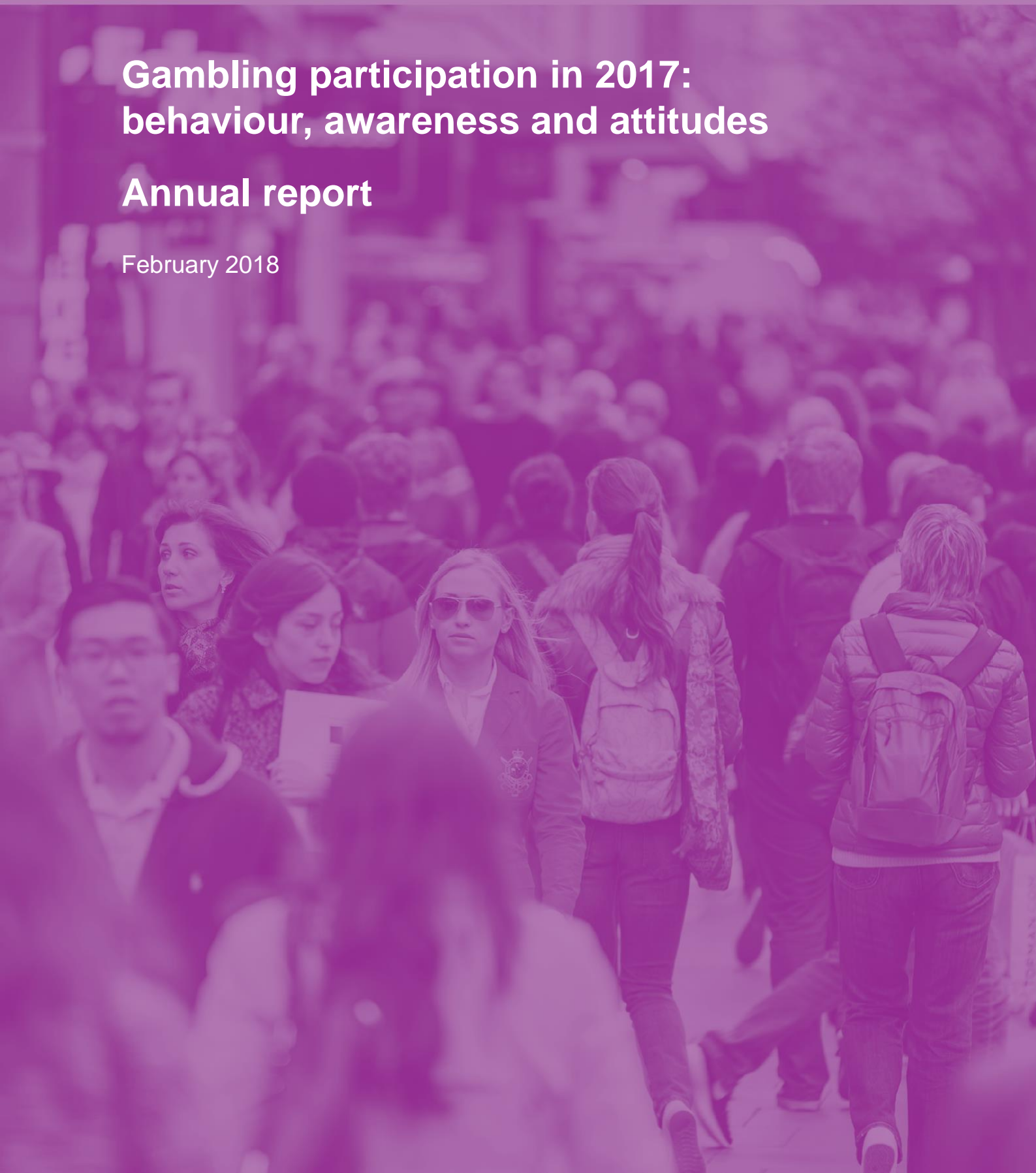


# **Gambling participation in 2017: behaviour, awareness and attitudes**

## **Annual report**

February 2018



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# Headline findings

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**45%**

Percentage of people who have participated in any form of gambling in the past four weeks  
(48% in year to December 2016)

**3.9%**

Proportion of respondents who were identified as low or moderate risk gamblers  
According to the full PGSI or DSM-IV screen

**31%**

Percentage of people who have participated in gambling in the past four weeks, excluding those who had only played the National Lottery draw  
(33% in year to December 2016)

**51%**

Proportion of online gamblers who have gambled using a mobile phone or tablet  
(43% in year to December 2016)

**18%**

Percentage of people who had gambled online in the past four weeks  
(17% in year to December 2016)

**26%**

Proportion of online gamblers who have bet in-play  
(26% in year to December 2016)

**1%**

Percentage of people who had played on machines in a bookmakers in the past four weeks  
(1% in year to December 2016)

**6%**

Proportion of gamblers who have ever self-excluded  
(6% in year to December 2016)

**0.8%**

Proportion of respondents who were identified as problem gamblers  
According to the full PGSI or DSM-IV screen

**33%**

Proportion of people who think that gambling is fair and can be trusted  
(34% in year to December 2016)

**41%**

Proportion of people who think that gambling is associated with crime  
(39% in year to December 2016)

# Executive summary

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## Background and context

This report presents annual estimates of gambling behaviour in Great Britain in 2017, and constitutes the Gambling Commission's regular tracker of gambling participation. The datasets have been gathered via a combination of telephone and online surveys with people aged 16+, conducted independently by Populus. The datasets cover the past four week participation rate, problem gambling estimates<sup>1</sup>, online gambling behaviour, consumer awareness of gambling tools, and perceptions and attitudes towards gambling.

This report reflects the headline findings and gambling behaviour in Great Britain, and is accompanied by a detailed data file and technical annex.

## Survey findings

### Gambling participation

Our research found that overall, gambling participation has decreased since 2016 with 45% of people aged 16+ having participated in at least one form of gambling in the past four weeks in 2017 (48% in 2016). Men are more likely to have gambled than women and those aged 55-64 are most likely to have gambled in the past four weeks. This is predominantly driven by participation in the National Lottery draws as when people who have only gambled in the National Lottery draws are excluded, participation is highest among 16-34 year olds.

Overall, 18% of people have gambled online in the past four weeks. Those aged 25-34 and 55-64 have seen the largest increases in online gambling participation whereas those aged 16-24 have seen a decline in online gambling participation in 2017. In terms of gambling activities:

- The National Lottery draws remain the most popular gambling activity, followed by scratchcards and other lotteries.
- Football and horse racing are the most popular betting activities.
- All gambling activities have seen an increase in online participation with the exception of betting on horse races and spread betting.
- In-person participation has declined for most activities.

### Problem gambling estimates

An estimated 0.8% of people were identified as a problem gambler according to the full Problem Gambling Severity Index (PGSI)<sup>2</sup> or DSM-IV screen with a further 3.9% identifying as at low or moderate risk.

### Online gambling behaviour

Although declining in use for gambling, laptops remain the most popular method of accessing online gambling in 2017 with 50% of online gamblers using a laptop. The use of mobile phones has seen the largest increase to 39% (an increase of 10 percentage points). The majority of online gamblers (97%) play at home. Male online gamblers were more likely than females to gamble outside of the home including on their commute, at work, at a venue or in a pub/club – as were younger age groups. Among online gamblers, 27% have bet in-play, with rates highest in 25-34 year olds but the largest increase was seen in 55-64 year olds. On average, online gamblers have four accounts with online gambling operators. 6% of online gamblers have bet on eSports during the past 12 months, with rates highest among 25-34 year olds.

<sup>1</sup> The Commission will continue to use the full PGSI and DSM-IV screen as its main measure of problem gambling as used in the Health Survey for England, Scottish Health Survey and the Welsh Problem Gambling Survey.

<sup>2</sup> The PGSI methodology is available in Appendix 1.

## Consumer analysis

Awareness of self-exclusion among those who have never excluded remains stable at 35%. Overall 6% of gamblers have ever self-excluded. Men and those aged 25-34 are most likely to self-exclude. Among gamblers, 60% have either seen or received gambling related information from a gambling operator, with most having seen or received information relating to transaction and play history of their account.

Overall, 22% have read terms and conditions, of which 27% felt they had been in a situation where terms and conditions had been unfair. Overall, 8% of gamblers have ever made a complaint to or about a gambling operator, with rates highest among 18-24 year olds.

In terms of social media and advertising:

- 26% of online gamblers follow a gambling company on a social media platform with rates highest among 18-24 year olds.
- Facebook remains the most popular social media platform on which online gamblers follow gambling companies.
- 51% of people have seen a gambling advert on the television in the past week and 46% of people have seen or heard a gambling sponsorship on the television or radio in the past week.
- Online gamblers are more likely to be prompted to spend money on gambling by advertising (e.g. seeing an advert on television) than social media posts.

## Perceptions and attitudes

Overall, perceptions and attitudes towards gambling are more negative than in 2016 with 33% of respondents thinking that gambling is fair and can be trusted and 41% thinking that gambling is associated with criminal activity. Theft and fraud are the crimes people associate the most with gambling.

In addition, 80% of people think there are too many opportunities for gambling nowadays and 71% think that gambling is dangerous for family life, however 64% of respondents thought that people should have the right to gamble whenever they want.

# Preface

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## The Gambling Commission

The Gambling Commission (the Commission) was set up under the Gambling Act 2005 (the Act) to regulate commercial gambling in Great Britain in partnership with licensing authorities. We also regulate the National Lottery under the National Lottery etc. Act 1993.

Further details can be found on our [website](#).

## Methodology

This report summarises data collected by the Commission during 2017, and covers gambling participation and consumer behaviour. The data have been gathered via a combination of telephone and online surveys, as indicated in the table below and throughout this report.

Topic area	Survey
Gambling participation Rates of problem gambling Perceptions of and attitudes towards gambling	Telephone
Online gambling behaviour Consumer interest and awareness	Online

Full methodological details can be found in appendix 1 of this report and in the accompanying technical annex. A brief overview of the approach used in each survey is included below.

### Report conventions

Trends described in this report identify percentage point changes, and are significant at the 95% level (unless otherwise stated).

The following conventions have been used in the tables:

- Denotes no observations (zero values)

Confidence levels and sample sizes for the most recent wave of data collection can be found in the technical annex.

The base sizes reported have been weighted.

### Telephone survey

The telephone survey is the Commission's main measure of past four week gambling participation, with surveys conducted on a quarterly basis in March, June, September and December of each year. Approximately 1,000 interviews are conducted each quarter with people aged 16+ in a standalone survey administered by Populus. The

sample used is nationally representative of the population of Great Britain and the findings presented in this report are weighted in terms of demographic and socio-economic indicators. The results are reported on a rolling year basis to counteract seasonal trends in gambling participation. The data reported in this publication cover the year to December 2017, with trend data taken from the same period in the three years previous.

The core content of the telephone survey is as follows:

- Past four week participation in a range of gambling activities<sup>3</sup>
- Mode of play on individual activities
- Frequency of play by activity and mode
- Problem gambling<sup>4</sup>
- Perceptions and attitudes towards gambling

### Online survey

The online survey is used to monitor online gambling behaviour and was launched following the introduction of regulation of overseas gambling companies transacting with GB customers (in line with the [Gambling \(Licensing and Advertising\) Act 2014](#)). The surveys are conducted quarterly in March, June, September and December by Populus. 2,000 interviews with people aged 18+ are collected each quarter and the survey sample is drawn from online panel members. Once again, the data reported are weighted in terms of demographic and socio-economic indicators and are calculated using all four quarters of data covering the year to December 2017, with trend data taken from the same period in previous years.

The core content captured in the online survey is:

- Devices used for gambling online for individual activities
- Location of play for individual activities
- In-play betting
- Number of accounts held with operators
- Impact of social media and advertising on spend
- Participation in social gaming

The online survey also includes broader questions asked to both gamblers and non-gamblers about wider gambling issues.

<sup>3</sup> The fruit and slot machine category and the sports betting category were expanded in March 2016 to provide more granularity in the data. Fruit and slot machines are now captured by location; in pubs, gaming centres or arcades, casinos and bingo halls. Sports betting is now collected by type; football, tennis and all other sports.

<sup>4</sup> The Commission will continue to use the full PGSI and DSM-IV screen as its main measure of problem gambling as used in the Health Survey for England, Scottish Health Survey and the Welsh Problem Gambling Survey.

# Gambling participation

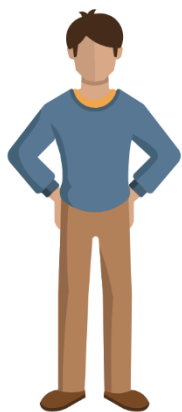
**45%** of adults aged 16+ have participated in gambling in the past four weeks

3% decrease from 2016

National Lottery draws are the most popular activity, but participation is declining

3% decrease from 2016

31% of gamblers have only gambled on National Lottery draws in the past four weeks



**48%**  
of men have gambled



**41%**  
of women have gambled



Participation in premise based gambling has decreased across most activities



Online participation has increased across most activities



**18%**  
of adults have gambled online



Playing on machines in a bookmakers has remained stable



Football is the most popular betting activity



**33%** of gamblers gamble once a week

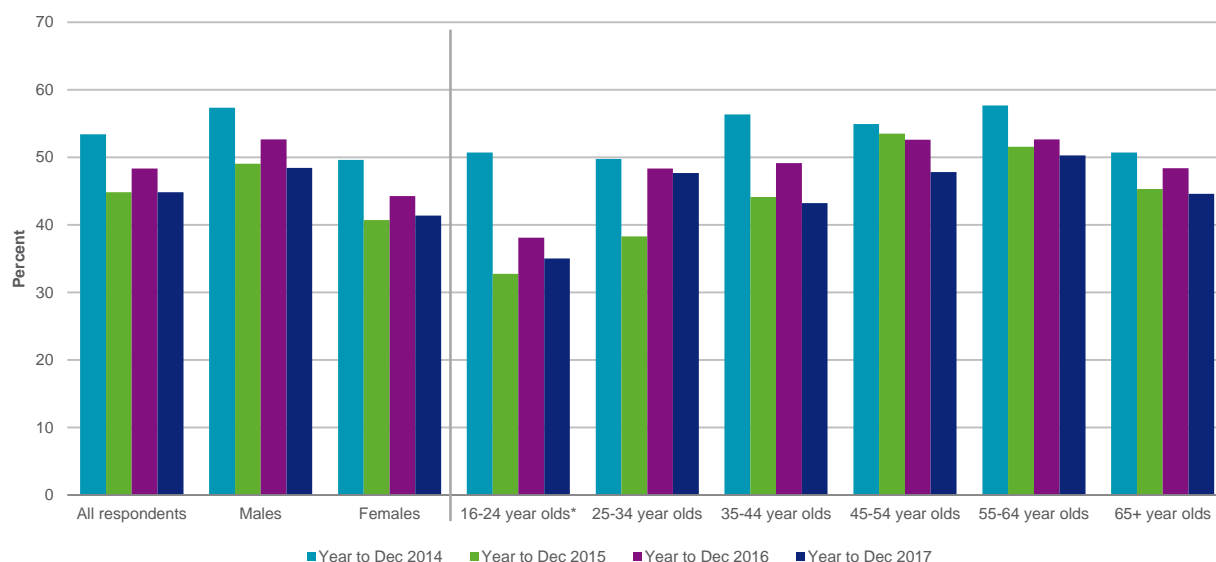
# Gambling participation

This section reports on gambling participation in the year to December 2017, using data collected via a quarterly telephone survey. Surveys are conducted with people in Great Britain aged 16+. These questions ask respondents about their gambling participation in the past four weeks. Full data tables can be found in the accompanying data file.

## How many people gamble

Overall, 45% of adults (16+) said they have participated in at least one form of gambling in the previous four weeks (a 3 percentage point decrease from 2016, but consistent with the figures reported in 2015). As figure 1 shows, a larger proportion of men (48%) have participated in any form of gambling than women (41%). Although gambling participation has declined across all age groups from 2016, those participating in gambling are more likely to be aged between either 45 and 64 and 25 and 34, with 50% of 55-64 year olds, and 48% of 45-54 year olds and 25-34 year olds having gambled in the past four weeks. Gambling participation declined the most among those aged 35 to 44, from 49% in 2016 to 43% in 2017.

Figure 1: Past four week gambling participation by gender and age<sup>5,6</sup> (n=4,001)



As participation in the National Lottery draws is so much higher than other gambling activities (see figure 5), changes in National Lottery participation can have a noticeable impact on overall participation rates. Figure 2 shows that when we look at just those who had gambled on at least one activity in the previous four weeks, 31% had only gambled on the National Lottery draws (a consistent finding with 2016). As a result, much of the decline in overall gambling participation since year to December 2014 can be attributed to falling participation in the National Lottery draws. It is therefore useful to remove the responses of respondents who have only participated in the National Lottery draws to highlight patterns across age and gender groups.

<sup>5</sup> In March 2016 the sample was broadened to include participants aged 16+.

<sup>6</sup> One survey conducted in the year to December 2014 took place in a period covering the Grand National. This explains the spike in overall participation (excluding National Lottery draw products), as well as for 18-24 year olds.

Figure 2: Proportion of gamblers participating in National Lottery draws only (n=1,793)

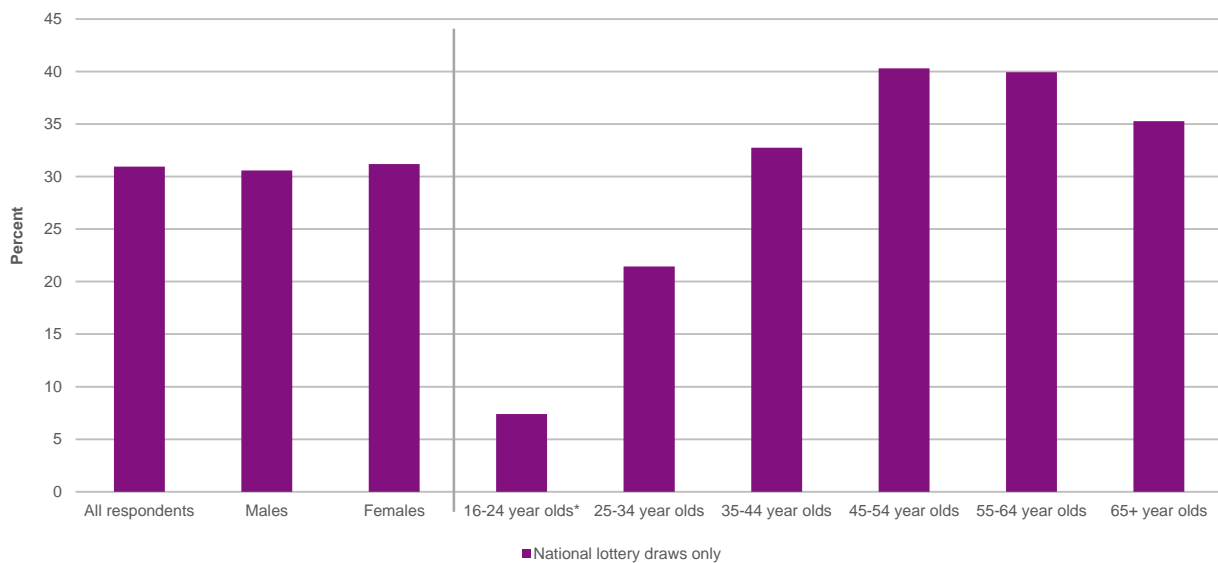
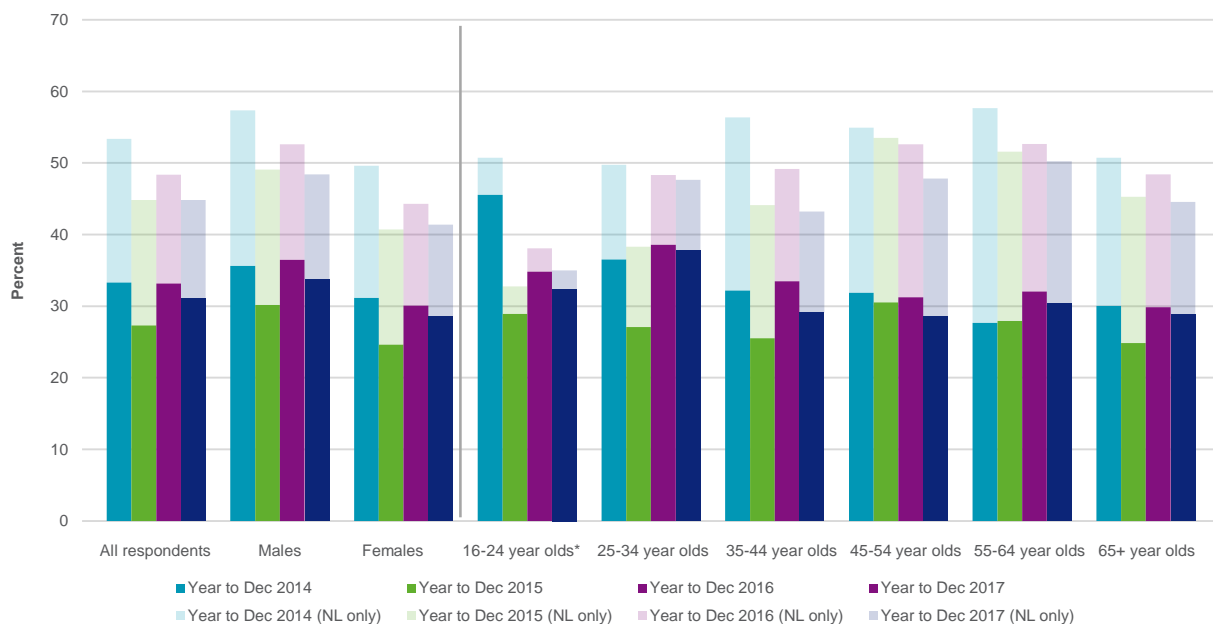


Figure 3 shows that when these respondents are excluded, the overall participation rate falls from 45% to 31%. Participation remained higher for men (34%) than women (28%). However, participation across the age groups varied, with 25-34 years olds and 16-24 year olds more likely to have gambled on at least one activity in the previous four weeks (37% and 32% respectively). Figure 3 also highlights via the shaded bars that those aged between 45 and 64 were most likely to have participated in only the National Lottery draws in the previous four weeks (19% of 45-54 year olds and 20% of 55-64 year olds).

Figure 3: Past four week gambling participation (excluding participation in National Lottery draws) by gender and age<sup>7,8</sup> (n=4,001)



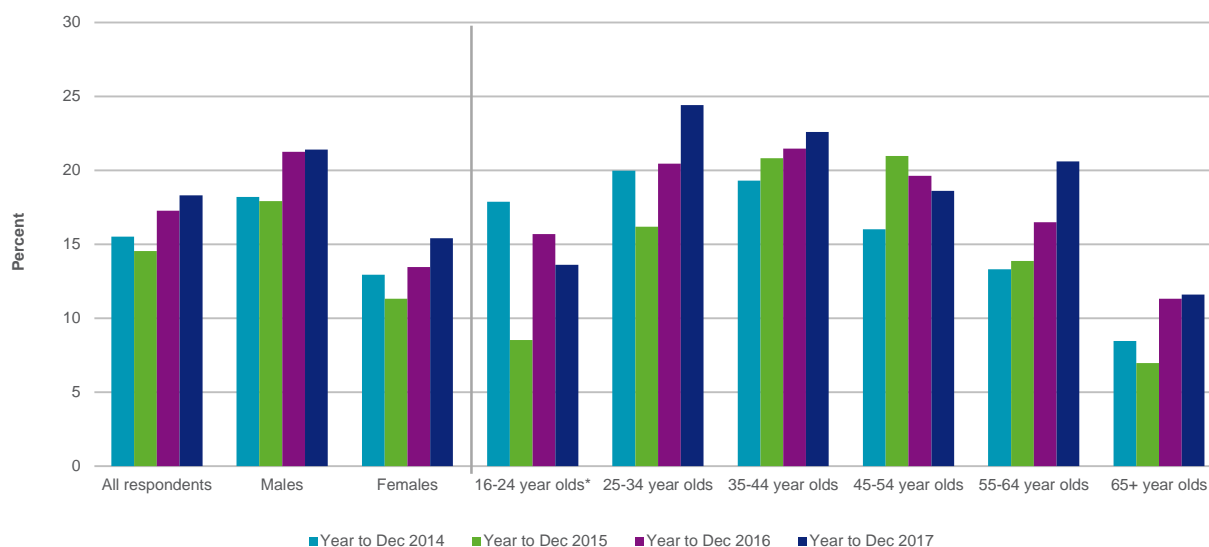
<sup>7</sup> In March 2016, the sample was broadened to include participants aged 16+

<sup>8</sup> One survey conducted in the year to December 2014 took place in a period covering the Grand National. This explains the spike in overall participation (excluding National Lottery draw products), as well as for 18-24 year olds.

