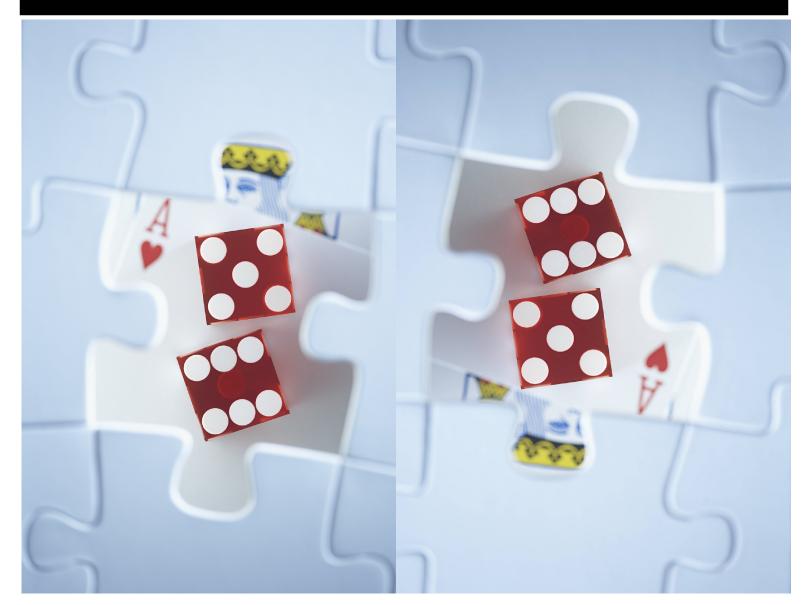
DECODING BRITISH COLUMBIAN YOUTH AND GAMBLING

FEBRUARY 2008







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DECODING BRITISH COLUMBIAN YOUTH AND GAMBLING

INTRODUCTION

The British Columbia Lottery Corporation (BCLC) engaged DECODE to explore current attitudes and behaviours of British Columbian youth (ages 15-24) with regards to gambling activities, in order to help inform provincial responsible gambling programming for youth. This study decodes current perceptions of and participation in various risk related activities, attitudes towards gambling, participation in various gambling activities, the role of parents and friends as influencers, and key gender and age variances amongst study participants.

This report is a summary of key findings and is intended to be used as a resource for various stakeholders and practitioners involved in youth related prevention initiatives and programs. This study is not intended to identify the causes of or incidences of problem gambling amongst youth in British Columbia.

ADDITIONAL INFORMATION

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METHODOLOGY

In September, 2007, DECODE executed an online quantitative study with 1,000 young British Columbians between the ages of 15-24. The respondent sample was drawn from an online panel of 400,000 Canadians sourced from Sympatico.MSN.ca and the survey instrument was programmed and hosted by OpenVenue. The estimated margin of error for this study is 3%, 19 times out of 20 (95% confidence level).

The online methodology was chosen as the preferred approach for a number of reasons. First, online penetration amongst the target audience is very high. Second, with mobile phone penetration rates amongst youth growing rapidly, it is becoming increasingly unreliable to survey youth through landline-based phone methodologies. In addition, the anonymity that online approaches offer tends to generate more open responses from youth to sensitive question areas.



DECODING YOUTH AND GAMBLING, SUMMARY REPORT

In order to understand youth gambling attitudes and behaviours, it is important to first understand how youth generally view risk-taking and risky activities. This provides insight into the types of potentially harmful issues that youth perceive as problematic today, and allows for an understanding and analysis of youth attitudes toward gambling within the context of the "realities" of the world they live in.

DECODING YOUTH ISSUES

The research identified a number of issues that are particularly relevant in the day-to-day lives of British Columbian youth between the ages of 15-24. Respondents in the study revealed their belief that the biggest issues that youth face today are: negative body image, drug use, drinking too much alcohol, drinking and driving, and peer pressure (See Figure 1.1).

