

**GAMBLING
COMMISSION**

Gambling participation in 2019: behaviour, awareness and attitudes

Annual report

February 2020



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Headline findings

47%



Percentage of respondents who have participated in any form of gambling in the past four weeks

(46% in year to December 2018)



0.5%

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 2018 (England)

32%



Percentage of respondents who have participated in gambling in the past four weeks, excluding those who have only played the National Lottery draws

(32% in year to December 2018)



15%

Proportion of online gamblers gambling in the workplace in the past four weeks

(12% in year to December 2018)

21%



Percentage of respondents who have gambled online in the past four weeks

(18% in year to December 2018)



51%

Proportion of respondents who have seen a gambling advert on the television in the last week

(54% in year to December 2018)

56%



Percentage of online gamblers who have more than one online account

(54% in year to December 2018)



29%

Proportion of respondents who think that gambling is fair and can be trusted

(30% in year to December 2018)

50%



Proportion of online gamblers who have gambled using a mobile phone in the past four weeks

(44% in year to December 2018)



43%

Proportion of respondents who think that gambling is associated with crime

(38% in year to December 2018)

65%



Proportion of gamblers who have read terms and conditions and found them to be helpful

(61% in year to December 2018)



Indicates a significant increase at the 95% confidence level



Indicates non-significant findings (tested at the 95% confidence level)



Indicates a significant decrease at the 95% confidence level

Gambling participation in 2019: behaviour, awareness and attitudes

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Data source:
Sample:
Fieldwork:

Gambling Commission Telephone Survey & Online Tracker, administered by Populus.
Telephone Survey (n=4,003 adults aged 16+), Online Tracker (n= 8,341 adults aged 18+)
Both surveys were administered quarterly in March, June, September & December 2019.

Gambling participation

47%



have gambled on any activity in the past four weeks



21%

have gambled on any activity online in the past four weeks

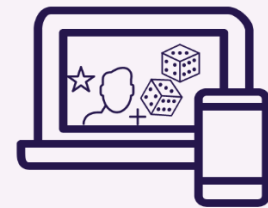


51%

of past four week gamblers gamble at least once a week

Online gambling behaviour

50% of online gamblers had used a mobile to gamble in the past four weeks



Online gamblers have an average of **3** online accounts
56% have more than one online account



6%

have ever bet on eSports (using money or items)

15%

gambled in the workplace in the past 4 weeks



Terms and conditions

1 in 5 gamblers have read terms and conditions



65%

of which found them helpful



Marketing and advertising

87%

of respondents have ever seen/heard any gambling advertisements or sponsorships

51%

of respondents have seen a gambling advert on the television in the last week

44%

of online gamblers have been prompted to spend money on gambling by seeing advertisements

29%

of online gamblers have been prompted to spend money on gambling by free bets and bonuses

Perceptions and attitudes

29%

think that gambling is conducted fairly and can be trusted

43%

think that gambling is associated with crime

News on TV was most likely to inform respondent's opinions around gambling (**40%**)

Executive summary

Background and context

This report provides an overview of consumer gambling behaviour in Great Britain in 2019, based on quarterly telephone and online tracking surveys conducted by Populus on behalf of the Gambling Commission. The report includes data on participation in gambling activities in the past four weeks, online gambling behaviour, awareness of gambling management tools and perceptions and attitudes towards gambling. The report also includes data on the prevalence of problem, moderate-risk and low-risk gambling. This data is taken from a separate source, the NHS Digital Health Survey for England (2018), due to its use of the full PGSI (Problem Gambling Severity Index) and DSM-IV screens¹.

Details on the survey methodologies used can be found in the Appendix.

Survey findings

Gambling participation

Our research found that overall, gambling participation has remained stable compared to 2018 with 47% of respondents aged 16+ having participated in at least one form of gambling in the past four weeks in 2019 (46% in 2018). By age, the highest level of gambling participation was found among the 45-54 age group (53%) however, if those who only participated in NL draws are excluded, those in the age group 25-34 had the highest participation level (41%).

Amongst respondents:

- The National Lottery draws remain the most popular gambling activity, followed by other lotteries and scratchcards.
- Football and horse racing are the most popular betting activities.
- Over half of past four week gamblers (51%) gamble at least once a week.
- 21% of all respondents have gambled online in the past four weeks, a significant increase since 2018.

Problem gambling estimates

The latest data from the NHS Digital Health Survey for England 2018² shows that the prevalence of problem gambling (according to the PGSI or DSM-IV screen) was 0.5%.

