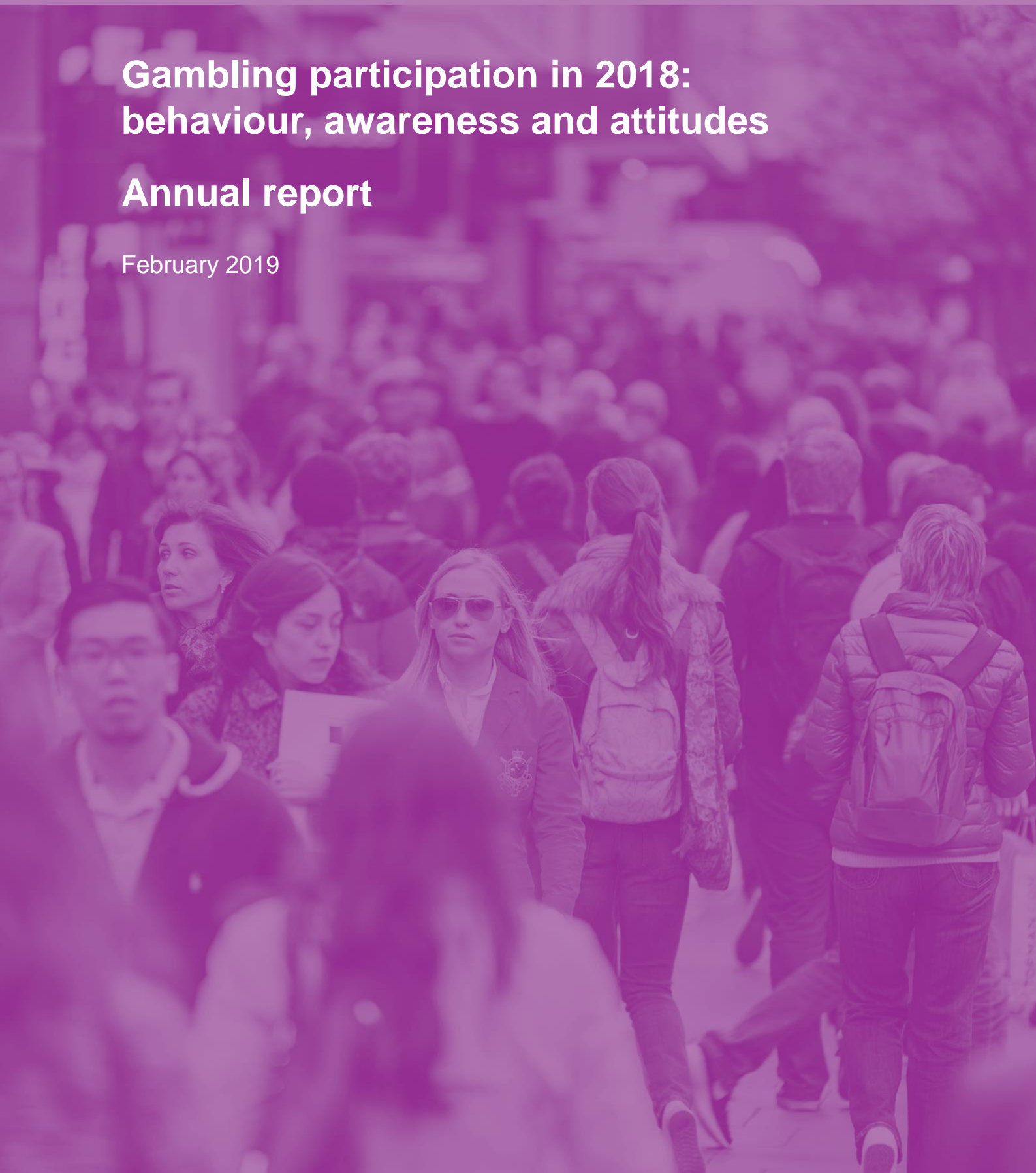


Gambling participation in 2018: behaviour, awareness and attitudes

Annual report

February 2019



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Headline findings

46%

Percentage of respondents who have participated in any form of gambling in the past four weeks
(45% in year to December 2017)

0.7%

Proportion of respondents who were classified as problem gamblers (those who gamble with negative consequences and a possible loss of control)
According to the full PGSI or DSM-IV screen in 2016

32%

Percentage of respondents who have participated in gambling in the past four weeks, excluding those who had only played the National Lottery draws
(31% in year to December 2017)

1.1%

Proportion of respondents who were classified as moderate-risk gamblers (those who experience a moderate level of problems leading to some negative consequences)
According to the full PGSI screen in 2016

18%

Percentage of respondents who had gambled online in the past four weeks
(18% in year to December 2017)

2.4%

Proportion of respondents who were classified as low-risk gamblers (those who experience a low level of problems with few or no identified negative consequences)
According to the full PGSI screen in 2016

1.5%

Percentage of respondents who had played on machines in a bookmakers in the past four weeks
(1.4% in year to December 2017)

6%

Proportion of gamblers who have ever self-excluded
(6% in year to December 2017)

55%

Proportion of online gamblers who have gambled using a mobile phone or tablet in the past four weeks
(51% in year to December 2017)

30%

Proportion of respondents who think that gambling is fair and can be trusted
(33% in year to December 2017)

23%

Proportion of online gamblers who have bet in-play
(26% in year to December 2017)

38%

Proportion of respondents who think that gambling is associated with crime
(41% in year to December 2017)

Executive summary

Background and context

This report presents annual estimates of gambling behaviour in Great Britain in 2018, 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, online gambling behaviour, consumer awareness of gambling management tools, and perceptions and attitudes towards gambling. Data on rates of problem, moderate and low-risk gambling are taken from our latest Combined Health Survey 2016 (which incorporates the Health Survey for England, the Scottish Health Survey and the Welsh Problem Gambling Survey) due to its use of the full PGSI (Problem Gambling Severity Index) and DSM-IV screens. We have also included data from the telephone survey for 2018 for reference¹.

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

Survey findings

Gambling participation

Our research found that overall, gambling participation has remained stable compared to 2017 with 46% of respondents aged 16+ having participated in at least one form of gambling in the past four weeks in 2018 (45% in 2017). Those participating in gambling were more likely to be aged between either 55-64 (55%) or 45-54 (52%), however if we exclude National Lottery draw only participation, those in the age group 25-34 had the highest participation level (40%).

Amongst respondents:

- 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.
- Over half of gamblers (52%) gamble at least once a week.
- 18% of all respondents have gambled online in the past four weeks.

Problem gambling estimates

According to our latest Combined Health Survey (2016), an estimated 0.7% of respondents were classified as a problem gambler according to the full Problem Gambling Severity Index (PGSI) or DSM-IV² screen, with up to 2.4% being classified as low-risk (those who experience a low level of problems with few or no identified negative consequences), with 1.1% presenting as moderate-risk gamblers (those who experience a moderate level of problems leading to some negative consequences).

By comparison, the Commission's regular telephone survey, which uses the PGSI mini-screen observed a problem gambling rate of 0.5% and 3.3% being classified as low-risk and 1.5% as moderate-risk, however we encourage the use of the figures taken from the Combined Health Survey due to its robustness and use of the full PGSI screen.

Online gambling behaviour

Among online gamblers, laptops and mobile phones remain the most popular method of accessing gambling online in 2018. Mobile phone use for gambling purposes significantly increased (44%, an increase of 5 percentage points from 2017), whilst laptop use significantly declined (45%, a 5 percentage point decrease from 2017).

¹ 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.

² Details on the PGSI and DSM-IV screens are available in Appendix 1.

Typically, online gamblers play at home (96%). Younger age groups are more likely to gamble outside the home, either on their commute, at work, at a sports venue, or at a pub or club.

Among online gamblers, 23% have bet in-play (a 4 percentage point decrease from 2017), with the rate being highest among 18-24 year olds. On average, online gamblers have three accounts with online gambling operators. 5% of online gamblers have bet on eSports during the past 12 months, with participation rates highest among 18-24 and 25-34 year olds.

Consumer analysis

Awareness of self-exclusion among gamblers is 47%. Overall, 6% of gamblers had ever self-excluded and a further 41% hadn't self-excluded but were aware of it.

Overall, 20% of gamblers 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 25-34 year olds (14%) and 18-24 year olds (13%).

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.
- 53% of respondents have seen a gambling advert on the television in the past week.
- 45% of online gamblers were prompted to spend money on a gambling activity due to the adverts that they saw, as were 49% of online gamblers (with a social media account) who saw adverts on a social media platform.

Perceptions and attitudes

Overall 30% of respondents think that gambling is fair and can be trusted and 38% think that gambling is associated with criminal activity. Gambling addicts stealing to carry on gambling and money laundering are the crimes that respondents associate the most with gambling.

In addition, 79% of respondents think there are too many opportunities for gambling nowadays and 71% think that gambling is dangerous for family life, however 62% of respondents think that people should have the right to gamble whenever they want.

Best odds and reputation of a company for being fair and trustworthy were the top factors that were important for to gamblers when first selecting an operator.

Preface

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 2018, and covers gambling participation and consumer behaviour. The data have been gathered via a combination of telephone, online and health surveys, as indicated in the table below and throughout this report.

Topic area	Survey
Gambling participation Perceptions of and attitudes towards gambling	Telephone
Online gambling behaviour Consumer interest and awareness	Online
Problem gambling rates Moderate and low-risk gambling	Combined Health Survey

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.

Telephone survey

The telephone survey is the Commission's main measure of past four week gambling participation, with waves 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 2018, 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
- Mode of play on individual activities
- Frequency of play by activity and mode
- Problem gambling
- 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 2018, 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
- eSports
- Number of accounts held with operators
- Terms and conditions
- Complaints
- Information to player
- 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.

Combined Health survey

Gambling participation and prevalence statistics are collected via the Health Survey for England, Scottish Health Survey and Welsh Problem Gambling Survey. Across all surveys, approximately 14,000 respondents in total are questioned on their gambling behaviour and the results from each survey are then compiled into a Combined Health Survey Great Britain report [Gambling behaviour in Great Britain in 2016](#).

Due to its large sample size and robustness, data from the Combined Health Survey relates to 2016 (the latest data available from this survey). As these are the only surveys where the full PGSI and DSM IV problem gambling screens are used, we continue to use these surveys as our main measure of low-risk, moderate-risk and problem gambling and report the full PGSI and DSM IV measures in the chapter 'Low, moderate-risk and problem gambling'³.

Report conventions

Year on year trends displaying percentage point changes are significant at the 95% level (unless otherwise stated).

The following conventions have been used in the tables:

- Denotes no observations (zero values)
- * Denotes small sample sizes <30 responses

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 and are shown for the year 2018 only in the figure titles.

³ 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.

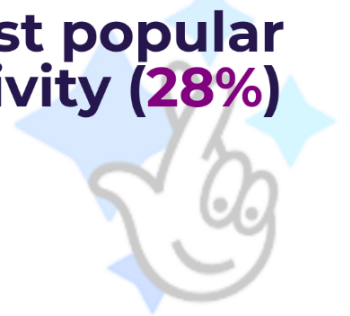
Gambling participation

46%

of adults aged 16+ have participated in at least one form of gambling in the past four weeks



The National Lottery draws remain the most popular activity (**28%**)



51%

of men have gambled

41%

of women have gambled

In the past four weeks...

55-64s

were most likely to have gambled on any activity (**55%**)

But, **23%** of 55-64s only played the National Lottery

25-34s

were most likely to have gambled (excluding the National Lottery draws) (**40%**)



of adults have gambled online



Playing on machines in a bookmakers has remained relatively stable (**1.5%**)



Football is the most popular betting activity (**5.7%**)



52% of gamblers gamble at least once a week

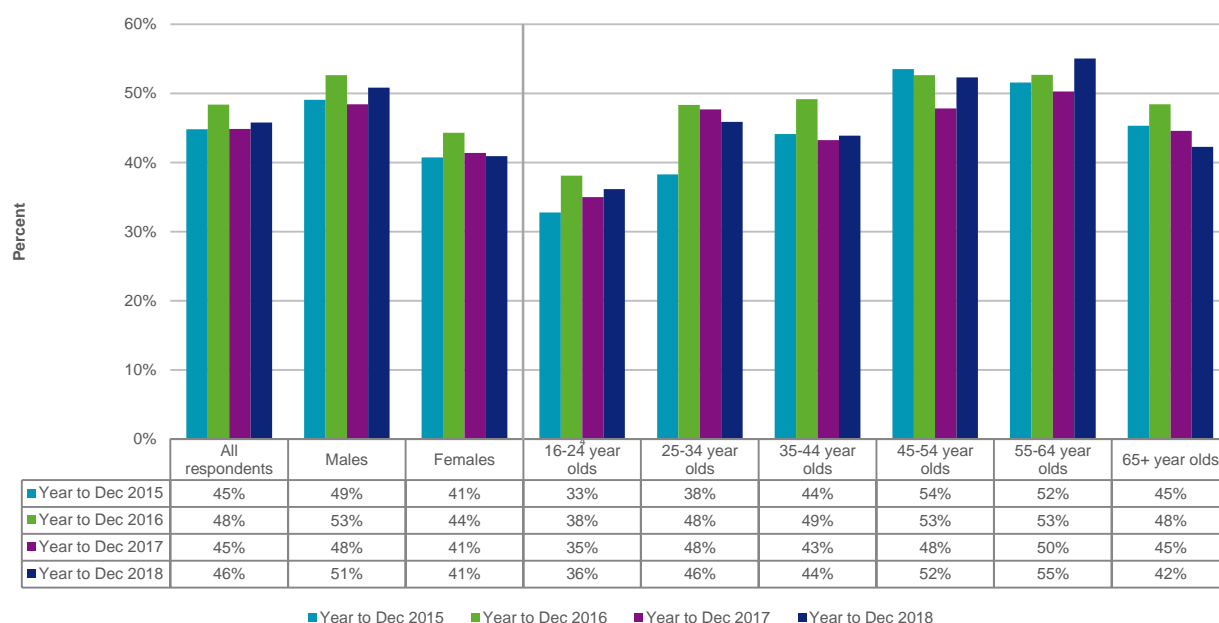
Gambling participation

This section reports on gambling participation in the year to December 2018, using data collected via a quarterly telephone survey. Surveys are conducted with people in Great Britain aged 16+⁴. These questions ask respondents about their gambling participation in the past four weeks.

How many people gamble

Overall, 46% of adults (16+) said they have participated in at least one form of gambling in the previous four weeks. As Figure 1 shows, a larger proportion of men (51%) have participated in any form of gambling than women (41%). Those participating in gambling are more likely to be aged between either 55-64 or 45-54, with 55% of 55-64 year olds and 52% of 45-54 year olds having gambled in the past four weeks. Those in the youngest and oldest age groups had the lowest gambling participation levels.

Figure 1: Past four week gambling participation by gender and age (n=4,009)



As participation in the National Lottery draws is so much higher than for 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, 30% had only gambled on the National Lottery draws. It is therefore useful to remove the responses of those who have only participated in the National Lottery draws to highlight patterns across age and gender groups.

There have been declines in those only playing the National Lottery draws among 16-24 year olds (4%, a 3 percentage point decrease from 2017), 25-34 year olds (14%, a 7 percentage point decrease from 2017), and 35-44 year olds (27%, a 6 percentage point decrease since 2017). There has also been a notable increase in those only playing the National Lottery draws among 65+ year olds (42%, a 7 percentage point increase from 2017).

⁴ In March 2016 the sample was broadened to include participants aged 16+.

Figure 2: Proportion of gamblers participating in National Lottery draws only (n=1,836)

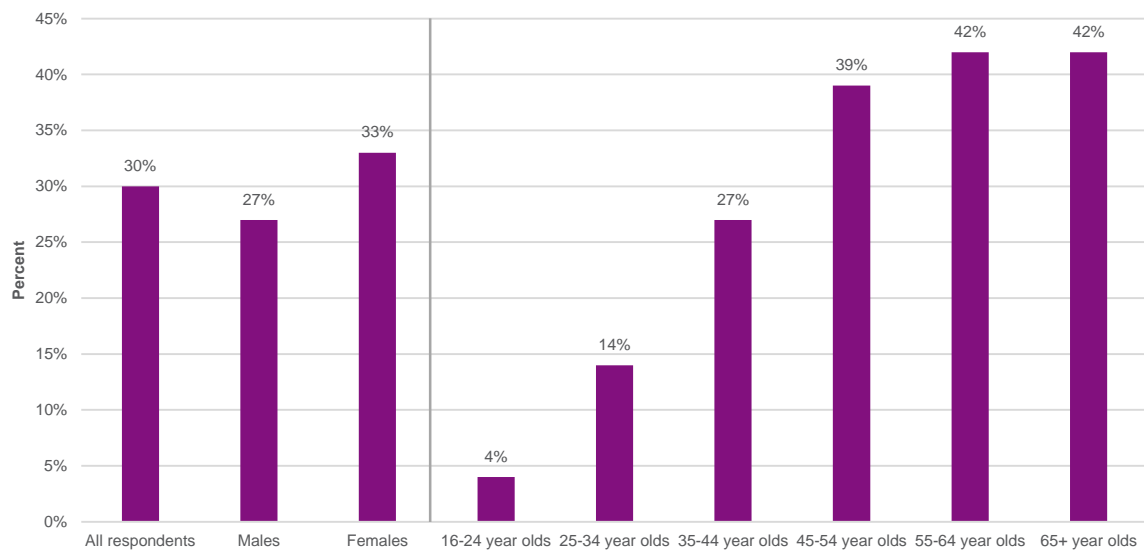
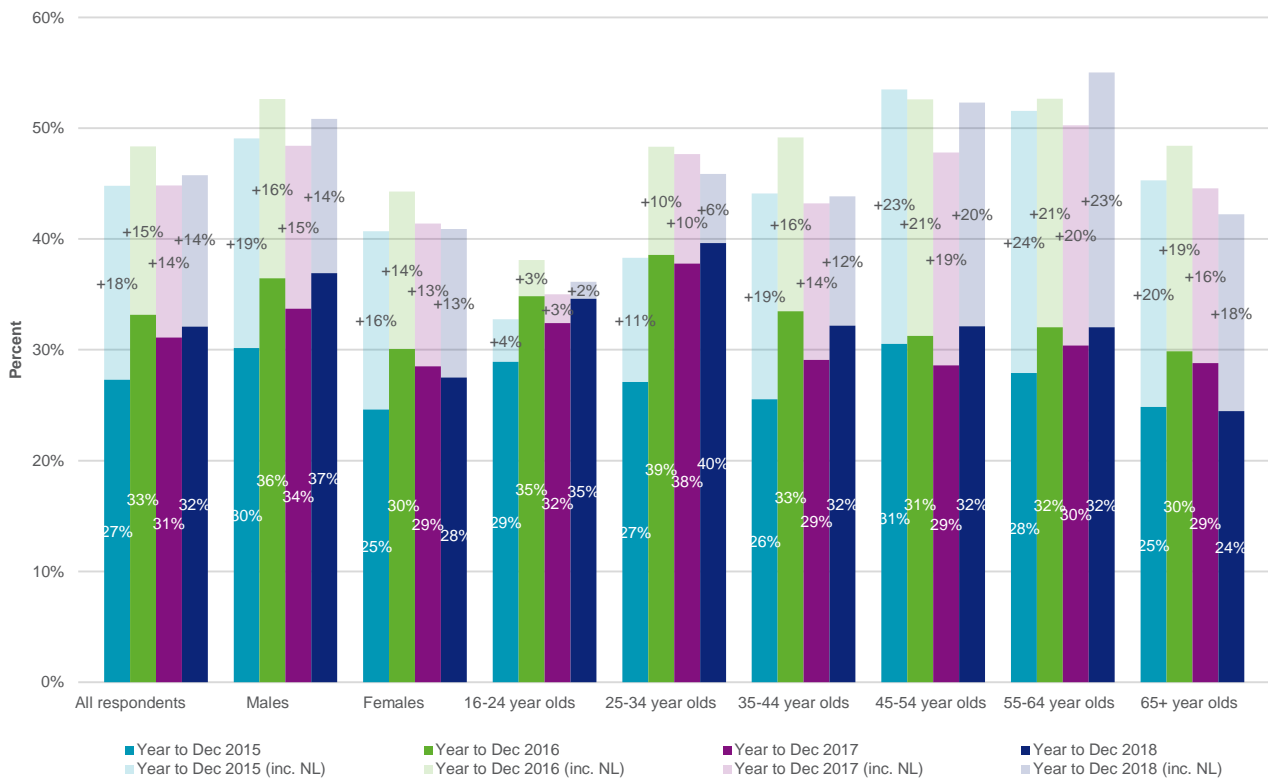


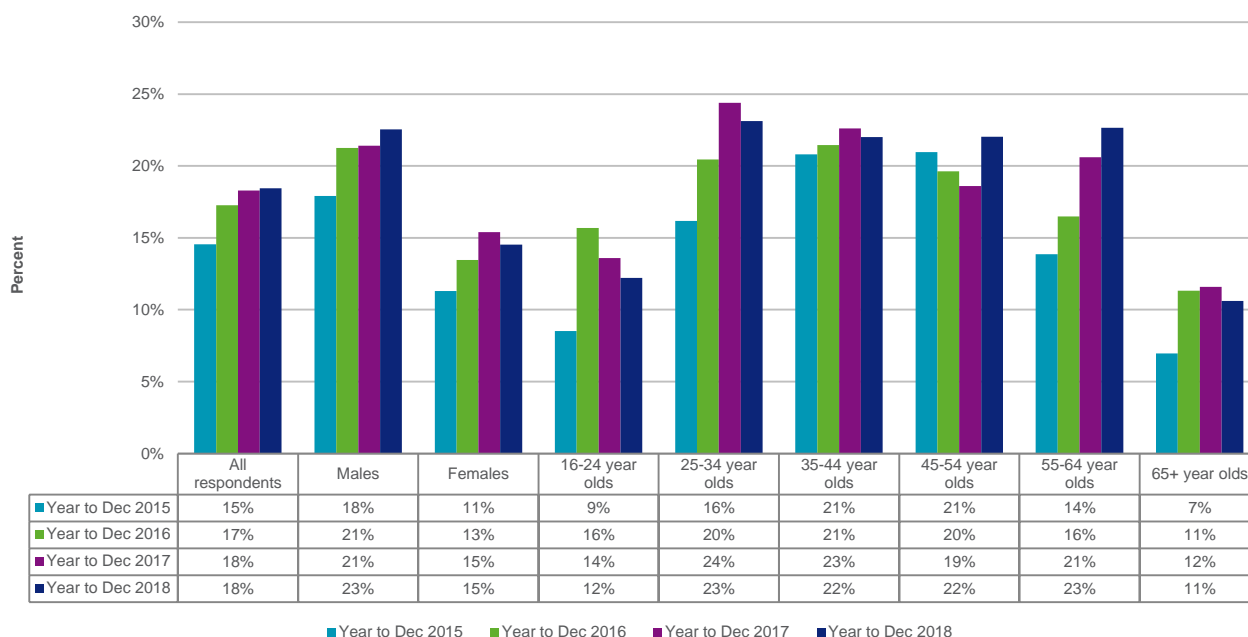
Figure 3 shows that when National Lottery draw only respondents are excluded, the overall participation rate falls from 46% to 32%. There has been an increase in participation among men (37%, a 3 percentage point increase from 2017), and it can be observed that this figure is higher for men than women (28%). Participation is highest in the 25-34 year old age group (40%), and lowest among the 65+ year old age group (24%, a decline of 4 percentage points since 2017). 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 (20% of 45-54 year olds and 23% of 55-64 year olds), whilst those aged 16-24 were least likely to have participated in only the National Lottery draws (2%).