Overall, 18% of people have gambled online in the previous four weeks (a 1 percentage point increase<sup>9</sup> from 2016 and a consistent trend since 2014). This is higher among men (21%) than women (15%). Those aged 55 to 64 and 25 to 34 saw the largest increase in online gambling participation, with 21% of 55-64 year olds and 24% of 25-34 year olds having gambled online in the previous four weeks (a 4 percentage point increase from 2016). However, online participation has decreased among those aged 16-24 from 16% in 2016 to 13% in 2017.

When those who only participated in National Lottery draws were excluded, the online gambling participation rate falls to 14% (the same proportion as 2016).

**Figure 4: Past four week online gambling participation by gender and age (n=4,001)**



## What people gamble on

Figure 5 shows the types of gambling activity in which people had participated in the previous four weeks and displays declining participation rates across most types of gambling activity.

The most popular activity in 2017 was National Lottery draws (27%, a 3 percentage point decrease from 2016), followed by scratchcards and other lotteries (both 11%, a 1 percentage point decrease<sup>10</sup> from 2016). Despite remaining the most popular gambling activity, there has been a continued decline in participation in the National Lottery draws coinciding with, amongst other factors, the increase in the Lotto ticket price from £1 to £2 which was introduced in October 2013 and the increase in the number of lotto balls which was introduced in October 2015.

As figure 5 shows survey changes<sup>11</sup> introduced in March 2016 have improved data collection accuracy for fruit and slot machines and sports betting, as there were notable increases in participation in both of these categories in the year to December 2016. In 2017, participation in fruit and slot machines decreased slightly to 4%, the most popular locations to participate in slots were pubs (2.4%) and arcades (2.2%). Participation in sports betting also decreased slightly to 6%.

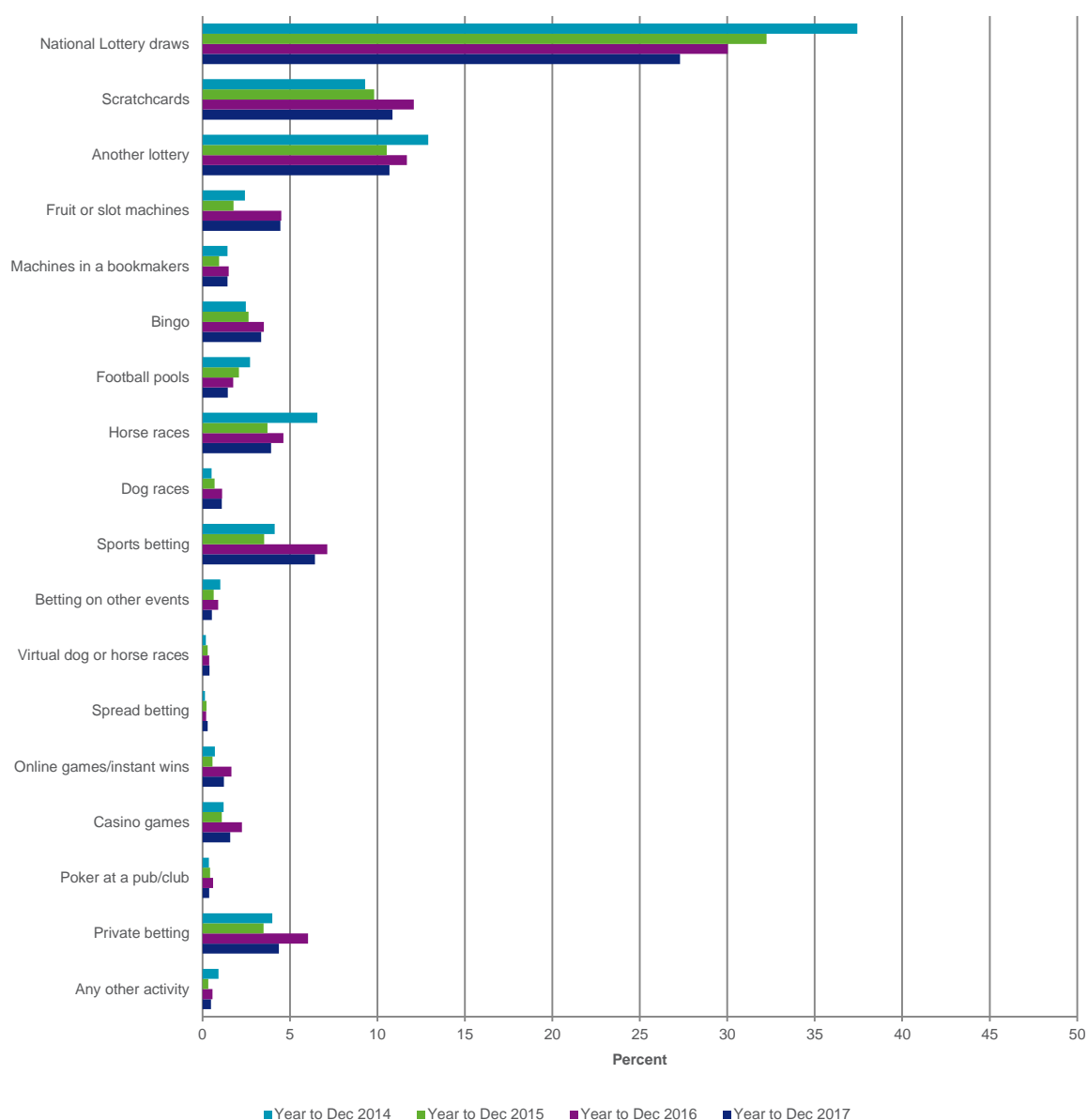
Machines in bookmakers (otherwise known as FOBTs) have remained stable from 2016 at 1%.

<sup>9</sup> Not statistically significant at the 95% level.

<sup>10</sup> Not statistically significant at the 95% level.

<sup>11</sup> The fruit and slot machine category and the sports betting category were expanded in March 2016 to provide more granularity in the data. Fruit and slot machines are now captured by location; in pubs, gaming centres or arcades, casinos and bingo halls. Sports betting is now collected by type; football, tennis and all other sports.

Figure 5: Past four week gambling participation by activity (n=4,001)

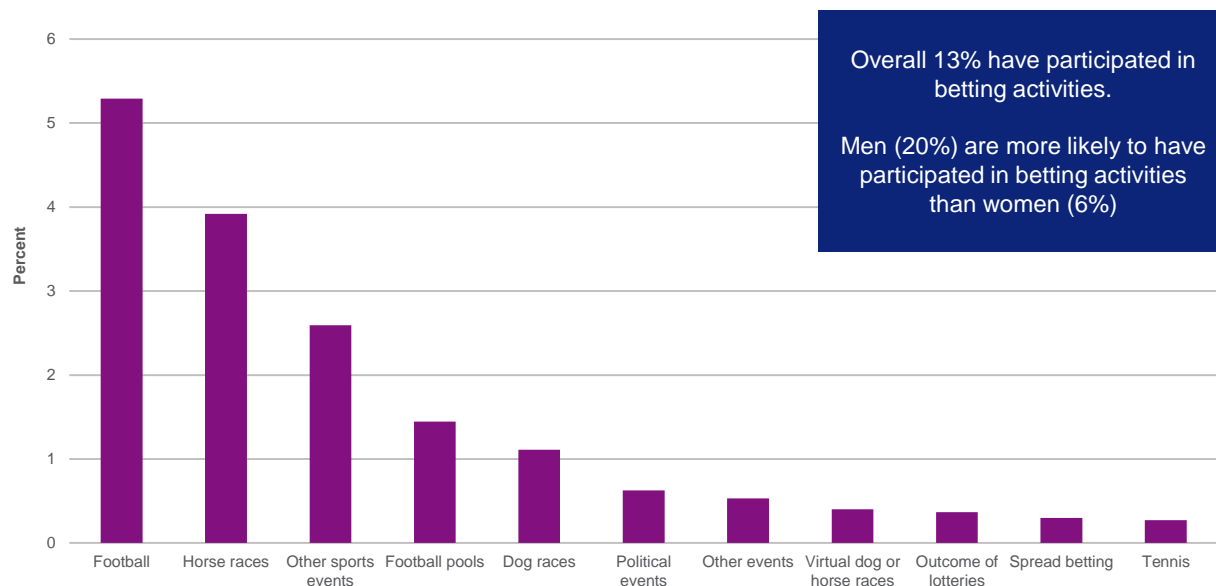


Overall, 13% of people had participated in any betting activity<sup>12</sup> in the previous four weeks. However, when we look at just those who had gambled on at least one activity in the previous four weeks, 29% had participated in betting activities. Figure 6 shows the most popular betting activity in 2017 was football (5%), followed by horse races (4%) and other sports (3%)<sup>13</sup>.

<sup>12</sup> Betting activities includes betting on horse races, betting on dog races, betting on football pools, betting on football, betting on tennis, betting on other sports events, betting on other events, betting on virtual dog or horse races, spread betting, betting on the outcome of lotteries, and betting on political events

<sup>13</sup> Survey changes in 2016 extended the data collection for different types of betting activities, with 'betting on other events', broadened to capture rates of betting on the outcome of lotteries and betting on political events.

Figure 6: Past four week betting participation by activity (n=4,001)



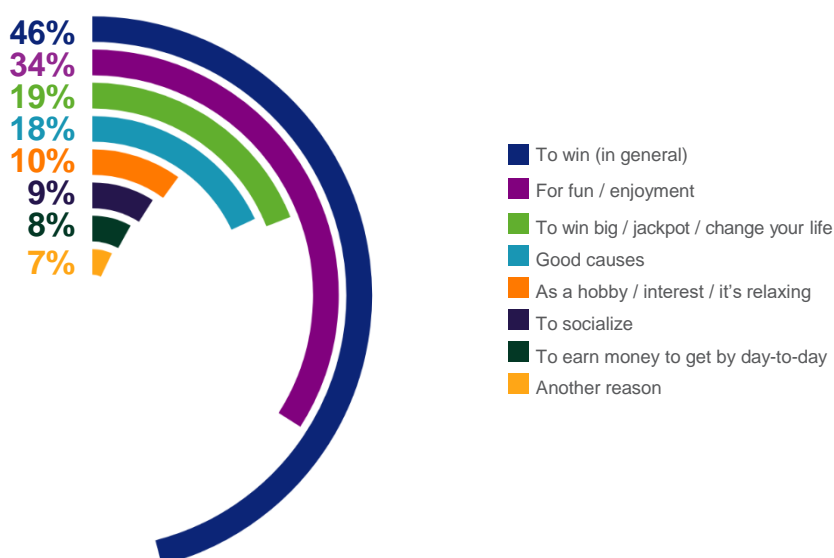
## Why people gamble

Survey changes at the beginning of 2017 extended data collection to ask gamblers to think about the reasons why they have taken part in gambling activities in the past four weeks.

As figure 7 shows, most gamblers reported participation was due to wanting to win in general (46%), followed by for fun and enjoyment (34%), wanting to win a jackpot (19%), and wanting to contribute to good causes (18%). Women are more likely than men to participate in gambling to win (49% and 44% respectively), and men are more likely than women to participate in gambling for fun and enjoyment (39% and 29% respectively). Younger age groups are much more likely to report they gamble for fun and enjoyment than older age groups.

National lottery players are much more likely to gamble to win in general (56%) than to gamble for fun (25%). Conversely, machines in bookmakers (FOBTs) players are much more likely to gamble for fun (61%) than to win (39%).

Figure 7: Reasons for past four week gambling participation (n=1,793)

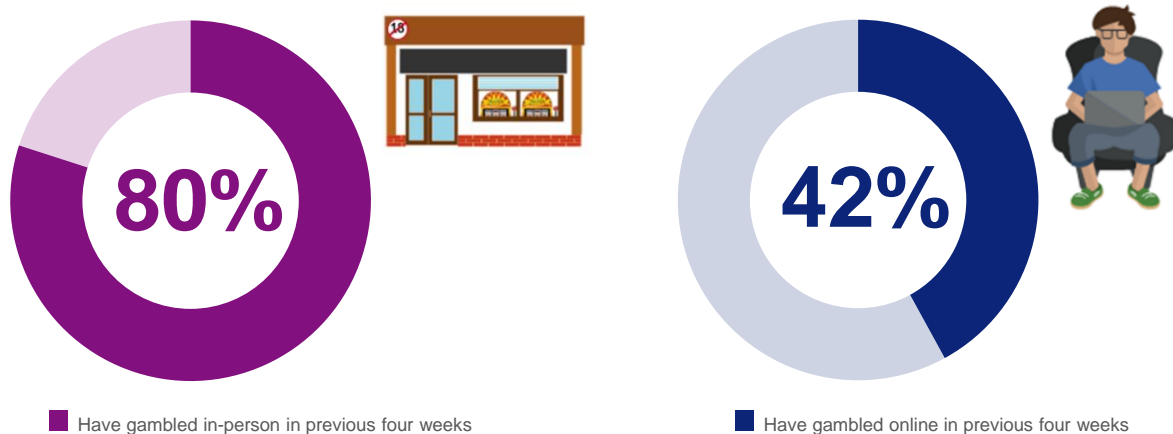


## How people gamble

For each activity undertaken that can be accessed through different methods, respondents are asked whether they participated in-person only, online only, or both<sup>14</sup>.

Figure 8 below shows that 80% of previous four week gamblers have gambled in-person, whilst 42% have gambled online. When interpreting this data caution should be applied due to the small base sizes involved for some activities. Base sizes can be found in the technical annex accompanying this report.

Figure 8: Overall participation in the past four weeks by channel (n=1,793)



Figures 9 and 10 display in-person and online participation in the previous four weeks by those activities that can be accessed through multiple methods<sup>15</sup>.

Figure 9 shows that there has been a decrease in in-person participation for a number of activities including the National Lottery draws (76%, a 3 percentage point decrease<sup>16</sup> from 2016), other lotteries (59%, a 4 percentage point decrease<sup>17</sup> from 2016), and casino games (58%, a 4 percentage point decrease from 2016). Most notably, bingo has seen the greatest decline in people playing in person from 2016 (71%, a 14 percentage point decrease from 2016), which coincides with the decline in the number of bingo premises in the last 12 months. This year has also seen a decrease in people placing bets on sporting events in person from 2016, which is likely to have been driven by the absence of major high profile sporting events taking place in 2017 compared with 2016. However, small increases in in-person participation have been seen across a number of betting activities.

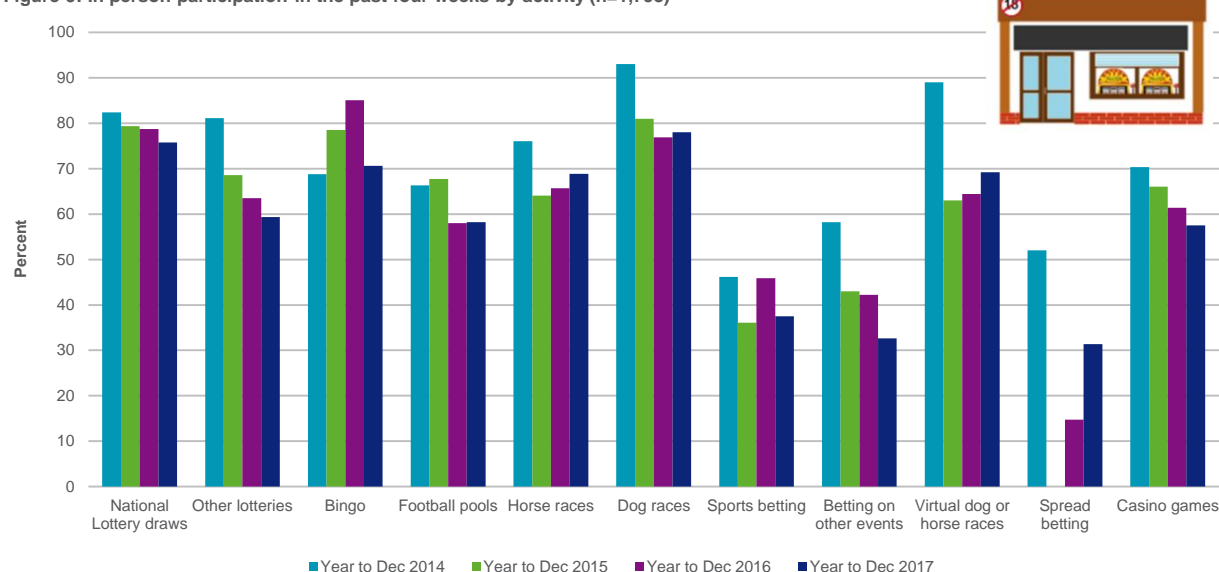
<sup>14</sup> When interpreting this data caution should be applied due to the small base sizes involved for some activities. Base sizes can be found in the technical annex accompanying this report.

<sup>15</sup> Both charts include respondents who have participated both in person and online, therefore combined percentages may add up to more than 100%.

<sup>16</sup> Not statistically significant at the 95% level

<sup>17</sup> Not statistically significant at the 95% level

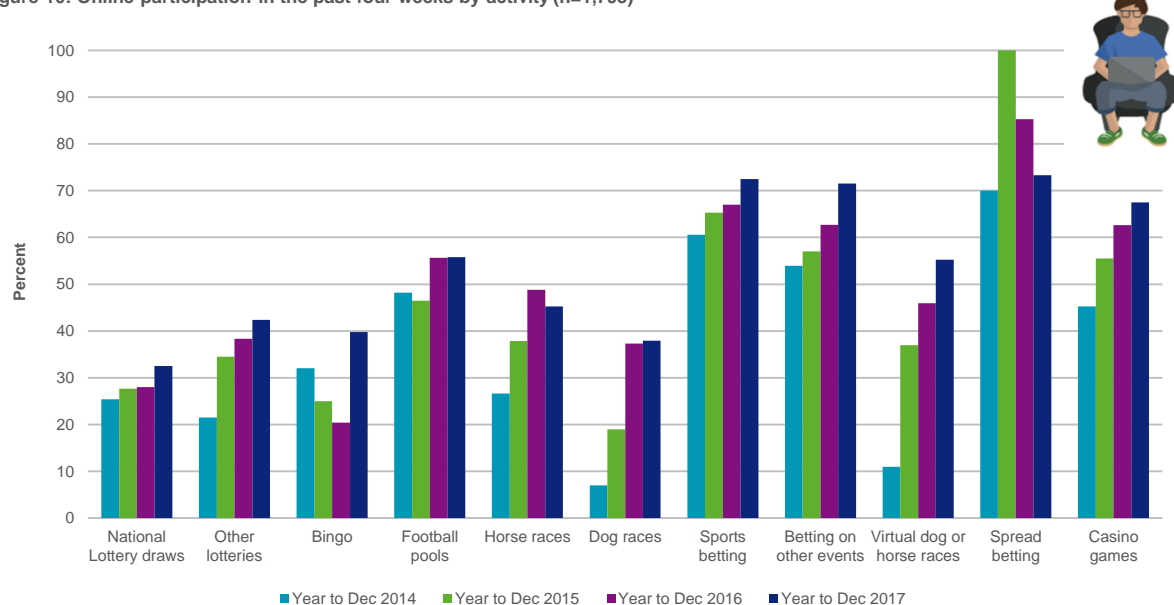
Figure 9: In person participation in the past four weeks by activity (n=1,793)



On the other hand, figure 10 displays online participation rates<sup>18</sup> where all types of gambling activity have seen increases with the exception of spread betting<sup>19</sup> and betting on horse races. This is most evident in bingo (40%, a 19 percentage point increase from 2016), which again coincides with the decline in number of bingo premises in the last 12 months. Increases have also been observed across the National Lottery draws (33%, a 5 percentage point increase from 2016) and other lotteries (42%, a 4 percentage point increase<sup>20</sup> from 2016).

These diverging trends may potentially indicate a shift in channel for many gamblers, either by existing gamblers moving from more traditional in person gambling to online methods, or newcomers choosing to gamble online as opposed to in person.

Figure 10: Online participation in the past four weeks by activity (n=1,793)



<sup>18</sup> In year to December 2015 no observations were recorded for spread betting

<sup>19</sup> Caution should be applied, spread betting is primarily a niche online activity and therefore has small sample sizes

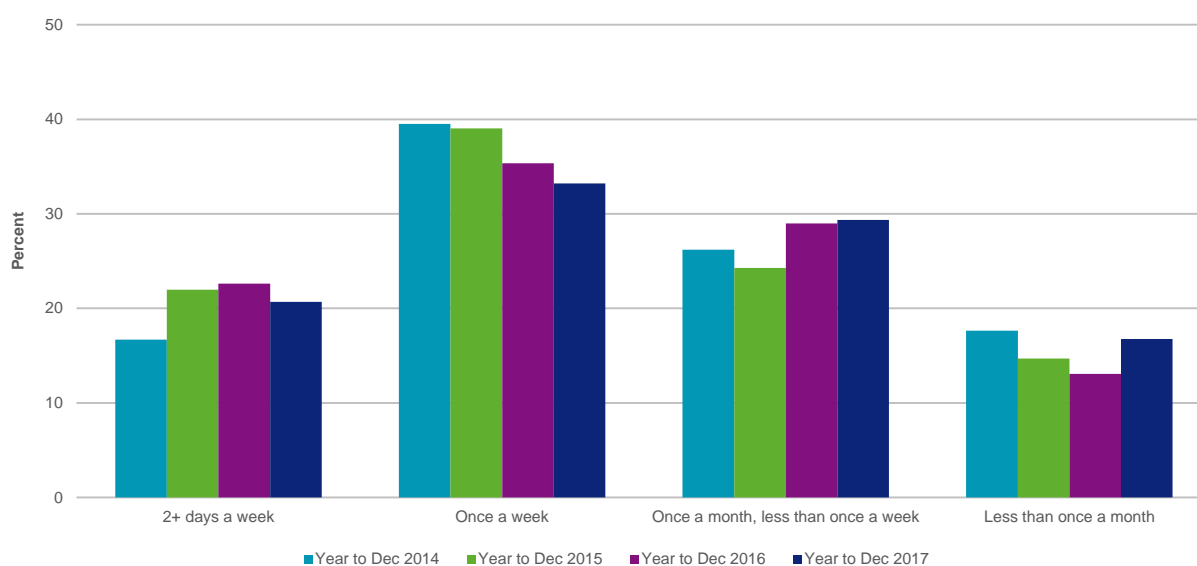
<sup>20</sup> Not statistically significant at the 95% level.

## How often people gamble

For each activity undertaken in the past four weeks, respondents are asked how often they spent money on that activity. The data displayed below shows overall frequency of play when all activities have been taken into account.

Figure 11 shows the highest frequency of gambling on any individual activity in the previous four weeks was most commonly once a week (33%, a 2 percentage point decrease<sup>21</sup> from 2016), closely followed by once a month but less than once a week (29%, no change from 2016). Since 2014 there has been a steady decline in the number of people saying once a week and an increase in the number of people saying once a month but less than once a week. Meanwhile, 21% gamble on any individual activity two or more days a week (a 2 percentage point decrease<sup>22</sup> from 2016) and 17% gamble less than once a month (a 4 percentage point increase from 2016).

Figure 11: Most common frequency of gambling on any activity (n=1,793)



<sup>21</sup> Not statistically significant at the 95% level.

<sup>22</sup> Not statistically significant at the 95% level.

# Problem and at-risk gambling



**0.8%**

**of respondents identified as problem gamblers**

According to the full PGSI or DSM-IV screen

**3.9%**

**of respondents identified as at-risk gamblers**

According to the full PGSI or DSM-IV screen

**58.3%**

**of respondents identified as non-problem gamblers**

According to the full PGSI or DSM-IV screen

**37.0%**

**of respondents were non-gamblers**

According to the Combined Health Survey 2015

The Commission will continue to use the full PGSI screen and the DSM-IV as its main measure of problem gambling as used in the Health Survey for England, Scottish Health Survey and the Welsh Problem Gambling Survey. These figures are displayed above.



**Men and younger people are more likely to be categorised as problem gamblers**



**5.6%**

**of gamblers have felt guilty about their gambling**



**5.6%**

**of gamblers have bet more than they can afford to lose**



**3.3%**

**of gamblers have been criticised about their gambling or told that they have a gambling problem**

The three figures above form the short-form Problem Gambling Severity Index, collected from the Commission's telephone survey.

# Problem and at-risk gambling

Problem gambling is defined as behaviour related to gambling which causes harm to the gambler and those around them<sup>23</sup>. This may include family, friends and others who know them or care for them. This section presents the Commission's official statistics on the prevalence of problem gambling, taken from the Gambling behaviour in Great Britain report released in August 2017, where the full PGSI screen and the DSM-IV is used as the main measure of problem gambling.

In addition, the Commission also tracks problem gambling data using the smaller scale telephone survey which acts as a more regular measure for identifying any changes in problem gambling trends. This tool uses a short-form Problem Gambling Severity Index<sup>24</sup> (PGSI mini-screen). This instrument is formed of three questions instead of the full nine. Respondents are then categorised by their total score as either a problem gambler, moderate risk gambler, low risk gambler, or non-problem gambler.