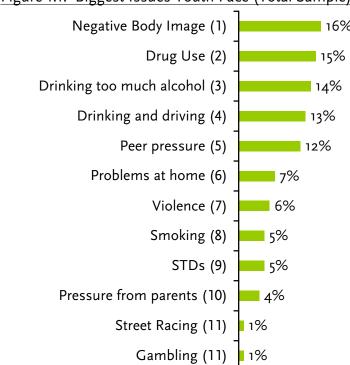


Figure 1.1: Biggest Issues Youth Face (Total Sample)

From the following list, what do you think is the biggest societal issue that people your age face? Source: DECODING British Columbian Youth and Gambling, DECODE

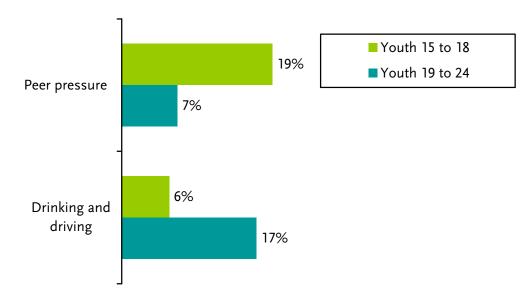


The research illustrates that, regardless of age or gender, young people do not perceive gambling to be a significant issue when compared to other youth issues. This poses a significant challenge for efforts to get youth to recognize potential risks of gambling.

While gender and age do not significantly impact the perceived importance of gambling as an issue, they do impact the perception of other youth-related issues. Negative body image, for instance, is ranked by female respondents of all ages surveyed to be the number one issue facing youth today; this is not the case for males, who rank this issue considerably lower. Similarly, within the 15-18 age segment, 21% of males ranked drug use as their biggest issue versus 9% of females within the corresponding age range. Attitudes about drug use level off for the 19-24 age range with 15% of males and females stating it is their biggest issue.

Perceptions about peer pressure and driving under the influence dramatically change in significance depending on life-stage. Regardless of gender, peer pressure is a particularly big issue for youth 15-18 and it decreases in relative importance as a youth issue for young people 19-24, which would suggest that the weight of peer pressure is much heavier during high school years. On the flip side, drinking and driving ranks much lower for youth in the younger age segment and then increases significantly in importance for youth in the 19-24 age segment (See Figure 1.2).

Figure 1.2: Perceptions that Change with Age (Biggest Youth Issues)



From the following list, what do you think is the biggest societal issues that people your age face? Source: DECODING British Columbian Youth and Gambling, DECODE



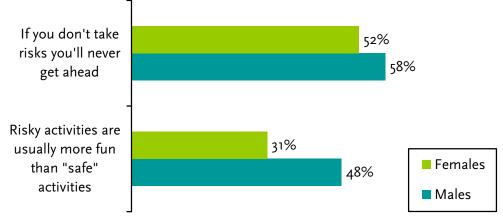
DECODING YOUTH & RISK

Overall, youth tend to view risk-taking behaviour positively and associate risk-taking with opportunity, excitement, and fun. Risk-taking appears to be perceived by many youth in the study as part of a process of advancement and opportunity. Few youth look at risk-taking negatively as evidenced by the percentage of respondents (84%) who disagreed with the opinion "taking risks is stupid". More than half of respondents in the study "agreed" or "strongly agreed" with the statement "If you don't take risks you'll never get ahead", and 48% of males shared the view that "risky activities are usually more fun than safe activities".

In terms of how young people perceive themselves, just under a third of youth considered themselves to be "risk-takers", with respondents over 19 exhibiting a higher tendency to see themselves as "risk-takers".

Gender plays a strong role in youth attitudes toward risk-taking; male respondents were particularly enthusiastic about risky activities and ranked risk significantly more positively than female respondents.

Figure 1.3 Males Interpret Risk-Taking More Positively than Females



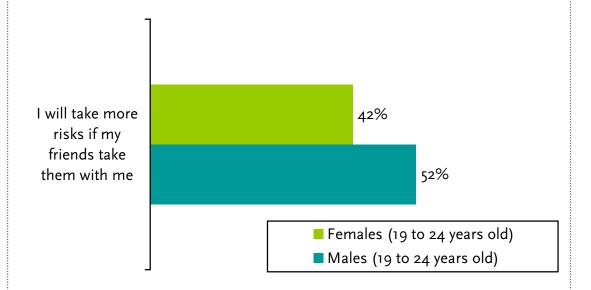
Please indicate how much you agree with the following statements? (Top 2 box answers) Source: DECODING British Columbian Youth and Gambling, DECODE

Respondents indicated that friends influence their risk taking behaviour, as 50% of underage youth (15-18) agreed or strongly agreed that they have a tendency to take more risks if their friends take them as well. Male



respondents in the 19-24 age range showed a significantly higher tendency than their female counterparts to report that friends play a role in influencing their choice to take risks (See Figure 1.4).