Figure 3: Past four week gambling participation (excluding participation in National Lottery draws) by gender and age (n=4,009)



Overall, 18% of respondents have gambled online in the previous four weeks (a consistent trend from 2017). Online participation was higher among men (23%) than women (15%). Online participation was highest for the middle age groups (25-64) and lowest for 16-24 year olds and those aged 65+. When those who only participated in the National Lottery draws were excluded, the online gambling participation rate falls to 14% (the same proportion seen in 2017).

Figure 4: Past four week online gambling participation by gender and age (n=4,009)



What people gamble on

The most popular activity in 2018 was the National Lottery draws (28%), followed by scratchcards and other lotteries (both 11%). Participation in the National Lottery draws has remained stable since 2017, though, prior to this there had been a continued decline in participation. This coincided 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.

There have been significant participation changes amongst the following activities; private betting (6.1%, a 1.7 percentage point increase from 2017), betting on other events (1.0%, a 0.5 percentage point increase from 2017) poker at the pub/club (0.8%, a 0.4 percentage point increase from 2017), any other activity (0.9%, a 0.4 percentage point increase from 2017).

The rate of participation of machines in bookmakers (otherwise known as FOBTs) was stable at 1.5% in 2018.

Figure 5: Past four week gambling participation – Top three activities (n=4,009)

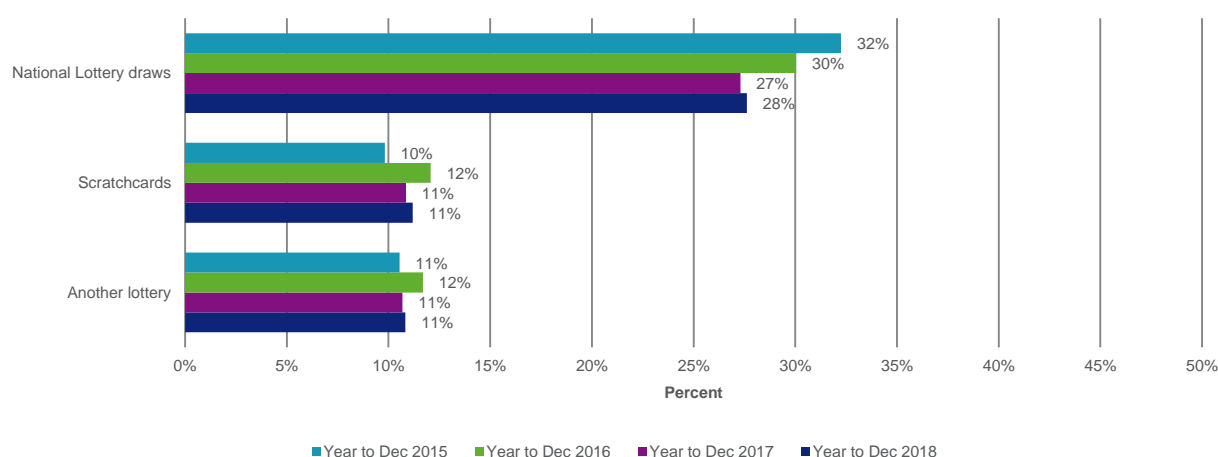


Table 1: Past four week gambling participation – All other activities (n=4,009)

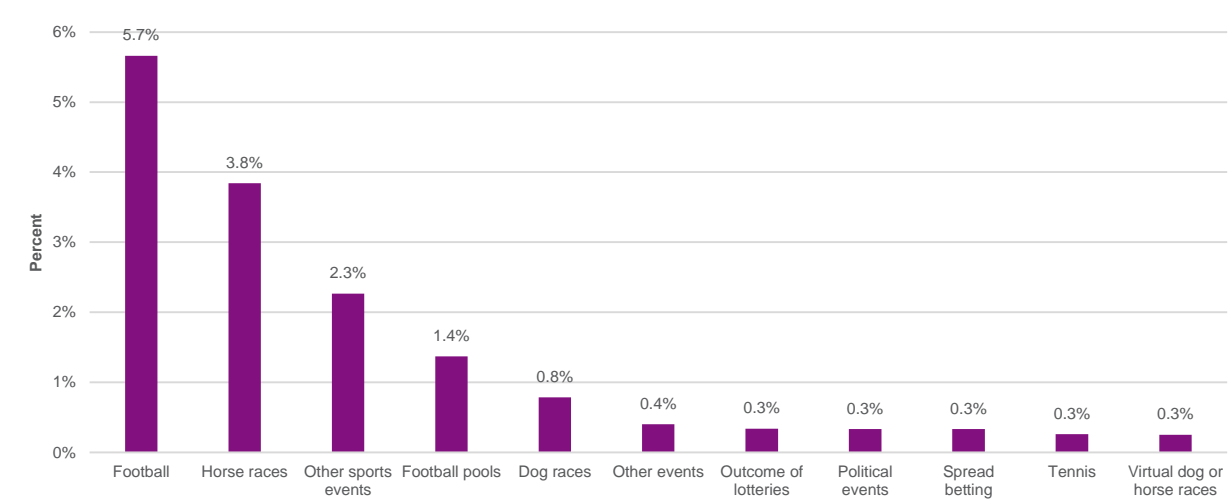
	Year to Dec 2015	Year to Dec 2016	Year to Dec 2017	Year to Dec 2018
Sports betting	3.5%	7.1%	6.4%	6.6%
Private betting	3.5%	6.0%	4.4%	6.1%
Horse races	3.7%	4.6%	3.9%	3.8%
Fruit or slot machines	1.8%	4.5%	4.4%	3.7%
Bingo	2.6%	3.5%	3.3%	2.6%
Casino games	1.1%	2.3%	1.6%	1.6%
Machines in a bookmakers	1.0%	1.5%	1.4%	1.5%
Football pools	2.1%	1.8%	1.4%	1.4%
Online games/instant wins	0.6%	1.7%	1.2%	1.2%
Betting on other events	0.6%	0.9%	0.5%	1.0%
Any other activity	0.3%	0.6%	0.5%	0.9%
Dog races	0.7%	1.1%	1.1%	0.8%
Poker at a pub/club	0.4%	0.6%	0.4%	0.8%
Spread betting	0.2%	0.2%	0.3%	0.3%
Virtual dog or horse races	0.3%	0.4%	0.4%	0.3%

Overall, 10% of all respondents had participated in any betting activity⁵ in the previous four weeks. The most popular betting activity in 2018 was football (5.7%), followed by horse races (3.8%) and other sports (2.3%)⁶, as can be observed in Figure 6.

⁵ 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

⁶ 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=4,009)



Why people gamble

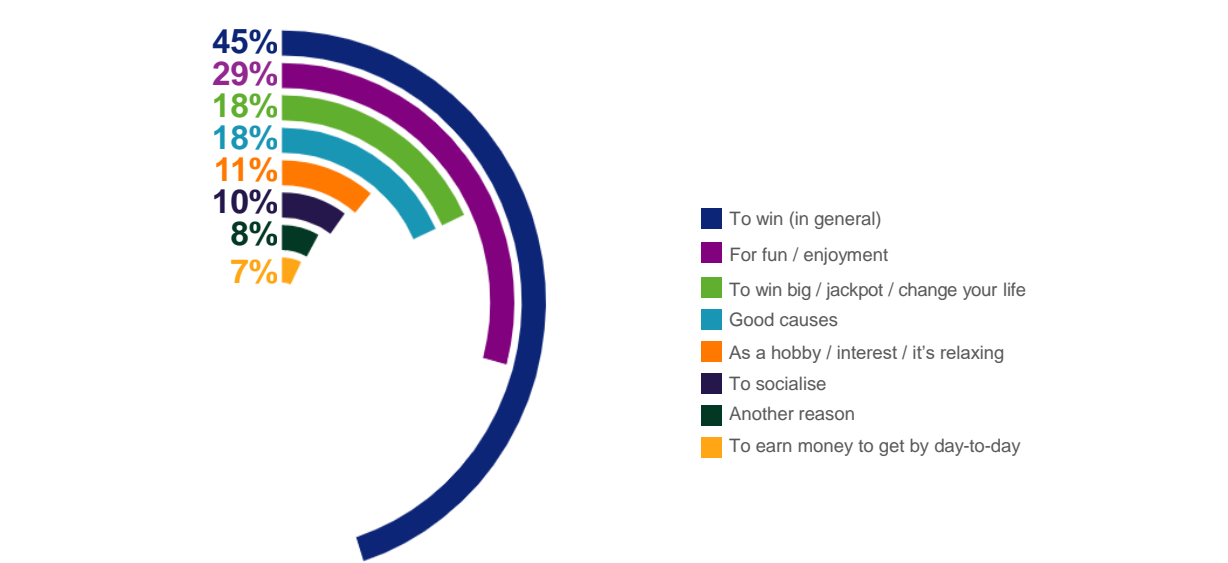
Gamblers were then asked to think about the reasons why they have taken part in gambling activities in the past four weeks.

As Figure 7 shows, most gamblers reported that participation was due to wanting to win in general (45%), followed by for fun and enjoyment (29%), wanting to win a jackpot (18%), and wanting to contribute to good causes (18%). A higher proportion of women gamble to win than men (49% and 42% respectively), and men are more likely than women to participate in gambling for fun and enjoyment (34% and 23% respectively). Since 2017, there has been a decrease in the proportion of respondents gambling for fun/enjoyment (29%, a 5 percentage point decrease from 2017).

National Lottery draw players are much more likely to gamble to win in general (53%) than to gamble for fun (20%). Conversely, machines in bookmakers (FOBTs) players are much more likely to gamble for fun (58%) than to win (32%).

Of those who brought tickets for a charity lottery or other lottery, 55% reported gambling to support good causes. This compares to 15% who brought tickets for the National Lottery draws, and 5% of those who purchased scratchcards⁷.

Figure 7: Reasons for past four week gambling participation (n=1,835)



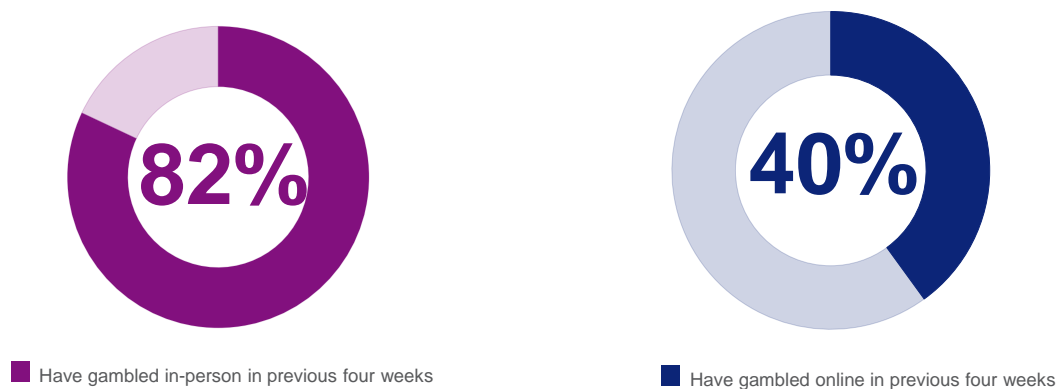
⁷ Respondents could select more than one reason and may have participated in more than one activity.

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 both⁸.

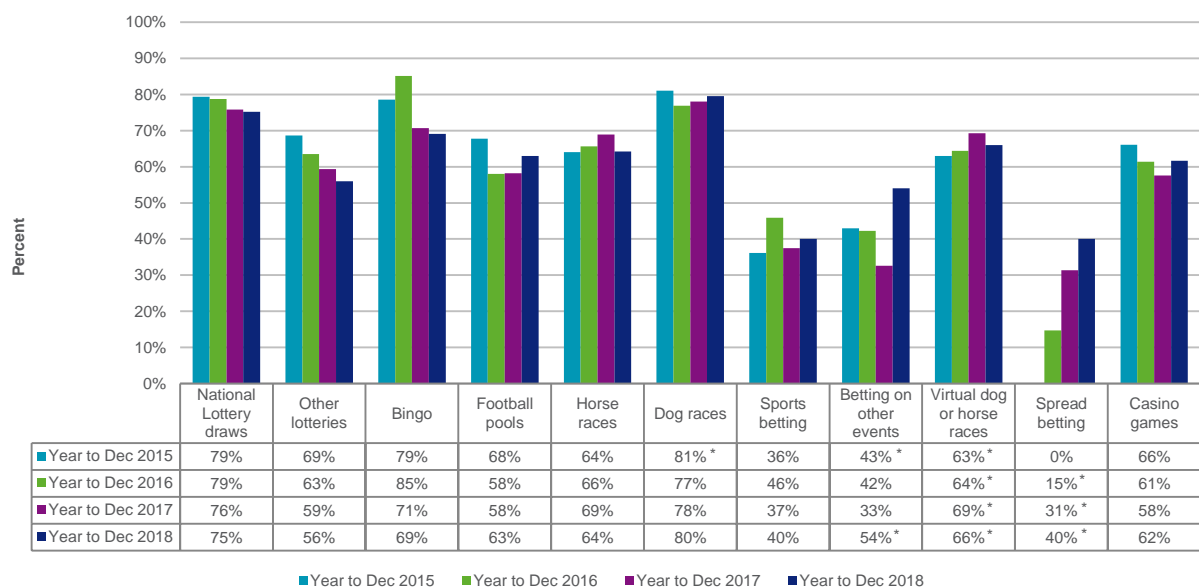
Figure 8 below shows that 82% of previous four week gamblers have gambled in-person, whilst 40% have gambled online. When interpreting this data caution should be applied due to the small base sizes involved for some activities. Base sizes can be found in the technical annex accompanying this report.

Figure 8: Overall participation in the past four weeks by channel (n=1,835)



Figures 9 and 10 display in-person and online participation in the previous four weeks by those activities that can be accessed through multiple methods⁹. Figure 9 shows that among those who had participated in each activity, those participating in dog races (80%) and the National Lottery draws (75%) were more likely to participate in these activities in-person.

Figure 9: In person participation in the past four weeks by activity (n=4,009)



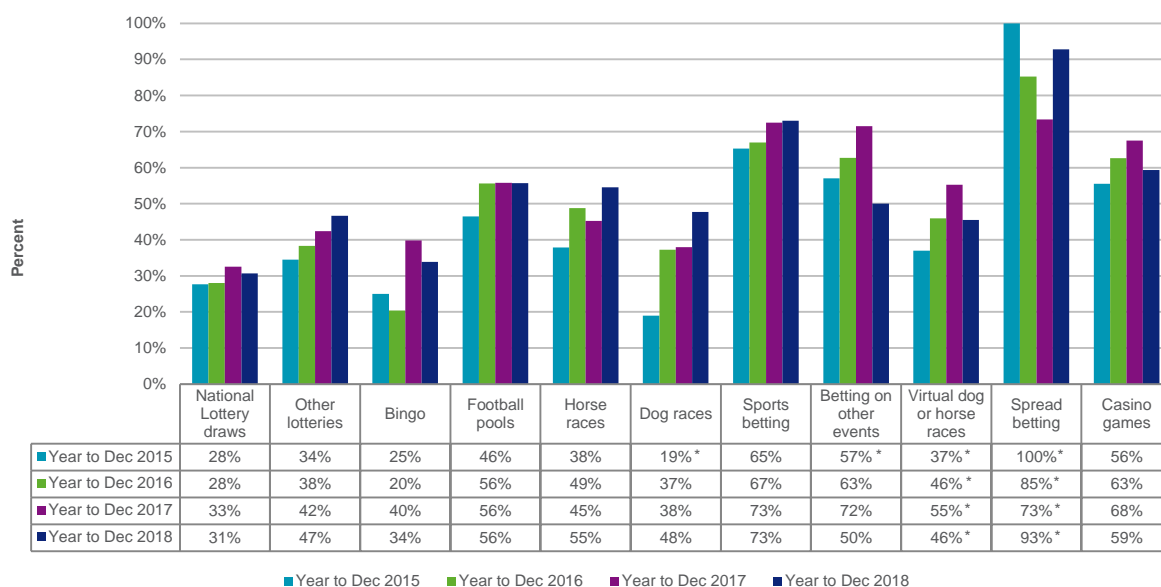
On the other hand, Figure 10 shows that among those who had participated in each activity, those participating in spread betting (93%*), sports betting (73%) and casino games (59%) were more likely to participate in these activities online. The most evident increases in online participation occurred among horse races (55%, a 10 percentage point increase from 2017) and dog races (48%, a 10 percentage point increase from 2017). A small increase also occurred within other lotteries (47%, a 5 percentage point increase from 2017).

⁸When 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.

⁹Both charts include respondents who have participated both in-person and online, therefore combined percentages may add up to more than 100%.

* Indicates a small base size (< 30)

Figure 10: Online participation in the past four weeks by activity (n=4,009)

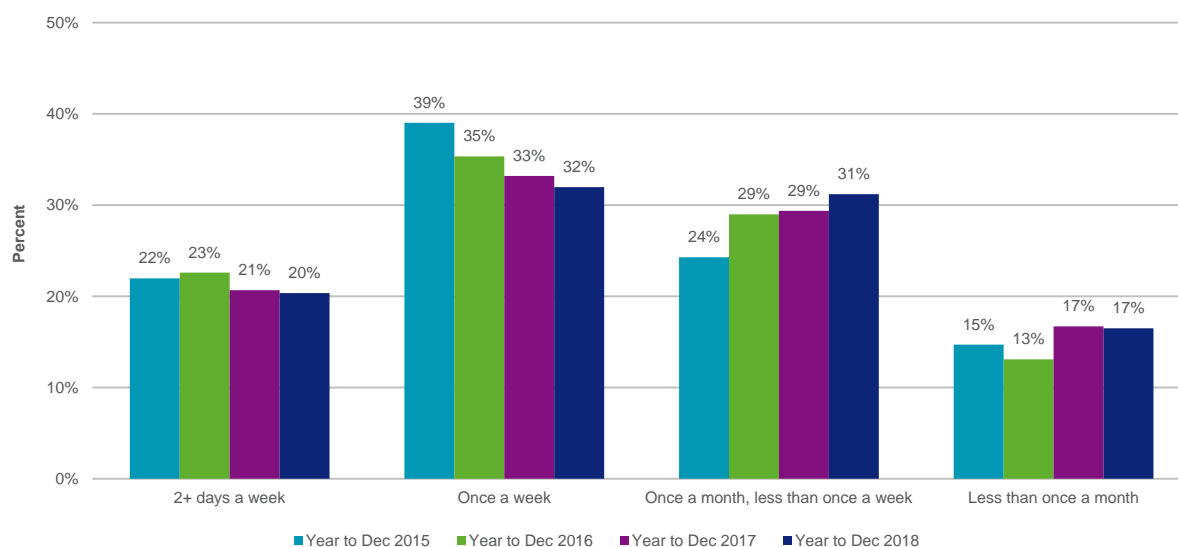


How often people gamble

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

Figure 11 shows the highest frequency of gambling on any individual activity (among those who have gambled on each activity in the past four weeks) was most commonly once a week (32%), followed by once a month but less than once a week (31%). Since 2015, there has been a steady decline in the number of respondents saying once a week and an increase in the number of people saying once a month but less than once a week. Meanwhile, 20% gambled on any individual activity two or more days a week, and 17% gamble less than once a month.

Figure 11: Most common frequency of gambling on any activity (n=1,835)



* Indicates a small base size (< 30)

Low-risk, moderate-risk and problem gambling



0.7%

of respondents identified as problem gamblers

According to the full PGSI or DSM-IV screen

1.1%

of respondents identified as moderate-risk gamblers

According to the full PGSI screen

2.4%

of respondents identified as low-risk gamblers

According to the full PGSI screen

52.9%

of respondents identified as non-problem gamblers

According to the full PGSI or DSM-IV screen

43.0%

of respondents were non-gamblers

According to the Combined Health Survey 2016



2.7%

of gamblers have felt guilty about their gambling

3.1%

of gamblers have bet more than they can afford to lose



2.0%

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

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 2016, Scottish Health Survey 2016 and the Welsh Problem Gambling Survey 2016. These figures are displayed above.

- Low-risk gamblers experience a low level of problems with few or no identified negative consequences
- Moderate-risk gamblers experience a moderate level of problems leading to some negative consequences
- Problem gamblers gamble with negative consequences and a possible loss of control

Problem and at-risk gambling

Problem gambling is defined as behaviour related to gambling which causes harm to the gambler and those around them¹⁰. 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 September 2018. The Gambling behaviour in Great Britain report brings together data from the Health Survey for England 2016, the Scottish Health Survey 2016, and the Welsh Problem Gambling Survey 2016. These are the only surveys where the full PGSI screen and the DSM-IV are used as the main measures 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 Index¹¹ (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 relatively 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, taken from the Gambling behaviour in Great Britain report 2016, with a summary of the telephone survey rates at the end of the chapter.