Due to the small base sizes presented by the Commission's telephone survey, the mini-screen should not be considered as the Commission's comprehensive estimate of problem gambling rates in Great Britain. As such the Commission will continue to use the full PGSI screen and the DSM-IV as its main measure of problem gambling as used in the Health Survey for England, Scottish Health Survey, and the Welsh Problem Gambling Survey. This section of the report therefore presents the main measure of problem gambling rates, with comparisons where possible to the problem gambling rates collected in the telephone survey.

Further information about the measurement of problem gambling can be found in appendix 1 or the technical annex accompanying this report.

## At-risk gambling

According to the Commission's official Health Survey rates, 3.9% of adults were classed as at-risk gamblers. Men are more likely to be classified as at-risk gamblers, with 6.0% of men identified as such, compared to 1.9% of women. Those aged 16-24 and 25-34 are most likely to be classified as at-risk (7.3% and 7.2% respectively). By comparison, the Commission's regular telephone survey, which uses the mini-screen reported at-risk rates to be 5.2%, however due to its small base sizes, the mini-screen should not be considered the Commission's comprehensive estimate of at-risk gambling rates in Great Britain.

Table 1: At-risk gambling by gender and age

Low or moderate risk gambling (according to the full PGSI or DSM-IV) by gender and age (2015)	
	2015 (%)
All respondents (n=14,941)	3.9
male respondents	6.0
female respondents	1.9
16-24 year olds	7.3
25-34 year olds	7.2
35-44 year olds	4.0
45-54 year olds	2.8
55-64 year olds	2.3
65-74 year olds	1.4
75+ year olds	0.5
Low or moderate risk gambling (according to the short-form PGSI) (Year to Dec 2017)	
	Year to December 2017 (%)
All respondents (n=4,001)	5.2

<sup>23</sup> Gamble Aware (<http://www.gambleaware.co.uk/recognise-a-problem>).

<sup>24</sup> Developing a Short Form of the PGSI (Volberg, 2012).

## Problem gambling

According to the Commission's official Health Survey rates, 0.8% of respondents were identified as problem gamblers. Men are more likely to be classified as problem gamblers with 1.5% of men identified as such compared to 0.2% of women. Those aged 25 to 34 are most likely to be classified as problem gamblers (2.0%), followed by 16-24 year olds (1.6%).

By comparison, the Commission's regular telephone survey, which uses the mini-screen, reported the problem gambling rate to be 0.6%, however due to its small base sizes, the mini-screen should not be considered the Commission's comprehensive estimate of at-risk gambling rates in Great Britain.

**Table 2: Problem gambling by gender and age (n=4,001)**

Problem gamblers (according to the full PGSI or DSM-IV) by gender and age (2015)	
	2015 (%)
All respondents (n=14,941)	0.8
male respondents	1.5
female respondents	0.2
16-24 year olds	1.6
25-34 year olds	2.0
35-44 year olds	1.4
45-54 year olds	1.4
55-64 year olds	0.9
65-74 year olds	0.6
75+ year olds	0.2
Problem gamblers (according to the short-form PGSI) (Year to Dec 2017)	
	Year to December 2017 (%)
All respondents (n=4,001)	0.6

Looking at the three questions that form the short-form Problem Gambling Severity Index in isolation, similar proportions of gamblers (5%) have reported having felt guilty about their gambling and having bet more than they can afford to lose. A smaller proportion of gamblers (3%) reported having been criticised about their gambling or told they have a gambling problem.

# Online gambling behaviour



Laptops remain the most popular device for online gambling



+10% from 2016

Use of mobile phones has increased for gambling (39% in 2017)



+8% from 2016

Use of mobile phones and tablets is increasing (51% in 2017).



**97%** of online gamblers play at home



Those aged under 35 are more likely to gamble outside of the home



22% of online gamblers aged 18-24 gamble at work



The average number of online accounts is 4



**1 in 4** online gamblers have bet in-play (last 4 weeks)



6% of respondents had bet on eSports (last 12 months)

# Online gambling behaviour

This section reports data on online gambling behaviour in the year to December 2017, using data collected via a quarterly online survey conducted by Populus. Surveys are conducted with people in Great Britain aged 18+. The core questions in the survey ask online gamblers about how and where they gamble online.

## Devices used

Once online gamblers have been identified in the survey (using questions covering past four week gambling participation by activity, followed by mode of play<sup>25</sup>), they are asked which devices they use to gamble online<sup>26</sup>.

Although in steady decline in recent years, laptops remain the most popular method of accessing online gambling (50% in 2017), this is followed by mobile phone devices (39%) and PCs (33%). The gender split across all devices was similar, the exception being PCs, where male gamblers were much more likely to have used a PC than females (39% compared to 24%).

There has been a growth in the proportion of people gambling online using mobile phones (39%, a 10 percentage point increase from 2016). In the last 12 months, mobile phone participation amongst men increased (40%, an 8 percentage point increase from 2016) and participation amongst women also increased from (38%, a 13 percentage point increase from 2016). The proportion of online gamblers who have gambled using either a mobile phone or tablet was 51%, an 8 percentage point increase from 2016).

Figure 12: Devices used for online gambling in the past four weeks (n=4,083)

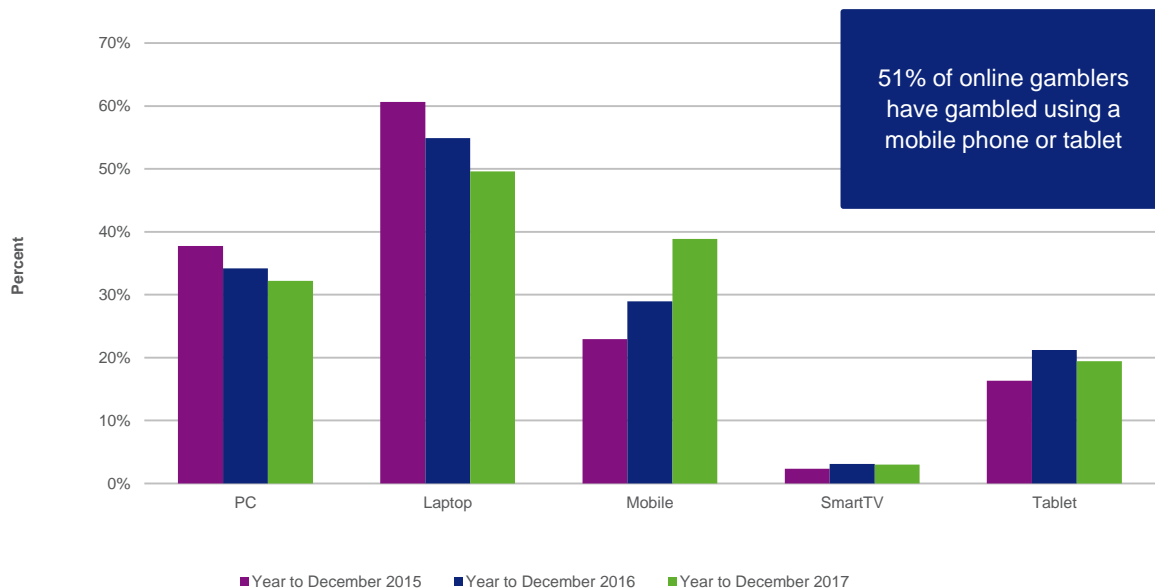


Figure 13 shows that those aged 18-44 are more likely to gamble with multiple devices, this is a consistent finding with 2016 as shown by the trend line. Betting on football, tennis and other events were the activities in which respondents were most likely to have used two or more devices.

<sup>25</sup> The phrasing of these questions is the same in both the online and telephone surveys.

<sup>26</sup> Respondents are able to select multiple devices over multiple activities.

Figure 13: Devices used for online gambling in the past four weeks by age<sup>27</sup> (n=4,083)

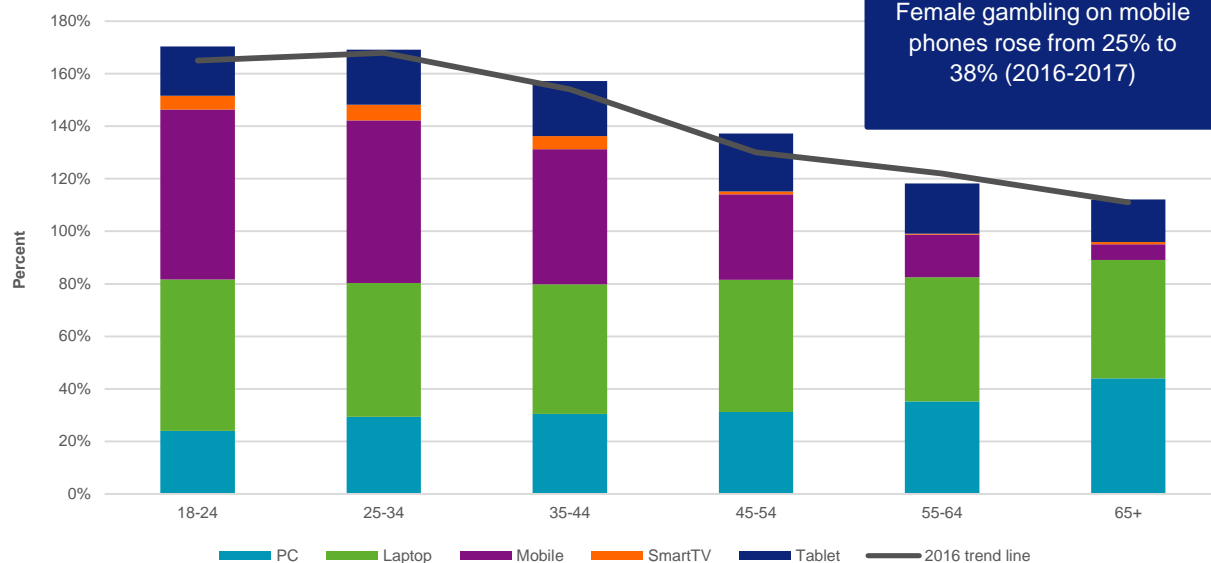
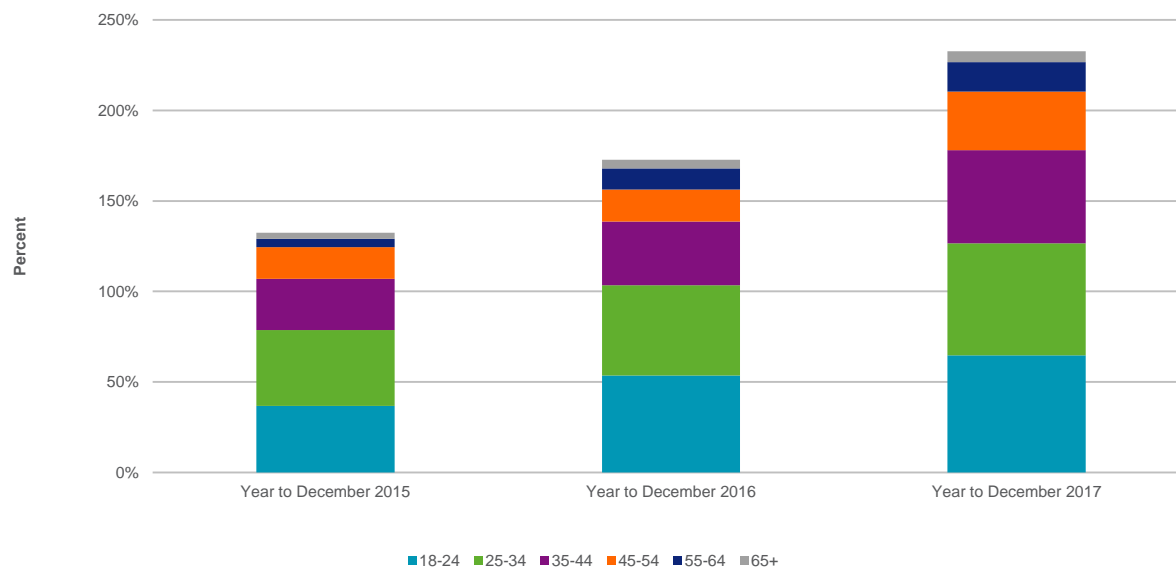


Figure 14 highlights the growth in mobile use by age group. The largest percentage increases are within the 35-44 age group (51%, a 16 percentage point increase on 2016) and the 45-54 age group (33%, a 15 percentage point increase on 2016), however, increases were seen across all age groups.

Figure 14: Use of mobile phone devices for gambling in the past four weeks by age<sup>28</sup> (n=4,083)



<sup>27</sup> Figures add to >100% due to respondents being able to select more than one option.

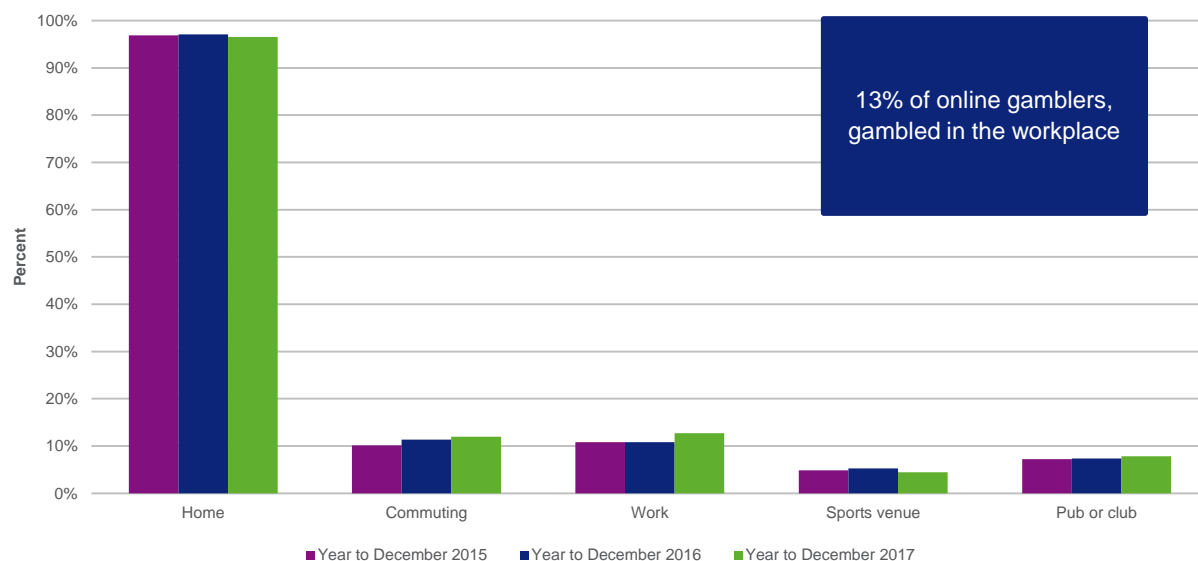
<sup>28</sup> Percentages add to >100% as age groups are stacked

## Location of online gambling

Given the increase in use of portable devices such as mobile phones and tablets, online gamblers are also asked about the location of their gambling; whether they gamble at home, whilst commuting, whilst they are at work, at a sports venue or track, or in a pub or club.

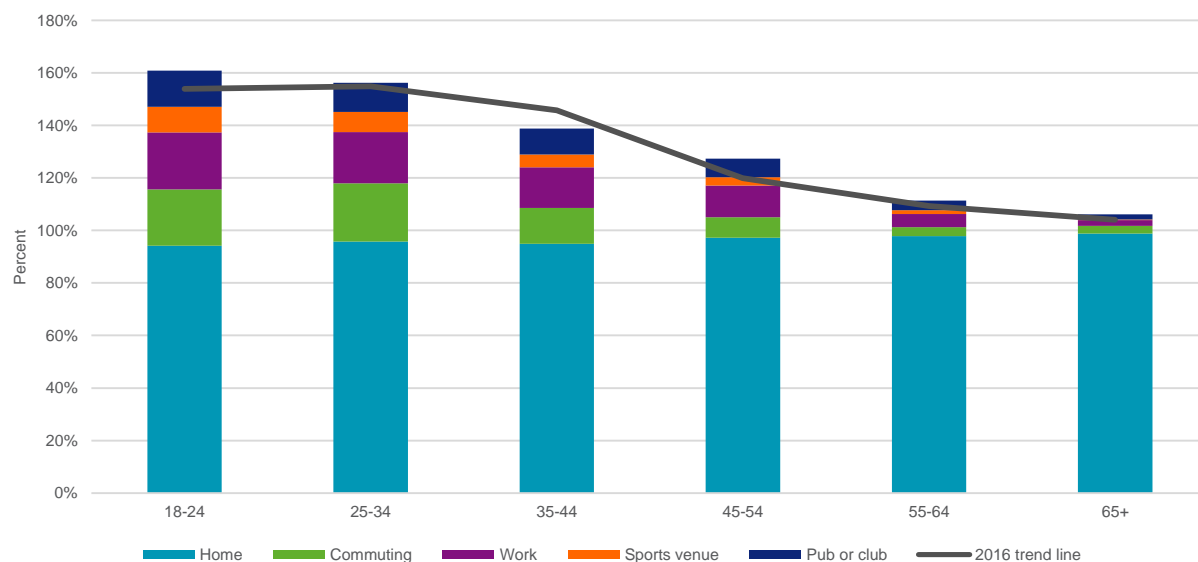
Gambling in the home remained the most popular location for online gambling with 97% of online gamblers reporting gambling at home. Male respondents were more likely than females to gamble outside of the home including on their commute, at work, at a venue or in a pub/club.

Figure 15: Location of online gambling in the past four weeks (n=4,083)



As figure 16 shows, rates of online gambling in the home is consistent across all age groups. However, it can be seen that the younger age groups also gamble in additional locations. Outside of the home, online gambling at work or on a commute to work are popular amongst the 18-24 and 25-34 age groups. Data showed that 22% of 18-24 year olds and 20% of 25-34 year olds had gambled at work. Interestingly it was those who engaged in spread betting and betting on sports events who were most likely to gamble in 2+ locations.

Figure 16: Location of online gambling in the past four weeks by age (n=4,083)

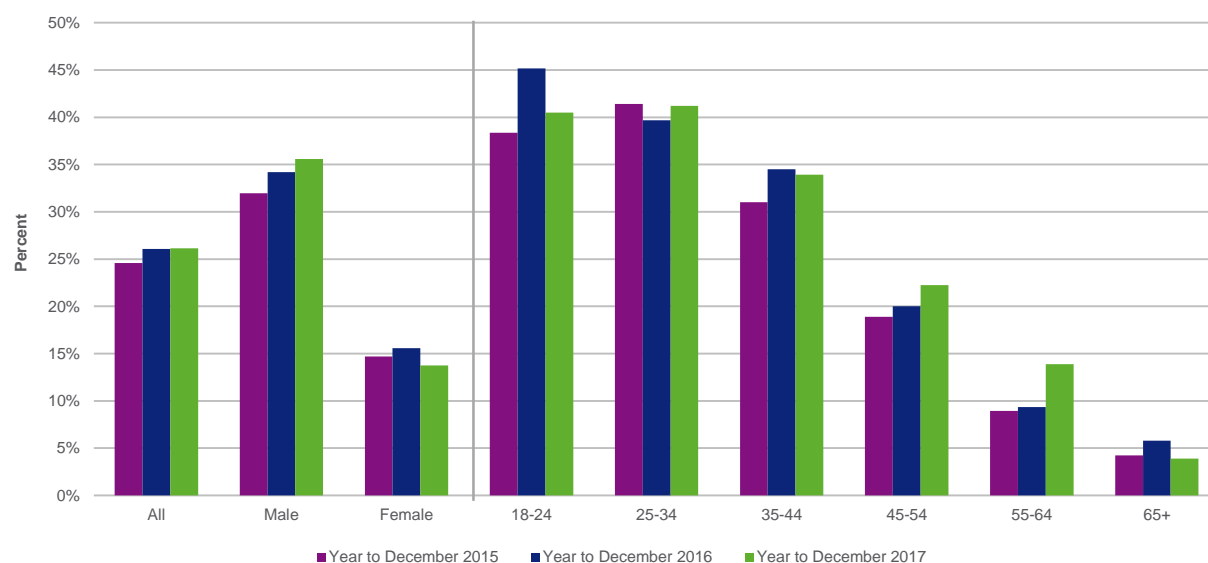


## In-play betting

In-play or live betting occurs while an event is actually taking place, for example, placing a bet on a horserace while the race is being run, or on a football match whilst it is being played. This form of betting takes place mainly, but not exclusively, on sporting events. It is predominantly an online activity with bets being made via the internet using either a betting exchange or a traditional bookmaker's website, but it can also take place in betting shops or over the phone. All respondents who have gambled online in the past four weeks are asked whether they have bet in-play.

Just over one quarter (26%) of online gamblers had bet in-play during the last four weeks, this is relatively consistent with the previous years. The largest change was within the 55-64 age group where in-play rates have increased (14%, a 5 percentage point increase from 2016).

Figure 17: Online gamblers past four week in-play betting by gender and age (n=4,083)



## Number of accounts

Online gamblers are asked how many online accounts they have with gambling companies, covering all activities including betting, bingo and lotteries, and how many of those they spend money with regularly – either in the past 12 months or on a monthly basis.

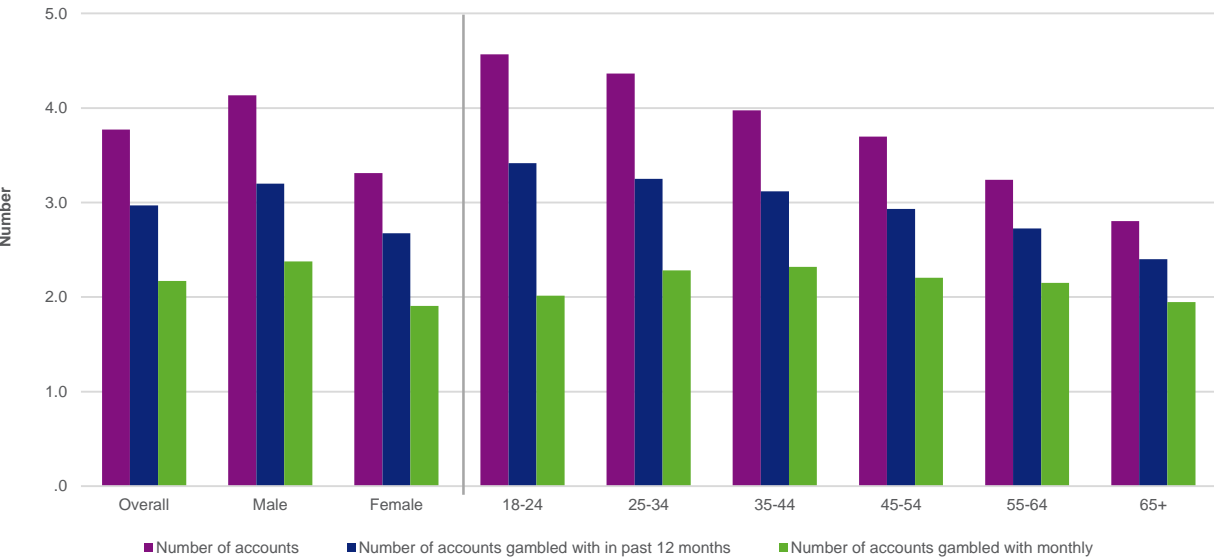
On average, gamblers have four online accounts with gambling companies in 2017, an increase from three reported in 2016, but the same number as that reported in 2015 (four accounts).