Figure 1.4: Gender Influences Attitudes toward Risk-Taking



Please indicate how much you agree with the following statements? (Top 2 box answers) Source: DECODING British Columbian Youth and Gambling, DECODE



2) YOUTH & GAMBLING

AWARENESS OF LEGAL RESTRICTIONS

Respondents showed a significantly higher awareness of the legal age required to drink alcohol and purchase cigarettes as compared to buying lottery tickets or gambling. Awareness of the age restrictions for all of these activities was slightly higher for those surveyed who are currently of legal age (19+). Gender also proved to impact awareness as female respondents in the study were significantly more likely to have selected the correct legal age for buying lottery tickets, gambling, drinking alcohol and purchasing cigarettes. Awareness of the correct legal age for buying lottery tickets and awareness of the legal age to gamble in British Colombia currently sits at 69% and 71% respectively.

Perceptions of the Nature of Gambling

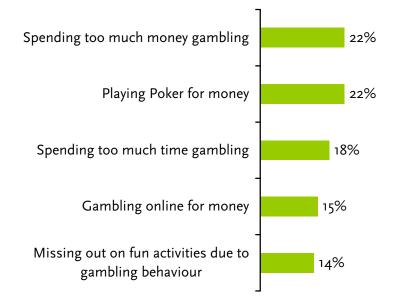
While respondents may not believe gambling is one of the biggest issues facing youth today, they are not naïve about the negative consequences of problem gambling. Although some youth (37%) view gambling as a "fun and exciting" activity, with males skewing significantly higher, a much higher portion (63%) agree that "gambling leads to problems". In fact, underage youth are significantly more likely than respondents who are of legal gambling age (19 to 24) to believe gambling tends to have negative implications. They are also more than twice as likely to believe gambling activities should be made illegal: 17% of youth ages 15-18 vs. 7% of youth ages 19-24.

When asked about whether gambling poses problems for friends or peers some respondents believed gambling can be problematic. Of the total sample, 22% said spending too much money gambling is either "somewhat of a problem" or a "major problem" for friends or peers. The same portion of youth felt this way about playing poker for money. 18% felt that spending too much time gambling is an issue, 15% felt the same way about gambling online for money, and 14% said friends' missing out on fun activities due to gambling is "somewhat of a problem" or a "major problem". Respondents who were of legal gambling age were significantly more likely than underage youth in the study to report that friends or peers spend too much money gambling, spend too much time gambling or gamble online for money (See Figure 2.1). When asked if they had ever personally experienced any type of problems as a result of their gambling, 7% indicated that they had



experienced either "some" or "many" problems in the past. While this particular finding sheds light on the respondent's perceptions, it is not designed nor intended to be a measure of the percentage of youth in the sample who have experienced problem gambling behaviours.

Figure 2.1: Youth Perspective on the Impact Gambling has on Peers/Friends



Amongst your peers at school, or friends in general, how big of a problem is... (Answers include "somewhat of a problem" and "a major problem"). (Top 2 box answers) Source: DECODING British Columbian Youth and Gambling, DECODE

SKILL VERSUS LUCK

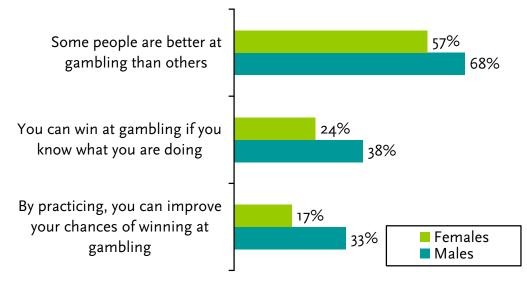
Youth show mixed opinions with regard to the role of "luck" and "skill" they feel is inherent in gambling activities. While the majority of respondents (close to 75%) agree with the opinion that most players are bound to lose regardless of how much they gamble, many respondents also expressed the belief that skill changes the game and one's chances of winning. On one hand, nearly 50% of respondents agreed "gambling is pure luck", yet close to 60% of respondents shared the opinion that "some people are better at gambling than others".