Due to the infrequency and long lead times associated with the various health surveys, we are looking to include the full 9 point PGSI screen in our regular quarterly telephone survey. Further information about the measurement of problem gambling can be found in Appendix 1.

Combined health survey estimates

Low and moderate-risk gambling

According to the Commission's official Health Survey rates, 2.4% of adults were considered low-risk gamblers, and a further 1.1% were classed as moderate-risk gamblers. By low-risk, we mean gamblers who experience a low level of problems with few or no identified negative consequences. For moderate-risk we mean gamblers who experience a moderate level of problems leading to some negative consequences.

Men are more likely to be classified as low or moderate-risk gamblers, with 3.9% classified as low-risk, and a further 1.9% classified as moderate-risk; this compares to 1.1% (low-risk) and 0.4% (moderate-risk) of women. Those aged 16-24 and 25-34 are most likely to be classified as low-risk (5.8% and 4.2% respectively) and moderate-risk (1.5% and 2.1% respectively).

Table 2: Low-risk gambling by gender and age

Low-risk gambling (according to the full PGSI) by gender and age (2016)	
	2016 (%)
All respondents (n=14,283)	2.4
Males	3.9
Female	1.1
16-24 year olds	5.8
25-34 year olds	4.2
35-44 year olds	1.6
45-54 year olds	1.8
55-64 year olds	1.5
65-74 year olds	1.1
75+ year olds	0.4

¹⁰ Gamble Aware (<http://www.gambleaware.co.uk/recognise-a-problem>).

¹¹ Developing a Short Form of the PGSI (Volberg, 2012).

Table 3: Moderate-risk gambling by gender and age

Moderate-risk gambling (according to the full PGSI) by gender and age (2016)	
	2016 (%)
All respondents (n=14,283)	1.1
Males	1.9
Females	0.4
16-24 year olds	1.5
25-34 year olds	2.1
35-44 year olds	2.0
45-54 year olds	0.7
55-64 year olds	0.7
65-74 year olds	0.2
75+ year olds	0.2

Problem gambling

According to the Commission's official health survey rates, 0.7% of respondents were classified as problem gamblers (gamblers who gamble with negative consequences and a possible loss of control). Men are more likely to be classified as problem gamblers with 1.2% of men classified as such compared to 0.2% of women. In terms of age, those aged 25 to 34 are most likely to be classified as problem gamblers (1.3%).

Table 4: Problem gambling by gender and age

Problem gamblers (according to the full PGSI or DSM-IV) by gender and age (2016)	
	2016 (%)
All respondents (n=14,314)	0.7
Males	1.2
Females	0.2
16-24 year olds	0.6
25-34 year olds	1.3
35-44 year olds	0.6
45-54 year olds	0.7
55-64 year olds	0.7
65-74 year olds	0.4
75+ year olds	0.1

Quarterly telephone survey estimates

Low-risk, moderate-risk and problem gambling

The Commission's regular telephone survey, which uses the mini-screen reported the low-risk rate to be 3.3% and the moderate-risk rate to be 1.5%. The problem gambling rate was 0.5%. 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 5: Problem gambling by gender and age

Low-risk, moderate-risk and problem gamblers (according to the PGSI mini-screen) (2018)	
	Year to December 2018 (%)
All respondents (n=4,009)	
Low-risk	3.3
Moderate-risk	1.5
Problem gambler	0.5

Online gambling behaviour

96%
of online
gamblers
play at
home



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



20%
of those
gambling
outside the
home, gamble
at work (aged
18-34)

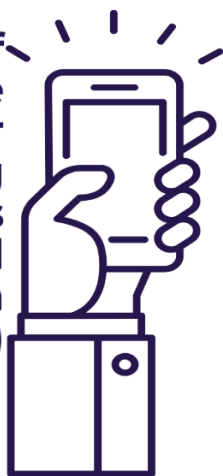


55%

of online
gamblers
have used a
mobile phone
or tablet to
gamble



Use of
mobile
phones for
gambling
has
increased
(**44%** in
2018)



45%

Laptops remain
popular for online
gambling, but use
has declined from
50% in 2017

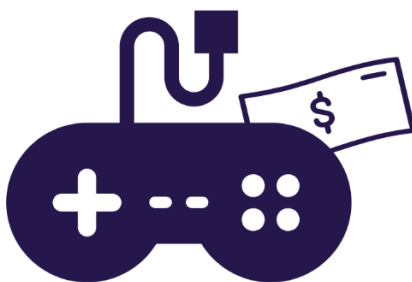


23%

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



5% of
all respondents had
bet on eSports (last
12 months)



The average
number of
online accounts
is **3**



Online gambling behaviour

This section reports data on online gambling behaviour in the year to December 2018, 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), they are asked which devices they use to gamble online¹².

Laptops (45%) and mobile phones (44%) remain the most popular methods of accessing online gambling. The gender split across all devices was similar, the exception being PCs, where male gamblers were more likely to have used a PC than females (34% compared to 20%).

Since 2017, the proportion of respondents gambling online through mobile phones has increased (44%, a 5 percentage point increase from 2017). Mobile phone participation amongst male online gamblers increased (57%, a 17 percentage point increase from 2017) as did participation amongst female online gamblers (43%, a 5 percentage point increase from 2017). The proportion of online gamblers who have gambled using either a mobile phone or tablet was 55%, a 4 percentage point increase from 2017).

The proportion of online gamblers using laptops significantly declined (45%, a 5 percentage point decrease from 2017) as did those using PC's (28%, a 4 percentage point decline from 2017) and tablets (18%, a 1 percentage point decline from 2017).

Figure 12: Devices used for online gambling in the past four weeks (n=3,787)

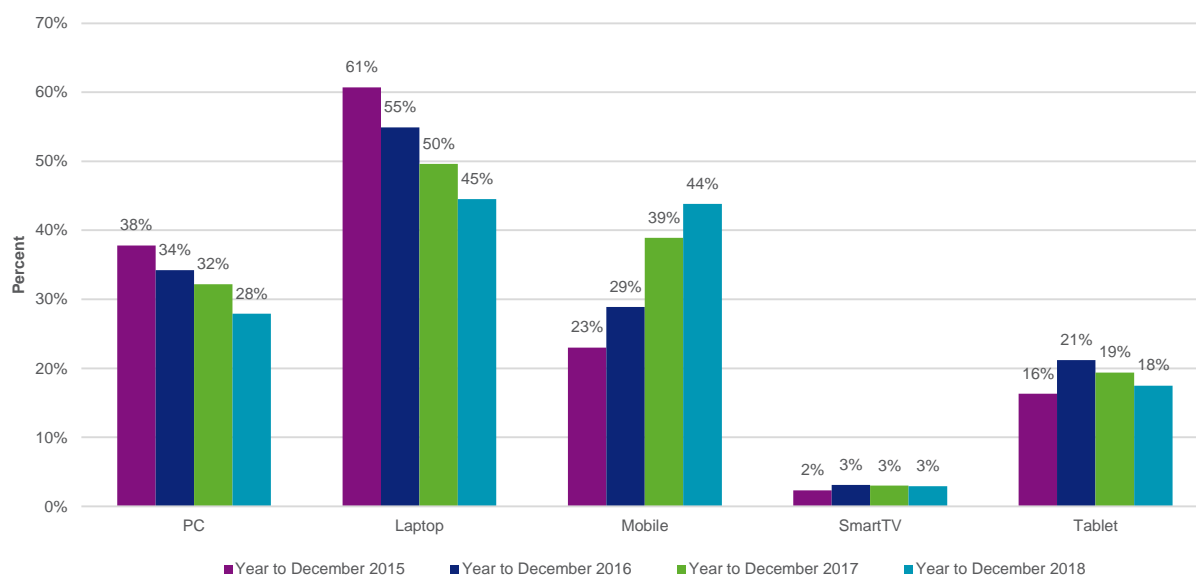


Figure 13 shows that those aged 18-44 are most likely to gamble with multiple devices. In addition to this, there have been increases in participation in gambling on mobile phones among those aged 25-65, and declines in those using laptops and PCs in the 18-54 age brackets.

¹² Respondents are able to select multiple devices over multiple activities.

Figure 13: Devices used for online gambling in the past four weeks by age¹³ (n=3,787)

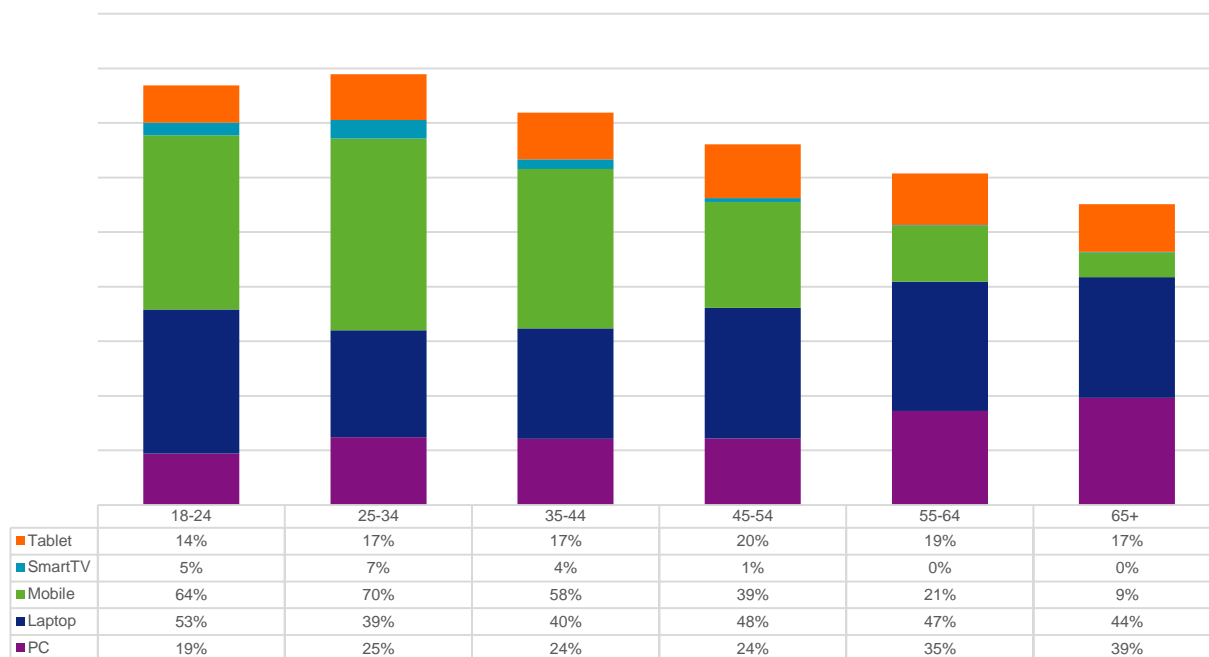
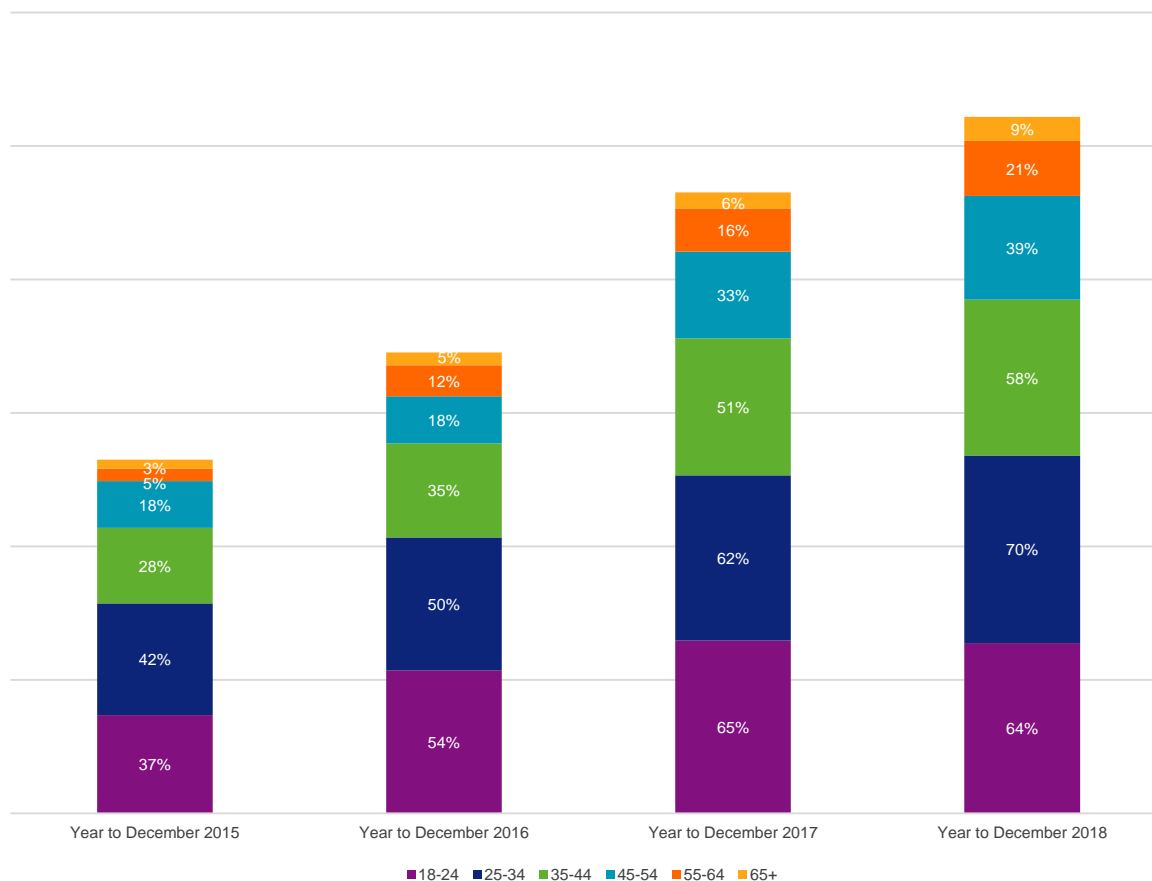


Figure 14 highlights the growth in mobile use by age group amongst online gamblers. Significant increases in mobile use can be seen among all age groups except for those aged 18-24. The largest year on year increases occurred within the 25-34 age group (70%, an 8 percentage point increase since 2017) and 35-44 (58%, a 7 percentage point increase since 2017).

Figure 14: Use of mobile phone devices for gambling in the past four weeks by age¹⁴ (n=3,787)



¹³ Figures add to >100% due to respondents being able to select more than one option.

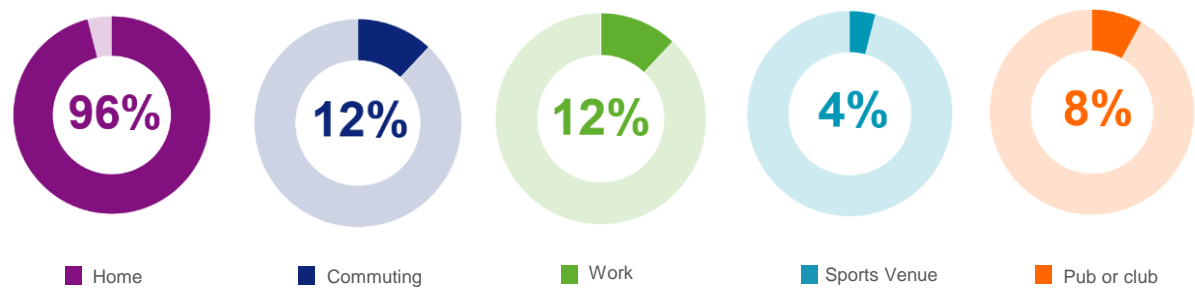
¹⁴ Percentages add to >100% as age groups are stacked

Location of online gambling

To further understand the 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.

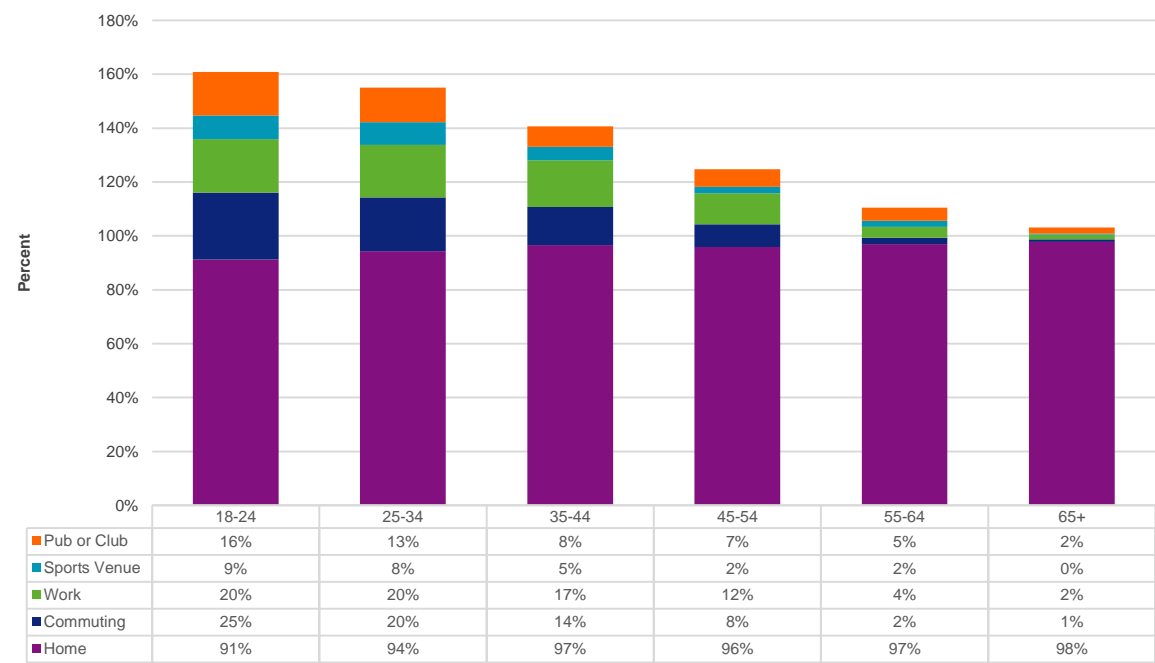
Gambling in the home remained the most popular location for online gambling with 96% of online gamblers reporting gambling at home. Male respondents had higher rates than females in terms of gambling outside of the home including on their commute, at work, at a venue or in a pub/club.

Figure 15: Location of online gambling in the past four weeks (n= 3,787)



As Figure 16 shows, rates of online gambling in the home are 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 on a commute or at work is most popular for those aged 18-34. Interestingly, the rates of participation among those aged 18-24 in a pub or club have increased (16%, a 2 percentage point increase since 2017) and also for those age 25-34 (13%, also a 2 percentage point increase from 2017).

Figure 16: Location of online gambling in the past four weeks by age¹⁵ (n= 3,787)



¹⁵ Figures add to >100% due to respondents being able to select more than one option.

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 under one quarter of online gamblers had bet in-play during the last four weeks (23%, a 3 percentage point decrease since 2017). The largest change was within the 35-44 age group (27% a 7 percentage point decrease from 2017).

Figure 17: Online gamblers' past four week in-play betting by gender and age (n=3,787)



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.

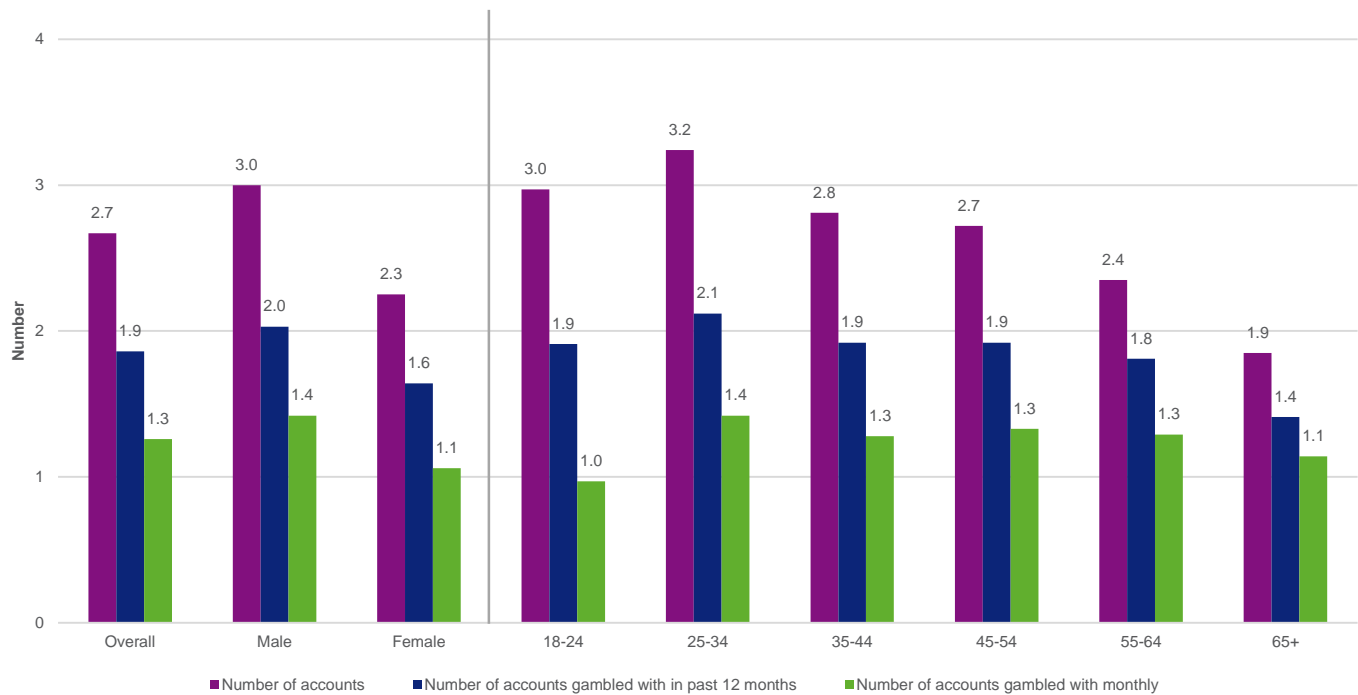
The majority of gamblers are registered online with one gambling company. The average number of accounts held in 2018 was 3.