Figure 18: Average number of accounts 2015-2017



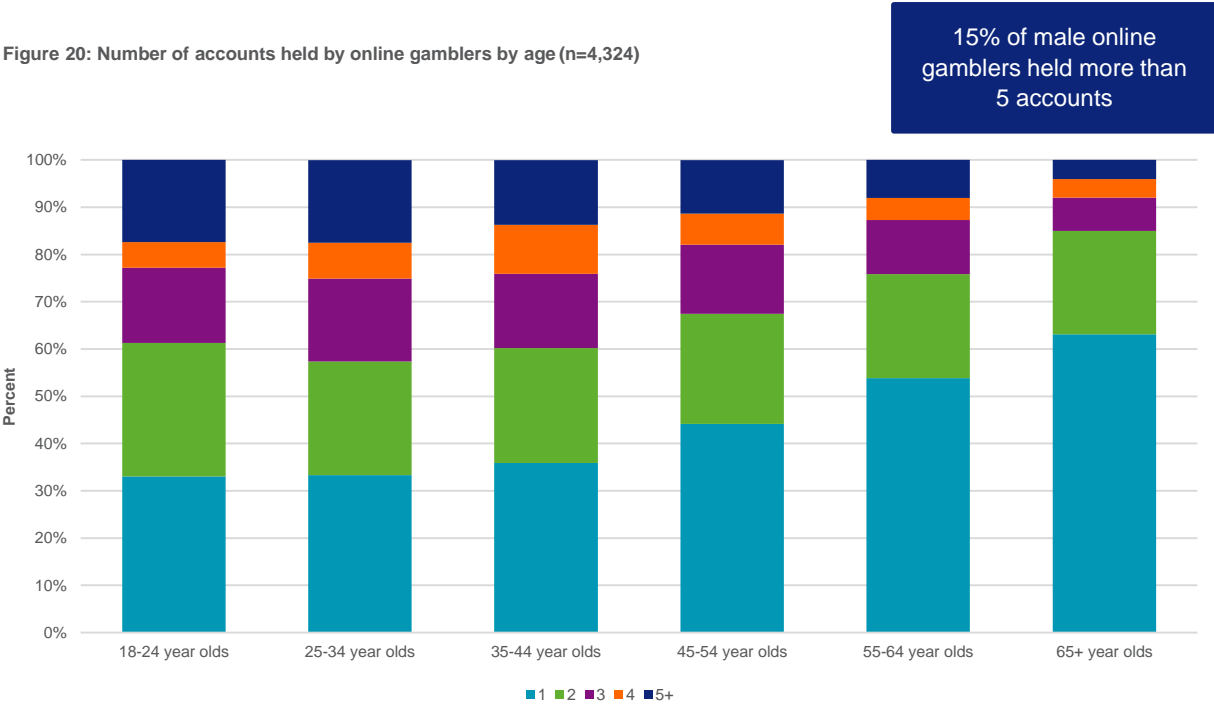
Males typically have more accounts than females (four and three accounts respectively) and younger online gamblers are much more likely to hold more accounts than those in the older age groups.

Figure 19: Average number of accounts held by online gamblers by gender and age (n=4,324)



Overall, around four in ten (44%) gamblers held just one online account, and it was more common for those in the older age groups to hold just one account. Those who were 18-24 and 25-34 were more likely to hold more than five accounts (17% and 18% respectively) compared to 12% of all gamblers. Males were also more likely than females to hold more than five accounts (15% compared to 9%).

Figure 20: Number of accounts held by online gamblers by age (n=4,324)



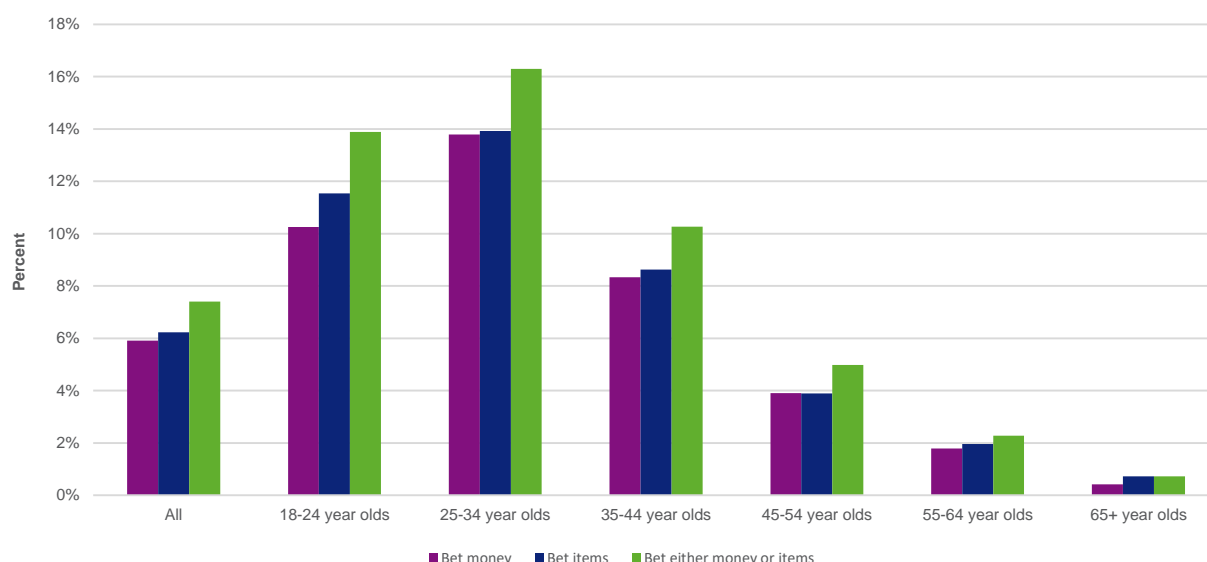
## eSports

eSports (Electronic Sports) are the competitive playing of video games and whilst not new, in recent years their popularity has continued to grow both as an entertainment and betting activity. eSports events or matches can be bet on using either money or in-game items such as skins, points, tokens, coins, or weapons. All respondents were asked whether they have bet on eSports in the past four weeks, past 12 months or have ever bet on eSports.

Questions on eSports have yet to be validated as 2017 was the first year in which the questions were asked. There is likely to be some bias from the sample being online due to respondents being much more likely to be engaged in online activities such as eSports.

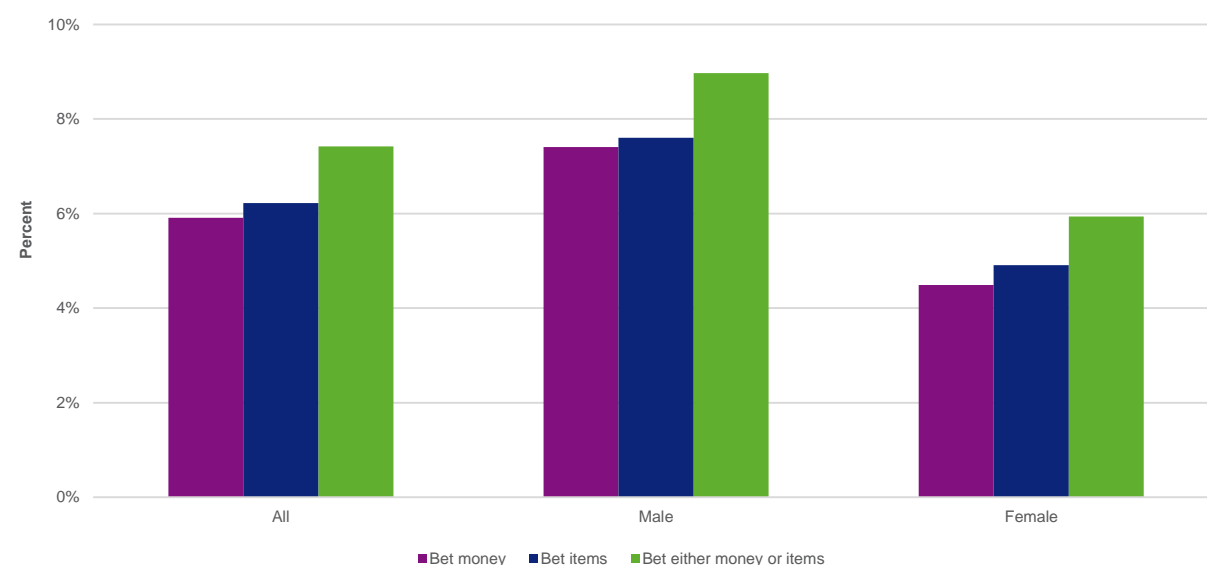
Overall, 7% of respondents had ever bet on eSports, with 6% doing so in the past 12 months. Of those that have ever engaged in eSports, participation rates were highest among those aged 25-34 year olds (16%) and lowest for those aged 65+ (1%).

Figure 21: Ever bet on eSports using money or items by age (n=4,178)



Engagement in eSports was highest for males; 9% had bet on eSports using either money or in play items compared to 6% of females.

Figure 22: Ever bet on eSports using money or items by gender (n=4,178)



# Consumer analysis



**60%**  
of gamblers have seen or received gambling related information from an operator



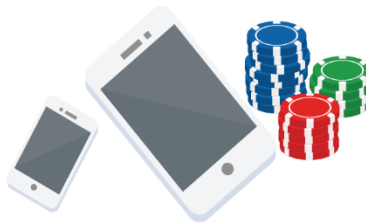
Financial limits are the most popular gambling management tool with 10% of online gamblers using them



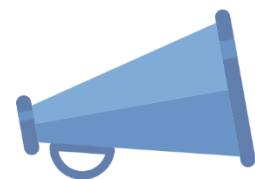
**6%** of gamblers have ever self-excluded  
Awareness or use of self-exclusion has risen since 2015 from 35% to 41%



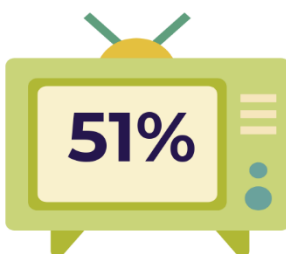
**22%**  
of gamblers have read terms and conditions



**24%**  
of people have played online gambling-style games



**8%** of gamblers have made a complaint about a personal gambling experience



**51%**  
of people have seen a gambling advert on TV in the past week



**53%** of gamblers have been prompted to gamble by adverts



**20%** of gamblers like gambling companies on Facebook



**12%** of gamblers follow gambling companies on Twitter

-6% from 2016

-3% from 2016

# Consumer analysis

The Commission's online survey also contains broader questions asked to both gamblers and non-gamblers about wider gambling issues and topics of interest to consumers. These are asked on a quarterly basis, biannually, annually or in a succession of monthly dip surveys depending on the nature of the questions.

## Self-exclusion and gambling management tools

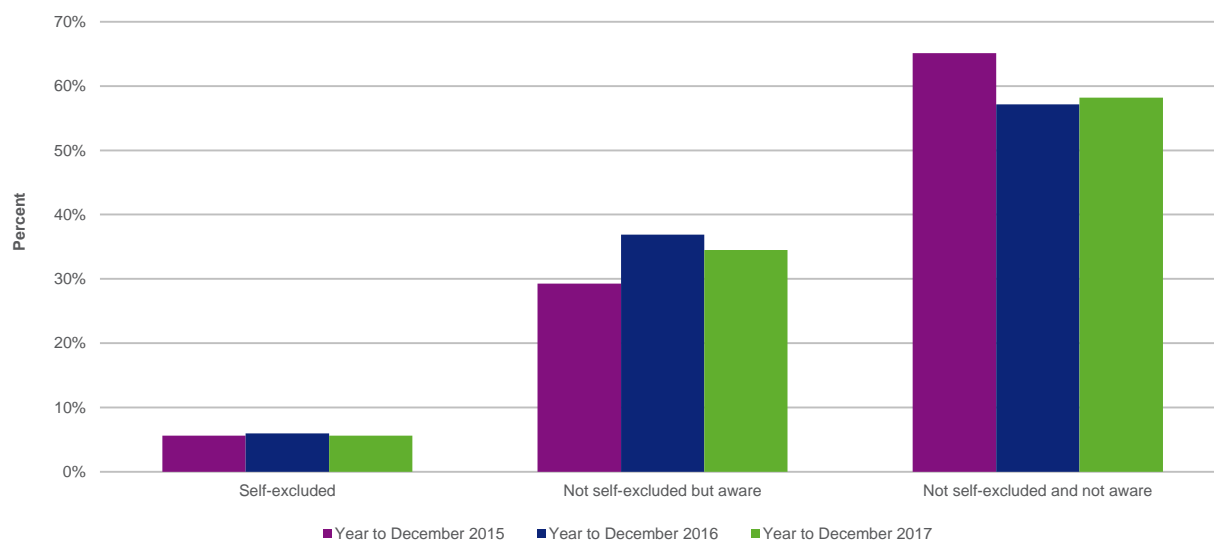
If a gambler thinks that they are spending too much time or money gambling – whether online or in gambling premises – and wish to be supported in their decision to stop they can ask to be self-excluded from a gambling company or to self-exclude from multi-operators. This is when the consumer enters a voluntary agreement that commits them to abstain from gambling and the company to take all reasonable steps to prevent them from gambling with them for a period of time. The minimum self-exclusion period is six months. Other, principally online<sup>29</sup>, tools that can be used to help a player to control their gambling are self-exclusion by product, setting time or money limits, reality checks and using time-outs to suspend play for a short period of time. Since 2015 questions have been included in the online survey to monitor gamblers' awareness of these tools and the extent to which they are used. They are asked on a quarterly basis to any gambler who has participated in any gambling activity in the past 12 months.

Figure 23: Gamblers awareness and use of self exclusion (n=5,094)



Overall, 6% of gamblers have ever self-excluded, consistent with the rates observed in previous years. Additionally, 35% of gamblers are aware of self-exclusion but have not self-excluded.

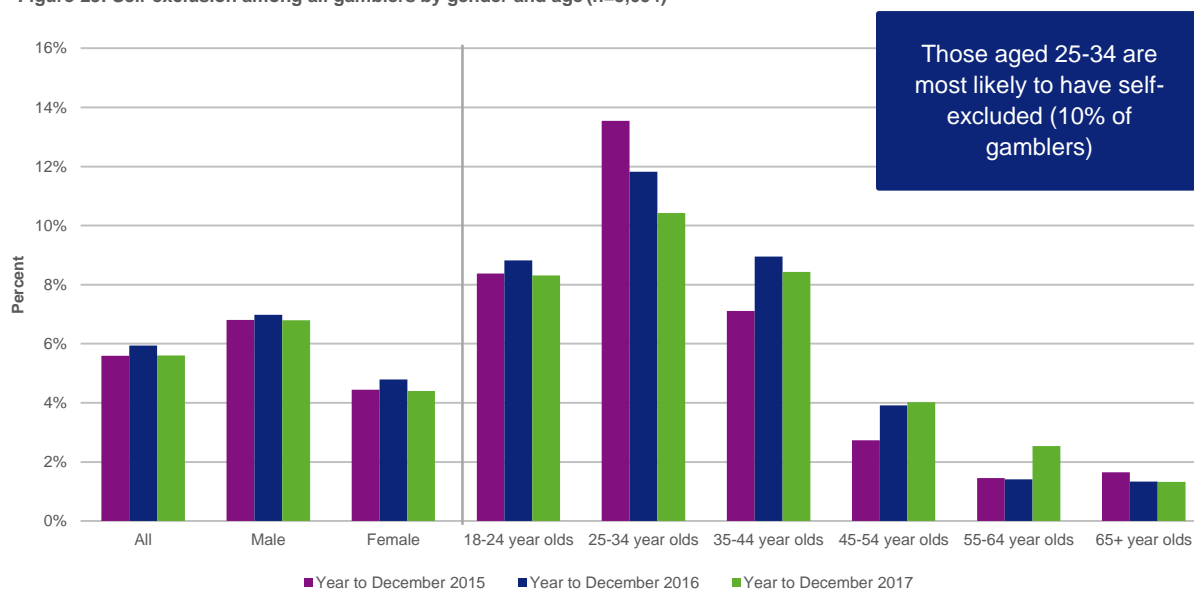
Figure 24: Gamblers awareness and use of self exclusion (n=5,094)



<sup>29</sup> Limit setting and reality check are also available on machines in bookmakers.

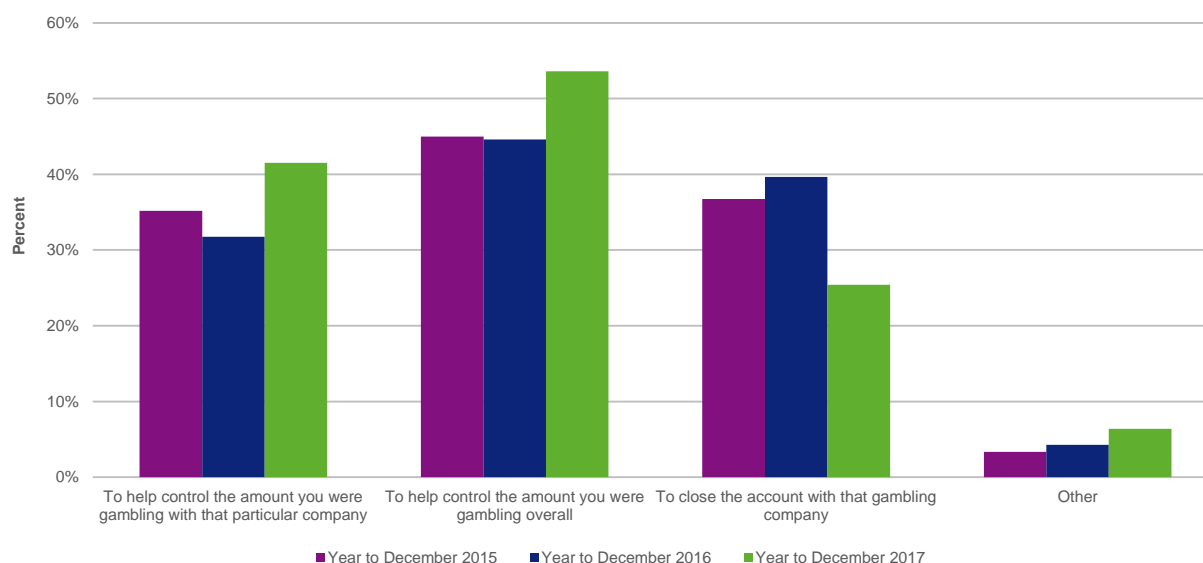
Figures show that men are more likely to self-exclude than females, with 7% of men having ever self-excluded compared to 4% of women. The age group most likely to have ever self-excluded are those aged 25-34, although this group has seen a decline in its self-exclusion rates since 2016 (10%, a 2 percentage point decrease from 2016).

Figure 25: Self-exclusion among all gamblers by gender and age (n=5,094)



Whilst self-exclusion is a facility to manage potentially problematic gambling, not everyone will use it only for this reason. If gamblers in the survey have ever self-excluded, they are asked why they chose to self-exclude. The most popular reason given for self-exclusion was to help control the amount being gambled overall (54%, a 9 percentage point increase from 2016), followed by to help control the amount being spent with a particular company (42%, a 10 percentage point increase from 2016). The increases seen in to help 'to control the amount being gambled overall' and 'help to control the amount being spent with a particular company' is due to the drop seen in people using self-exclusion to close their account (which was second highest figure last year).

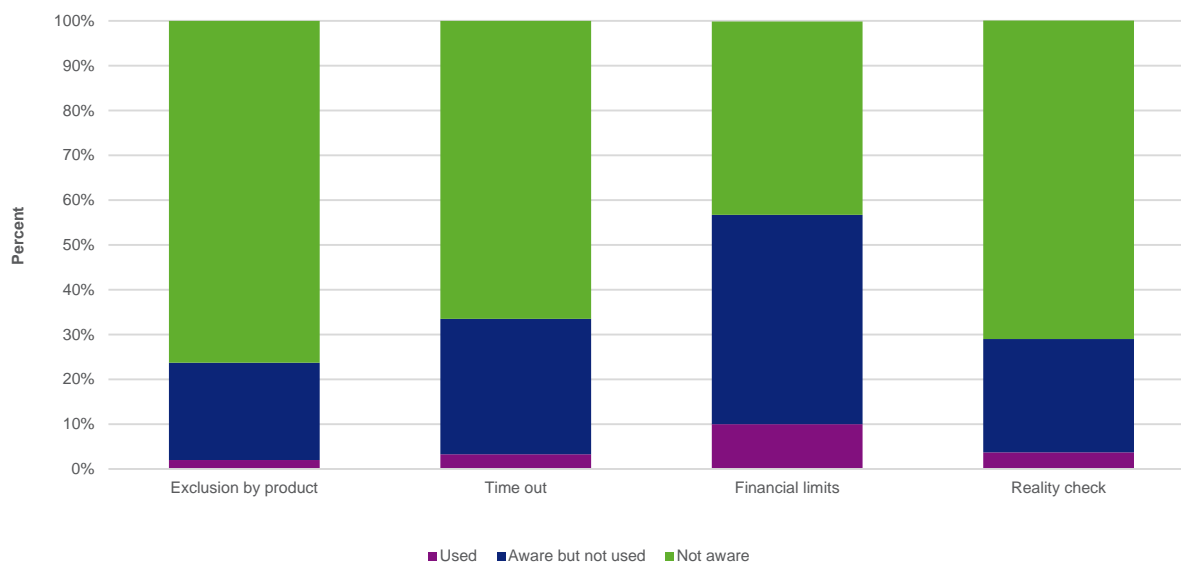
Figure 26: Reasons for self-excluding (n=377)



Gamblers were also asked if they have used a selection of gambling management tools. Financial limits were the most used tool in 2017 with 10% of gamblers having used them, a consistent finding since 2016.

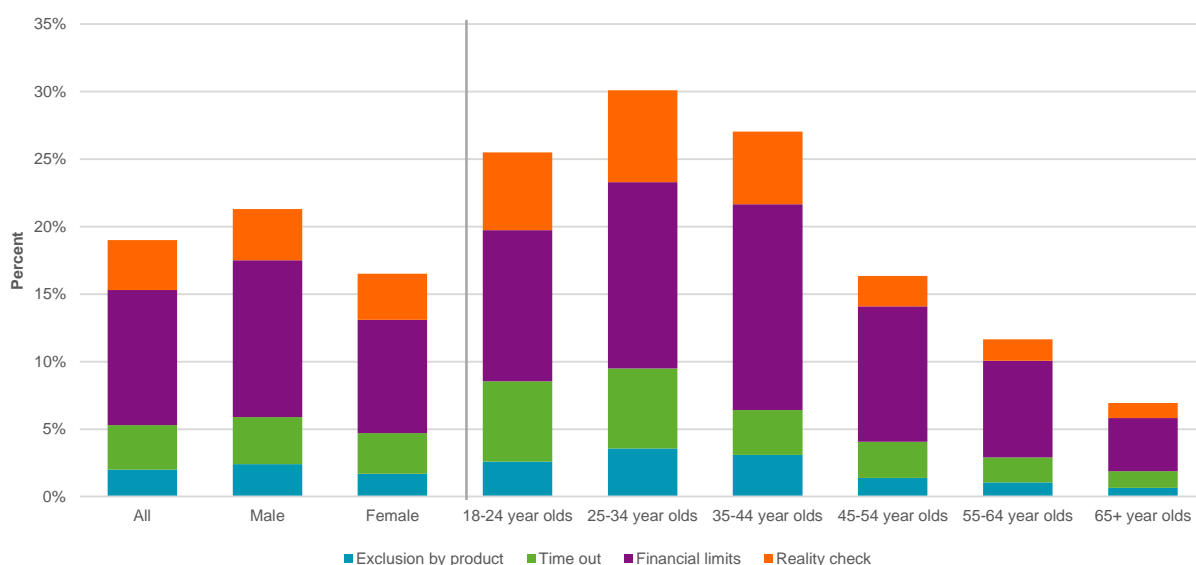
Self-exclusion by product had both the lowest use and awareness rates, consistent with the findings from 2016. An explanation for this might be that unlike the other tools referenced, exclusion by product is not a tool that the Commission requires operators to provide.

**Figure 27: Use and awareness of gambling management tools (n=5,094)**



Those in the age groups covering 18-44 year olds were most likely to have used any of the gambling management tools. Self-exclusion by product was most commonly used by those aged 25-34 (4%).

**Figure 28: Gamblers use and awareness of gambling management tools by gender and age (n=5,094)**



## Information for players

In 2017, the online survey incorporated questions on information for players. This section covers gambling related materials produced by operators which may have either been directly sent to a customer or may form part of their general literature (i.e. tips to control gambling, where to seek help to control gambling). Gamblers were asked about what information they seen and whether it had an impact on their gambling behaviour.

In total, 60% of gamblers had either received at least one piece of gambling related information from an operator, or seen a piece of information online or in gambling premises.

Figure 29: Proportion of gamblers who have either received or seen at least one piece of gambling related information from an operator (n=3,306)



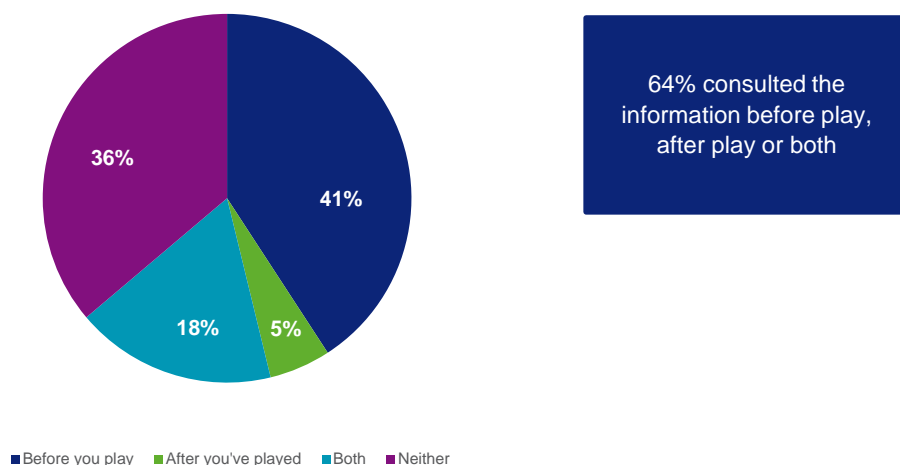
The information that people were most likely to have seen was in relation to the transaction and play history of their account (49%) followed by the chances of winning a prize (35%) and the chances of winning each prize (35%).