Close to a third of youth surveyed believed that the outcome of a gambling activity is impacted by the player's knowledge or skill level and agreed that, "you can win at gambling if you know what you are doing." Interestingly, those who held this opinion were significantly less likely to believe "gambling leads to problems." Male attitudes toward gambling skewed significantly higher on statements that imply gambling is a skill that can be learned. A third of males held the belief that "by practicing, you can improve your



chances of winning at gambling"; almost double the percentage of females with this perception (See Figure 2.2).

Figure 2.2: Male's Attitudes about Gambling Lean toward Skill



How much do you agree with the following statements? (Top 2 box answers) Source: DECODING British Columbian Youth and Gambling, DECODE

OPINIONS OF GAMBLING AS AN ACTIVITY

Gambling is generally not perceived to be an activity that has a high value in terms of enjoyment, and for most youth in the study gambling is an activity "they can take or leave" (64%). While some respondents indicate it is something that they enjoy (16%), very few consider gambling to be one of their favourite activities (2%). For the most part, youth do not perceive gambling to be a viable money-making activity, although roughly 1 in 10 respondents held the opinion that "gambling can be a good way to make some extra money". Half of respondents did feel, however, that there is no harm in gambling with "fake money" or when there is no exchange of money or something of value.

PARTICIPATION IN GAMBLING ACTIVITIES

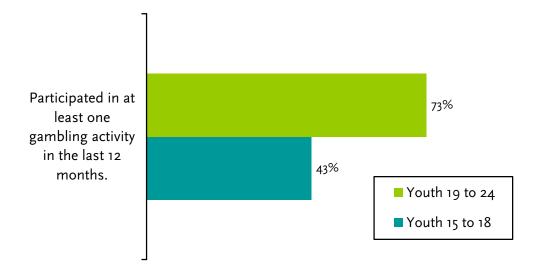
Amongst respondents, the incidence of participation in gambling activities involving an exchange of either money or something of value varies significantly depending on age.

In the last 12 months, 43% of underage youth (ages 15-18) have participated in a gambling activity for which money or something of value



was exchanged. This figure increases significantly for youth in the study who are of legal gambling age (19-24) with 73% reporting that they have gambled in the last year (See Figure 2.3).

Figure 2.3: Participation in Gambling Activities over the Last Year



In the past 12 months have you gambled on something where you risked money or something of value? Source: DECODING British Columbian Youth and Gambling, DECODE

Due to legal age restrictions on gambling activities, it follows that respondents' participation in various types of gambling activities are best examined in two groups: youth ages 15-18 and youth ages 19-24. Findings indicate that, amongst underage youth, the types of gambling activities with the highest level of participation were: Scratch and Win/Instant Win Tickets (16%), a dare or challenge (15%), Poker/Texas Hold'em (13%), betting on the outcome of a game (11%), and raffle tickets for fundraising (9%). Within the underage segment, the most significant gender difference is with respect to Poker/Texas Hold'em. 21% of underage males have played Poker/Texas Hold'em within the last 12 months versus 5% of females during the same time period.

Among respondents aged 19-24, the top gambling activities in terms of participation over the last year were: Lottery Tickets (47%), Scratch and Win/Instant Win (41%), Slot Machines (23%), Poker/Texas Hold'em (21%), and Pull Tabs (18%).

Participation in live gambling activities increases sharply when youth enter into the legal gambling age group for the following activities: Instant Win, Lottery Tickets, and Slot Machines. In contrast, the progression of participation in Poker is a more gradual process (from 13% to 21%).