By comparison, the Commission's regular telephone survey (2019), which uses the PGSI mini-screen³ observed a problem gambling rate of 0.6% for Great Britain, however we recommend the use of the figures taken from the NHS Digital Health Survey England due to its robustness and use of the full PGSI and DSM-IV screens.

Online gambling behaviour

Mobile phones remain the most popular method of gambling online in 2019. Among online gamblers, mobile phone use for gambling significantly increased (50%, an increase of 6 percentage points from 2018), whilst laptop use significantly declined (38%, a 6 percentage point decrease from 2018).

Those who gamble on mobile phones were typically in the younger age groups, with 76% of 18-24 year olds, 72% of 25-34 year olds and 66% of 35-44 year olds who gamble online, using a mobile to gamble in the previous four weeks. This contrasts with 14% of those aged 65+.

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

² Data for Wales 2018 is not currently available, although will be released in 2020. Gambling questions were not included on the Health Survey for Scotland in 2018, so data will not be available for this year.

³ Details on the PGSI mini-screen can be found at <http://www.gamblingcommission.gov.uk/PDF/survey-data/Developing-a-Short-Form-of-the-PGSI.pdf>

Typically, online gamblers play at home (95%), however, there has been an increase in the proportion of online gamblers gambling in the workplace (15%, a 3 percentage point increase). On average, online gamblers have three accounts with online gambling operators and 21% have bet in-play in the last 4 weeks.

Over half (56%) of online gamblers were registered online with more than one account, and 20% of those aged 18-24 had more than five online accounts.

In terms of eSports⁴, 6% of all respondents have ever bet on eSports (money or items), with participation rates highest among 18-24 and 25-34 year olds.

Consumer analysis

Overall, 47% of gamblers were aware of the self-exclusion facility, a significant 12 percentage point increase over a five year period (35% in 2015).

One in five gamblers (20%) have read terms and conditions, of which 26% felt they had been in a situation where the terms and conditions of an operator had been unfair. 65% of those who had read terms and conditions reported finding them helpful, which is a significant increase on the previous year (61% in Year to December 2018).

Overall, 7% of gamblers have ever made a complaint to or about a gambling operator, with rates highest among 18-24 year olds (12%) and 25-34 year olds (11%).

In terms of social media and advertising:

- 23% of online gamblers follow a gambling company on a social media platform with rates highest among 18-24 year olds.
- Facebook remains the most popular social media platform on which online gamblers follow gambling companies.
- 51% of respondents have seen a gambling advert on the television in the past week, a significant decline on 2018.
- 44% of online gamblers were prompted to spend money on a gambling activity due to adverts that they saw
- 52% of online gamblers (with a social media account) were prompted to spend money on a gambling activity due to adverts they had seen on a social media platform.

In total, 29% of online gamblers had ever participated in online gambling style games. Over a five year period, there has been a significant increase in the proportion of respondents playing slot or fruit machine games.

Perceptions and attitudes

Overall, 29% of respondents think that gambling is conducted fairly and can be trusted. Whilst the figure is stable since 2018, it does represent a significant decline over the past 10 years.

In total, 43% think that gambling is associated with criminal activity (a significant decline since 2018). Gambling addicts stealing to carry on gambling was the crime that respondents associate the most with gambling.

In addition, 82% of respondents think there are too many opportunities for gambling nowadays and 73% think that gambling is dangerous for family life, however, 60% of respondents think that people should have the right to gamble whenever they want.

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

⁴ eSports (Electronic Sports) are the competitive playing of video games

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 2019 and covers gambling participation and consumer behaviour. The data has been gathered via a combination of telephone and online surveys, as indicated in the table below and throughout this report. In addition, the report also draws upon data from the Health Survey England⁵ from 2018.

Topic area	Survey
Gambling participation - Perceptions of and attitudes towards gambling	Telephone (2019)
Online gambling behaviour – Consumer interest and awareness	Online (2019)
Problem gambling, moderate-risk and low-risk rates	Health Survey England (2018)

Telephone survey

The telephone survey provides 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 data reported in this publication cover the year to December 2019, with trend data taken from the same period in the four years previous. Further details can be found in the Appendix.

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. Approximately 2,000 interviews with people aged 18+ are collected each quarter and the survey sample is drawn from Populus 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 2019, with trend data taken from the same period in previous years. Further details can be found in the Appendix.

Health Survey England

The Health Survey England is commissioned by NHS Digital, and the Commission includes questions on gambling participation and rates of problem gambling within the survey. The Health Survey England data included within this report relates to 2018 in which the survey interviewed over 8,000 adults aged 16+.