Figure 30: Proportion of gamblers who have seen or received different types of information about gambling (n=3,306)



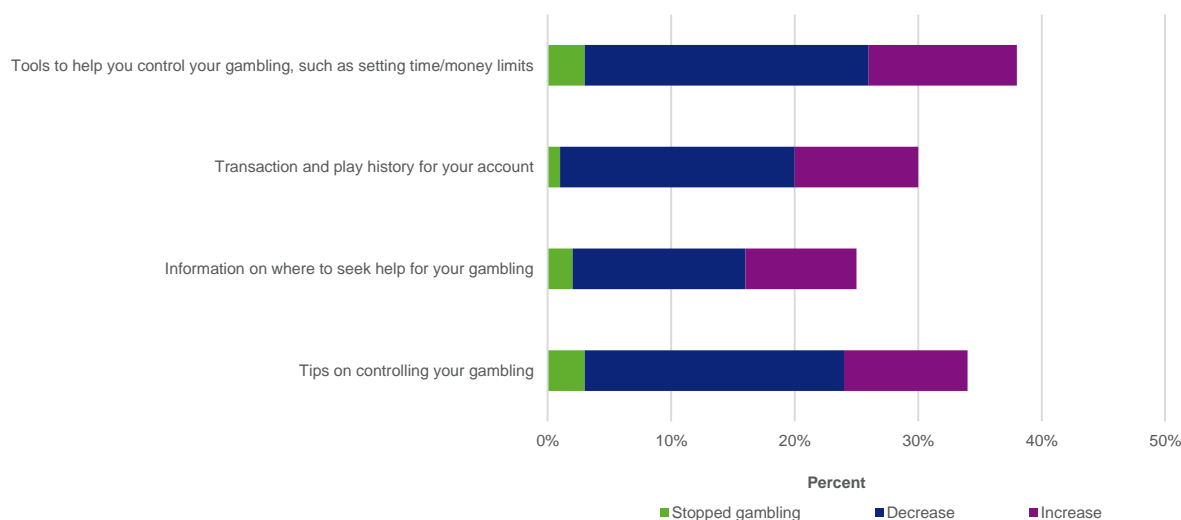
When asked at what point they consulted the information, 64% of gamblers said that they consulted the information before play, after play or both, 36% did not consult any information. Gamblers were most likely to consult the information before play (41%), and a further one in six (18%) consulted the information both before and after play.

Figure 31: Time of consulting the information seen (n=1,587)



In terms of the information provided by gambling companies, tips on 'controlling gambling yourself' had the biggest impact on reducing the frequency of peoples gambling. This was particularly the case for younger people (18-24) with 39% stopping or decreasing their time spent gambling based upon seeing information on this subject.

Figure 32: Impact on frequency of gambling based upon information received from gambling companies (n=1,055 - 1,186)



In terms of the information provided by gambling companies, tools to help control gambling had the biggest impact on stopping or reducing the amount people spent on gambling. Respondents in the younger age groups were more likely to either stop or reduce the amount spent gambling as a result of the information seen. For instance, after seeing information relating to tools to help control gambling, 44% of those aged 18-24 either stopped or reduced the amount that they gambled, as did 39% of those in this age group who saw information in relation to tips to control gambling.

Figure 33: Impact on the amount spent gambling based upon information received from gambling companies (n=1,055 - 1,186)



Online gamblers who reported reading information about their transaction history were asked why the information they had seen had either led to a decrease, an increase or had no impact on the amount of time or money spent gambling. Reasons included:

Reasons given as to why seeing transaction history information decreased gamblers time or money spent gambling

"Because it was obvious that I was losing more than I was winning"

"It made me think about what I was spending"

"It was a reality check as to how much I was spending"

"Because when you see it in black and white it's always more than you thought"

Reasons given as to why seeing transaction history information did not impact gamblers time or money spent gambling

"I only bet how much I can afford to lose, so therefore had no influence"

"Win or lose I have a set amount"

"I am in control of my betting and already know these things"

"I gamble for enjoyment and don't gamble more than I can afford to lose"

Reasons given as to why seeing transaction history information increased gamblers time or money spent gambling

"It shows how much money you spend gambling and you then have the impulse to do it more as you can afford more"

"It increases because that information makes me know how much I have done and so I can do more if I have not reached the limit I can afford"

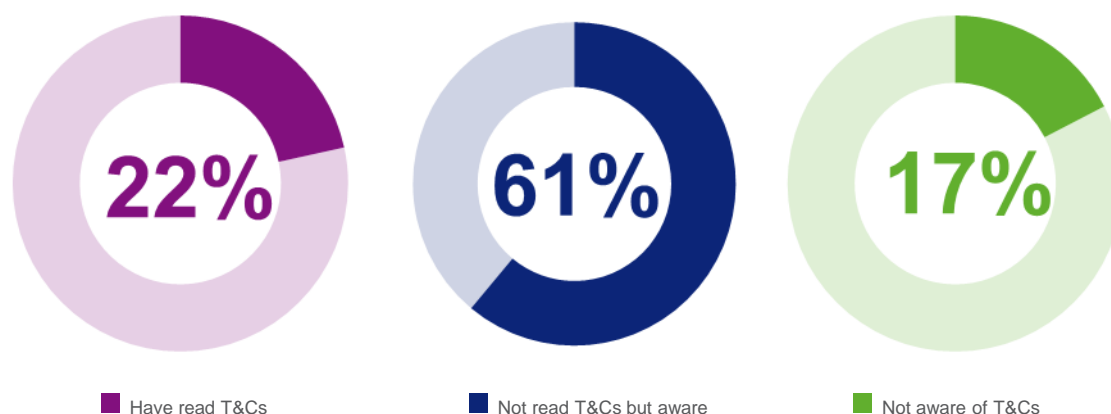
"Because I became aware of how much money I had lost, and this resulted in me having the urge to try and win back as much of this money as possible"

## Terms and conditions

The online survey included questions to monitor gamblers' awareness and perceptions of terms and conditions provided by gambling operators. Gamblers are asked whether they had ever read terms and conditions and, if they had, whether they found them to be helpful.

Overall, 22% of gamblers have ever read the terms and conditions provided by a gambling operator. The majority (61%) have not read the terms and conditions despite being aware of their availability. 17% did not know that terms and conditions were available.

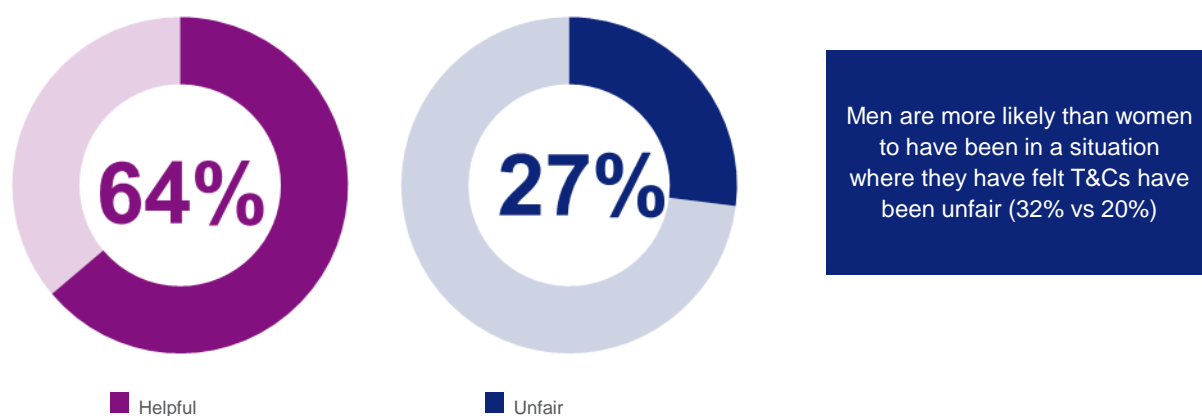
Figure 34: Gamblers' use and awareness of terms and conditions (n=6,830)



Men are more likely to have ever read the terms and conditions than women, with 24% of men ever having done so compared to 19% of women. Those aged 25-34 are most likely to have ever read terms and conditions (29%) whereas just 13% of 65 and overs have. 39% of all gamblers who were not aware that terms and conditions were available were aged 65+.

Figure 35 shows that of those gamblers who have ever read terms and conditions, 64% found them helpful and 27% reported having been in a situation where they have felt that a gambling operator's terms and conditions have been unfair.

Figure 35: Proportion of gamblers who found terms and conditions to be helpful and unfair (n=1,472)



## Complaints

Complaints from consumers are an important tool for any industry. Any gambler – whether they have gambled online or in premises – has the right to make a complaint about a personal gambling transaction, in the first instance, directly to the relevant gambling business. If a consumer and gambling business cannot agree a solution about a gambling transaction that has taken place, a complaint may then be referred to an Alternative Dispute Resolution body (ADR). Consumers can report the way a gambling business is being run to the Commission.

In September 2017 questions were added to the online survey to review and track complaints being made in the gambling industry in response to the 2016 European regulations and the 2017 ADR review<sup>30</sup>. All respondents who have gambled in the past 12 months were asked whether they have ever made a complaint related to a personal gambling experience and, if they had, what the complaint was about and how long it took to gain an initial outcome. Overall, 8% of gamblers reported having ever made a complaint, with a further 5% wanting to make a complaint but didn't. By comparison, 88% of gamblers had not needed to make a complaint.

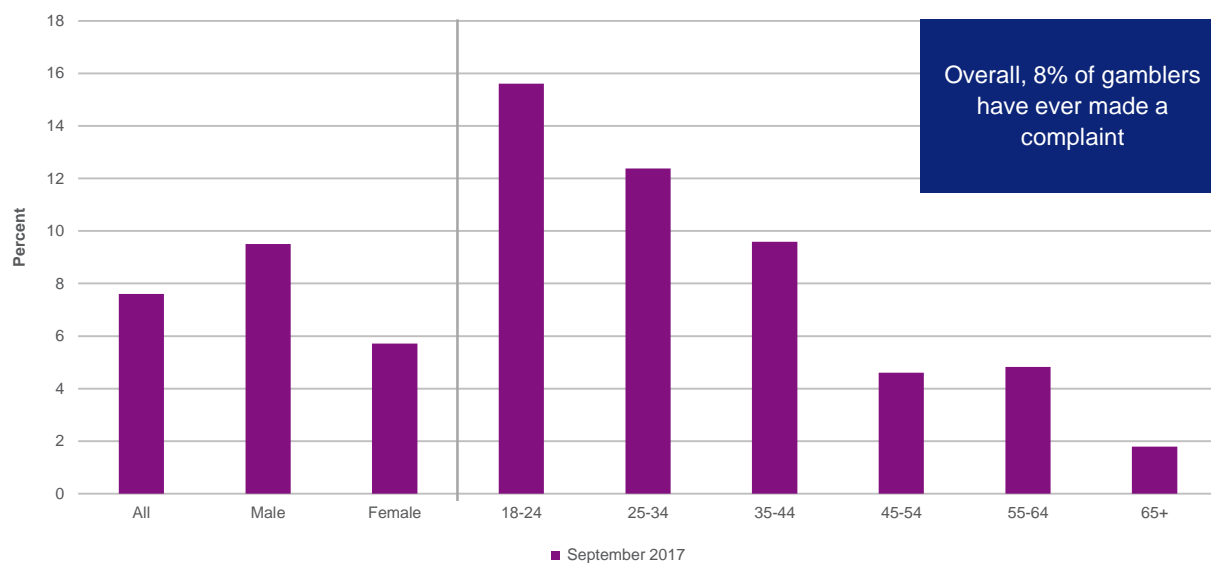
Figure 36: Proportion of gamblers who have made or attempted to make a complaint (n=1,664)



Men are more likely to have ever made a complaint about a personal gambling experience than women, with 10% of men having made a complaint compared with 6% of women. Younger age groups have the largest proportions of complaints made, with 16% of 18-24 year olds and 12% of 25-34 years reporting having ever made a complaint.

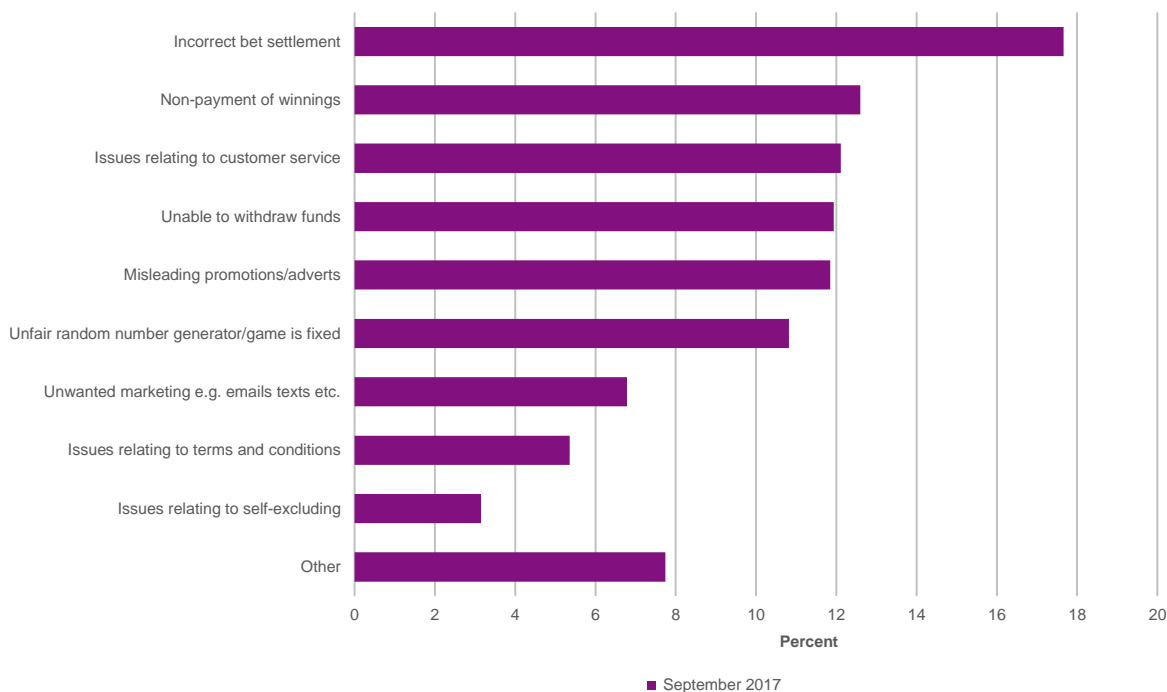
<sup>30</sup> A review one year after the introduction of the Alternative Dispute Resolution (ADR) scheme <http://www.gamblingcommission.gov.uk/PDF/Complaints-processes-in-the-gambling-industry.pdf>

Figure 37: Proportion of gamblers who have made a complaint by gender and age (n=1,664)



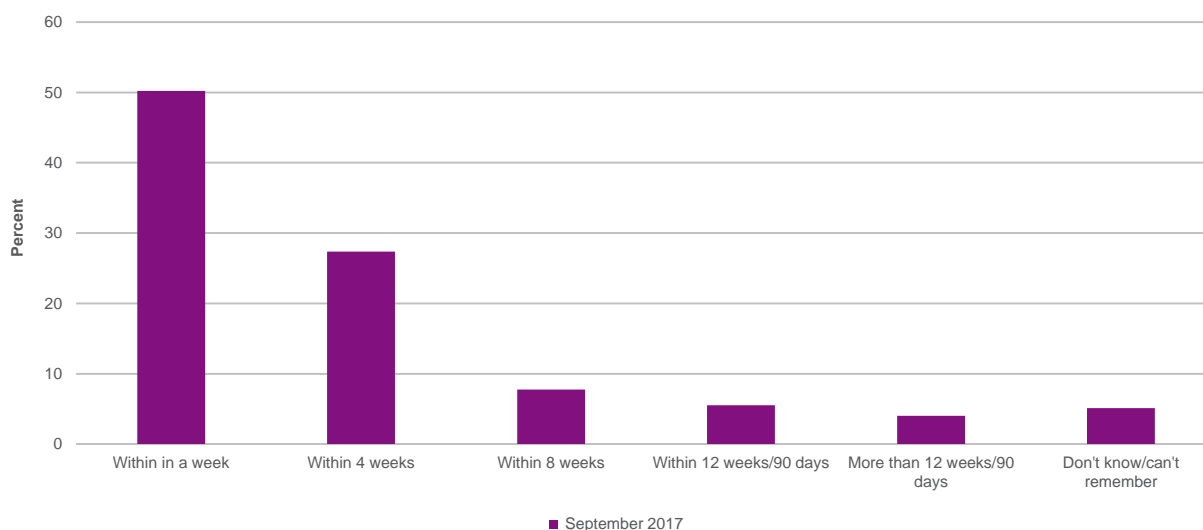
Gamblers who have ever made a complaint were asked what their most recent complaint was regarding. Figure 38 shows most complaints were made in relation to an incorrect bet settlement (18%). Similar proportions of gamblers have made a complaint about non-payment of winnings (13%), issues relating to customer service (12%), inability to withdraw funds (12%) and misleading gambling promotions/adverts (12%). Smaller proportions of complaints were made in relation to terms and conditions (5%) and self-exclusion (3%).

Figure 38: Reasons for most recent complaint (n=127)



Gamblers who have ever made a complaint were also asked how long it took before they received an initial outcome to their complaint. Overall, 91% of gamblers received an initial outcome within 90 days (the regulated period of time in which an ADR must tell both parties the outcome of a dispute), with 50% receiving an outcome within a week.

Figure 39: Time taken until initial outcome of complaint received (n=127)



## Social media and advertising

The online survey has included questions about consumers' use of social media and the impact of advertising since its inception in March 2015. This data is now collected on a biannual basis in surveys running in March and September of each year, with the questions asked to all online gamblers.

Online gamblers are asked whether they follow a gambling company on Facebook, Twitter, LinkedIn, Google+ and Instagram. Overall, 26% of online gamblers followed a gambling company on any of these social platforms in 2017 (a 6 percentage point decline from 2016). This has decreased most notably among females (22%, a 8 percentage point decrease from 2016), 25-34 year olds (41%, a 10 percentage point decrease from 2016) and 35-44 year olds (34%, a 7 percentage point decrease from 2016).

Figure 40: Proportion of online gamblers following gambling companies on social media by gender and age (n=2,042)

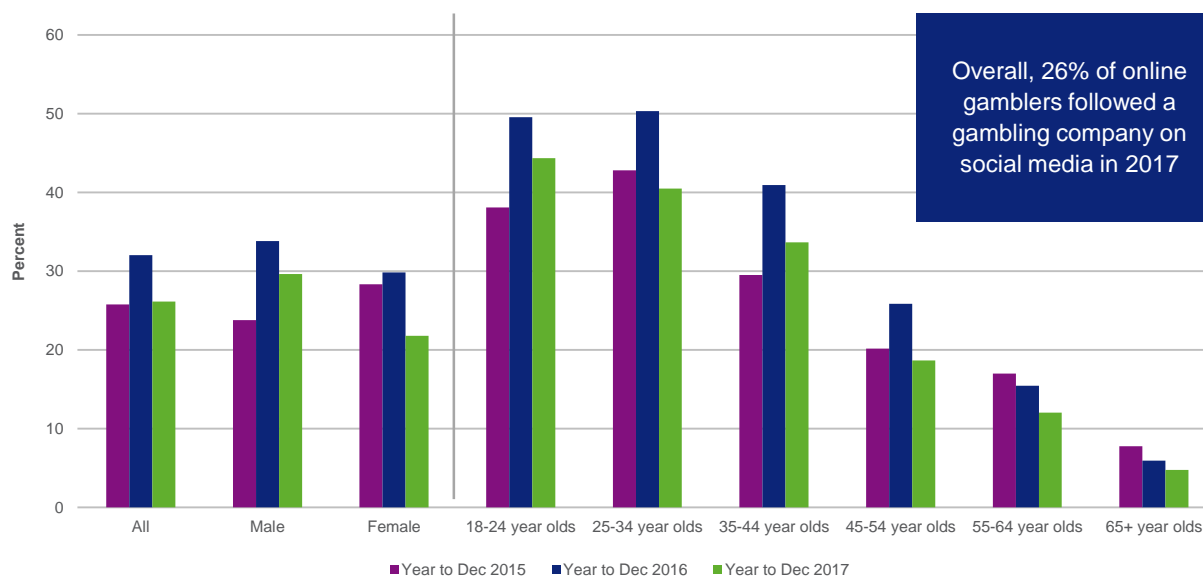
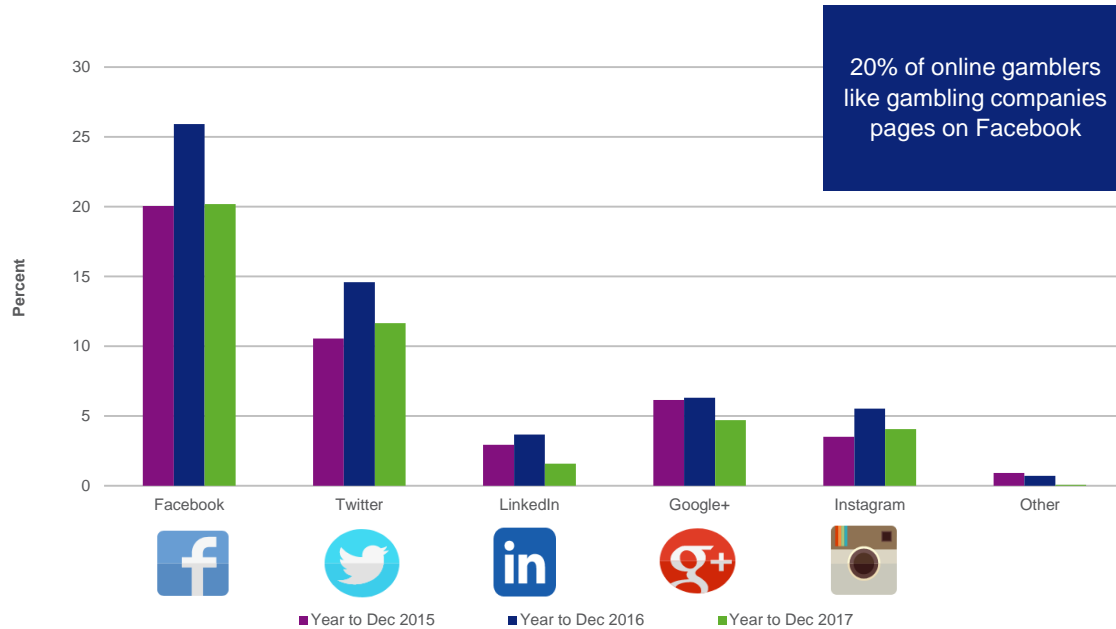


Figure 41 displays the results for each social media platform. Although there has been a decline since 2016, Facebook remains the most popular social media platform in which online gamblers follow gambling companies (20%, a 6 percentage point decrease from 2016). This is followed by Twitter (12%, a 3 percentage point decrease from 2016), Google+ (5%, a 2 percentage point decrease from 2016), and Instagram (4%, a 1 percentage point decrease from 2016).

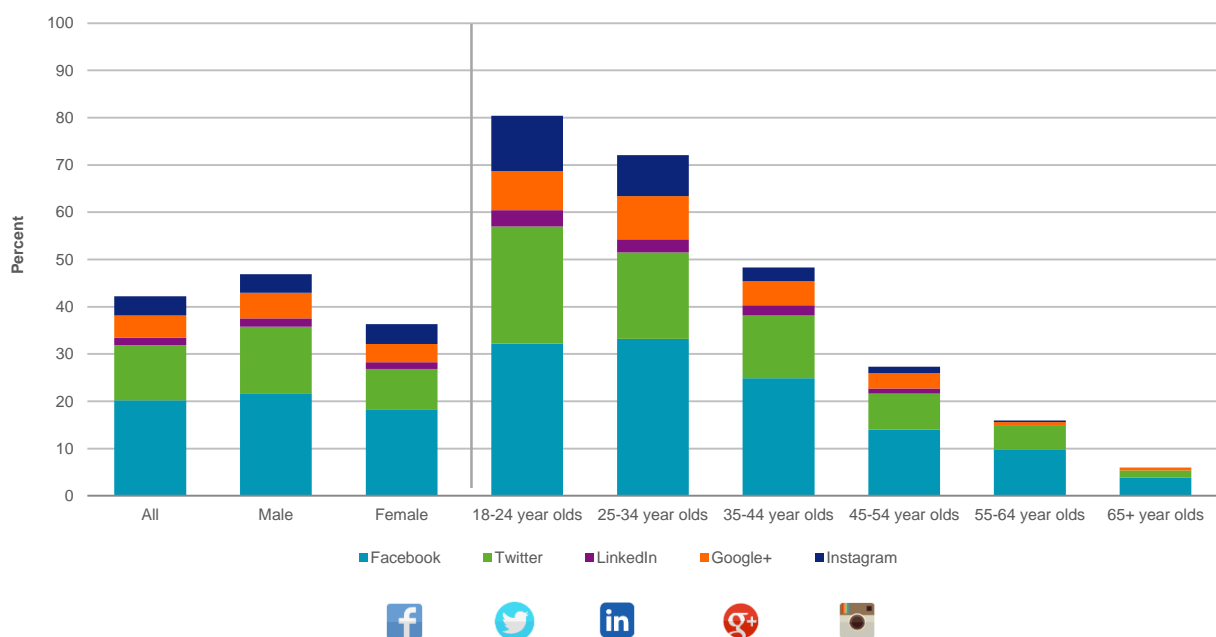
This is consistent with findings from the latest Adult's Media Use and Attitudes Report<sup>31</sup> (Ofcom, 2017) which identifies Facebook as by far the most popular social media platform among adult internet users aged 16+.