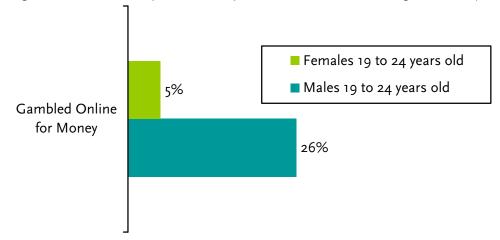


3) ONLINE GAMBLING

GAMBLING ONLINE FOR MONEY

Gender and age strongly impact the likelihood that young people gamble online for money. Of all respondents who have participated in at least one gambling activity in the last 12 months, 13% have gambled online for money. Looking at respondents samples by gender shows the dramatic difference in online gambling participation between males and females: 21% of males have gambled online for money in the past year versus 5% of females. Gender differences proved to be significant in both the underage and legal age respondent segments. 10% of underage males have gambled online for money versus 4% of underage females. The gap between male and female activity becomes much more pronounced in the 19-24 age range. 26% of males in this age range have gambled online for money in comparison with only 5% of females in this age range (See Figure 3.1).

Figure 3.1: Gender Impacts Participation in Online Gambling for Money



Have you ever gambled on an internet site for money? Source: DECODING British Columbian Youth and Gambling, DECODE

Online Gambling Activities Played for Money

The top 3 online gambling activities played where there was an exchange of money or something of value were: Poker/Texas Hold'em (30%), Video



Lottery Terminals or Slot Machines (15%), and Casino table games (blackjack) (14%).

Respondents who have played poker online in the last 12 months said the top reasons they play online are: "I can play anytime I want to" (52%), "it's fun" (50%), "something to do to pass the time" (48%), "winning money" (38%), and "it's a good way to improve my poker playing skills" (35%).

In terms of frequency, of those who have participated in at least one gambling activity where money or something of value was exchanged over the last year, just under a quarter (23%) said they gamble online "sometimes" and 5% said they gamble online "often". Online gambling amongst underage youth significantly skews male with 28% of underage males reporting they gamble online "sometimes" in comparison with 13% of underage females. Similarly, 8% of underage males reported gambling online "often" versus only 1% of underage female respondents.

ONLINE = EASY ACCESS TRAINING GROUND

Online gambling sites offer youth who share in the belief "you can improve their chances of winning at gambling with practice" an easy access arena to try and do so. In fact, 37% of underage males and 11% of underage females report it is "easy" to gamble online even if you are not yet of legal gambling age. One might say that the Internet provides a training ground for youth to "practice" and develop an interest and understanding of gambling activities. Amongst underage youth, 37% have gambled online with "fake" money (where no actual prize money is paid out). Poker/Texas Hold'em leads the list of online gambling activities played by respondents. 71% of underage respondents who have gambled online have played Poker/Texas Hold'em online using "fake" money.

As part of this study, participation in one of the Facebook Poker applications was tracked to identify the rate of increase of new users. The findings showed a considerable increase in user base of this poker application which allows users to play poker with other Facebook members for free. As of October 5, 2007 the number of active Facebook Poker application users was 159,119. The active user base of this application increased to almost 300,000 by mid November, and hit 434,455 by January 14, 2008.

MIGRATION FROM FREE GAMBLING SITES TO GAMBLING ONLINE FOR MONEY

The majority of youth who play poker online began playing on free poker sites. Only 8% of youth who have played poker online started playing on "for



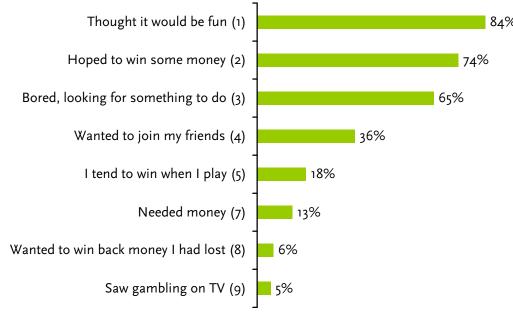
money" sites. While many youth (40%) who starting playing poker online for free still restrict their online playing to free sites, 28% reveal they started playing for fun on free sites and now sometimes play poker for money online on other sites, and 13% say they have moved their online poker play completely over to money sites.