Figure 18: Average number of accounts 2015-2018



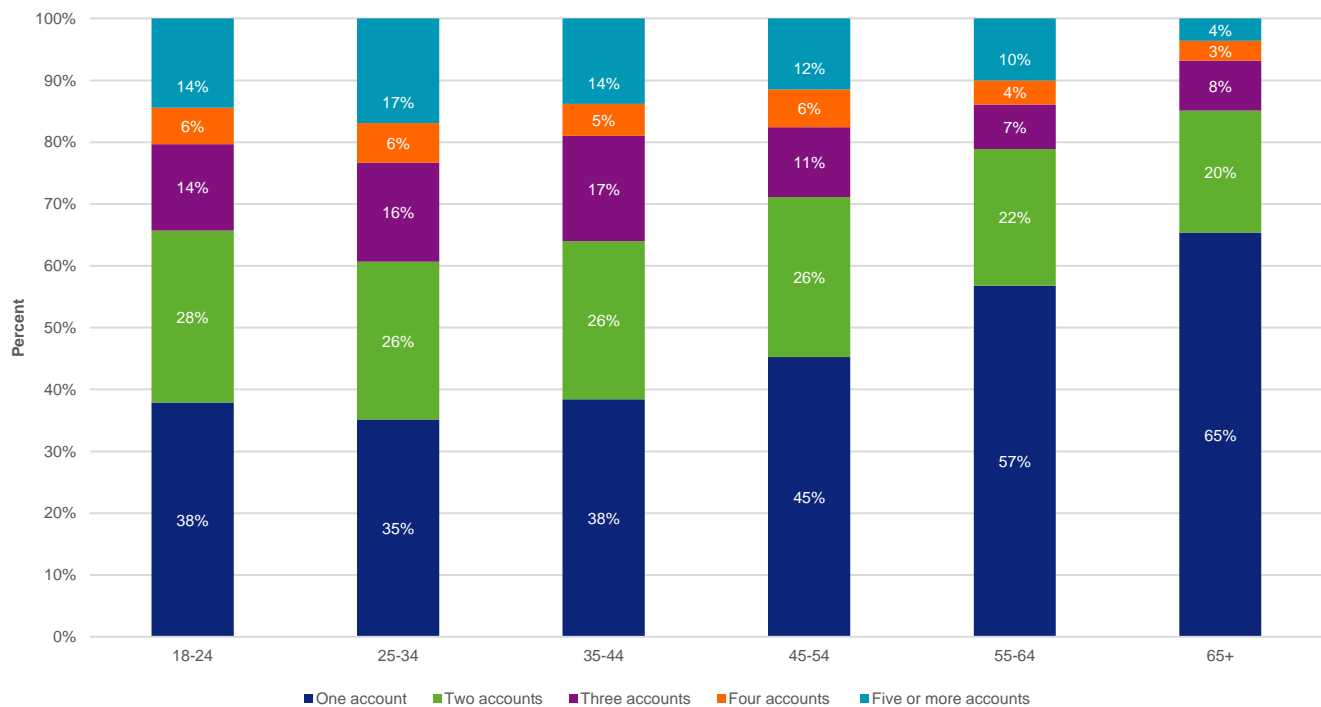
Figure 19 illustrates that on average, males have more accounts than females (three accounts compared to two), and younger gamblers tend to hold slightly more accounts on average than those in the older age groups.

Figure 19: Average number of accounts held by online gamblers by gender and age (n=4,082)



Overall, just under half (46%) of gamblers held just one online account; and this was increasingly common for those in the older age groups. Younger gamblers were more likely to hold more than five accounts; 17% of those aged 25-34 held five or more accounts, whilst this was the case for just 4% of those aged 65+

Figure 20: Number of accounts held by online gamblers by age (n=4,082)

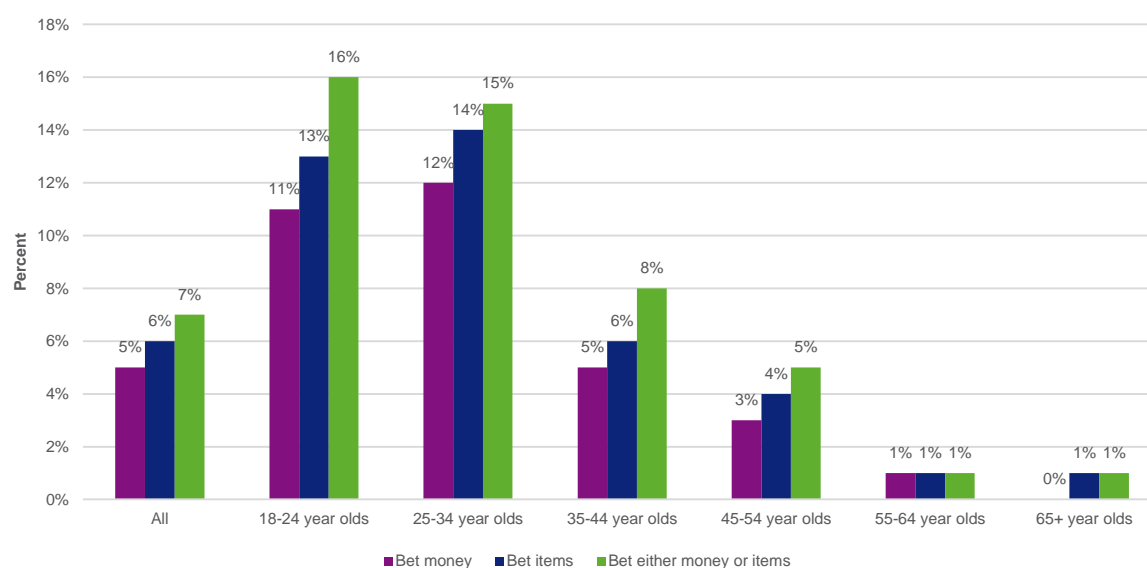


eSports

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.

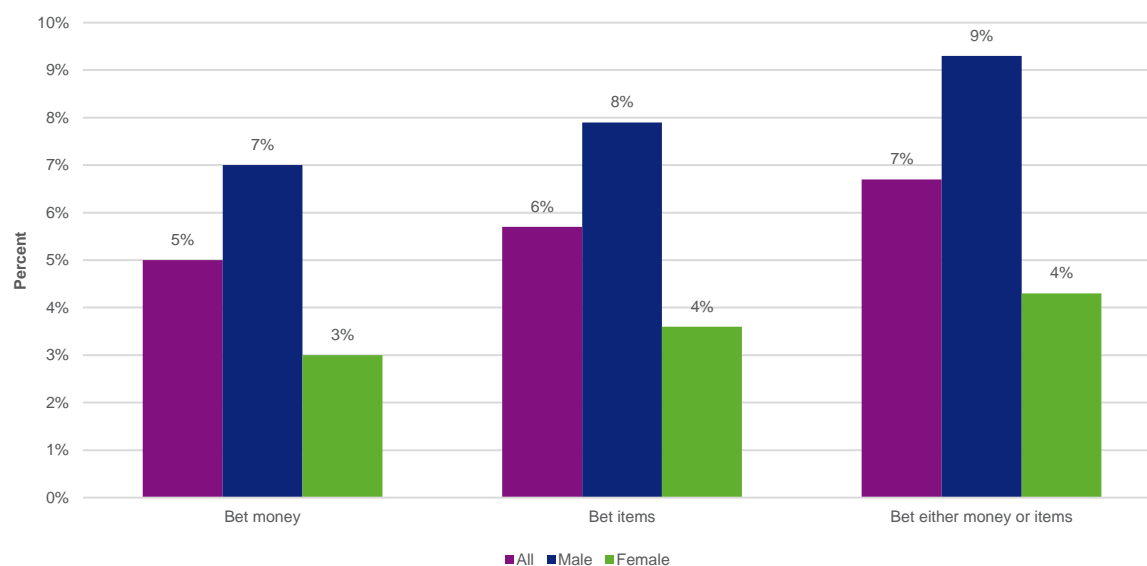
Overall, 7% of respondents had ever bet on eSports, with 5% doing so in the past 12 months. Participation rates for those who had ever bet on eSports were highest among those aged 18-24 (16%) and 25-34 year olds (15%) and lowest for those aged 55-64 and 65+ (1%).

Figure 21: Ever bet on eSports using money or items by age (n=4,174)



Engagement in eSports betting was highest for males; 9% had ever bet on eSports using either money or in play items compared to 4% of females. The proportion of females ever betting on eSports with money (3%, a 2 percentage point decrease from 2017), with items (4%; a 1 percentage point decrease from 2017) and with either money or items (4%, a 2 percentage point decrease from 2017) has declined.

Figure 22: Ever bet on eSports using money or items by gender (n=4,174)



Consumer analysis



59%

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



6% of gamblers have ever self-excluded

Awareness or use of self-exclusion has risen to 47%
(41% in 2017)



Financial limits are the most popular gambling management tool with **9%** of online gamblers using them



20%

of gamblers have read terms and conditions



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



21%

of people have played online gambling-style games



53%

of people have seen at least one gambling advert on TV in the past week

45% have been prompted to gamble by adverts



19% of gamblers like gambling companies on Facebook



9% of gamblers follow gambling companies on YouTube



8% of gamblers follow gambling companies on Twitter

66%

of 18-24 year olds and

54%

of 25-34 year olds who gamble follow gambling companies on Facebook, Twitter or YouTube

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 wishes to be supported in their decision to stop, they can ask to be self-excluded from a gambling company or self-exclude from multiple-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, 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.

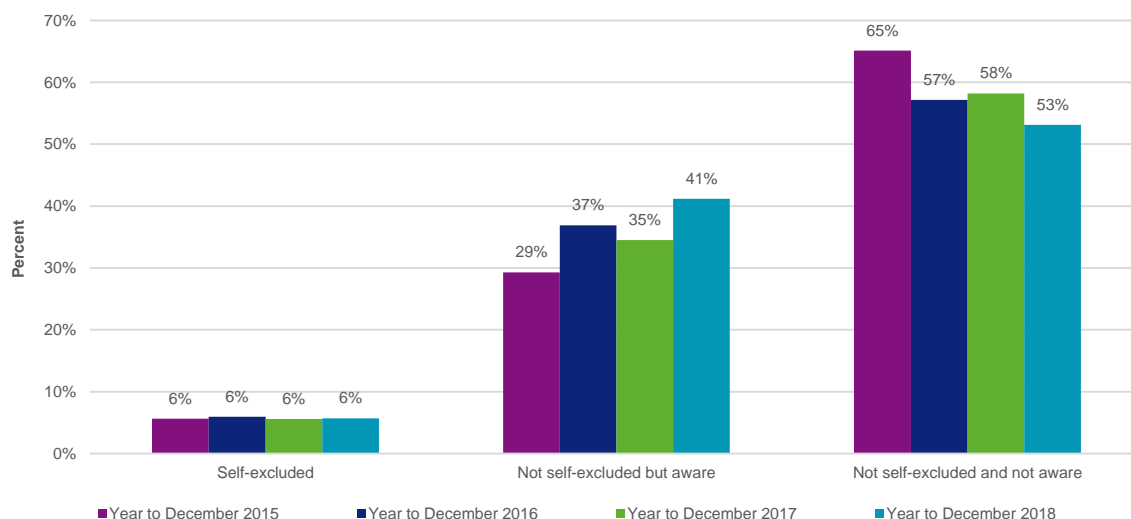
Since 2015 questions have been included in the online survey to monitor gamblers' awareness of these tools and the extent to which they are used. They are asked on a quarterly basis to any gambler who has participated in any gambling activity in the past 12 months.

Figure 23: Gamblers awareness and use of self-exclusion (n=6,425)



Overall, 6% of gamblers have ever self-excluded, consistent with the rates observed in previous years. Additionally, 41% of gamblers are aware of self-exclusion but have not self-excluded (41%, a 6 percentage point increase from 2017). Over half of gamblers aren't aware of self-exclusion (53%, a 6 percentage point decrease from 2017).

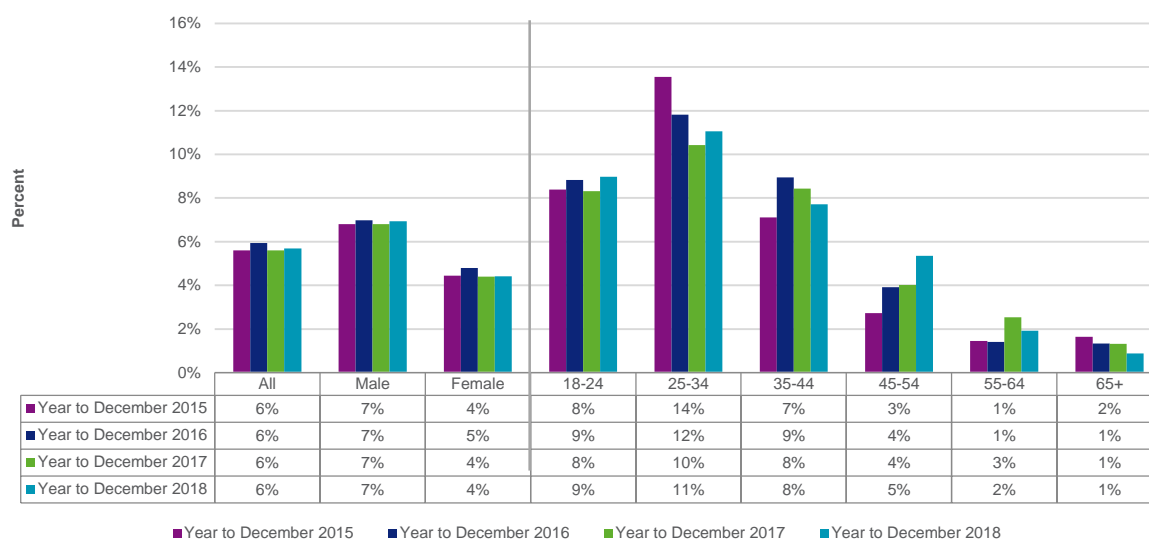
Figure 24: Gamblers awareness and use of self-exclusion (n=6,425)



Figures show that higher proportions of men have self-excluded compared to women, with 7% of men having ever self-excluded compared to 4% of women. Those aged 25-34 were the age group with the highest self-exclusion rates (11%).

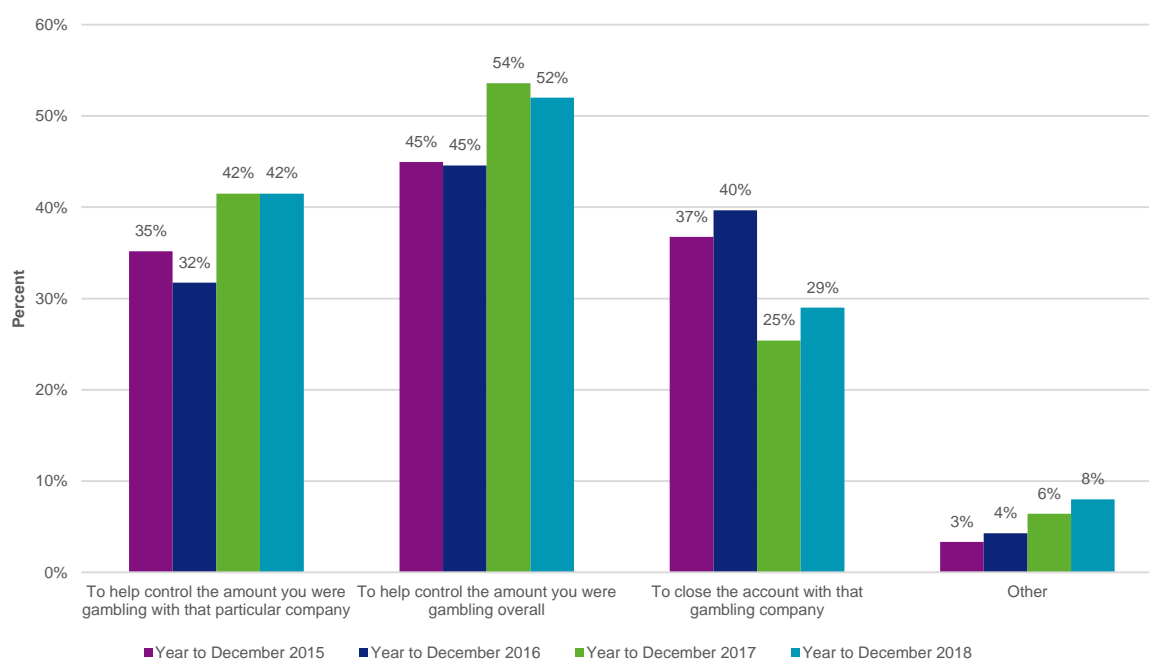
Rates of self-exclusion have increased among those in the 45-54 age group (5%; a 1 percentage point increase from 2017), and have decreased in the 55-64 and 65+ age groups (a 2 and 1 percentage point decrease respectively on 2017).

Figure 25: Self-exclusion among all gamblers by gender and age (n=6,425)



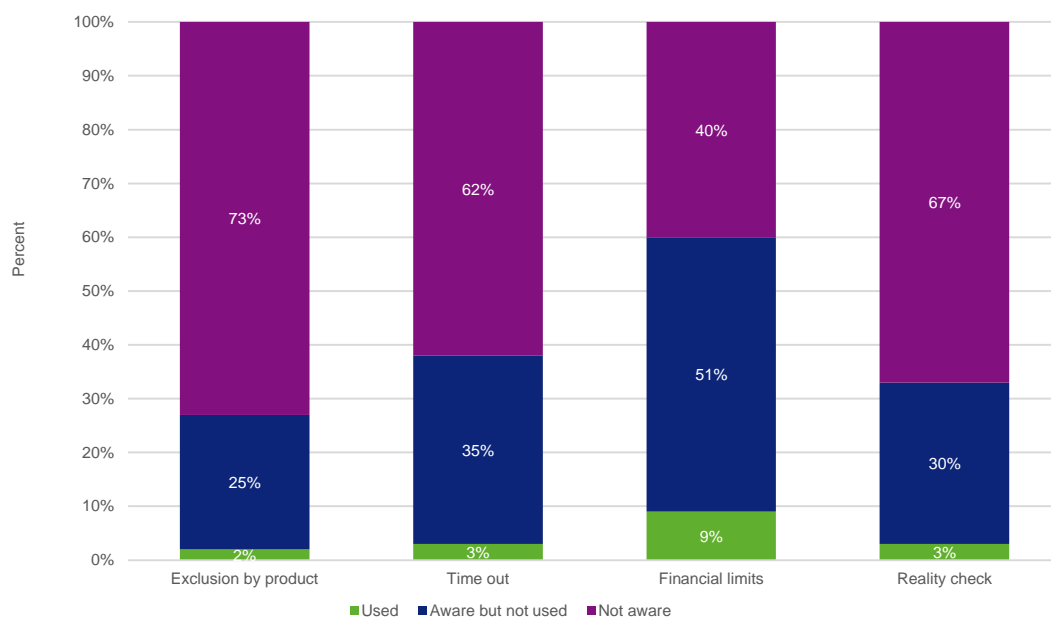
Whilst self-exclusion is a facility to manage potentially problematic gambling, not everyone will use it only for this reason. If gamblers within the survey have ever self-excluded, they are asked why they chose to self-exclude. The most popular reason given for self-exclusion was to help control the amount being gambled overall (52%), followed by to help control the amount being spent with a particular company (42%).

Figure 26: Reasons for self-excluding (n=365)



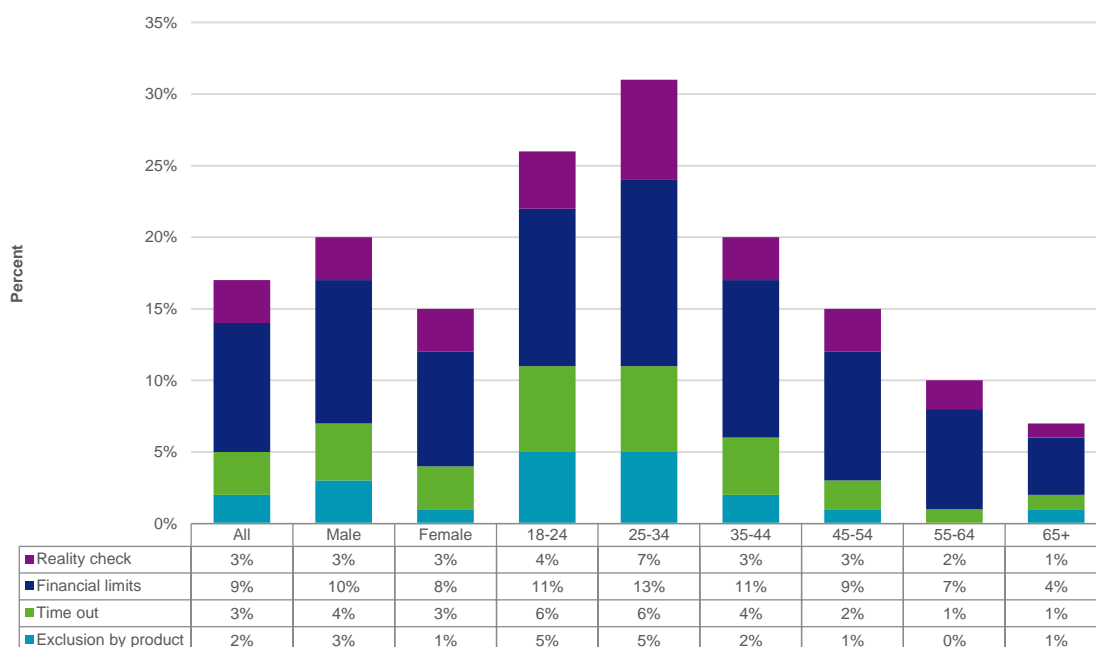
Gamblers were also asked if they have used a selection of gambling management tools. Financial limits were the most used tool in 2018 with 9% of gamblers having used them, a similar proportion to that observed in 2017 (10%). Self-exclusion by product had both the lowest use and awareness rates, consistent with the findings from 2017.

Figure 27: Use and awareness of gambling management tools (n=6,425)



Those aged 18-34 were most likely to have used any of the gambling management tools.

Figure 28: Gamblers use of gambling management tools by gender and age (n=6,425)



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 have seen and whether it had an impact on their gambling behaviour.