Figure 41: Proportion of online gamblers following gambling companies on social media by platform (n=2,042)



As figure 42 shows, Facebook was the most popular social media platform across both genders and all age groups. A total of 32% of 18-24 year olds and 33% 25-34 year olds who gamble online, follow gambling companies on Facebook.

Figure 42: Following gambling companies on social media by platform, gender and age (n=2,042)



<sup>31</sup> Ofcom 2017 ([https://www.ofcom.org.uk/data/assets/pdf\\_file/0020/102755/adults-media-use-attitudes-2017.pdf](https://www.ofcom.org.uk/data/assets/pdf_file/0020/102755/adults-media-use-attitudes-2017.pdf))

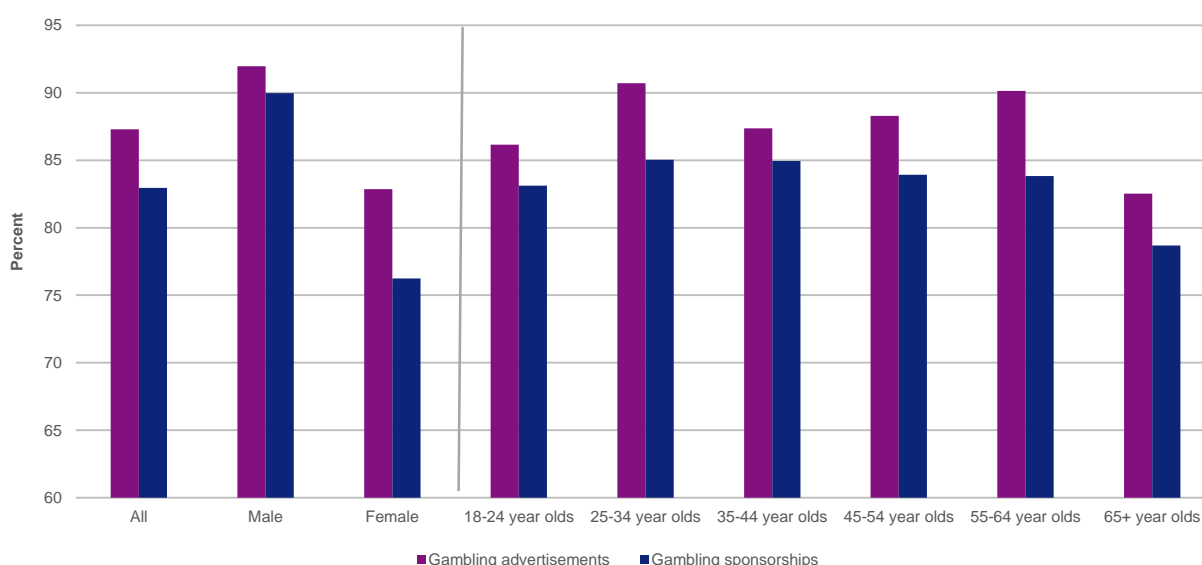
In September 2017, a new question around sponsorships was asked to all respondents of the online survey to understand people's awareness of gambling sponsorships<sup>32</sup> compared to gambling advertisements<sup>33</sup>. Figure 43 shows that overall, 87% of people have ever seen any gambling advertisements and 83% have ever seen any gambling sponsorships. This equates to 89% of people who have ever seen any gambling advertisements or gambling sponsorships.

Figure 43: Proportion of respondents who have seen or heard any gambling advertisements, any gambling sponsorships, or both (n=2,063)



Figure 44 shows respondents across all demographic groups are more likely to have seen or heard any gambling advertisements than gambling sponsorships. Men are much more likely to have seen gambling advertisements than women, with 92% of men and 83% of women reporting they have seen or heard gambling advertisements. Those who have seen or heard gambling advertisements are more likely to be aged 25-34 (91%) and 55-64 (90%). However, gambling sponsorships are most likely to have been seen or heard by those aged 25-44, with 85% of 25-34 year olds and 35-44 year olds having reported so.

Figure 44: Seen or heard any gambling advertising and sponsorships by age and gender (n=2,063)

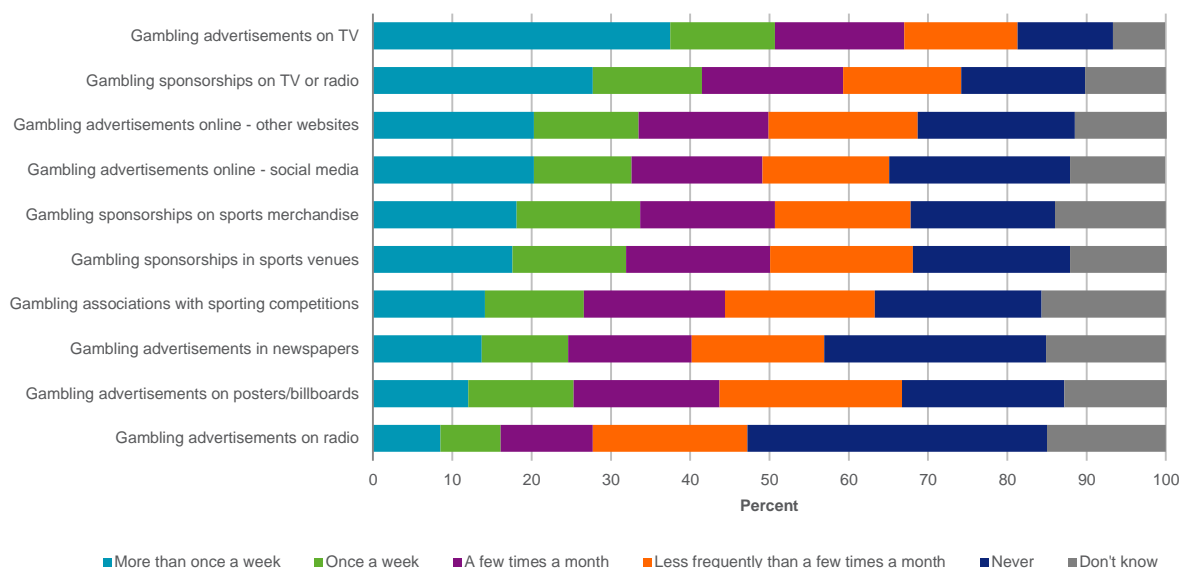


<sup>32</sup> Gambling sponsorships refer to a commercial agreement between a gambling company and another company e.g. Betway sponsoring West Ham United Football club from February 2015 to present

<sup>33</sup> Gambling advertisements refer to the promotion of gambling via a variety of media.

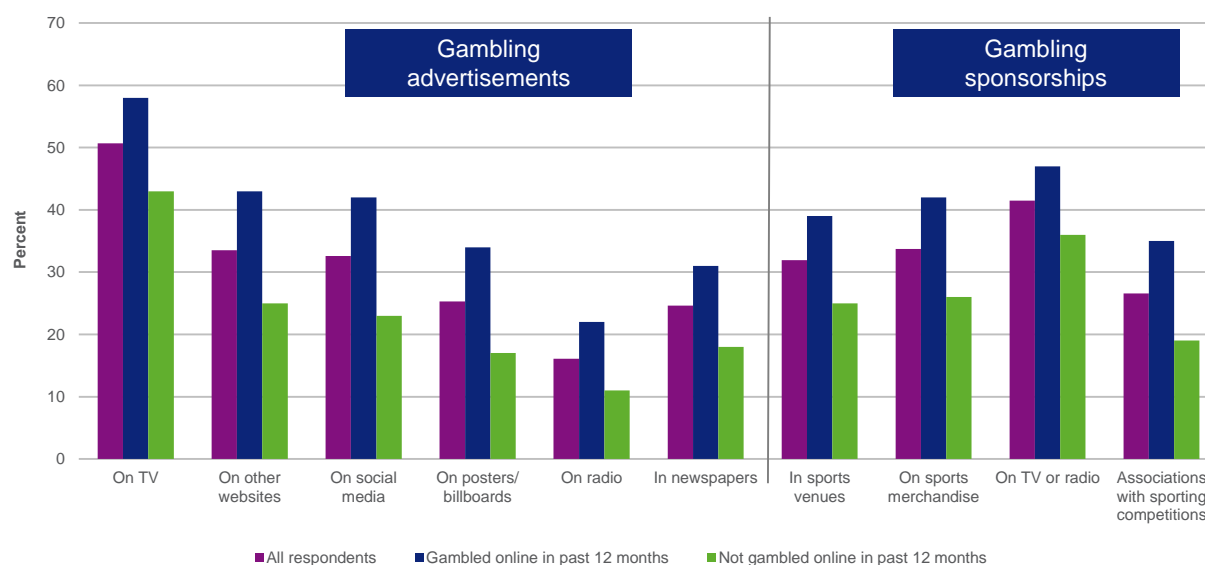
Gambling advertisements are most likely to have been seen on television, with 81% having ever done so and 51% reporting seeing television gambling adverts at least once a week. Gambling sponsorships were most likely to have been seen or heard on the television or radio, with 74% having ever done so and 42% reporting seeing or hearing television or radio gambling sponsorships at least once a week.

Figure 45: Seen or heard any gambling advertising and sponsorships by frequency (n=2,063)



As figure 46 shows, online gamblers are much more likely to have seen or heard all types of gambling advertisements and sponsorships than those who have not gambled online in the past 12 months. Gambling advertisements on social media sees the largest difference between online gamblers and non-online gamblers, with 42% of respondents who have gambled online in the past 12 months and 23% of respondents who have not gambled online on the past 12 months reporting having seen gambling advertisements on social media.

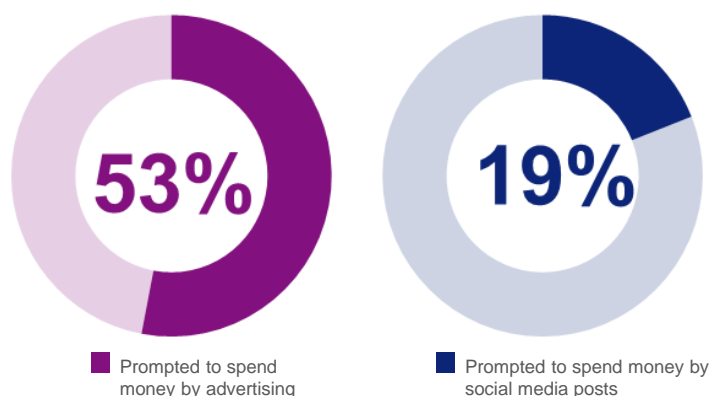
Figure 46: Seen or heard any gambling advertising and sponsorships at least weekly by gambling status (n=2,063)



Online gamblers who do follow gambling companies on social media, were asked whether or not social media posts or various forms of advertising have prompted them to spend money on gambling.

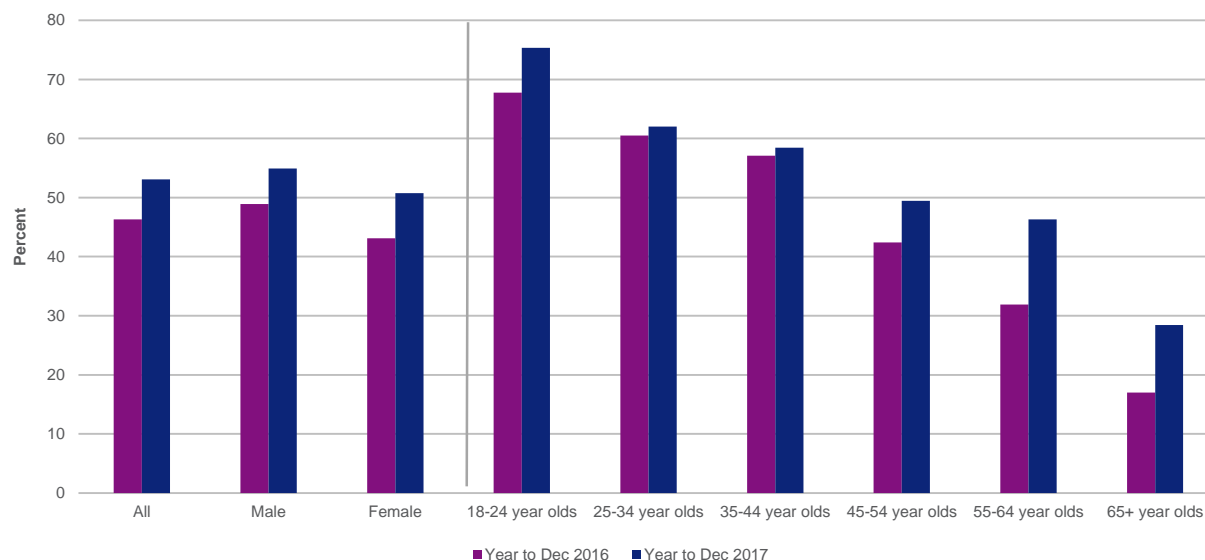
As figure 46 shows, online gamblers are more likely to be prompted to spend money on gambling by advertising than social media posts, with 53% saying that they had been (a 7 percentage point increase from 2016), compared to 19% by social media posts (a 2 percentage point decrease<sup>34</sup> from 2016).

Figure 47: Proportion of online gamblers prompted to spend money on gambling by advertising and social media (n=2,042)



The proportion of online gamblers prompted to spend money on gambling by advertising has increased across all demographic groups since 2016. Whilst not as likely to have been prompted to spend money by advertising, older age groups have seen the largest increases on prompted spend, with 46% of 55-64 year olds and 28% of 65+ year olds having been prompted to spend money on gambling by advertising they have seen or heard (a 14 and 11 percentage point increase respectively from 2016).

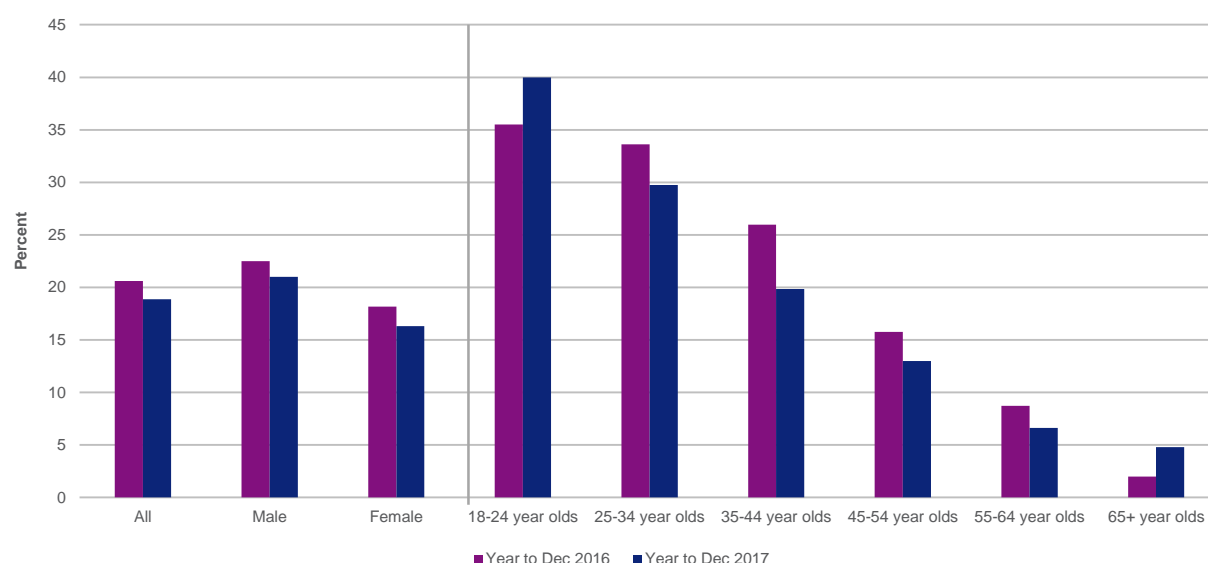
Figure 48: Proportion of online gamblers prompted to spend money on gambling by advertising by gender and age (n=2,042)



The proportion of online gamblers prompted to spend money on gambling by social media posts has declined across most demographic groups with the exception of the youngest and oldest. Prompted spend by social media posts increased among 18-24 year olds to 40% from 36% in 2016, and increased among 65+ year olds to 5% from 2% in 2016.

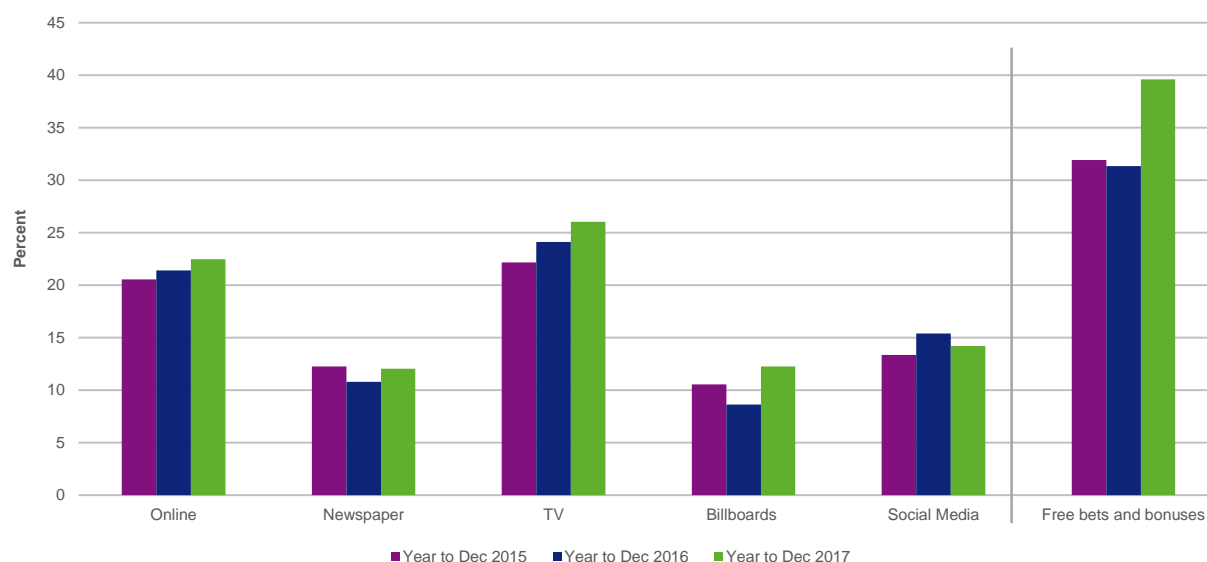
<sup>34</sup>Not statistically significant at the 95% level.

Figure 49: Proportion of online gamblers prompted to spend money on gambling by social media posts by gender and age (n=2,042)



Focusing on advertising in particular, figure 50 shows that in 2017 online gamblers were most likely to be prompted to spend money on gambling by promotions for free bets and bonuses (40%, an 8 percentage point increase from 2016). This was followed by adverts on the television (26%, a 2 percentage point increase<sup>35</sup> from 2016), and online (23%, a 1 percentage point increase<sup>36</sup> from 2016). There has been a small decline in the proportion of online gamblers saying advertising on social media has prompted them to gamble, 14% (a 1 percentage point decrease<sup>37</sup> from 2016).

Figure 50: Proportion of online gamblers prompted to spend money on gambling by types of advertising (n=2,042)



<sup>35</sup> Not statistically significant at the 95% level.

<sup>36</sup> Not statistically significant at the 95% level.

<sup>37</sup> Not statistically significant at the 95% level.

## Social gaming

Some games that can be played online often look like gambling but do not meet the legal definition of gambling. The games are casino style games which may involve a game of chance for a prize and may use gambling-related imagery or mechanics such as cards or dice, but offer a prize which is not money or money's worth. The games are played over the internet often via mobile phones and are built on social networks. Some of these games are 'social' in the sense that interaction with other people is a key feature of the gaming or gambling. Within this section of the report we refer to these games as social casino games.

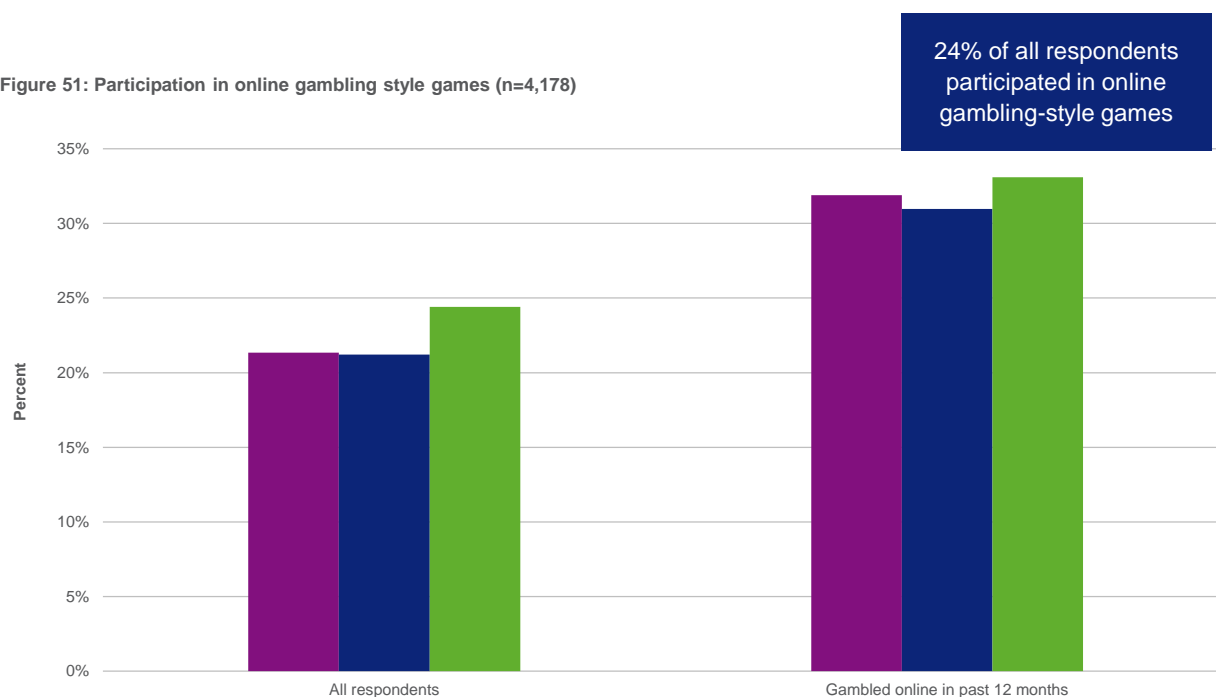
The boundaries between social casino gaming and commercial gambling have become increasingly blurred as a result of:

- The growth in use of social media by social casino gaming and gambling companies.
- An increasing convergence between the products of traditional gambling and social casino gaming businesses.

As such, participation in social casino gaming has been tracked in the online survey since its launch in 2015. Questions are asked to all respondents on a biannual basis.