Report conventions

- Year on year (2018-2019) trends displaying percentage point changes are significant at the 95% confidence level (unless otherwise stated). Where results are described as stable, there is not a significant difference from the previous year at the 95% confidence level.
- Within each chart title, the source survey and the unweighted sample size is included (the number of respondents to each question during 2019).
- For the telephone and online surveys, significance testing has been applied on the basis of quota samples and should therefore be viewed with some caution. Where statistical significance has been noted, this is on the basis that it would be significant, if the data were generated from a probability sample. Further information on use of quota samples can be found [on the UK Statistics Authority website](#).
- Figures on each chart/graph may not add to 100% due to rounding.

⁵ The Health Survey England is commissioned by NHS Digital. For further detail on the methodology please visit <https://digital.nhs.uk/data-and-information/publications/statistical/health-survey-for-england/2018>

Gambling participation

This section reports on gambling participation in the year to December 2019, using data collected via the Gambling Commission's quarterly telephone survey, which is conducted with people in Great Britain aged 16+⁶. These questions ask respondents about their gambling participation in the past four weeks.

How many people gamble

Overall, 47% of adults (16+) said they had 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 (43%). The age groups most likely to have participated in gambling were those aged between either 45-54 or 35-44, with 53% of 45-54 year olds and 50% of 35-44 year olds having gambled in the past four weeks. Similar to the previous year, those in the youngest and oldest age groups had the lowest gambling participation levels.

During the last 12 months, significant changes were seen in the participation rate of 35-44 year olds (50%; a 6 percentage point increase from 2018) and of the 55-64 age group (48%; a 7 percentage point decrease from 2018).

Figure 1: Past four week gambling participation by gender and age (Telephone Survey; n=4,003)



As participation in 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 looking at only those who had gambled on at least one activity in the previous four weeks, 31% had only gambled on National Lottery draws. It is therefore useful to remove the responses of those who have only participated in National Lottery draws to highlight patterns across age and gender groups.

⁶In March 2016 the sample was broadened to include participants aged 16+.

Figure 2 shows that those in the older age categories (45+) were most likely to participate in only National Lottery draws. This contrasts with gamblers aged 16-24, of which 6% were participating in only National Lottery draws.

Figure 2: Proportion of gamblers participating in National Lottery draws only (Telephone Survey; n=1,860)

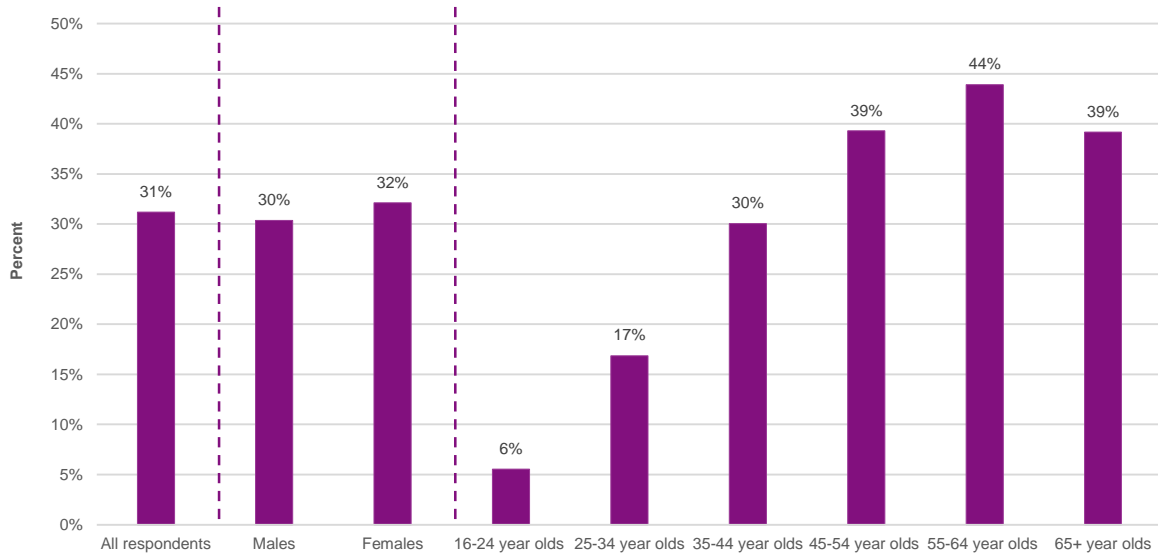
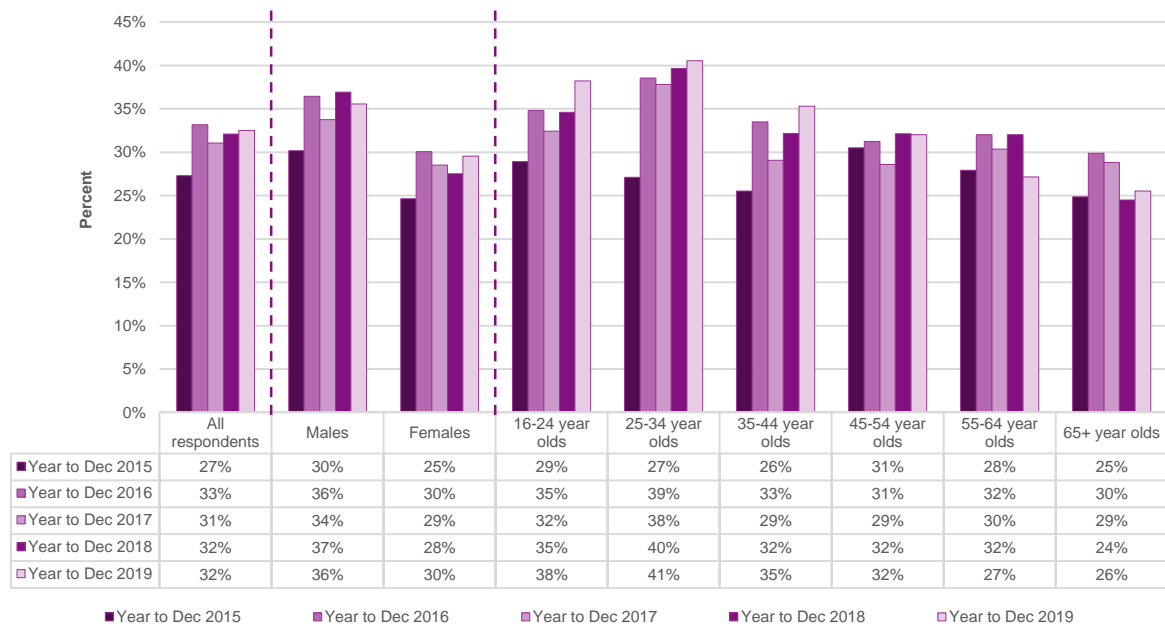