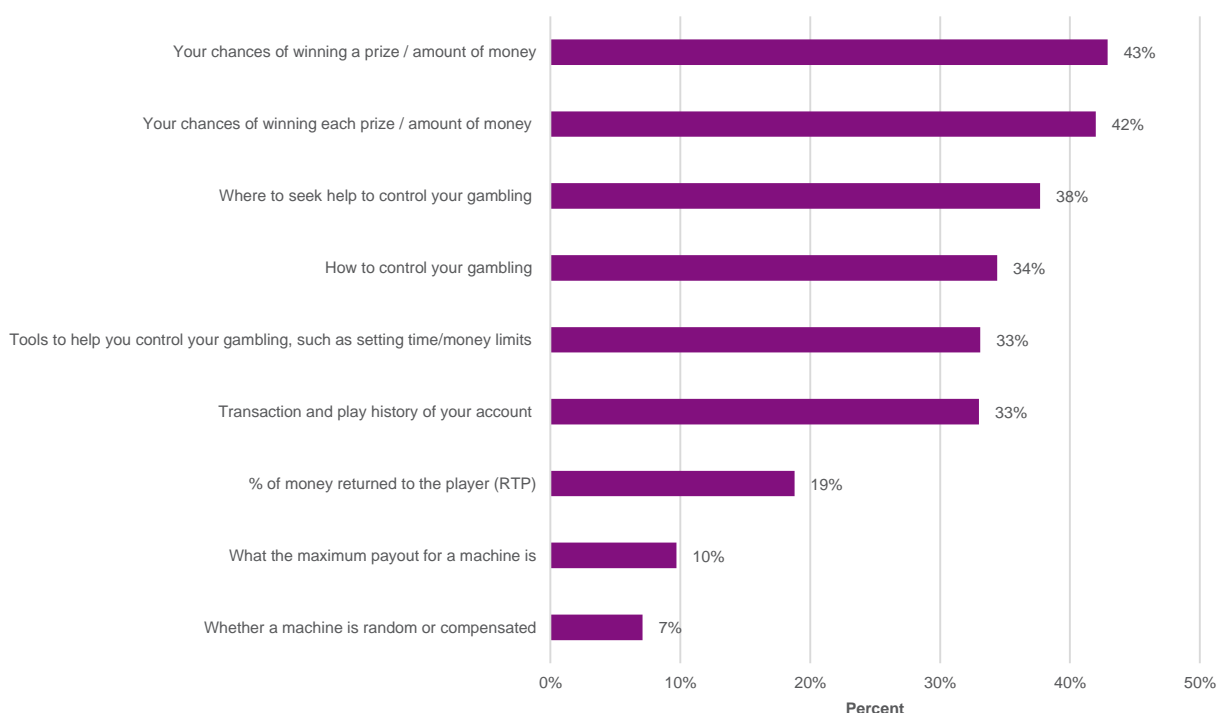
In total, 59% of gamblers had either received at least one piece of gambling related information from an operator, or seen a piece of information online or inside/outside a gambling premises, which is similar to that observed in 2017 (60%).

Figure 29: Proportion of gamblers who have either received or seen at least one piece of gambling related information from an operator (n=3,272)



The information that respondents were most likely to have seen was in relation to your chances of winning a prize (43%, a 9 percentage point increase from 2017), and your chances of winning each prize (42%, a 9 percentage point increase from 2017). Other significant increases occurred for where to seek help to control your gambling (38% a 10 percentage point increase from 2017) and how to control your gambling (34%, an 8 percentage point increase from 2017).

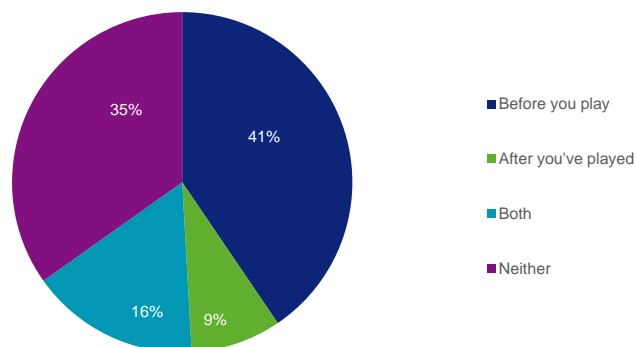
Figure 30: Proportion of gamblers who have seen or received different types of information about gambling¹⁶ (n=3,272)



¹⁶ Transaction and play history of your account is asked to online players only. 'What the maximum payout for a machine is' and 'Whether a machine is random or compensated' are asked to machine players only.

All those who have seen 'percentage of money returned to player', 'your chances of winning any prize', 'your chances of winning each prize', 'whether a machine is random or compensated' and 'what the maximum pay-out for a machine is' were asked at what point they consulted the information they had seen. 65% of those that had seen or received any information said that they consulted the information before play, after play or both, while 35% did not consult any information. Gamblers were most likely to consult the information before play (41%), and a further one in six (16%) consulted the information both before and after play.

Figure 31: Time of consulting the information seen (n=1,565)



In terms of the information provided by gambling companies, tools to help you control your gambling (such as setting time/money limits) had the biggest impact on reducing the frequency of respondents' gambling.

Figure 32: Impact on frequency of gambling based upon information received from gambling companies (n=1,080 - 1,234 – bases vary by each of the four information options)



Looking at the information provided by gambling companies, tools to help control gambling had the biggest impact on stopping or reducing the frequency of gambling. The proportion of respondents decreasing their gambling as a result of seeing tips on controlling their gambling decreased significantly, (17%, a 4 percentage point increase from 2017)

Figure 33: Impact on the amount spent gambling based upon information received from gambling companies (n=1,080 - 1,234 – bases vary by each of the four information options)



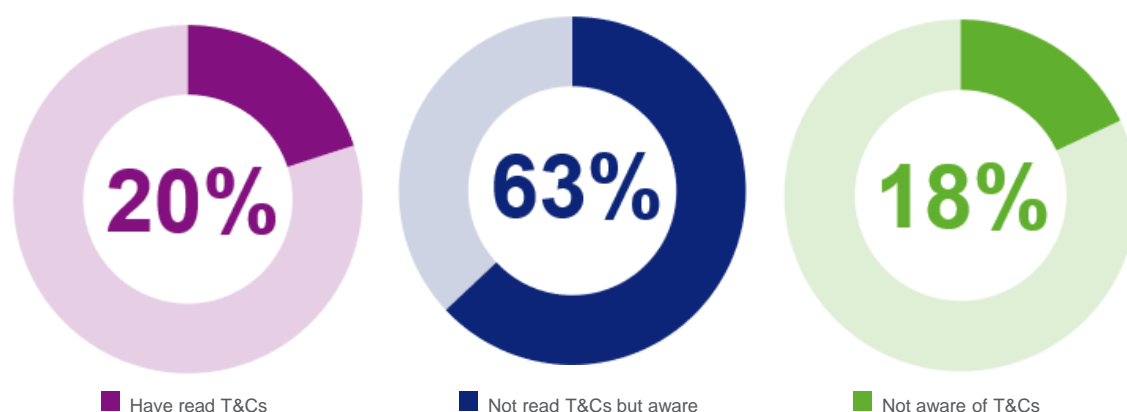
The percentage of respondents stopping spending on gambling as a result of seeing information about the transaction and play history of their account has increased significantly, (3%, a 2 percentage point increase from 2017).

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 (T&C's) and, if they had, whether they found them to be helpful.

Overall, 20% of gamblers have ever read the terms and conditions provided by a gambling operator. The majority (63%) have not read the terms and conditions despite being aware of their availability. 18% did not know that terms and conditions were available.

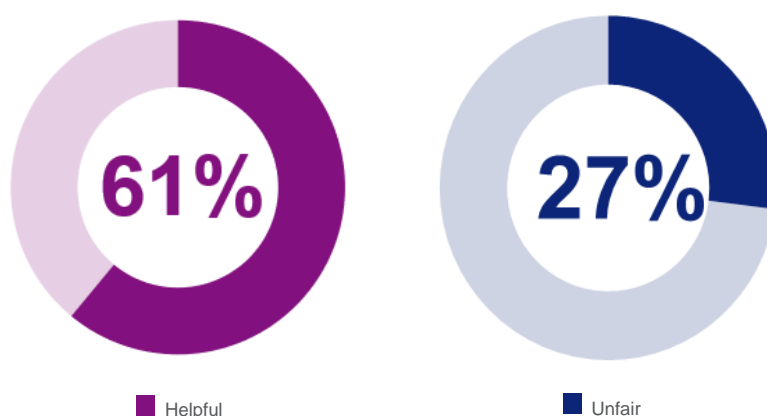
Figure 34: Gamblers' use and awareness of terms and conditions (n=6,562)



Men are more likely to have ever read the terms and conditions than women, with 22% of men ever having done so compared to 17% of women. Those aged 25-34 are most likely to have ever read terms and conditions (26%) whereas just 11% of 65 and overs have done so. Interestingly 37% 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, 61% 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 had read terms and conditions) and found them to be helpful and unfair (n=1,282)



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.

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 4% wanting to make a complaint but didn't. By comparison, 88% of gamblers had not needed to make a complaint.

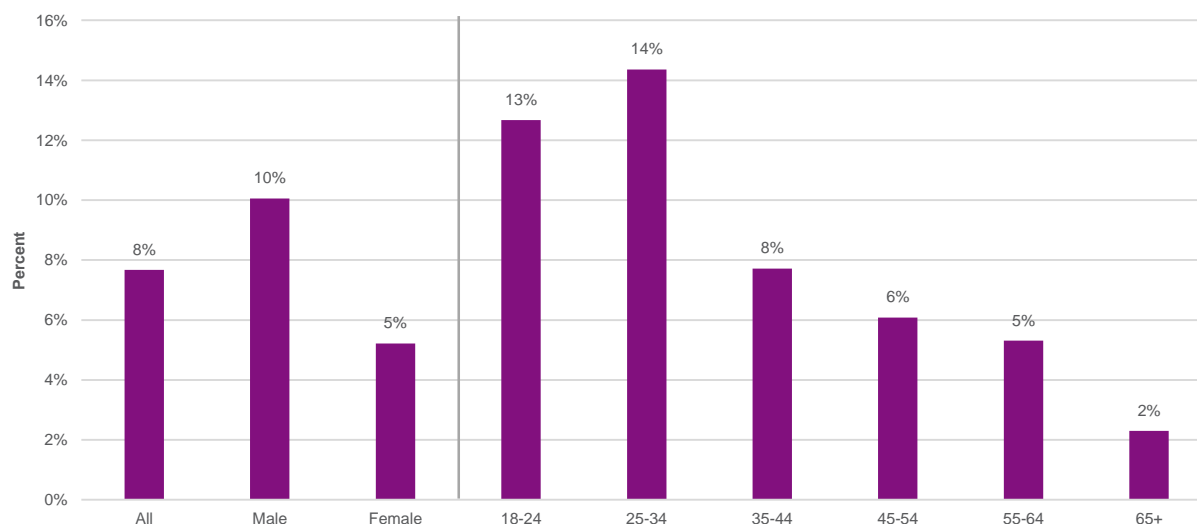
Figure 36: Proportion of gamblers who have made or attempted to make a complaint (n=3,272)



Figure 37 shows that men more likely to have made a complaint about a personal gambling experience than women, with 10% of men having made a complaint compared with 5% of women. Younger age groups have the largest proportions of complaints made, with 14% of 25-34 year olds and 13% of 18-24 year olds reporting having ever made a complaint.

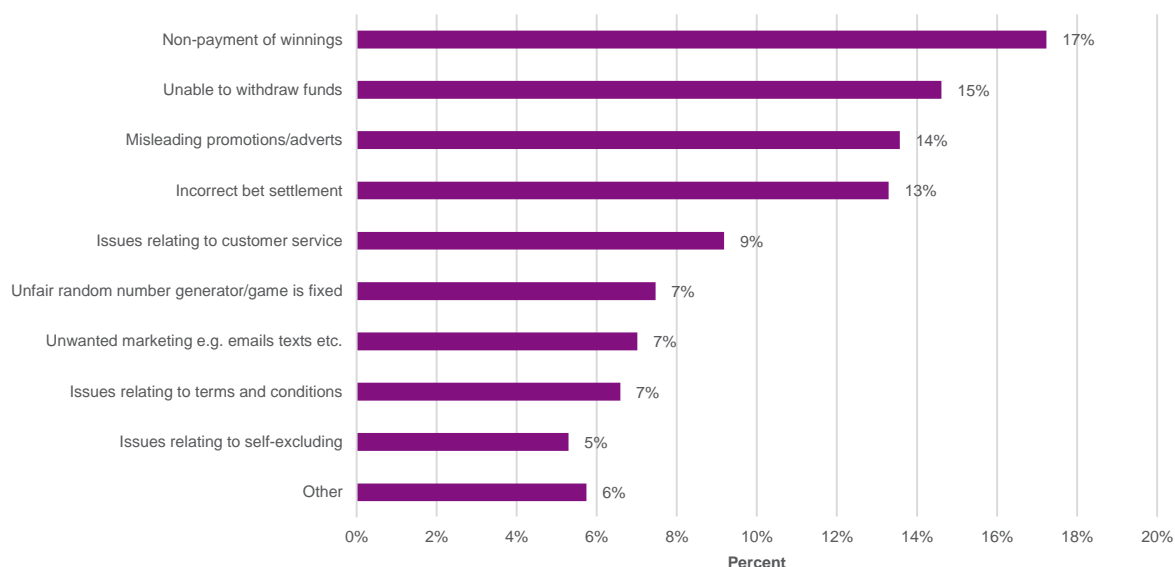
Significant changes were seen in the 18-24 age group (13%, a 3 percentage point decrease since 2017), 25-34 year olds (14%, a 2 percentage point increase on 2017), 35-44 year olds (8%, a 2 percentage point decrease from 2017) and 45-54 year olds (6%, a 1 percentage point increase from 2017).

Figure 37: Proportion of gamblers who have ever made a complaint by gender and age (n=3,271)



Gamblers who have ever made a complaint were asked what their most recent complaint was regarding. Figure 38 shows that the most common reason for the most recent complaint was in relation to non-payment of winnings (17%). Similar proportions of gamblers have made a complaint about being unable to withdraw funds (15%), misleading promotions/adverts (14%) and incorrect bet settlements (13%).

Figure 38: Reasons for most recent complaint (n=251)



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, YouTube, Snapchat, Google+ and Instagram. Overall, 26% of online gamblers followed a gambling company on any of these social platforms in 2018. This has decreased most notably among those aged 35-44 (27%, a 7 percentage point decrease from 2017), however there have been increases in online gamblers following gambling companies on social media among those aged 45-54 (23%, a 4 percentage point increase from 2017), 55-64 year olds (15%, a 3 percentage point increase from 2017) and those aged 65+ (7%, a 2 percentage point increase from 2017).

Figure 39: Proportion of online gamblers following gambling companies on social media by gender and age (n=2,042)

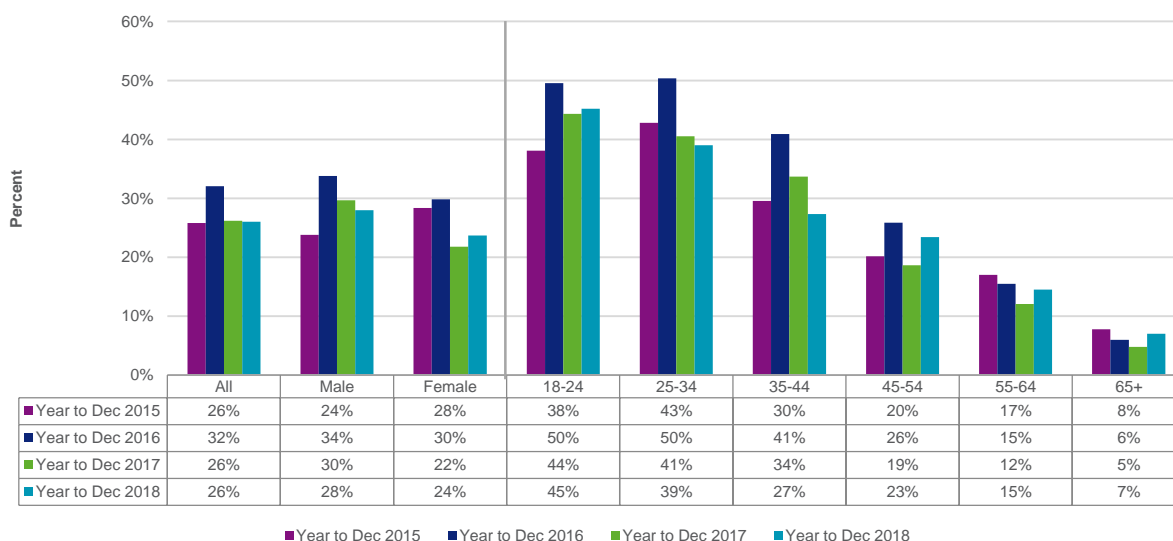
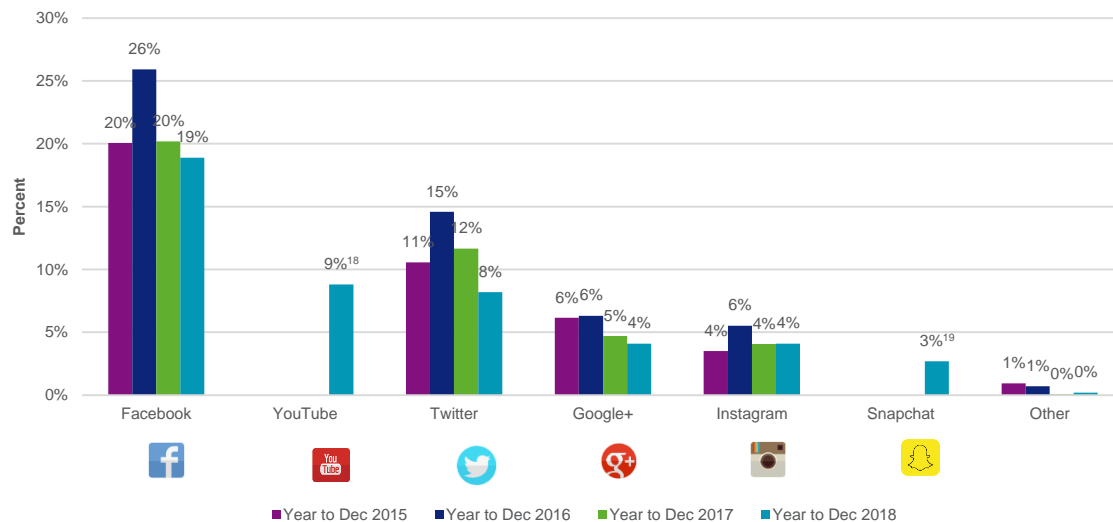


Figure 40 displays the results for each social media platform. During 2018, the list of social network platforms was expanded to cover YouTube and Snapchat.

Facebook remains the most popular social media platform in which online gamblers follow gambling companies (19%). This is followed by YouTube (9%) Twitter, which has seen a decline in followers (8%, a 4 percentage point decrease from 2017), Google+ (4%), Instagram (4%) and Snapchat (3%).

These figures are consistent with findings from the latest Adult's Media Use and Attitudes Report¹⁷ (Ofcom, 2018) which identifies Facebook as the most popular social media platform among adult internet users aged 16+.

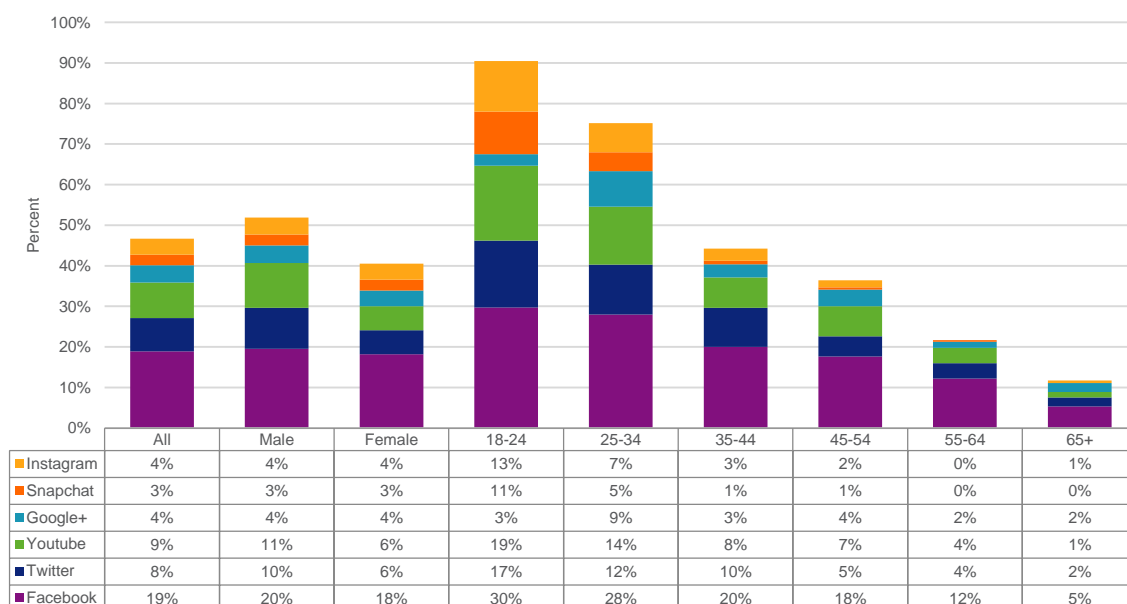
Figure 40: Proportion of online gamblers following gambling companies on social media by platform (n=2,042)



As Figure 41 shows, Facebook was the most popular social media platform on which to follow a gambling company across both genders and all age groups.

Significant decreases were seen in terms of those following gambling companies on Facebook for those aged 25-34 (28%, a 5 percentage point decrease from 2017) and 35-44 year olds (20%, a 5 percentage point decrease from 2017), and significant increases were seen in the 45-54, 55-64 and 65+ categories for Facebook use. Twitter use for following gambling companies significantly declined across all gender and age groups except for those aged 65+.

