Hawk) Limited Stakes Riverboat Gaming Legalized in Iowa
1990	Riverboat Gaming Legalized in Illinois
1991	Riverboat and Dockside Gaming Legalized in Mississippi
1993	Gaming Legalized in New Orleans Riverboat Gaming Legalized in Louisiana
1994	Limits removed from Gaming in Iowa

Due to its individual-state regulated nature, the product life cycle of gaming is substantially different from most other product innovations. Whereas interstate diffusion of most goods and services is easily accomplished through physical distribution or franchising, state regulations must be changed to make gaming available. The growth/diffusion and product life cycle progression of gaming therefore is quite complex and subject to the vagaries of voters and legislative actions.

Nationally, gaming is experiencing a burst of exponential growth after having been in the maturity stage for decades. Gaming is being introduced into new states/regions much like mature U.S. products are introduced into new markets overseas. Therefore, each gaming location experiences a life cycle of its own.

With the increasing acceptance of gaming by the American public, the slow-revenue introductory stage at new gaming locations is brief (often nonexistent), followed by a phenomenally snowballing growth in revenue. However, the length of this growth stage has varied depending on location and the opening of gaming operations in contiguous

states or population centers. Many states that had postponed legalization of gaming are rushing to legalize these activities to capture potential tourism and tax revenues fleeing their borders to neighboring states. This "domino effect" escalation of gaming's availability should serve to sustain the national growth trend of gaming, but will subject individual gaming operations to increasing competitive pressures.

The life cycle dynamics of a new gaming location can be vividly demonstrated by examining the revenue patterns from gaming facilities located in Central City, Colorado. As can be seen in Table 2, gaming revenues snowballed soon after becoming available but, after less than two years, revenue patterns became erratic and comparable months' revenues even began to decrease for a short period of time.

Table 2. Central City, Colorado Gaming Revenue (in millions)

Month	1992*	1993
January	3.3	5.9
February	4.4	5.3
March	5.3	6.5
April	5.3	6.6
May	6.0	7.6
June	7.0	7.2
July	8.5	8.2
August	8.1	7.5
September	7.4	6.7
October	6.8	6.6
November	4.9	5.2
December	4.5	5.6

* First Year of Full Operations
Source: Colorado Division of Gaming

Similar rapid declines have occurred in Biloxi, Mississippi's casinos where initial slot revenues topped \$207 per machine per day and in one year declined to \$109 (Popkin & Hetter, 1994).

Much of the boom in revenue growth being experienced in the gaming industry may be due to the novelty of gaming to most Americans. Satiated with the well-established leisure activities that have been available to them, many Americans may see gaming as a new sensation and, therefore, more amusing than their usual recreational choices. If this novelty benefit is a primary motivator of new gamers, we can conclude that, in a relatively short to moderate period of time, gaming operations will experience a flattening of revenues when the majority of prospects no longer perceive it to be novel but commonplace. Bello and Etzel (1985) found that tourists who seek novelty in vacations tend to refrain from revisiting destinations because once visited, the novelty is gone. Gaming may also suffer a similar type of problem in retaining novelty seeker tourists.

Emerging Gaming Segments

The development of new games and expanded gaming availability has given rise to several gaming segments, each with a profile somewhat different from the other and each with different benefits sought from gaming. Four broad segments appear to be emerging: 1) high rollers, 2) day-trippers, 3) low stakes/new adopters, 4) family vacationers.

- ♦ **High rollers.** This segment is composed of sophisticated gamblers (both domestic and foreign), to whom traditional gaming was originally targeted. These gamers tend to be wealthy, older, and male. High rollers tend to play games of skill more than luck.
- ♦ **Day-trippers.** Retirees dominate this segment. These gamers make several short-duration trips to operations within easy driving distance, and wager relatively significant amounts per trip, but tend to play slots and other video gaming options.
- ♦ **Low-stakes/new adopters.** Gamers in this segment have only recently discovered and accepted gaming as an interesting day or evening diversion. They choose location primarily based on proximity. Members of this segment are predominantly part of the growing cadre of aging baby boomers and their retiree parents, with the time and money to enjoy the entertainment associated with gaming. Many gamers in this segment are younger women who tend to play video gaming alternatives. Generation X young adults are also found in this segment.
- ♦ **Family vacationers.** Due in part to the development of complementary tourism attractions, such as theme parks, this segment tends to gamble as an offshoot of a family vacation, utilizing a variety of amenities in the gaming destination devoted to recreation and family fun.

Casual and occasional gamers comprise a growing portion of new entrants found in the low stakes/new adopters and family vacationer market segments. They are attracted to easy-to-learn games (lotteries, bingo, slot machines, and other electronic gaming devices) because these alternatives require little commitment of time or money (Edmondson, 1986). These games are particularly attractive to a broad cross section of the population that has already become accustomed to and enjoys playing state lotteries. Easy-to-learn games that are controlled by the player are now the games of preference for casino patrons as can be seen in Table 3.