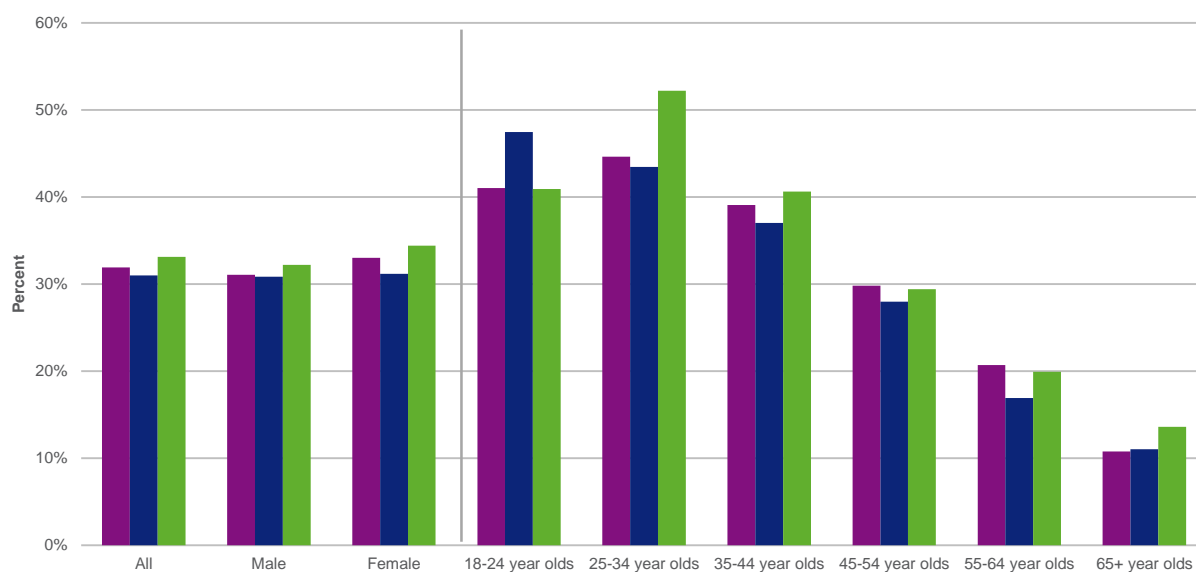
Of all respondents asked, 24% had participated in online gambling-style games (a 3 percentage point increase from 2016). This figure increased to 33% when only looking at those who had gambled online in the past 12 months.

Figure 51: Participation in online gambling style games (n=4,178)



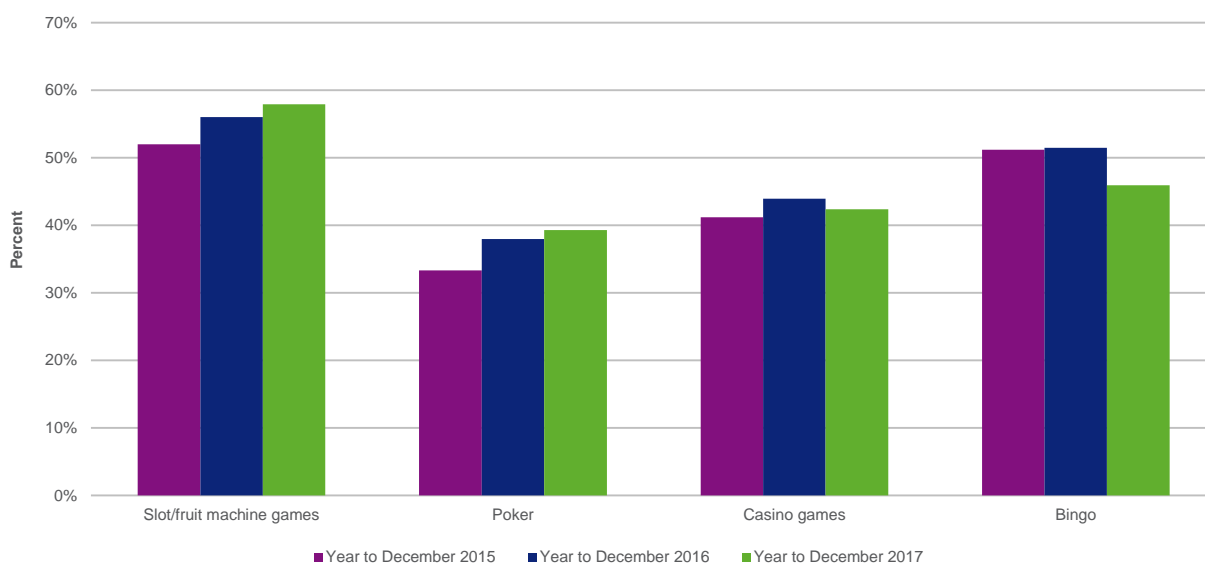
Participation was higher for those aged 25-34 (52% of all those who had gambled in the last 12 months) and levels of participation for males and females were similar (32% and 34% respectively).

Figure 52: Participation in online gambling-style games amongst online gamblers by gender and age (n=2,280)



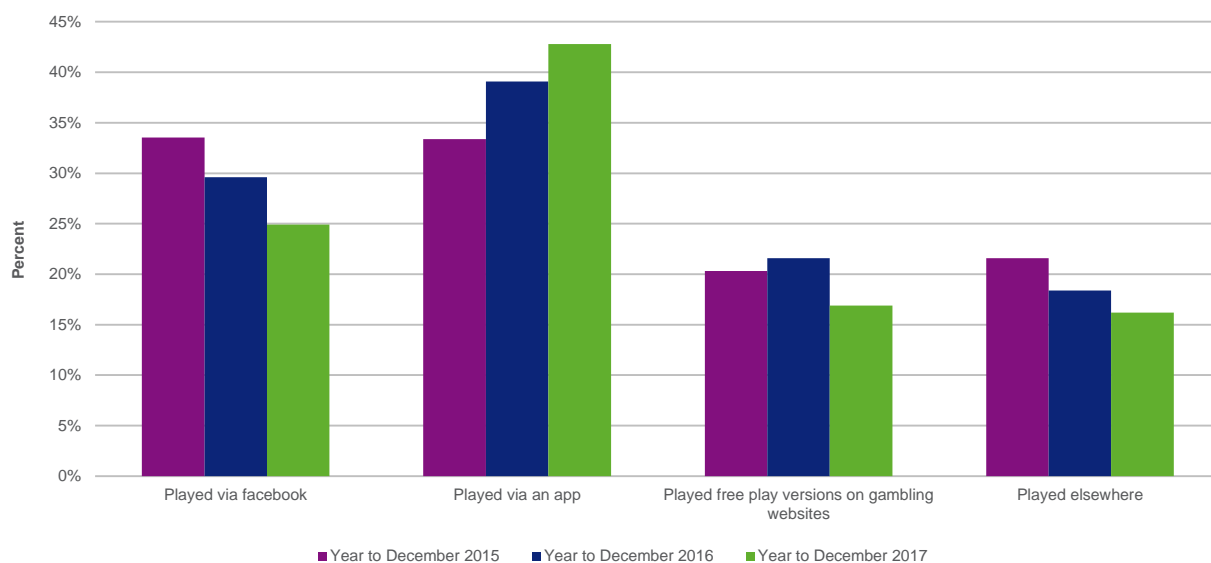
The most popular games were slot or fruit machine style games, with 58% of social gamers having played them in the last four weeks. This is followed by bingo style games which saw a small decline (46% a 5 percentage point decrease from 2016). Poker style games saw an increase in participation, albeit a small one.

Figure 53: Past four week participation in online gambling-style games by game type (n=756)



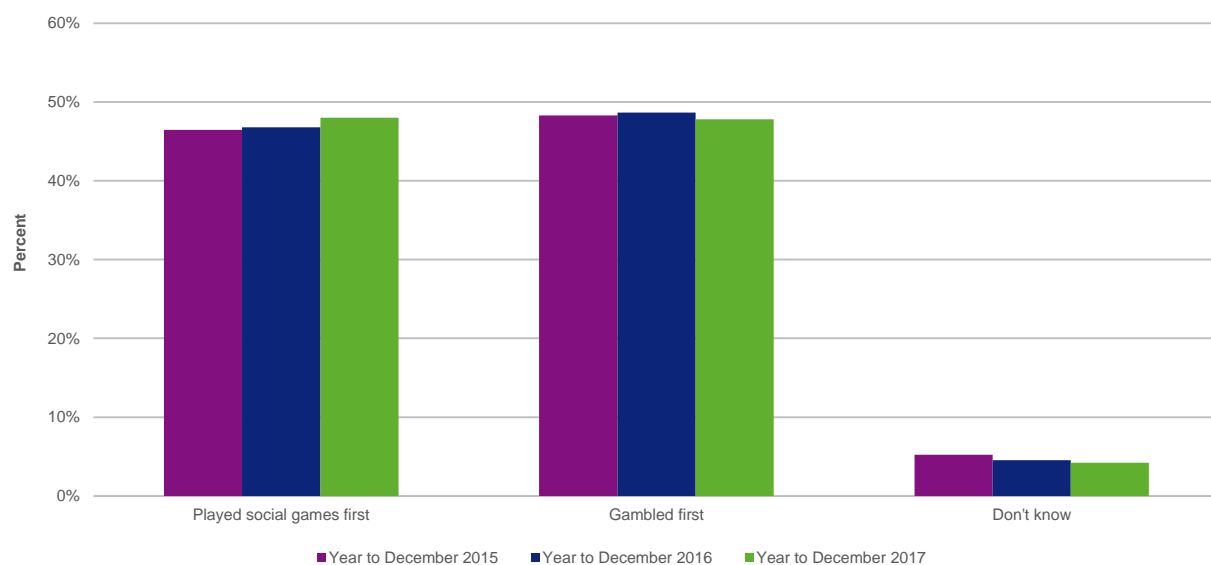
In 2017, social casino gamers most commonly played games via an app, with 43% having done so in the past four weeks. The next most common platform to play games on was Facebook (25%), however, this has declined since 2016 (a 5 percentage point decrease).

Figure 54: Past four week participation in online gambling-style games by mode of play (n=756)



Amongst social casino gamers who had also gambled, 48% stated that the first activity that they undertook was gambling to win money, the same proportion as those who reported that they had played online gambling games first. The remaining 4% could not remember which activity they had done first.

Figure 55: First activity participated in (n=536)



<sup>35</sup> The remaining 4% could not remember which they had done first.

# Perceptions and Attitudes



**64% think people should have the right to gamble whenever they want**

**-3% from 2016**

**Reputation of a company being fair and trustworthy is the top choice when selecting an operator**



**Public opinion is informed by personal experience, television news and experience of a friend/family member**



**33% of people think that gambling is fair and can be trusted**



**+2% from 2016**

**41% of people think that gambling is associated with criminal activity**



**People think that protecting children from gambling is the most important policy issue**



**+2% from 2016**

**71% of people think that gambling is dangerous for family life**



**+2% from 2016**

**80% of people think there are too many opportunities for gambling**



**Overall, attitudes towards gambling are declining**

# Perceptions and attitudes

## Perceptions

The Commission has been tracking public perceptions of gambling since 2008, using questions asked to respondents on a quarterly basis using the telephone survey. The questions measure the extent to which people in Great Britain think that gambling is fair and can be trusted, and that gambling is associated with criminal activity. Overall, attitudes towards gambling have become more negative.

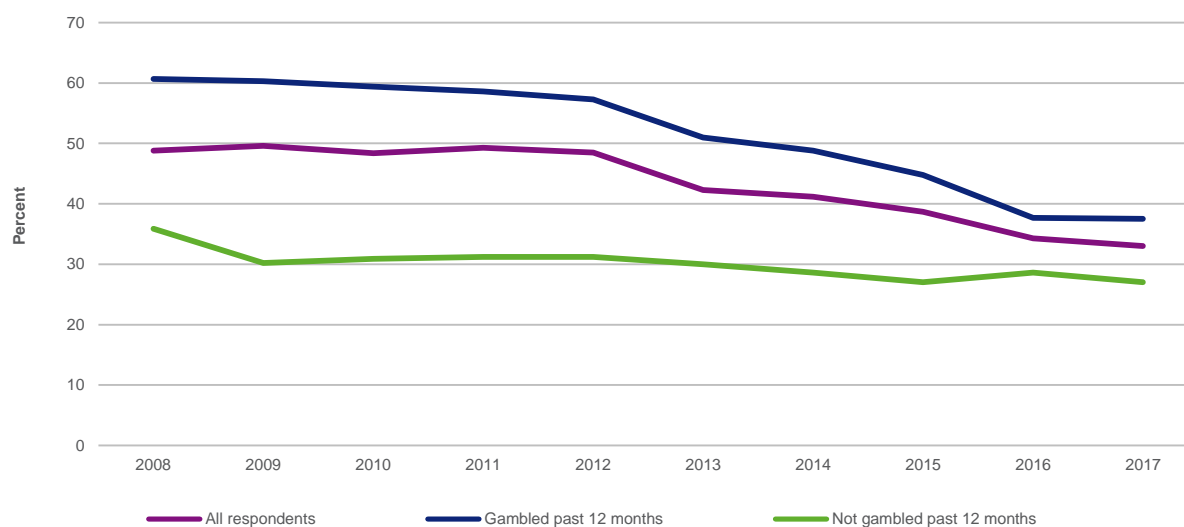
Table 3 shows the percentage of respondents who agreed, either strongly or slightly, with the statement that gambling in this country is fair and can be trusted.

Table 3: Agree that gambling is conducted fairly and can be trusted (n=4,001)

In this country, gambling is conducted fairly and can be trusted (%)										
Agree with statement	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
All respondents	48.8	49.6	48.4	49.3	48.5	42.3	41.2	38.7	34.3	33.0
Gambled past 12 months	60.7	60.3	59.4	58.6	57.3	51.0	48.8	44.8	37.7	37.5
Not gambled past 12 months	35.9	30.2	30.9	31.2	31.2	30.0	28.6	27.0	28.6	27.0

Overall, 33% of people in Great Britain agreed with the statement that gambling was fair and can be trusted in 2017 (a 1 percentage point decline from 2016). Gamblers continue to be more positive than non-gamblers although the data shows a decline in both gamblers and non-gamblers perceptions that gambling is fair and can be trusted across the series. However, in 2017 gamblers perceptions have remained stable at 38% from 2016. As previously reported, these findings could be related to gamblers' concerns about the fairness of terms and conditions and the odds offered by gambling companies.

Figure 56: Agree that gambling is conducted fairly and can be trusted (n=4,001)



<sup>38</sup> Not statistically significant at the 95% level

Table 4 shows the percentage of respondents who agreed (either strongly or slightly) with the statement that gambling in Great Britain is associated with criminal activity.

Table 4: Agree that gambling is associated with criminal activity (n=4,001)

In this country, gambling is associated with criminal activity (%)										
Agree with statement	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
All respondents	42.0	41.3	36.9	36.5	39.6	39.8	41.2	39.6	38.5	40.9
Gambled past 12 months	40.3	38.2	35.8	34.4	36.5	37.8	40.2	37.4	36.2	39.3
Not gambled past 12 months	44.6	46.7	39.3	40.5	45.3	42.5	42.9	43.8	42.3	42.9

Overall, 41% of people in Great Britain agreed with the statement that gambling was associated with criminal activity in 2017 (a significant increase from 2016). Although gamblers' perceptions remain more positive than non-gamblers, the proportion of gamblers that agreed gambling is associated with criminal activity has significantly increased since 2016 from 36% to 39%. Non-gamblers' perceptions remain relatively consistent from 2016.

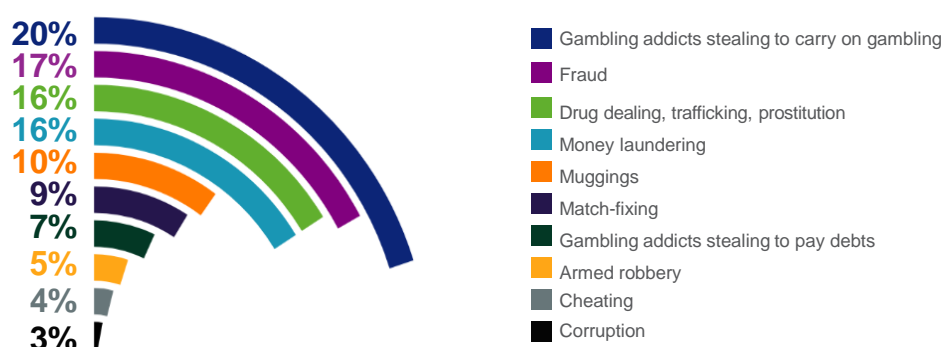
Figure 57: Agree that gambling is associated with criminal activity (n=4,001)



Respondents who agreed that gambling was associated with criminal activity in 2017 were asked which crimes they associated with gambling. Most respondents mentioned theft for the purpose to continue gambling (20%), followed by fraud (17%), drug dealing/trafficking/prostitution (16%), and money laundering (16%).

Perceptions of crimes associated with gambling are relatively similar among both gamblers and non-gamblers with the exception of match fixing where gamblers are more likely to associate this with gambling than non-gamblers.

Figure 58: Proportion of respondents mentioning a crime (n=1,634)



## Attitudes towards gambling

As well as overall perceptions of gambling this section includes more specific public attitudes and opinions towards gambling in Great Britain. In the 2007 British Gambling Prevalence Survey (BGPS) questions were developed for the first time to capture this data. The Attitudes Towards Gambling Scale (ATGS), consisting of a series of 14 statements, was developed with each statement expressing an attitude towards gambling, with five response options on a likert scale from *strongly agree* to *strongly disagree*. Due to constraints on questionnaire space in the 2010 BGPS, the number of attitude items was reduced and the scale was redeveloped as a shortened eight item scale called the ATGS-8<sup>39</sup>.

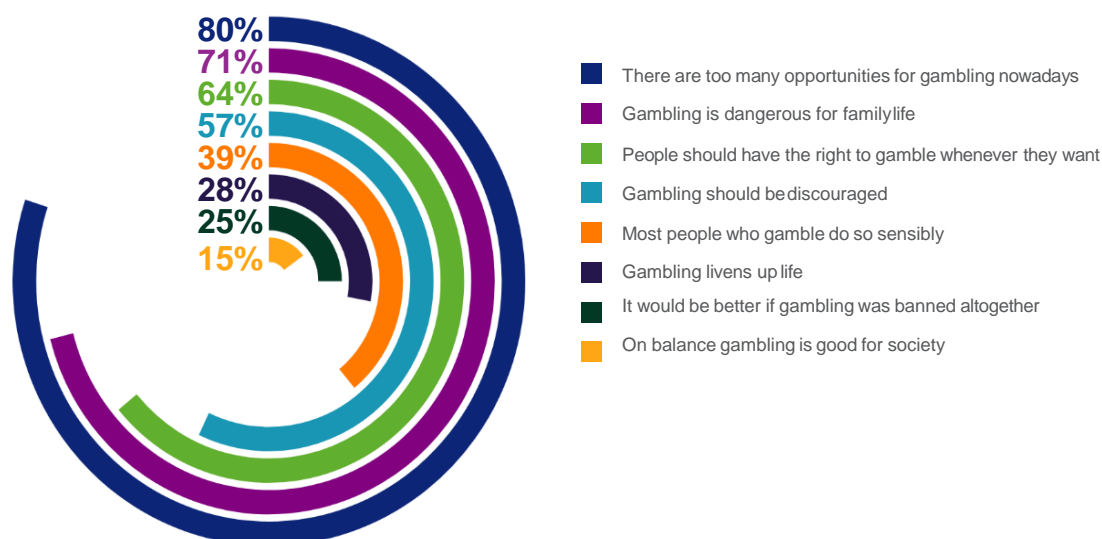
The ATGS-8 statements were added to the Commission's telephone survey in March 2016 to provide an up to date score for the first time since 2010. Total scores range between 8 and 40, with a score of 24 representing the exact mid-point and an overall neutral opinion towards gambling. Scores above 24 are interpreted as representing more positive attitudes overall, whilst scores below 24 represent more negative attitudes overall.

Table 5: Mean scores for each attitude statement by gender and age (n=4,001)

ATGS-8 attitudes statements mean scores									
Agree with statement	All	Male	Female	16 –24	25 –34	35 –44	45 –54	55 –64	65+
People should have the right to gamble whenever they want	3.6	3.8	3.4	3.6	3.7	3.5	3.6	3.6	3.5
There are too many opportunities for gambling nowadays	1.7	1.8	1.7	2.0	1.8	1.7	1.6	1.5	1.7
Gambling should be discouraged	2.4	2.5	2.3	2.6	2.5	2.3	2.3	2.2	2.3
Most people who gamble do so sensibly	3.0	3.0	3.0	3.0	3.0	3.0	3.1	3.0	3.0
Gambling is dangerous for family life	2.1	2.1	2.0	2.3	2.2	2.2	2.0	2.0	1.8
On balance, gambling is good for society	2.2	2.3	2.2	2.5	2.3	2.3	2.1	2.1	2.1
Gambling livens up life	2.6	2.7	2.4	2.9	2.7	2.7	2.5	2.5	2.4
It would be better if gambling was banned altogether	3.4	3.6	3.3	3.5	3.5	3.4	3.4	3.4	3.3
<b>Total ATGS-8 score</b>	<b>21.0</b>	<b>21.7</b>	<b>20.3</b>	<b>22.4</b>	<b>21.6</b>	<b>21.1</b>	<b>20.7</b>	<b>20.4</b>	<b>20.1</b>

Figure 59 shows the proportion of respondents who agreed with each individual attitudes statement. Overall, people's attitudes towards gambling have become more negative since 2016. In 2017, 80% of people agreed that there are too many opportunities for gambling nowadays (an increase of 2 percentage points from 2016), whilst 71% agreed that gambling is dangerous for family life (an increase of 2 percentage points from 2016). However, 64% of people agreed that people should have the right to gamble whenever they want (a decrease of 3 percentage points from 2016). Only 15% of people agreed that gambling is good for society (no difference from 2016) and 25% felt it would be better if gambling was banned altogether (an increase of 2 percentage points from 2016).

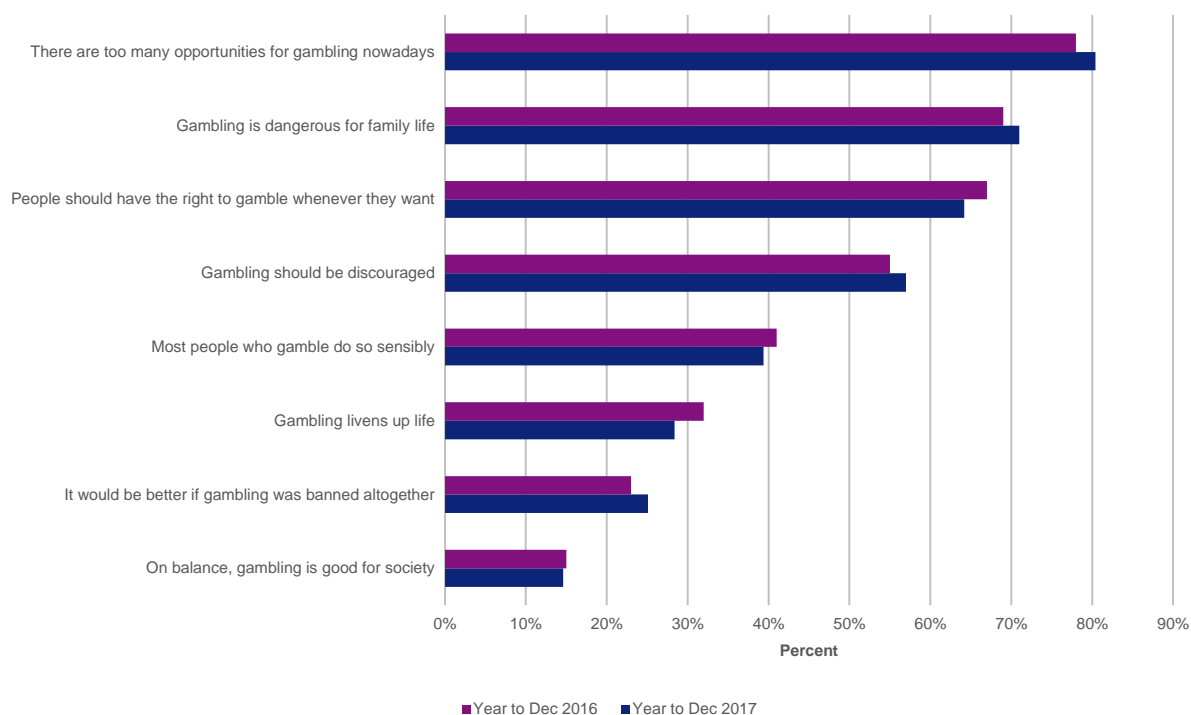
Figure 59: Proportion of respondents agreeing with individual attitude statements (n=4,001)



<sup>39</sup> British Gambling Prevalence Survey (2010)

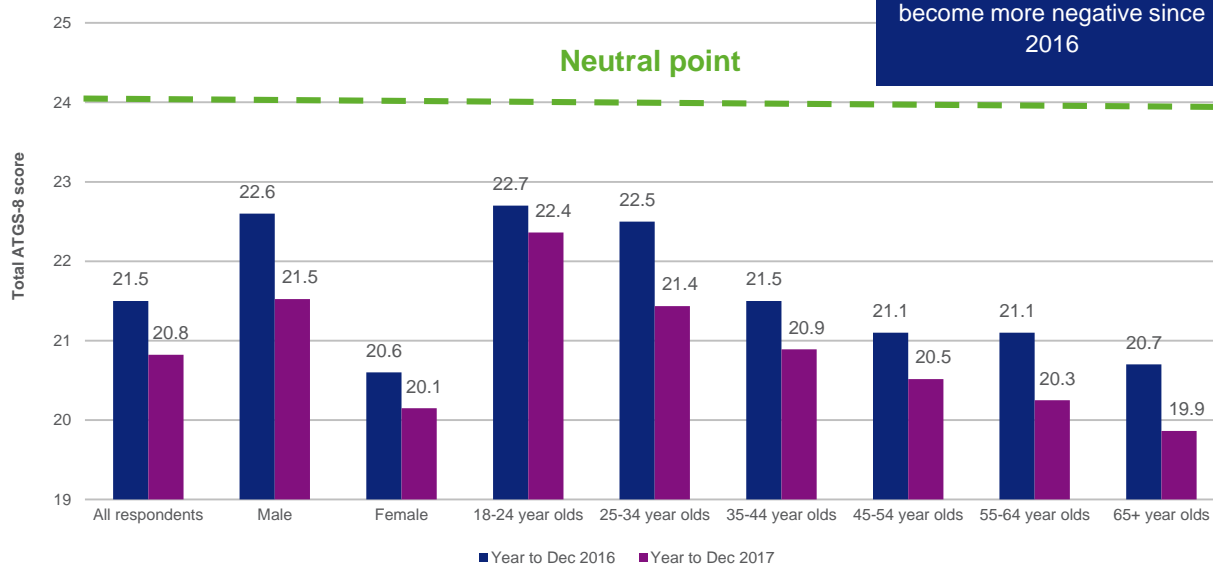
<sup>40</sup> Not statistically significant at the 95% level.