Figure 41: Following gambling companies on social media by platform, gender and age (n=2,042)



¹⁷ Ofcom 2018 (https://www.ofcom.org.uk/_data/assets/pdf_file/0011/113222/Adults-Media-Use-and-Attitudes-Report-2018.pdf)

¹⁸ New YouTube category was added in 2018

¹⁹ New Snaphat category was added in 2018

Respondents of the online survey were asked about advertisements²⁰ and sponsorships²¹ to help understand people's awareness of gambling related media. Figure 42 shows that overall, 86% of respondents have ever seen any gambling advertisements and 83% have ever seen any gambling sponsorships. This equates to 88% of respondents who have ever seen any gambling advertisements or gambling sponsorships. These levels of awareness are consistent with those seen in 2017.

Figure 42: Proportion of respondents who have seen or heard any gambling advertisements, or gambling sponsorships, or both (n=4,175)

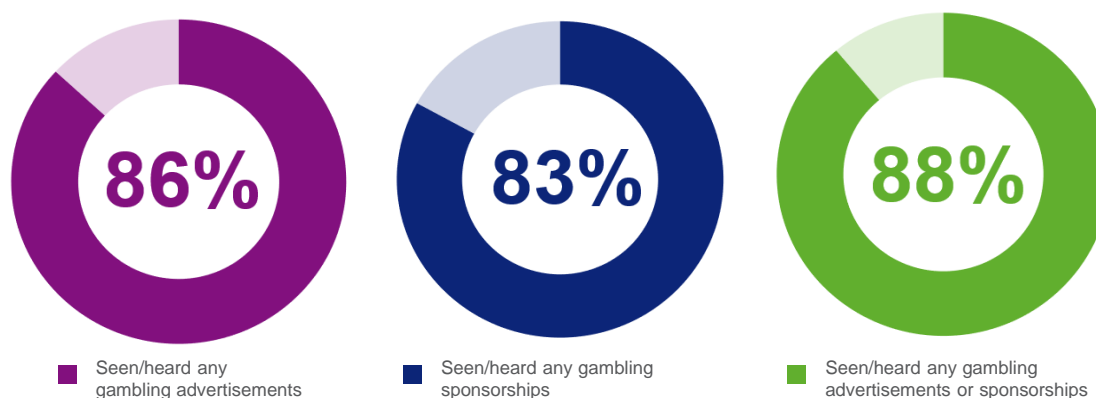
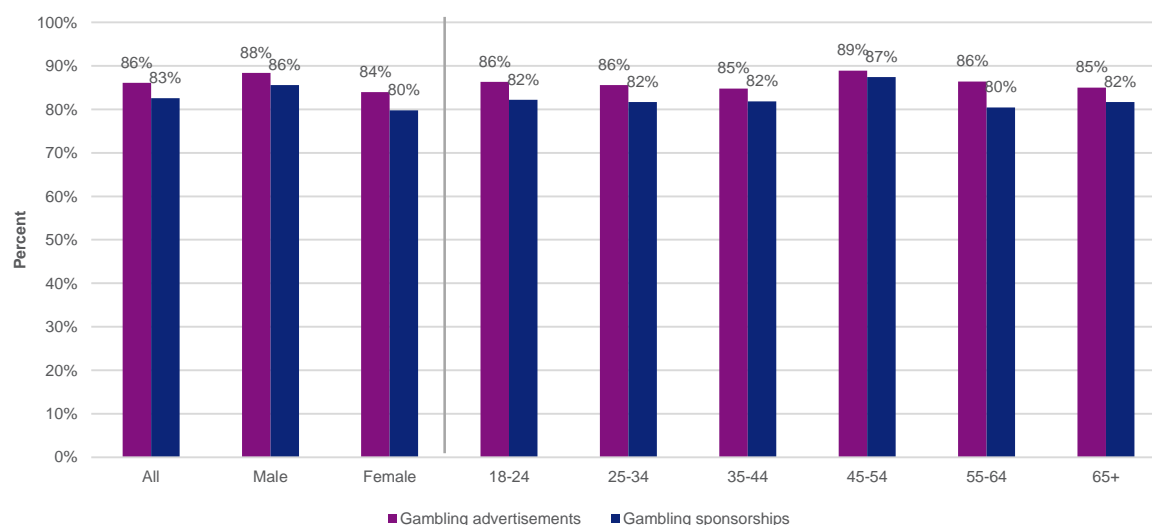


Figure 43 shows that across all demographic groups, larger proportions of respondents have seen or heard any gambling advertisements than gambling sponsorships. A higher proportion of men than women have seen gambling advertisements, with 88% of men and 84% of women reporting they have seen or heard gambling advertisements.

Significant decreases in visibility of advertisements since 2017 were seen in males (88%, a 4 percentage point decrease), 25-34 year olds (86%, a 5 percentage point decrease) 35-44 year olds (85%, a 2 percentage point decrease) and 55-64 year olds (86%, a 4 percentage point decrease). A significant increase was seen in the age group 65+ (85%, a 2 percentage point increase from 2017).

In terms of sponsorship, significant decreases were seen in males (86%, 4 percentage point decrease) 25-34 year olds (82%, a 3 percentage point decrease), 35-44 year olds (82%, a 3 percentage point decrease) and 55-64 year olds (80%, a 4 percentage point decrease), whilst increases were seen in females (80%, a 4 percentage point increase), 45-54 year olds (87% a 3 percentage point increase) and those aged 65+ (82%, a 3 percentage point increase).

Figure 43: Seen or heard any gambling advertising and sponsorships by age and gender (n=4,175)



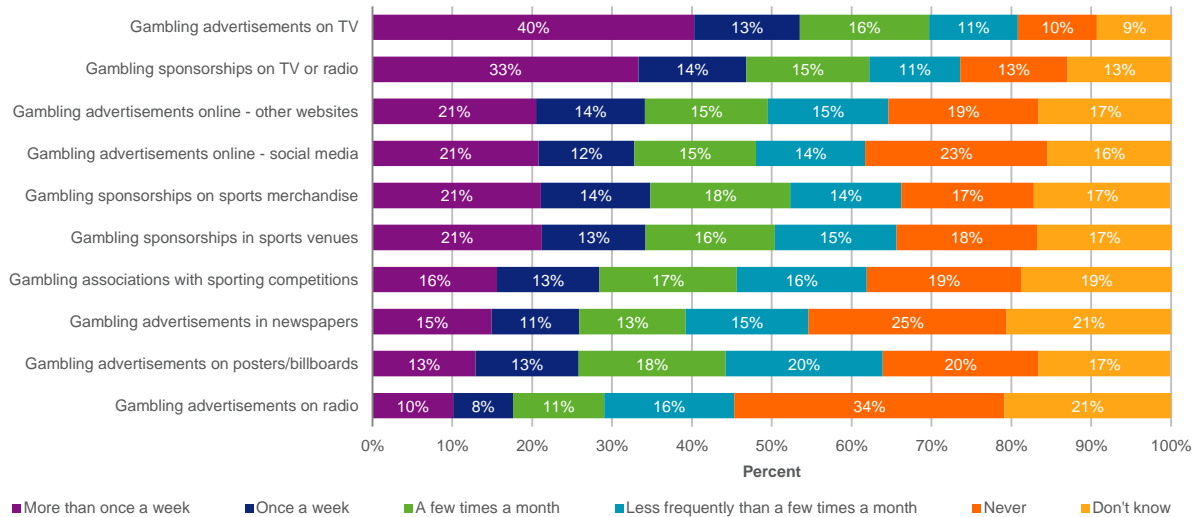
²⁰ Gambling sponsorships refer to a commercial agreement between a gambling company and another company e.g. Betway sponsoring West Ham United Football club from February 2015 to present

²¹ 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 53% 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 47% reporting seeing or hearing television or radio gambling sponsorships at least once a week.

There were significant increases seen since 2017 in terms of the proportions of respondents seeing the following more than once a week: gambling advertisements on TV (40%, a 2 percentage point increase), gambling sponsorships on TV or radio (33%, a 5 percentage point increase), gambling sponsorships on sports merchandise (21%, a 3 percentage point increase), gambling sponsorships in sports venues (21%, a 3 percentage point increase) and gambling adverts on the radio (10%, a 1 percentage point increase).

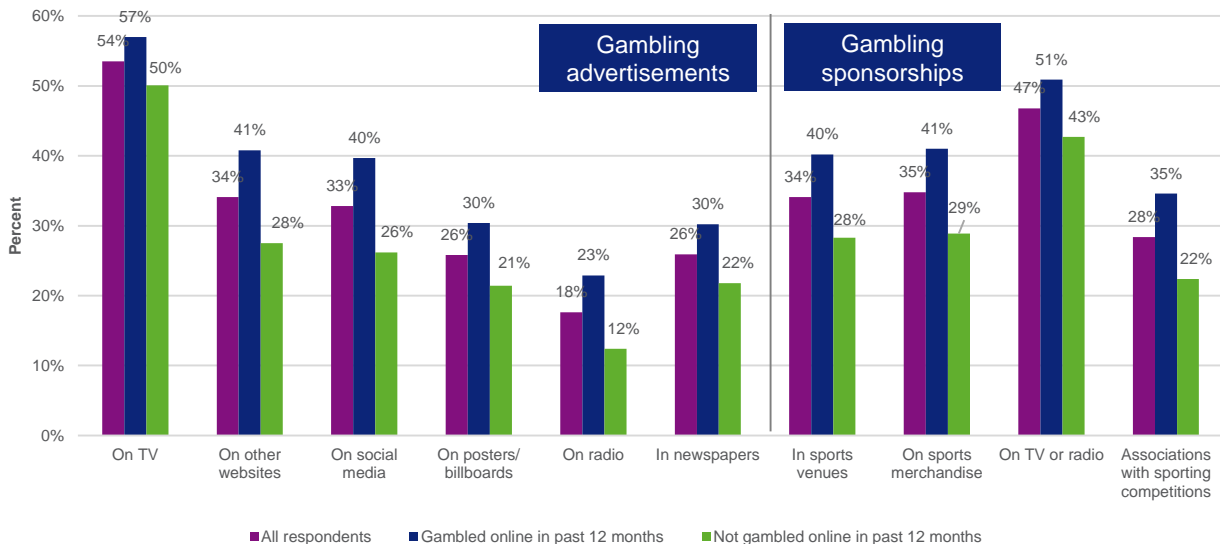
Figure 44: Seen or heard any gambling advertising and sponsorships by frequency (n=4,175)



As Figure 45 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 those who have not gambled online, with 40% of respondents who have gambled online in the past 12 months and 26% of those who have not gambled online on the past 12 months reporting having seen gambling advertisements on social media.

Overall, there were significant increases in seeing or hearing gambling adverts for non-gamblers across all media types with the exception of radio. The only significant increase for gamblers was for seeing gambling sponsorships on the TV or radio.

Figure 45: Seen or heard any gambling advertising and sponsorships at least weekly by gambling status (n=4,175)

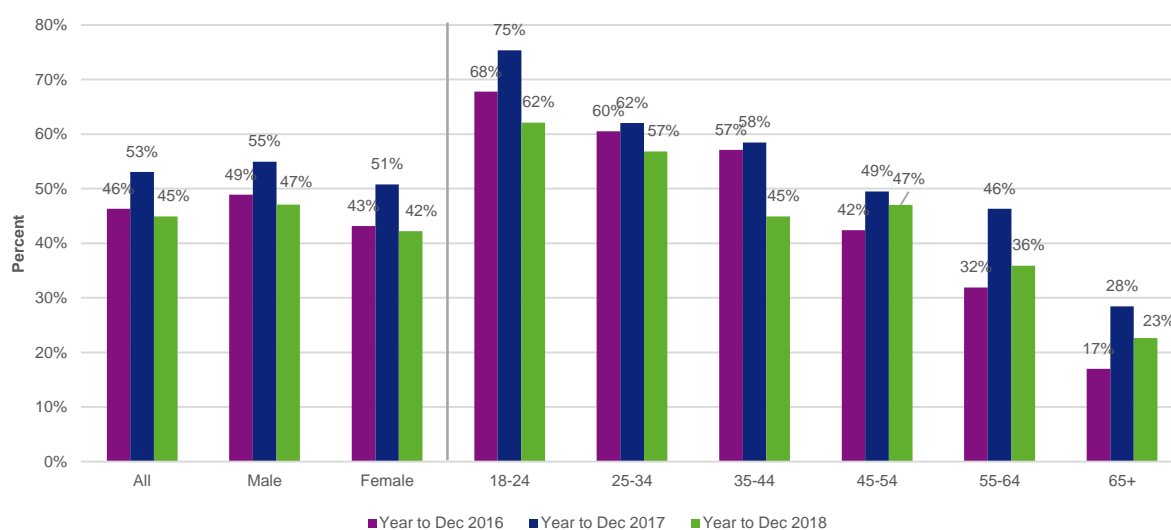


Online gamblers were asked whether or not various forms of advertising have prompted them to spend money on gambling.

As Figure 46 shows, across all online gamblers, 45% have been prompted to spend money on gambling as a result of seeing various forms of advertising (an 8 percentage point decrease from 2017). Since 2017, the proportion of online gamblers prompted to spend money on gambling by advertising has declined across all demographic groups.

The largest declines can be seen among 18-24 year olds (62%, down 13 percentage points) and 35-44 year olds (45%, down 13 percentage points). It can also be observed that those in the younger age groups were more likely overall to be prompted to spend money on gambling by advertising.

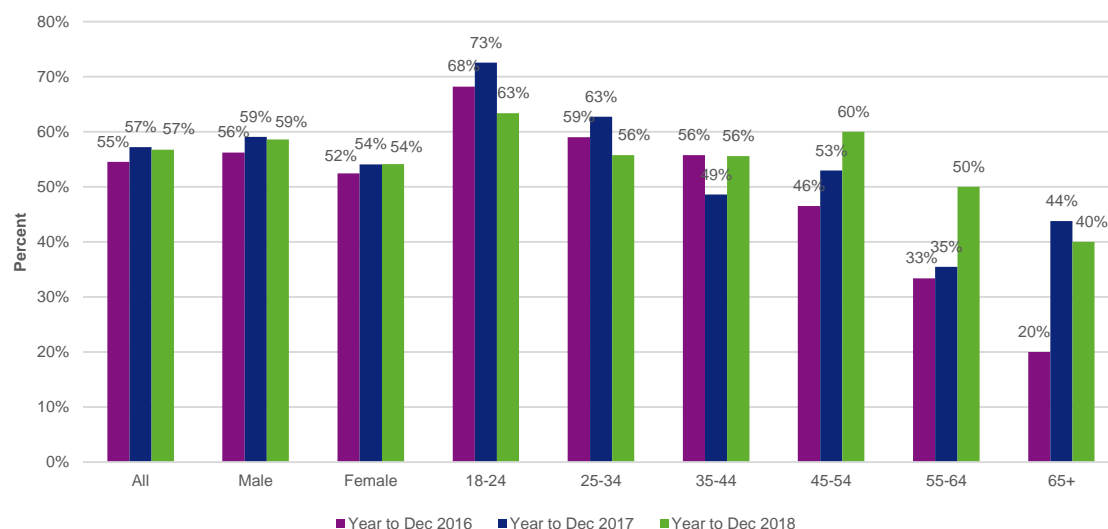
Figure 46: Proportion of online gamblers prompted to spend money on gambling by advertising by gender and age (n=2,043)



As Figure 47 shows, the proportion of online gamblers (with a social media account) prompted to spend money on gambling as a result of seeing posts on social media has remained stable at 57%.

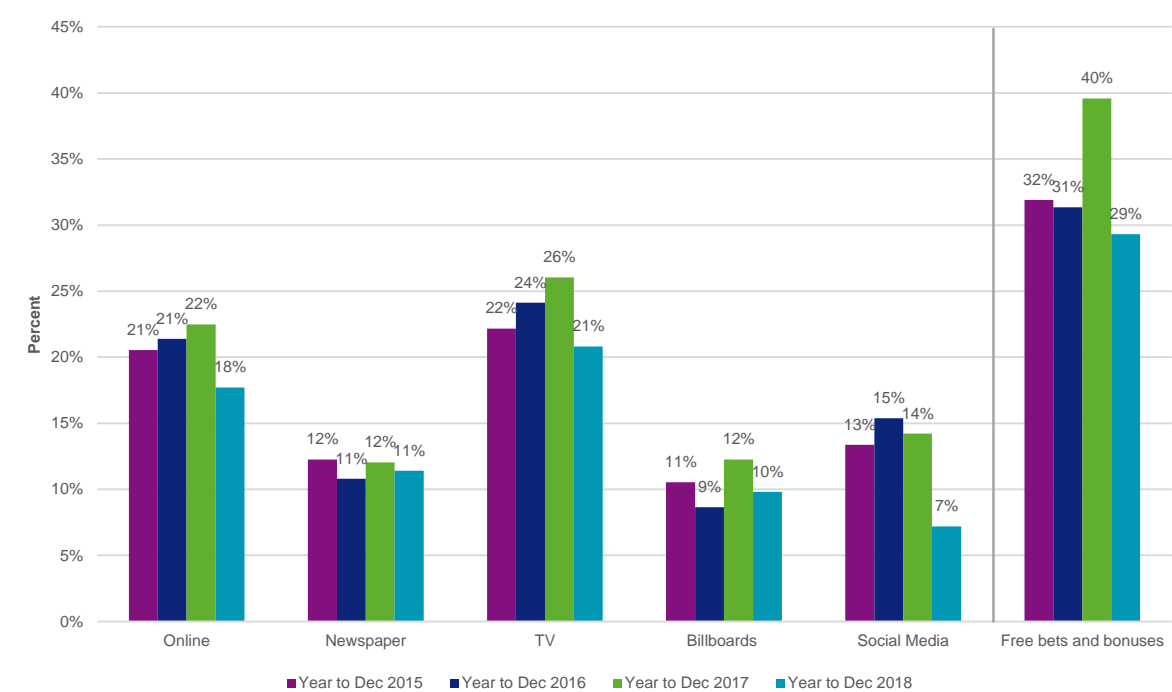
Significant decreases were seen across the 18-24 age group (63%, a 10 percentage point decrease from 2017) and the 25-34 age group (56%, a 7 percentage point decrease from 2017). Significant increases were seen in the 35-44 age group (56%, a 7 percentage point increase since 2017), the 45-54 age group (60%, a 7 percentage point increase from 2017) and the 55-64 age group (50%, a 15 percentage point increase from 2017).

Figure 47: Proportion of online gamblers (with a social media account) who were prompted to spend money on gambling by seeing social media posts by gender and age (n=532)



Focusing on advertising in particular, Figure 48 shows that in 2018 online gamblers were most likely to be prompted to spend money on gambling by promotions for free bets and bonuses (29%, an 11 percentage point significant decrease from 2017). Significant changes were also seen for adverts on the television (21%, a 5 percentage point decrease from 2017), online adverts (18%, a 4 percentage point decrease from 2017), billboard adverts (10%, a 2 percentage point decrease from 2017) and social media (7%, a 7 percentage point decrease from 2017).

Figure 48: Proportion of online gamblers prompted to spend money on gambling by types of advertising (n=2,043)



Social gaming

Some games that can be played online often look like gambling but do not meet the legal definition of gambling. These casino style games 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. They are played over the internet often via mobile phones and are built on social networks, they are ‘social’ in the sense that interaction with other people is a key feature of the gaming or gambling. These are also referred to as social casino games.

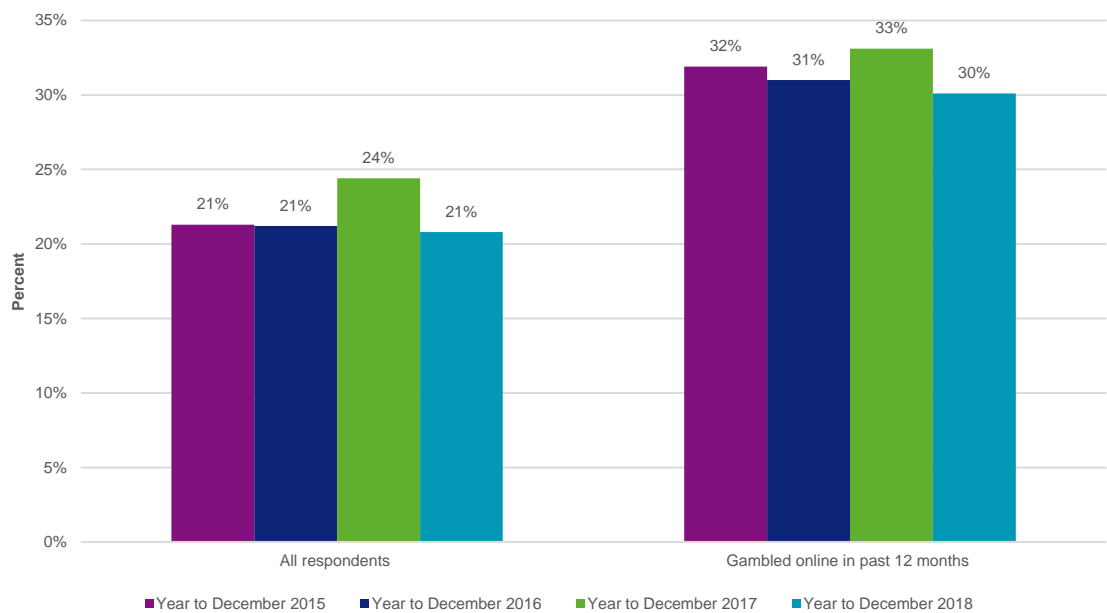
The boundaries between social casino gaming and commercial gambling have become increasingly blurred as a result of:

- 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, 21% had participated in online gambling-style games (a 3 percentage point decrease from 2017). This figure increased to 30% when looking only at those who had gambled online in the past 12 months (also representing a 3 percentage point decrease since 2017).