Table 3. Casino Game Preference

Casino Game	Percentage Preference		
	1980	1990	1993
1. Slots	39%	50%	54%
2. Blackjack ("21")	34	20	20
3. Dice ("Craps")	10	6	4
4. Keno	7	2	2
5. Poker	4	2	1
6. Video Poker/21/Keno Machines	0	15	16
7. Other	6	5	3

Based on data from Dandurand, 1982,
Las Vegas Visitor Profile Study, 1990 and 1993.

Casual and occasional gamers who have recently been attracted to new gaming venues not only provide frequent repeat business but also serve as opinion leaders within their social circles in the diffusion and acceptance of this recreational activity.

The impact of focusing on traditional gaming market segments can be witnessed in the actions of large gaming establishments in Las Vegas which had historically attempted to appeal to the "high roller" who could by definition be placed in the upper-middle or upper class group based on income criteria. This presumption of assumed customer social class was shattered by

the success of establishments such as Circus-Circus which effectively attracted both middle and lower class gamblers. The renewed growth that occurred in Las Vegas in the early 1980s was a result of establishments actively courting the middle and working class "low rollers" (Kristof, 1985). Recent additions to product offerings in Las Vegas such as the MGM Grand Hotel Casino and Theme Park, the Luxor, and Treasure Island, as well as many more planned developments and expansions, provide some indication of the potential for continued growth by embracing these once ignored market segments.

As a tourism destination/conference city, Las Vegas should see its growth closely tied to the national economy's fortunes, remaining in the maturity stage for many years to come. Atlantic City's fortunes, however, may be entering decline since it is primarily dependent on high rollers and day-trippers. This limited market appeal, combined with new competition within its market area, is beginning to be displayed in recent revenue trends. When adjusted for inflation, gaming revenues in Atlantic City increased from approximately \$2,898,000,000 in 1990 to \$2,942,100,000 in 1993 or by only \$44.1 million. The increase in gaming availability appears to have had a more significant effect on Atlantic City than Las Vegas since Atlantic City is more dependent on the regional low-roller/day-tripper segment that is the primary target of the new gaming locations in the Northeast.

Lottery players, compared to nonlottery players, have lower income, are less educated and younger, and also exhibit more heavy shopping and browsing behaviors.

Demographics and Social Class

The face of the American population is changing as are the demographic profiles of the individuals who are taking advantage of new gaming opportunities. The traditional demographic profiles of Las Vegas and Atlantic City gamers may prove to be inadequate as attempts are made to segment current and potential gamers at the many new gaming venues. For example, even in two established gaming locations, i.e., Las Vegas and Atlantic City, Borg, Mason, and Shapiro (1990) found significant demographic differences between gamers. When analyzing the gaming participants in Las Vegas and Atlantic City, they found only two demographic similarities—sex and education. More importantly, they found significant differences in the other seven demographic variables analyzed: age, race, marital status, occupation, income, mode of transportation, and gambling budget.

Similarities and differences in the demographic and behavioral characteristics of lottery and casino participants point to some of the problems faced by individuals and organizations as they attempt to understand the proliferation of gaming. These similarities and differences help to explain the apparent segments that are developing to take advantage of new gaming venues. Two recent studies have helped to shed some light on the similarities and differences found between lottery and casino players.

Lottery players, compared to nonlottery players, have lower income, are less educated and younger, and also exhibit more heavy shopping and browsing behaviors (no difference on race or sex). However, there are differences within lottery players. Those lottery players who purchase only one or two tickets per week were more educated than those who purchased three, four, or five tickets per week. Yet, very heavy lottery players, i.e., those who buy more than 5 tickets per week, tend to be older, of relatively high income, and report additional betting activity, such as horse races, slot machines, and poker (Burns, Gillett, Rubenstein, and Gentry, 1990). Therefore, it appears that very heavy lottery players are similar in many respects to day-trippers.

The Harrah's Corporation funded an extensive survey of gamers (Harrah's, 1994). This study revealed that gamers, in general, tend to have incomes and educations greater than the typical U.S. household, and tend to be disproportionately white collar. The study also showed that casino players at the new destinations are slightly different demographically than gamers who visit the traditional casino locations (those in Nevada and Atlantic City). They have slightly lower incomes, are more likely to be female, younger, and less likely to hold white-collar jobs.

The Harrah's survey also found that gamers who visit casinos four or more times per year are different from the less frequent gamers. Retirees compose 34% of the frequent gamers in the survey while the less frequent players were more likely to be younger men with higher educations and white collar employment. Therefore, it appears the former group is similar to the day-tripper segment while the latter is like the low-stakes/new adopter segment.

Implications

Although many present and future gaming locations do not have the marketing advantages of a destination resort such as Las Vegas, they do have one factor in common with well-established and successful operations in Atlantic City, New Jersey and Laughlin, Nevada: a location within easy driving distance of a large population base. Ease of access combined with a new desire based on the social acceptance and novelty of gaming as recreation has attracted many first-time gamers and generated frequent repeat visitors.