4) INFLUENCERS TO YOUTH GAMBLING

FRIENDS AND FUN - SOCIAL ASPECT

Overall, the notion that youth "thought it would be fun" tops the list of reasons why they gamble. The hope of winning money follows second and is followed by "bored, looking for something to do", and by "wanted to join my friends" (See Figure 4.1).

Figure 4.1: Motivation for Gambling in the Last 12 Months



Please select the top 3 reasons why you have gambled in the last 12 months. Source: DECODING British Columbian Youth and Gambling, DECODE

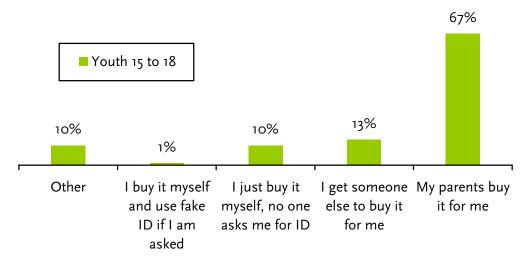
Delving into the influencers that increase the frequency with which youth gamble, friends are most important. The amount of money youth have follows second, while the amount of free time youth have is third. Males appear to be more heavily influenced by friends while the frequency with which females gamble is influenced more strongly by the amount of money they have. It is likely that the relative influence of friends relates to the type of gambling activities youth partake in, with an increased importance of friends for males due to the social aspects of male-preferred activities such as poker.



PARENTS

The research identified that parents play an integral role with respect to many areas related to youth and gambling. For one, parents are most likely to be providers of lottery or instant win tickets for underage youth. 67% of underage respondents who have played the lottery or instant win tickets in the last 12 months report they "usually" acquired the tickets through their parents purchasing the tickets for them. Less common ways of acquiring lottery or instant win tickets included: "asking someone else who is older to buy the tickets for me" (13%), and "buying the tickets alone without being asked for ID" (10%).

Figure 4.2: Methods of Acquiring Lottery or Instant Win Tickets



How do you usually get the lottery or instant win tickets to play? Source: DECODING British Columbian Youth and Gambling, DECODE

LINKS BETWEEN PARENTS AND THEIR CHILDREN

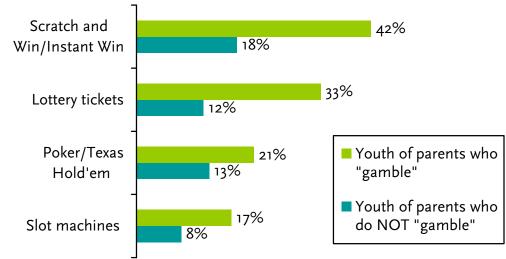
This study suggested that there is a link between a parent's gambling activity and their child's attitudes about gambling and participation in gambling activities. For instance, in the underage segment, 50% of youth who say their parents have gambled in the last year have themselves gambled in the last



year in comparison to 43% of total respondents in the underage segment. Similarly, in the 19-24 year old age segment, 81% of respondents who say their parents have gambled in the last year have also gambled as opposed to 73% of total respondents within that age range.

Youth who report that their parents have gambled in the past year show a significantly higher participation in various gambling activities than youth who report that their parents have not gambled in the past 12 months. This includes: Scratch and Win (more than twice as likely), Lottery tickets (almost 3 times more likely), Poker/Texas Hold'em (almost 50% more likely), and Slot Machines (twice as likely). (See figure 4.3).





In the past 12 months, have you bet/gambled on any of the following either with money or something of value?

Source: DECODING British Columbian Youth and Gambling, DECODE

In addition, with respect to attitudes about gambling, respondents who said their parents have gambled in the past year were significantly more likely to believe gambling is a "fun and exciting" activity (42%) than those with non-gambling parents (27%).