Figure 60: Proportion of respondents agreeing with individual attitude statements by year (n=4,001)



The total ATGS-8 score for all respondents is 21.0 (0.5 lower than 2016), which is placed on the negative side of the neutral point of 24 and has become more negative since 2016. On average men expressed more negative attitudes than women on most of the individual attitude statements and therefore has a higher overall score of 21.7 (0.9 lower than 2016) compared to 20.3 (0.3 lower than 2016) for women. Positivity towards gambling declines with age as 16-24 year olds have a higher overall score of 22.4 compared to 20.1 for 65+ year olds.

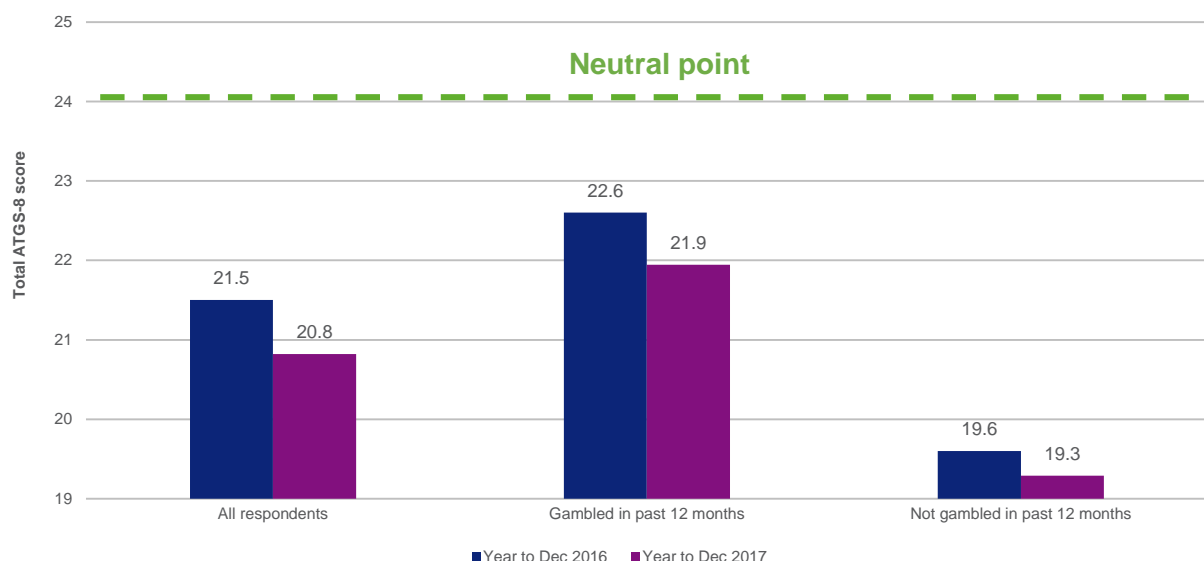
Figure 61: Total ATGS-8 score by gender and age (n=4,001)



Overall, people's attitudes towards gambling have become more negative since 2016

Attitudes towards gambling are more negative among non-gamblers than gamblers, a consistent trend since 2016. Those who have gambled in the past 12 months have an ATGS-8 score of 21.9 (a decrease of 0.7 since 2016). Non-gamblers have an ATGS-score of 19.3 (a 0.3 decrease from 2016).

Figure 62: Total ATGS-8 score by gambling status (n=4,001)

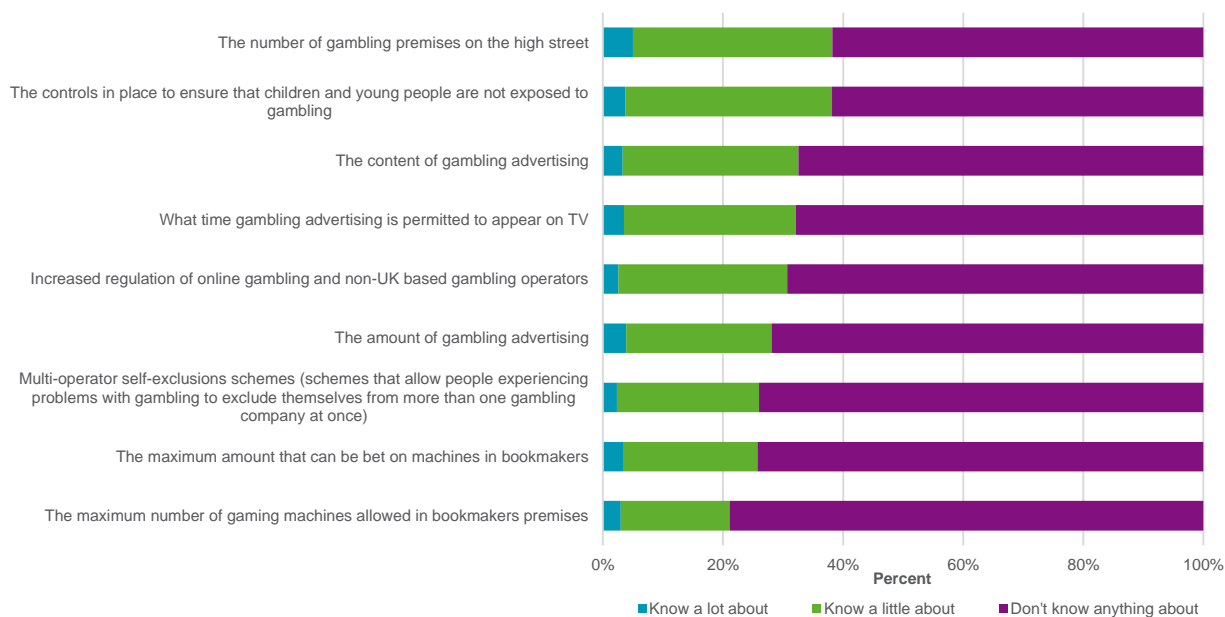


## Public opinion on gambling policy

In October 2016 further questions capturing the opinions and attitudes of the Great British public were included in the Commission's online survey to further support the findings collected in the telephone survey (reported above). As opposed to capturing people's opinions on gambling in general, these questions were designed to provide insight into attitudes towards topical gambling policy issues.

Respondents were first asked about their awareness of nine selected policy issues covering topics such as gambling advertising, machines in bookmakers, and self-exclusion. The full list can be seen in figure 63 along with rates of public awareness.

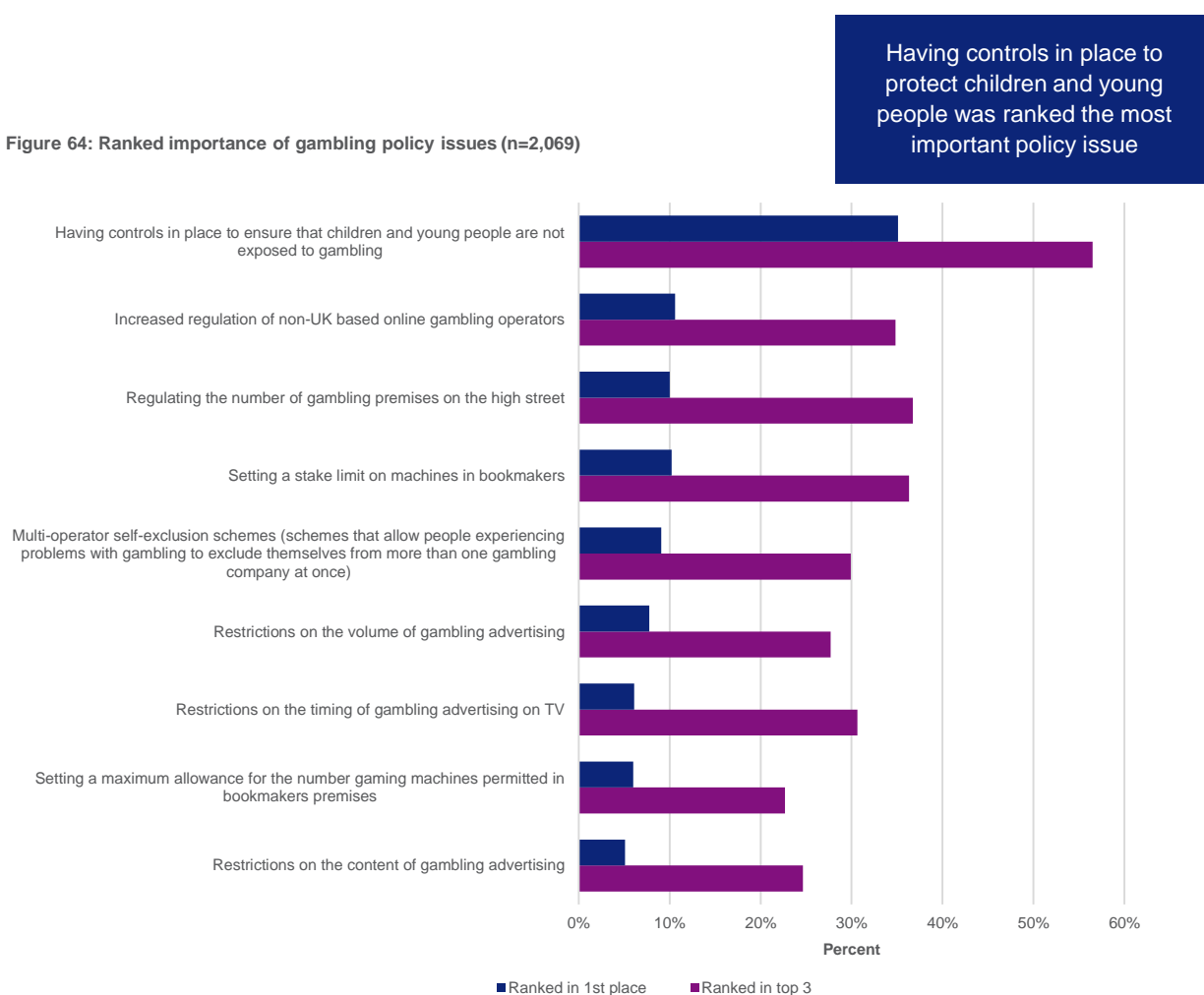
Figure 63: Awareness of gambling policy issues (n=2,069)



The two policy issues that the general public were most aware of are the number of gambling premises on the high street and the controls in place to ensure children and young people are not exposed to gambling, each with 38% stating that they knew a lot or little about the topic. This was followed by the content of gambling advertising (33%) and, what time gambling advertising is permitted to appear on TV (32%). The issue that the public knew least about was the maximum number of gaming machines allowed in bookmakers premises, with 21% stating that they knew a lot or little about the issue.

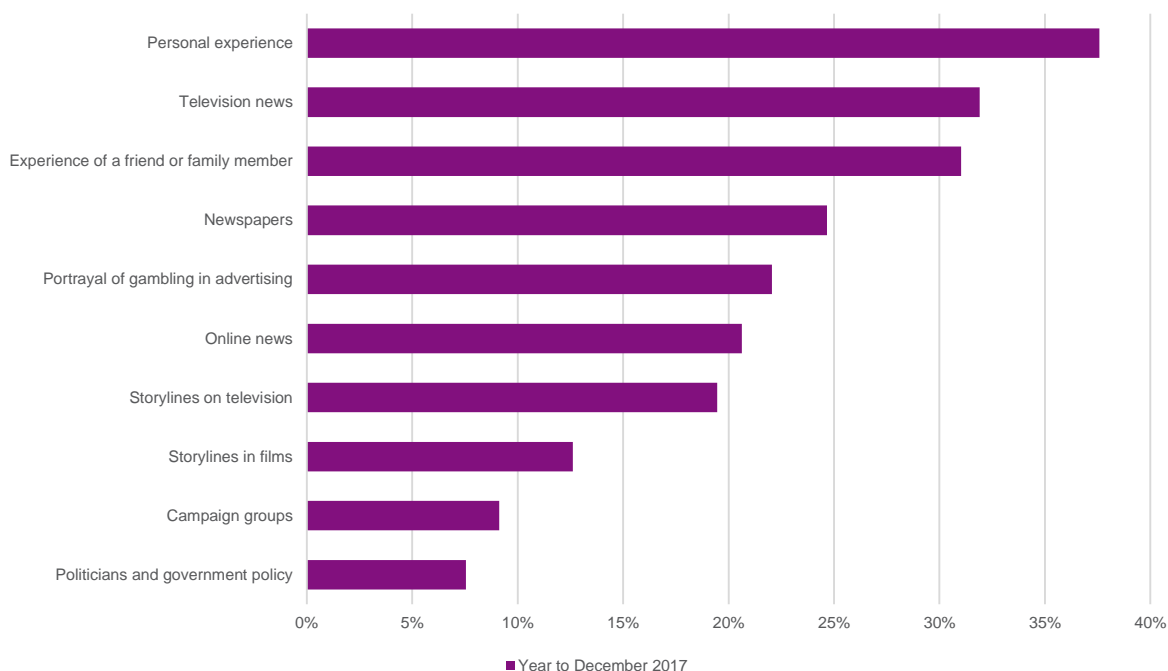
This was followed up by a question used to ascertain how important the public felt that various regulatory measures covering each of the nine issues are. Respondents were asked to rank each issue in order of importance and figure 63 shows the results of this ranking exercise. By far, the issue most people ranked as the highest importance was having controls in place to ensure that children and young people are not exposed to gambling (35%). In addition, this was also the issue most often ranked in people's top three issues and consistent with the results from the previous year.

Figure 64: Ranked importance of gambling policy issues (n=2,069)



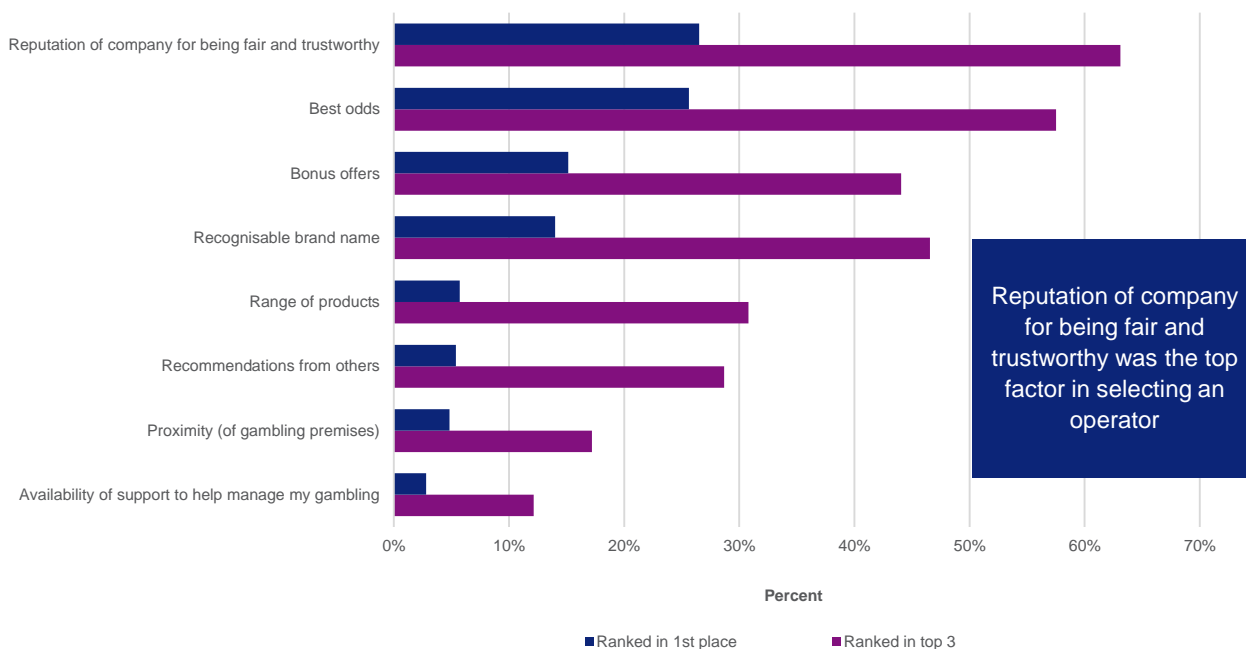
Respondents were then asked about what channels had informed their overall opinion of gambling on society. Personal experience most often informed people's opinions (38%), followed by television news (32%) and the experience of a friend or family member (31%).

**Figure 65: Channels informing public opinion (n=2,069)**



Finally, gamblers were asked about which factors influenced their choice of operator. The most important factor selected was reputation of a company for being fair and trustworthy, selected by 27% of gamblers as their top choice, this was closely followed by operators who offered the best odds, with 26% of gamblers selecting it as their top choice.

**Figure 66: Factors influencing gamblers in their choice of operator (n=3,306)**



# Appendix 1 – methodology

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This appendix provides further explanation of the methodologies used for each section of this report. Further methodological details including sample sizes, margins of error and questionnaire scripts can be found in the accompanying technical annex.

## Gambling participation

Gambling participation data is collected on a quarterly basis using a bespoke telephone survey administered by Populus<sup>41</sup>. The results cover the calendar years 2014 – 2017 and are based on a rolling year average of the four quarters in the year, reducing the effect of seasonal variations in gambling behaviour. Surveys are conducted in March<sup>42</sup>, June, September and December with approximately 1,000 interviews conducted per quarter. Each survey captures past four week gambling behaviour amongst people aged 16+<sup>43</sup> in Great Britain.

Telephone survey sample is generated through Random Digit Dialling<sup>44</sup> (RDD) of GB phone numbers. The sample is subject to quotas to ensure it is as nationally representative as possible. On introduction respondents are screened to ensure they are 16+ and fit in remaining unfilled quotas.

The quotas are set based on:

- Age
- Gender
- Region
- Social grade

In addition data are weighted for analysis to ensure all results are representative of the adult population. Weights are set based on the National Readership Survey (a face-to-face random probability survey of approximately 15,000 respondents). The variables used for weighting are:

- Age
- Gender
- Region
- Social grade
- Whether they have taken a foreign holiday in the past 3 years
- Tenure
- Number of cars in the household
- Working status

<sup>41</sup> Until March 2015 the survey was conducted by ICM Unlimited as part of their telephone omnibus survey. Following the cessation of the omnibus, the Commission chose to commission a standalone telephone survey, for which Populus were selected as supplier following a competitive tender process.

<sup>42</sup> For the first quarter of 2014 the timing of the ICM omnibus meant that the survey had to be conducted in the period after the Grand National. This had the impact of inflating the rates of participation, in particular amongst those aged 18-24 and 25-34. This lack of control over survey timing is one of the factors which has prompted the Commission to commission a stand-alone survey of gambling participation.

<sup>43</sup> In March 2016 the sample was broadened to include participants aged 16+

<sup>44</sup> Random Digit Dialling (RDD) is a method for sampling of telephone surveys which involves the random generation of telephone numbers. This method is effective in the GB population due to the high rate of telephone ownership and the fact that it allows the sampling of individuals who are ex-directory.

The core content captured in the survey is:

- Past four week participation in a range of gambling activities
- Mode of play on individual activities
- Frequency of play by activity and mode

The full script for the questionnaire is available in the technical annex.

## Problem and at-risk gambling

Rates of problem gambling are also collected on a quarterly basis in the telephone survey, using the short form Problem Gambling Severity Index (PGSI mini-screen)<sup>45</sup>. The screen was developed by Gemini Research to provide a screen which is more easily administered than the full 9-item PGSI.

The screen is formed of three questions which broadly capture issues associated with problem gambling. The questions are:

1. Have you bet more than you could really afford to lose?
2. Have people criticised your betting or told you that you have a gambling problem?
3. Have you felt guilty about the way you gamble or what happens when you gamble?

Respondents select from never – sometimes – most of the time – almost always for each of the questions. Questions are then scored from 0-3 based on response giving a total possible screen score of 9. The scoring categorisation is shown in the table below:

Score	Categorisation
0	Non-problem gambler
1	Low-risk gambler
2-3	Moderate-risk gambler
4+	Problem gambler

Due to the small base sizes presented by the telephone survey, the mini-screen should not be considered the Commission's comprehensive estimate of problem gambling rates in Great Britain. As such the Commission will continue to use the full PGSI screen and the DSM-IV as its main measure of problem gambling using the Health Surveys for England, Scottish Health Survey, and the Welsh Problem Gambling Survey.

<sup>45</sup> Developing a Short Form of the PGSI (Volberg, 2012).

## Online gambling behaviour

As well as collecting data on overall gambling participation, the Commission collects more in-depth data from online gamblers specifically about their online gambling behaviour. This is done via a quarterly online survey conducted by Populus as part of their online omnibus survey. Results cover the calendar year 2016, with surveys again taking place in March<sup>46</sup>, June, September and December with approximately 2,000 interviews conducted per quarter with people aged 18+ in Great Britain. This generates a sample of nearly 1,000 online gamblers each quarter. To avoid response bias from other sections of the omnibus, gambling content is always included at the start of the survey. Results are based on a rolling year average of the four quarters in the year to reduce the effect of seasonal variations in gambling behaviour.

The online survey sample is sourced through a panel and the sample is subject to quotas in-line with those used for the telephone survey which are outlined above.

In addition data are weighted for analysis in-line with the methodology used for the telephone survey which is outlined above.

The core content captured in the online survey is:

- Past four week participation in a range of gambling activities
- Mode of play on individual activities
- Frequency of play online
- Devices used for gambling online for individual activities
- Location of play for individual activities
- In-play betting
- Number of accounts held with operators
- Self-exclusion and gambling management tools
- Terms and conditions
- Participation in social gaming

The full script for the questionnaire is available in the technical annex, along with further detail about the methodology and sampling approach.

## Consumer analysis

The online survey also includes broader questions asked to both gamblers and non-gamblers about wider gambling issues. Some questions are asked on a quarterly basis, biannually or annually basis depending on the nature of the questions. Some are generated on an ad-hoc basis in response to changes in trends observed through either the telephone survey or the core online survey, or in line with emerging issues in the gambling industry.

Included for the first time in this report is data covering:

- eSports
- Information to players
- Complaints

The survey has also been used to enhance our understanding of public opinions towards the gambling industry and topical issues, which is incorporated into the following section on consumer perceptions and attitudes.

## Perceptions and attitudes

In addition to data relating participation in gambling the telephone survey also captures information on perceptions of gambling amongst both gamblers and the general public. The survey captures perceptions in two areas on a five-point scale from strongly disagree – strongly agree:

- Whether gambling is fair and can be trusted
- Whether gambling is linked to crime

In 2016 the Commission added further questions to the telephone survey covering attitudes towards gambling. These questions (known as the ATGS-8) were previously asked in the British Gambling Prevalence Survey 2010, and were designed to measure attitudes towards gambling in general, rather than attitudes towards individual gambling activities or towards currently topical gambling policy issues. The analysis is included in this report for the second time.

In order to generate a score from the ATGS-8, each response is given a score between 1 and 5. For those items phrased in a way that is positive towards gambling a score of 5 is given to strongly agree responses, 4 to agree, 3 to neither agree nor disagree, 2 to disagree and 1 to strongly disagree responses. The scoring is reversed for those attitude statements that are negatively phrased, from a score of 1 for strongly agree responses to 5 for strongly disagrees responses. Scores from the eight separate items are then summed to generate the total ATGS-8 score. Total scores therefore range between 8 and 40, with a score of 24 representing the exact mid-point and an overall neutral opinion towards gambling. Scores above 24 are interpreted as representing more positive attitudes overall, whilst scores below 24 represent more negative attitudes overall.

This section also includes data from wider questions on public opinions, captured using the Commission's online survey.

# GAMBLING COMMISSION

## Keeping gambling fair and safe for all

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