The availability of gaming opportunities is likely to continue its explosive growth during the 1990s; we, therefore, must plan for the future. This future is far from certain. Gaming could see continued revenue growth and participation, or like lotteries, gaming could face saturation and even decline. Extrapolating from available data and the very short historical track record of new gaming venues, we offer the following speculations about the future of gaming in the United States.

The following factors should have a positive impact on current and future gaming operations:

- ♦ Gaming facilities located within easy driving distances of large Metropolitan Statistical Areas and having the requisite demographic and social class composition could attract the necessary critical mass of patronage and repeat business to remain economically viable.
- ♦ New gaming patrons will reflect the demographic characteristics of individuals participating in state-sponsored lotteries.
- ♦ Future growth of recreational participation in gaming activities and revenues will be derived from increased acceptance by members of the lower and middle social classes.
- ♦ Future growth of recreational participation in gaming activities and resulting revenues will be derived from increased acceptance by an aging and rapidly increasing cadre of affluent baby boomers.
- ♦ Future growth of recreational participation in gaming activities and resulting revenues will be derived from increased acceptance by younger nontraditional segments who have been conditioned to the excitement of electronic games and media.

The continued rapid growth in gaming opportunities and success of current gaming facilities is far from assured. Just as lottery revenues have begun to plateau (Karcher, 1992), gaming revenues could face the same type of saturation in the future. As revenues plateaued, state-sponsored lotteries attempted to attract more players with new technology and games of chance (Karcher, 1992) which will introduce gaming to even more individuals. Although there is currently a large pent-up demand for casino gaming, this demand could easily disappear (Applebome, 1994). The specter of saturation in gaming locations

also looms on the horizon. As states realize the possible loss of tourism expenditures and tax revenues to gaming opportunities across their borders, they have been quick to authorize new gaming facilities within their own borders.

The following factors could have a negative impact on current and future gaming operations:

- ♦ New gaming participants who are attracted to the novelty of these activities may soon move to new and more attractive entertainment activities, such as virtual reality.
- ♦ Legislators and voters may limit or revoke gaming licenses due to a backlash against gaming resulting from saturation and potential social problems.
- ♦ Tax revenues may be diluted due to saturation resulting from the proliferation of locations and cross-border cannibalization of a finite pool of gaming participants.
- ♦ Due to overbuilding and narrowing profit margins development funds for continued expansion of gaming locations may become more difficult to obtain.
- ♦ Gaming operations must compete with other recreational activities that appeal to active and health conscious baby boomers who may not find the sedentary activity of gaming as appealing as the present group of retirees.
- ♦ Gaming operations may be subjected to federal taxation that will squeeze both casino profits and state and local taxing flexibility.
- ♦ Industry gaming revenues could increase, but casino venue revenues may decrease if legislative action makes gaming via interactive television available in the home.

To stay fresh and avoid being perceived as ordinary, gaming operators may need to review the experiences of state lotteries as they faced the problems of maturation and saturation. New products and special promotions which have been used successfully by these state lotteries could be used to buoy interest in gaming activities by providing novelty benefits.

Summary

Gaming is experiencing a burst in popularity from participants seeking entertainment, legislators seeking new tax revenues, and communities and tribes seeking economic development. The proliferation of gaming locations combined with changing moral standards have made gambling accessible and acceptable to millions of Americans who have never before participated in legalized gaming activities. Although the expanded availability of gaming opportunities has moved the maturing gaming industry into a new phase of rapid growth, the future direction of gaming is unknown at this time.

The spread of gaming locations and the acceptance of gaming as a legitimate leisure activity may be explained and analyzed from a marketing perspective through diffusion theory and the product life cycle.

The development of new games and expanded gaming availability have given rise to several gaming segments, each with a profile somewhat different from the other and each with different benefits sought from gaming.

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With increasing public acceptance of gaming, the slow-revenue introductory stage at new gaming locations is typically brief, followed by very rapid growth in revenue. However, the length of this growth stage is often shortened by the "domino effect" as neighboring states legalize casino operations to capture potential tourism and tax revenues fleeing their borders to neighboring states. This escalation of gaming's availability should serve to sustain the national growth trend of gaming, but will subject individual gaming operations to increasing competitive pressures. However, much of the boom in revenue growth experienced in the gaming industry may be due to the novelty pursuing behaviors on the part of entertainment seekers.

Similarities and differences in the demographic and behavioral characteristics of lottery and casino participants point to some of the problems faced by individuals and organizations as they attempt to understand the proliferation of gaming. While these similarities and differences help explain the apparent segments that are developing to take advantage of new gaming venues, future research on gaming activities, behaviors, and the benefits sought from gaming could aid in gaining a better understanding on the breadth of potential markets as well as the potential impacts of gaming establishments of host communities. Gaming could see continued revenue growth and participation, or like lotteries, gaming could face saturation and even decline.

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