Figure 3 shows that when National Lottery draw only respondents are excluded, the overall participation rate falls from 47% to 32%. Since 2015, the proportion of respondents gambling on any activity (excluding National Lottery draws) has increased by 5 percentage points. Males were more likely than females to gamble (36% compared to 30%) and 16-34 age groups were more likely to gamble than other age groups.

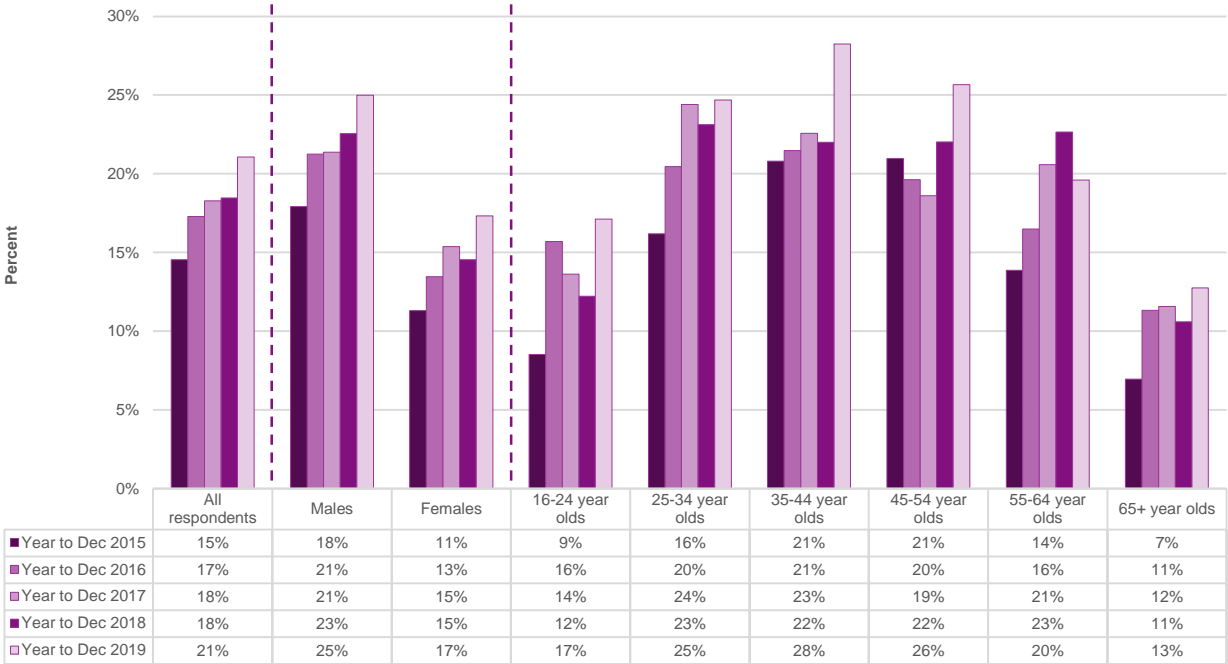
Figure 3: Past four week gambling participation (excluding participation in National Lottery draws) by gender and age (Telephone Survey; n=4,003)