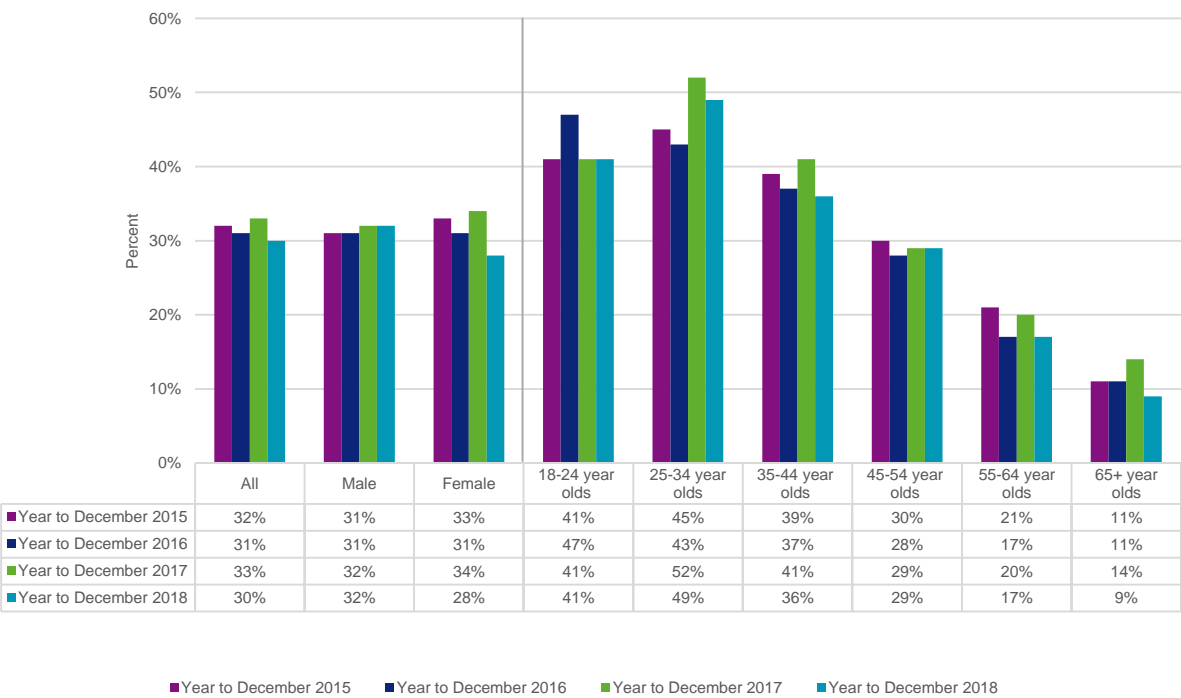
Figure 49: Ever participated in online gambling style games (n=4,174)



Participation in online gambling-style games among online gamblers was highest for those aged 25-34 (49% of all those who had gambled online in the last 12 months) and lowest for those aged 65+ (9%).

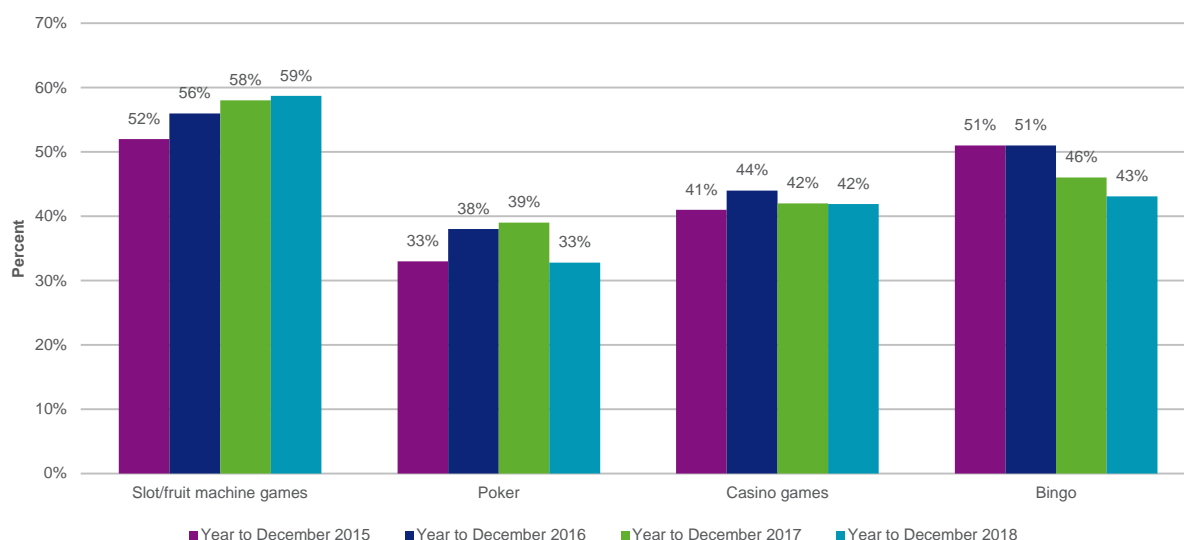
Since 2017, significant decreases have been seen for female participation in online gambling-style games (28%, a 6 percentage point decrease), those aged 25-34 (49%, a 3 percentage point decrease), 35-44 year olds (36%, a 5 percentage point decrease), and those aged 65+ (9%, a 5 percentage point decrease). Participation between 2017 and 2018 was stable for males and the all other age groups.

Figure 50: Ever participated in online gambling-style games amongst online gamblers by gender and age (n=2,039)



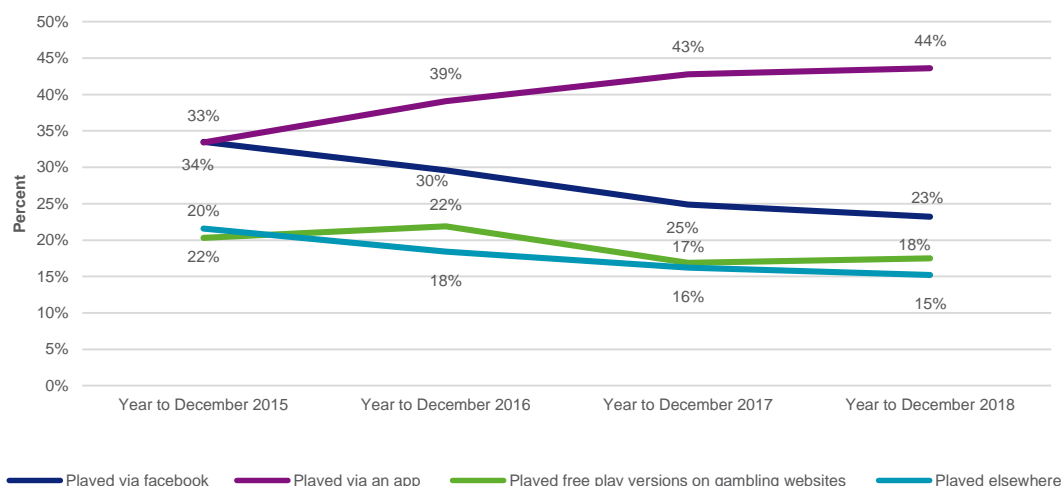
The most popular gambling-style games were slot or fruit machine style games, with 59% of social gamers having played them in the last four weeks. Levels of participation across all games types were comparable to 2017.

Figure 51: Past four week participation in online gambling-style games amongst online gamblers by game type (n=434)



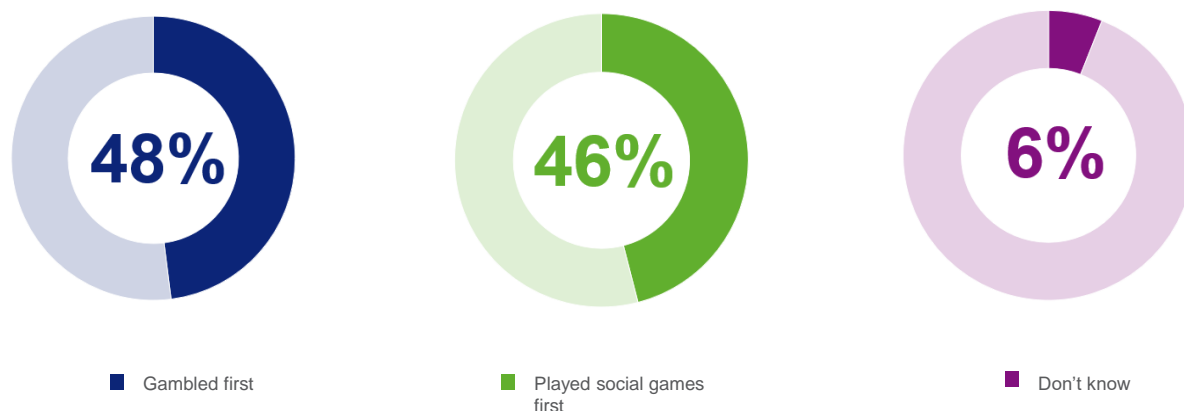
In 2018, online gambling style games were most commonly played via an app, with 44% of online gamblers having done so in the past four weeks. The next most common platform to play games on was Facebook (23%), followed by free play versions (18%) and played elsewhere (15%).

Figure 52: Past four week participation in online gambling-style games amongst online gamblers by mode of play (n=434)



Amongst social gamers who had also gambled, 48% stated that the first activity that they undertook was gambling to win money. 46% reported playing online gambling games first. The remaining 6% could not remember which activity they had done first.

Figure 53: First activity participated in (n=511)



Perceptions and attitudes



30% of people think that gambling is fair and can be trusted

-3% from 2017

38% of people think that gambling is associated with criminal activity



62% think people should have the right to gamble whenever they want



79% of people think that there are too many opportunities for gambling nowadays



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

36% of respondents agree with the statement...

-3% from 2017

"Most people who gamble do so sensibly"



Public opinion is informed by news on TV



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

Best odds and the reputation of a company being fair and trustworthy are the top choices when selecting an operator

	9/1
	20/1
	1/4

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.

Table 6 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 6: Agree that gambling is conducted fairly and can be trusted (n=4,009)

In this country, gambling is conducted fairly and can be trusted (%)										
Agree with statement	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
All respondents	50	48	49	49	42	41	39	34	33	30
Gambled past 12 months	60	59	59	57	51	49	45	38	38	34
Not gambled past 12 months	30	31	31	31	30	29	27	29	27	25

Overall, 30% of respondents agreed with the statement that gambling was fair and can be trusted in 2018 (a 3 percentage point decline from 2017). Gamblers' attitudes remains more positive than non-gamblers, with a higher percentage of gamblers agreeing with the statement that gambling is fair and can be trusted. Overall, 34% of gamblers agreed with the statement that gambling was fair and can be trusted in 2018 (a 4 percentage point decline from 2017) and 25% of non-gamblers agreed with the statement (a 2 percentage point decrease from 2017).

Figure 54: Agree that gambling is conducted fairly and can be trusted (n=4,009)

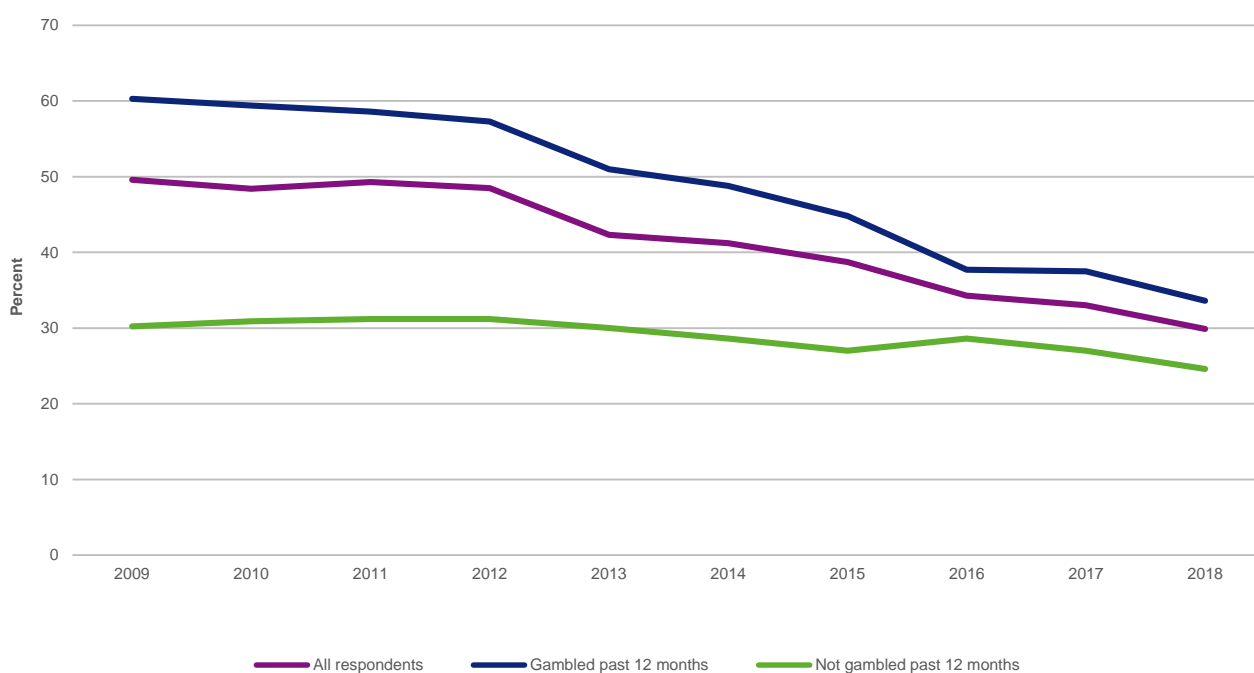


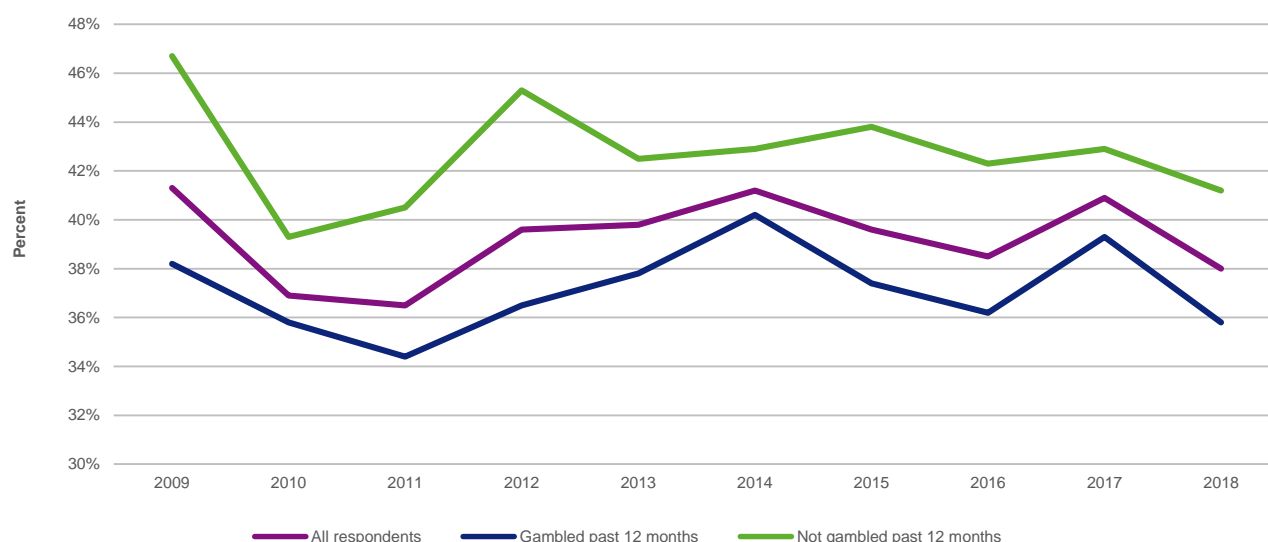
Table 7 shows the percentage of respondents who agreed (either strongly or slightly) with the statement that gambling in Great Britain is associated with criminal activity.

Table 7: Agree that gambling is associated with criminal activity (n=4,009)

In this country, gambling is associated with criminal activity (%)										
Agree with statement	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
All respondents	41	37	37	40	40	41	40	39	41	38
Gambled past 12 months	39	36	34	37	38	40	37	36	39	36
Not gambled past 12 months	47	39	41	45	43	43	44	42	43	41

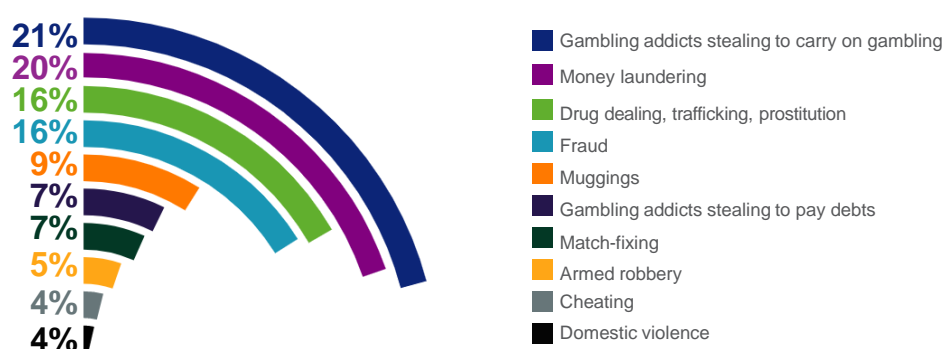
Overall, 38% of respondents agreed with the statement that gambling was associated with criminal activity in 2018. Gamblers' perceptions were more positive than non-gamblers. The proportion of gamblers that agreed gambling is associated with criminal activity was 36% compared to 41% for non-gamblers. Since 2017, there has been a significant decline in gamblers' agreeing with the statement that gambling is associated with criminal activity (36%, a 3 percentage point decrease since 2017).

Figure 55: Agree that gambling is associated with criminal activity (n=4,009)



Respondents who agreed that gambling was associated with criminal activity in 2018 were asked which crimes they associated with gambling. Gambling addicts stealing to carry on gambling was most commonly mentioned (21%), followed by money laundering (20%, a 4 percentage point increase from 2017), fraud (16%), and drug dealing/trafficking/prostitution (16%).

Figure 56: Proportion of respondents mentioning a crime (n=1,524)



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.

The ATGS-8 statements were added to the Commission's telephone survey in March 2016. In order to generate a score from the ATGS-8, each response is given a score between 1 and 5. Scores from the eight separate items are summed to generate a total ATGS-8 score. 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.

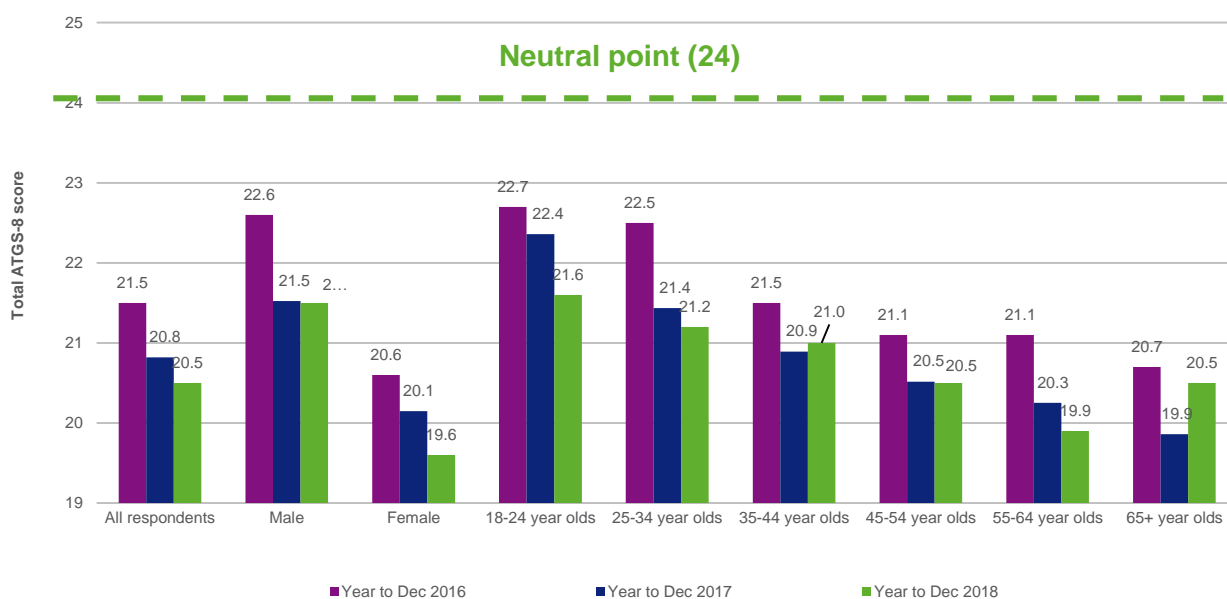
Table 8 shows each ATGS statement, alongside the mean score (out of 5) for each individual statement, whereas Figure 57 below shows the total summed score for all eight statements.

Table 8: Mean scores for each attitude statement by gender and age (n=4,009)

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	3.5	3.7	3.4	3.6	3.6	3.6	3.5	3.5	3.5
There are too many opportunities for gambling nowadays	1.7	1.8	1.7	2.0	1.8	1.7	1.7	1.5	1.7
Gambling should be discouraged	2.3	2.5	2.2	2.5	2.5	2.4	2.3	2.3	2.2
Most people who gamble do so sensibly	2.9	3.0	2.9	2.8	2.9	3.0	3.0	3.0	2.9
Gambling is dangerous for family life	2.1	2.1	2.0	2.2	2.3	2.2	2.1	2.0	1.8
On balance, gambling is good for society	2.2	2.3	2.1	2.4	2.3	2.2	2.2	2.0	2.0
Gambling livens up life	2.6	2.8	2.3	2.8	2.7	2.7	2.5	2.4	2.3
It would be better if gambling was banned altogether	3.4	3.6	3.2	3.4	3.5	3.5	3.4	3.4	3.3

The total ATGS-8 score for all respondents is 20.5, which is placed on the negative side of the neutral point of 24.

Figure 57: Total ATGS-8 score by gender and age (n=4,009)



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 21.7. Non-gamblers have an ATGS-score of 18.8.