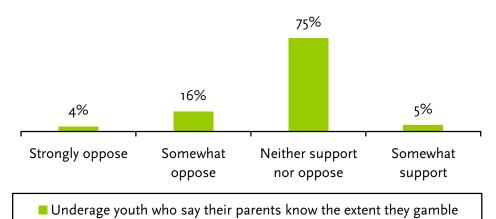
YOUTH PERCEPTIONS ON THEIR PARENT'S AWARENESS

Parents' supervision and awareness of their children's gambling involvement is an area that may warrant future research. Currently, 42% of underage youth who have gambled in the last year said their parents "never" supervised their computer use. Also, 52% of underage youth who have participated in at least one gambling activity where their was an exchange of money or something of value in the last year said they "sometimes" gamble at home,



and 9% reported that they "often" gamble at home. Although many young people indicated that they felt their parents were aware of their participation in gambling activities, many also believed their parents were indifferent to it. Of all youth in the survey who had gambled in the last year, 75% said their parents know the extent to which they gamble. Of significant note is that 75% of underage respondents whose parents were aware of their gambling believed that their parents neither support nor oppose their gambling. (See Figure 4.4)

Figure 4.4: Youth Perceptions of their Parent's Attitudes



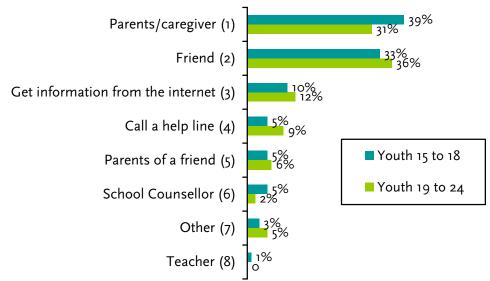
How do your parents/guardians feel about you gambling? Source: DECODING British Columbian Youth and Gambling, DECODE

PARENTS CAN BE PARTNERS

Not only are parents linked to participation in gambling activities they are also the first resource that underage youth say they would turn to should they ever feel they had a gambling problem. Friends followed close behind as a helpful resource youth felt they would potentially approach for help. (See Figure 4.5)



Figure 4.5: Resources Youth Potentially would turn to for Help



If you had a problem with gambling, who would you go to first for help? Source: DECODING British Columbian Youth and Gambling, DECODE

5) KEY THEMES AND CONSIDERATIONS

Some important themes have emerged in the study, providing insight and perspective on how to effectively communicate responsible gambling messaging to youth. The themes that should be top of mind when crafting responsible messaging campaigns include: risk is perceived to be positive, gender impacts gambling attitudes and behaviours, poker is on the rise, online changes the game, and parents can be partners. These themes and their respective implications are outlined below.

RISK IS PERCEIVED AS POSITIVE

Responsible messaging campaigns need to reflect the reality that youth perceive risk-taking behaviours as a catalyst for excitement, fun, and opportunity. Youth do not perceive gambling to be a pressing issue in comparison to other youth issues, such as drinking and driving or drug use, which have a higher likelihood of having immediate and severe consequences. Traditional responsible gambling messages that emphasize the level of risk and probability involved in gambling activities may not be the best angle to use when communicating with young people. Similarly, while shock-based communication messages may work well to reach youth for drinking and driving campaigns, they are less likely to be impactful for responsible gambling messages. Using humour/irony and framing the social and lifestyle impact of problem gambling may prove to be more in tune with youth perceptions of gambling. Synchronizing the tone of the message so it fits well



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with youth perspectives is key as it helps ensure the message is perceived as credible when it reaches youth audiences.

GENDER IMPACTS GAMBLING ATTITUDES AND BEHAVIOURS

Responsible use messaging needs to be tailored to impact specific youth audiences. Differences between gambling attitudes and behaviours of young males and young females are significant enough to warrant customized responsible youth messaging campaigns. Campaigns targeted to underage youth, for example, should be developed based on the knowledge that incidences of online gambling, poker, as well as the tendency to view gambling as a skill are highly skewed toward males. Female respondents appear to be more attracted to less social gambling activities such as Scratch & Win/Instant Win Tickets and Lottery Tickets. Findings and insights related to gender should be integrated into the content of communication messages as well as their design and placement.