Figure 58: Total ATGS-8 score by gambling status (n=4,009)

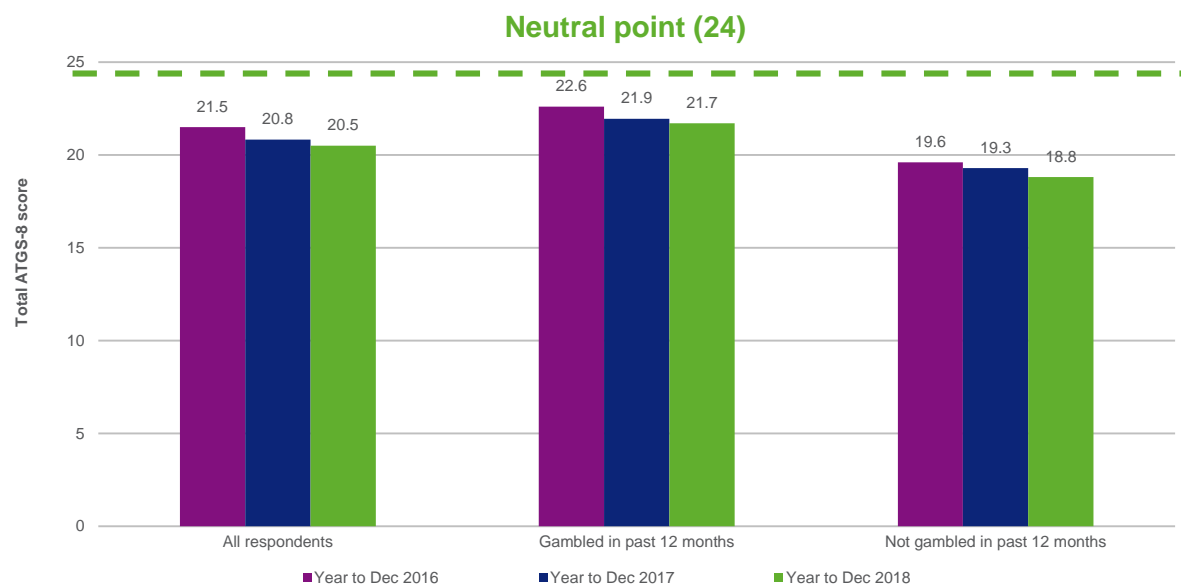
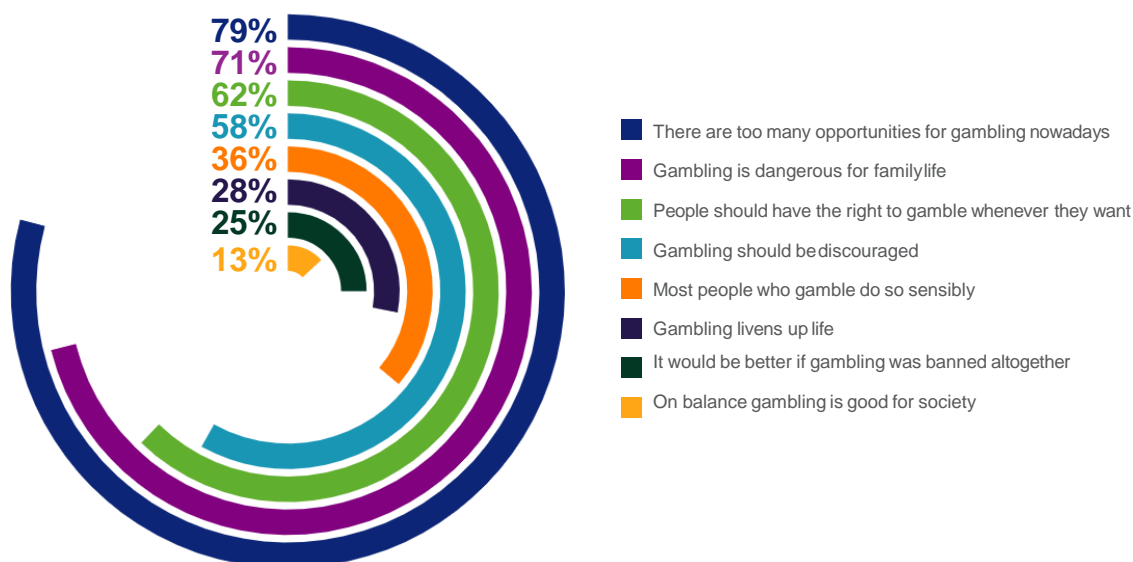


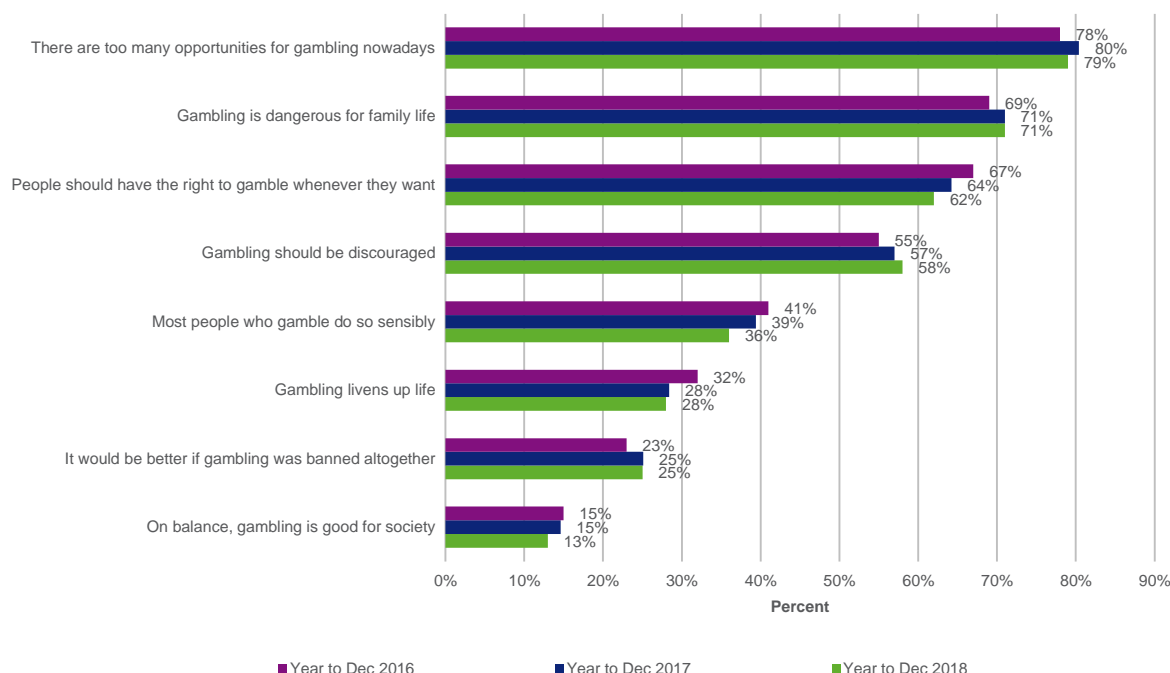
Figure 59 shows the proportion of respondents who agreed with each individual attitude statement. Overall, respondents' attitudes towards gambling are similar to those observed last year, with the exception of 'most people who gamble do so sensibly' (36%, a 3 percentage point decrease from 2017).

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



In 2018, 79% of respondents agreed that there are too many opportunities for gambling nowadays, whilst 71% agreed that gambling is dangerous for family life. However, 62% of respondents agreed that people should have the right to gamble whenever they want. Importantly, 36% of respondents agreed that most people who gamble do so sensibly (a 3 percentage point decrease from 2017).

Figure 60: Proportion of respondents agreeing with individual attitude statements by year (n=4,009)

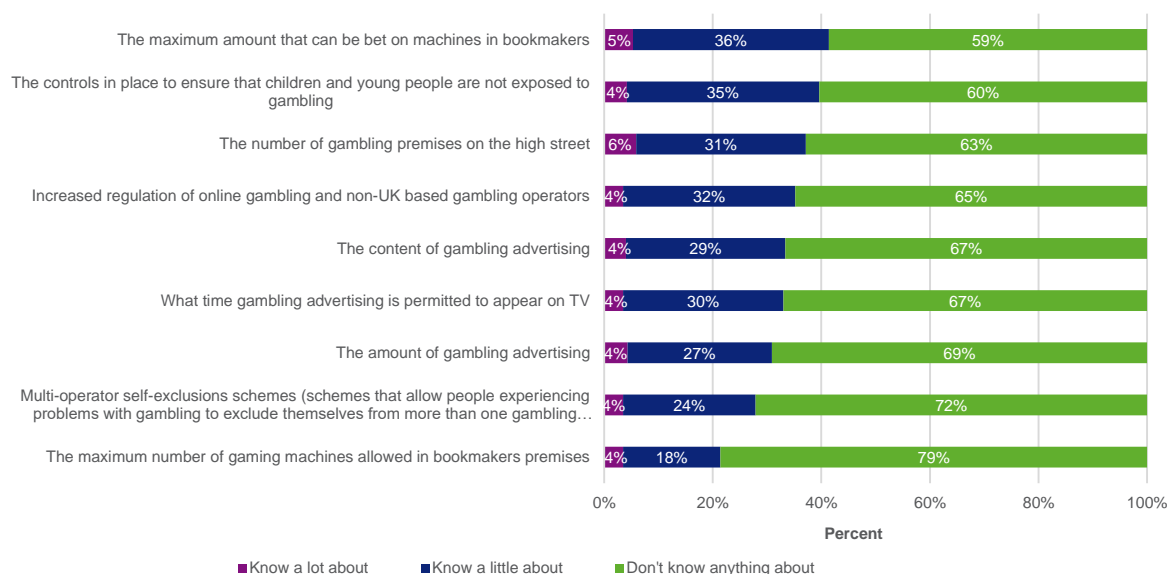


Public opinion on gambling policy

Questions capturing the opinions and attitudes of the Great British public are included in the Commission's online survey once a year in June to 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 61 along with rates of public awareness.

Figure 61: Awareness of gambling policy issues (n=2,093)



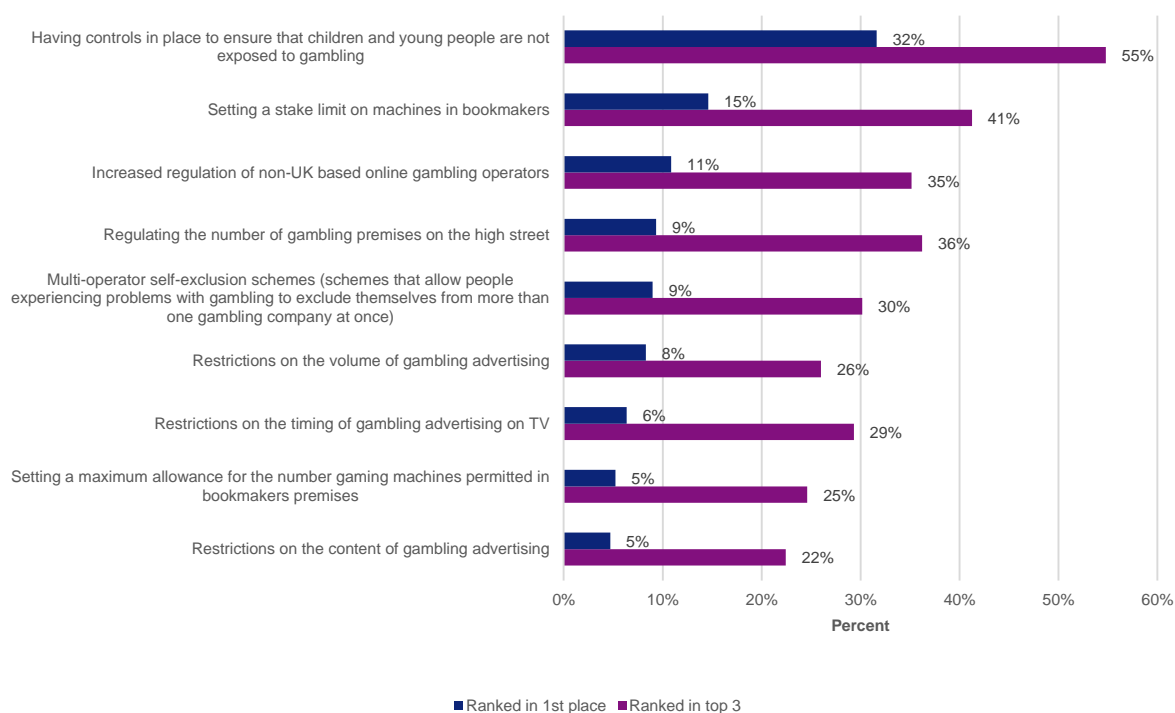
The two policy issues that the general public were most aware of were the maximum amount that can be bet on machines in bookmakers, with 41% stating that they knew a lot or little about the topic, and the controls in place to ensure that children and young people are not exposed to gambling, with 39% stating that they knew a lot or little about the topic. This was followed by the number of gambling premises on the high street (37%) and increased regulation of online gambling and non-UK based gambling operators (36%). Similar to 2017, the issue that the public knew least about was the maximum number of gaming machines allowed in bookmakers' premises, with 22% 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 62 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 (32%, a 3 percentage point decrease from 2017). This was also the issue most often ranked in people's top three issues, consistent with the results from the previous year.

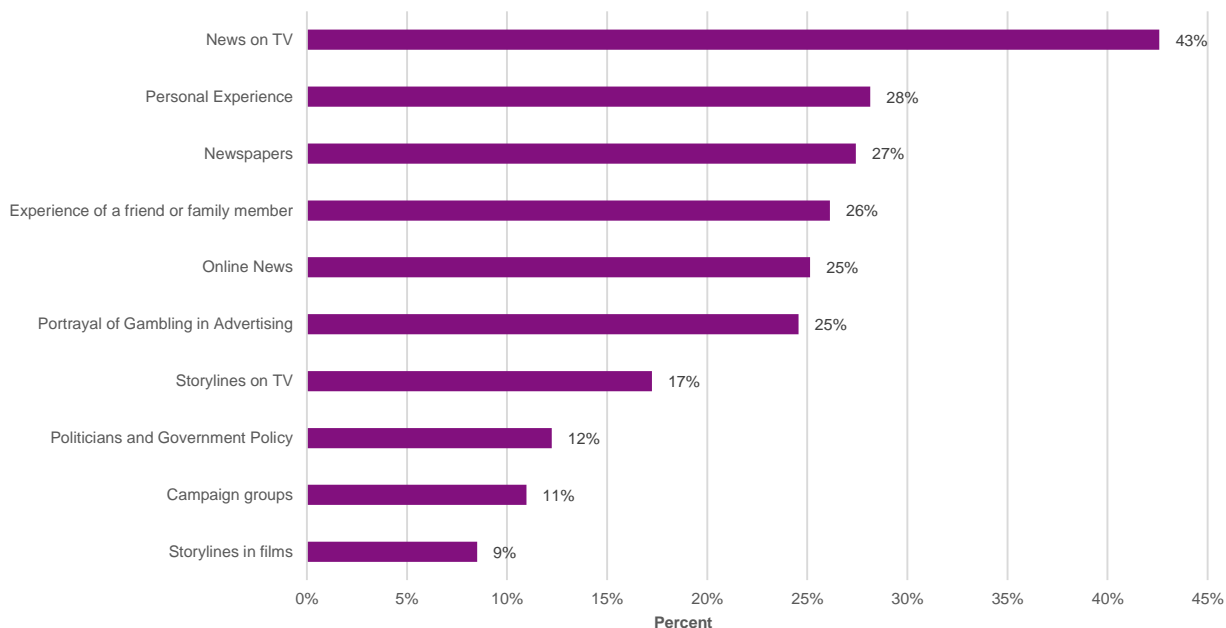
There have been significant increases in the perceived importance of setting a stake limit on machines in bookmakers, with 15% ranking it as the most important issue (a 5 percentage point increase from 2017), and 41% ranking it among the top three issues (a 5 percentage point increase from 2017).

Figure 62: Ranked importance of gambling policy issues (n=2,093)



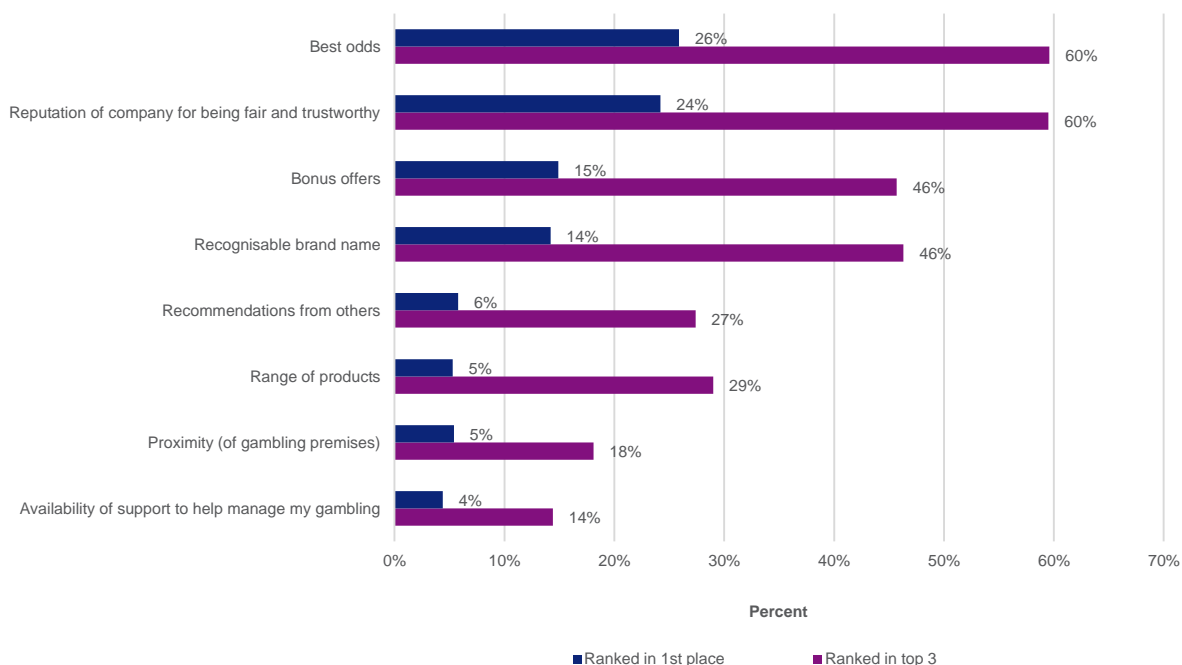
Respondents were then asked about what channels had informed their overall opinion of gambling on society. News on TV most often informed people's opinions (43%), followed by personal experience (28%) and newspapers (27%).

Figure 63: Channels informing public opinion (n=2,093)



Gamblers were also asked about which factors were important when first gambling with a new company. The most important factor selected was operators who offered the best odds, selected by 26% of gamblers as their top choice, closely followed by reputation of a company for being fair and trustworthy, with 24% of gamblers selecting it as their top choice (a 3 percentage point decrease from 2017).

Figure 64: Factors which were important to gamblers when selecting an operator for the first time (n=3,272)



Since 2017, there has been an increase in respondents ranking 'availability of support to help manage my gambling' as their first place (4%, a 1 percentage point increase from 2017), and as their top three (14%, a 2 percentage point increase from 2017).

Appendix 1 – methodology

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 Populus²². The results cover the calendar years 2015 – 2018 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, June, September and December with approximately 1,000 interviews conducted per quarter. Each survey captures past four week gambling behaviour amongst people aged 16+²³ in Great Britain.

Telephone survey sample is generated through Random Digit Dialing²⁴ (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

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.

²² 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.

²³ In March 2016 the sample was broadened to include participants aged 16+

²⁴ Random Digit Dialing (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.

Problem and at-risk gambling

Rates of problem gambling are collected on a quarterly basis in the telephone survey, using the short form Problem Gambling Severity Index (PGSI mini-screen)²⁵. 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 (gamble with no negative consequences)
1	Low-risk gambler (experience a low level of problems with few or no identified negative consequences)
2-3	Moderate-risk gambler (experience a moderate level of problems leading to some negative consequences)
4+	Problem gambler (gamble with negative consequences and possible loss of control)

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. These health surveys cover approximately 14,000 respondents who are questioned on their gambling behaviour and the results from each survey are then compiled into a Combined Health Survey Great Britain report. [Gambling behaviour in Great Britain in 2016](#).

It should be noted that due to the large sample sizes and robustness, data from the health surveys relates to 2016 (the latest data available from these surveys), however as these are the only surveys where the full PGSI and DSM IV problem gambling screens are used, we continue to use these surveys and report the full PGSI and DSM IV measures of problem gambling in the chapter 'Low, moderate-risk and problem gambling'.

Full PGSI and DSM-IV screens

The PGSI was developed by Ferris and Wynne and was specifically developed for use among the general population rather than within a clinical context. It was developed, tested and validated within a general population survey of over 3,000 Canadian residents. The instrument was revised in 2003.

The PGSI consists of nine items ranging from 'chasing losses' to 'gambling causing health problems' to 'feeling guilty about gambling'. Each item is assessed on a four-point scale: never, sometimes, most of the time, almost always. Responses to each item are given the following scores: never = zero; sometimes = one; most of the time = two; almost always = three. When scores to each item are summed, a total score ranging from zero to 27 is possible. A PGSI score of eight or more represents a problem gambler. This is the threshold recommended by the developers of the PGSI and the threshold used in this report. The PGSI was also developed to give further information on sub-threshold problem gamblers. PGSI scores between three and seven are indicative of 'moderate risk' gambling and a score of one or two is indicative of 'low risk' gambling.

The DSM-IV screening instrument is based on criteria from the fourth edition of the Diagnostic and Statistical Manual of the American Psychiatric Association (DSM-IV). This contains ten diagnostic criteria ranging from 'chasing losses' to 'committing a crime to fund gambling'.

²⁵ Developing a Short Form of the PGSI (Volberg, 2012).

The DSM-IV criteria constitute a tool created for diagnosis by clinicians of pathological gambling and were not intended for use as a screening instrument among the general population.

Therefore, there is no recommended questionnaire version of the DSM-IV. An adapted version of the DSM-IV to use in a survey setting was developed for the British Gambling Prevalence Survey (BGPS) and was subject to a rigorous development and testing process, including cognitive testing and piloting. Each DSM-IV item is assessed on a four-point scale, ranging from 'never' to 'very often'.

Responses to each item are dichotomised to show whether a person meets the criteria or not and a total score between zero and ten is produced.

Among clinicians, a diagnosis of pathological gambling is made if a person meets five out of the ten criteria. Many surveys, when adapting the DSM-IV criteria into a screening instrument for use within a general population survey, have included a further category of 'problem gambler' for those who meet at least three of the DSM-IV criteria. This approach was adopted for the Health survey series.

Online gambling behaviour

As well as collecting data on overall gambling participation and problem gambling, 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 2018, with surveys again taking place in March, 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.

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 to 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.

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

Making gambling fairer and safer

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