THE RISE OF POKER

Like never before, poker is everywhere. The availability of poker play and poker viewing continues to expand as multiple media channels provide poker games or shows. Between TV broadcasts of Celebrity Poker or professional games, such as the World Poker Tour, online poker sites, social networking sites that include poker games, and mobile applications that support poker play, there are unlimited ways for youth to engage in poker at various times throughout the day. Media messaging around poker has impacted and continues to impact the normalization of gambling in general. Professional poker players have become well-known "Poker Stars", a sign of the widespread "poker craze" that has swept North America. Without a doubt, the rise of poker is impacting gambling attitudes and behaviours of youth today. The notion of gambling as a "skill" that can be improved with practice is one example of youth perceptions of the nature of gambling that is likely shaped or impacted because of the rise of poker.

Responsible gambling messages need to adapt to address youth engagement in poker. Instead of being restricted to playing at a casino or being required to purchase tickets from a vendor where there are age restrictions in place, poker (live or online) is not necessarily regulated and often takes place at home or at a friend's house. It follows that responsible messages focused on poker play need to target youth where they are playing, (i.e. in their home via TV and online campaigns). Also, creators of communication messages should



recognize and understand the generally positive social associations youth have for poker and the continued glamorization of the game.

ONLINE CHANGES THE GAME

Youth today have grown up in a world where online activities are continuously integrated into their daily lives. They are accustomed to easy access, instant information or play, and have developed the skills and savvy to use the Net with ease. Online gambling sites continue to increase in popularity, opening up countless avenues for youth to participate in gambling activities. The migration patterns identified in the study suggest that many youth who begin gambling online with "fake" money progress to "real" money sites afterwards. Social networking sites that are targeted to youth, such as Facebook, have quickly added poker and other gaming applications increasing the reach and popularity of online gambling. Males appear to be most vulnerable to online gambling involvement since their attitudes toward gambling as a skill based activity may encourage them to begin gambling on "fake" money sites. As a result, responsible gambling campaigns need to evolve so that they target youth not only where they spend their time but also where they gamble. Creating web-based strategies is essential. Numerous gambling sites actively attract new online users via pop-ups, other types of online advertisements, and links to social networking sites. Online responsible gambling campaigns need to be developed and implemented to educate youth as they make choices about their level of engagement in "fake" or "real" money gambling sites.

PARENTS CAN BE PARTNERS

This study clearly highlights that parents should be engaged as active partners both in regulating gambling behaviours and educating youth about responsible gambling. The rise of online gambling and poker are increasingly making the home one of the main locations where youth gamble. As a result, parents are in a position to recognize their child's participation in gambling activities and provide guidance and education about responsible gambling and gambling prevention. Parents appear to be the primary providers of lottery and other types of gambling tickets for youth, and accordingly can play an integral role as both regulators and role models. Parents are also the number one resource youth say they would turn to if they ever experience any problems as a result of gambling, which illustrates that youth are open to the idea of parents as resources for advice or help. Therefore, creating responsible messaging campaigns targeted to parents should be a high priority. Reaching youth where they spend their time involves not only targeting where they engage in gambling activities (i.e. increasingly at home)



but also who they turn to for advice or guidance. Parents need to engaged and given the tools and information necessary to understand the current realities of youth and gambling so that they can actively play a role in communicating responsible gambling messages to youth.

APPENDIX

SAMPLE SIZES REFERENCED IN THIS SUMMARY REPORT:

Sample	Sample Size
Total respondents	1,000
Female respondents	508
Male respondents	492
Youth ages 15-18	400
Youth ages 19-24	600
Females, ages 15 to 18	208
Males, ages 15 to 18	192
Females, ages 19 -24	300
Males, ages 19 – 24	300
Respondents who have participated in at least one gambling activity in the last 12 months	600
Female respondents who have participated in at least one gambling activity in the last 12 months	300
Male respondents who have participated in at least one gambling activity in the last 12 months	300
Youth ages 15-18, who have participated in at least one gambling activity in the last 12 months	171
Youth ages 19-24, who have participated in at least one gambling activity in the last 12 months	429
Females, ages 15-18 who have participated in at least one gambling activity in the last 12 months	81
Males, ages 15-18 who have participated in at least one gambling activity in the last 12 months	90
Females, ages 19-24 who have participated in at least one gambling activity in the last 12 months	219
Males, ages 19-24 who have participated in at least one gambling activity in the last 12 months	210
Respondents who have played poker online in the past 12 months	86