Overall, 21% of adults have gambled online in the previous four weeks, which is a 3 percentage point increase since 2018 and a 6 percentage point increase since 2015 (both significant increases).

Online participation was higher among men (25%) than women (17%). There have been increases in online gambling participation amongst both males and females, though this is only significant amongst females (17%; a 2 percentage point increase from 2018). There has been a significant increase in those aged 16-24 (17%, a 5 percentage point increase) and 35-44 (28%, a 6 percentage point increase) gambling online.

Figure 4: Past four week online gambling participation by gender and age (Telephone Survey; n=4,003)



What people gamble on

In 2019, the most popular gambling activities were National Lottery draws (30%), followed by other lotteries (13%) and scratchcards (10%). Until 2017, there had been a continued decline in participation in National Lottery draws. This coincided with, amongst other factors, the increase in the Lotto ticket price from £1 to £2 in October 2013 and the increase in the number of Lotto balls in October 2015. However, National Lottery draws show signs of recovery with a 2 percentage point increase in participation since 2018.

Other than National Lottery draws, there have been significant changes in participation rates for numerous activities. These include increases in participation in other lotteries (13%, a 2 percentage point increase from 2018) and fruit or slot machines in bingo halls (0.5%; a 0.3 percentage point increase). There have also been declines in participation for machines in a bookmakers, which are otherwise known as Fixed Odds Betting Terminals (FOBTs) (0.8%; a 0.7 percentage point decrease from 2018). This may in part be due to the FOBT maximum stake cut from £100 to £2, which was introduced on 1st April 2019.

There has also been an increase in participation in online slot machine-style games and instant wins⁷ (3.1%; a 1.9 percentage point increase from 2018).

⁷ In December 2017 this option was expanded, with separate options for National Lottery online instant wins and other instant wins. Participation is reported by the new categories and has been combined to continue the existing trend.

Figure 5: Past four week gambling participation – Top three activities (Telephone Survey; n=4,003)

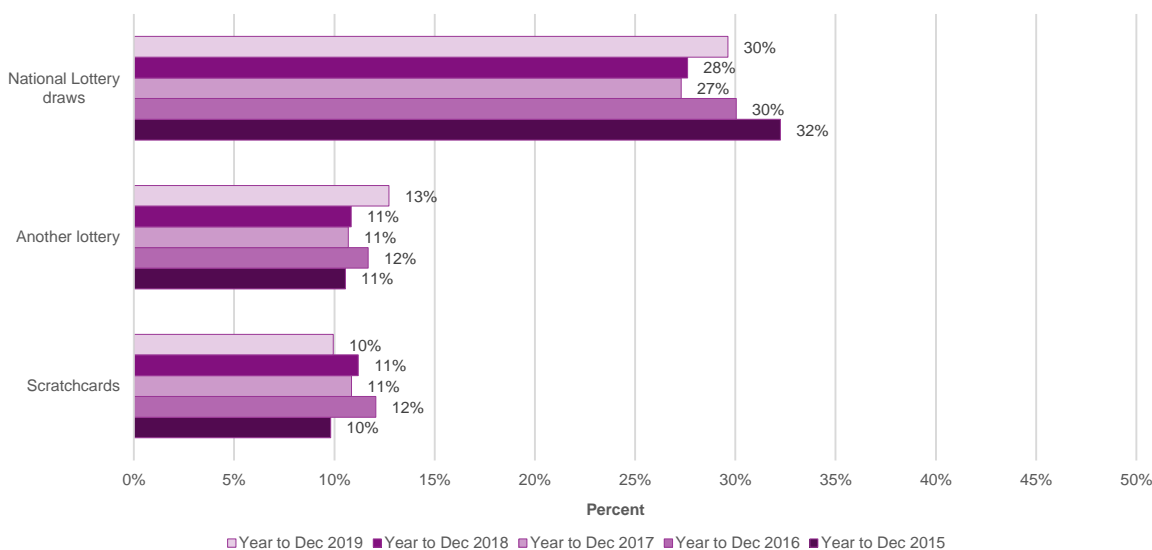
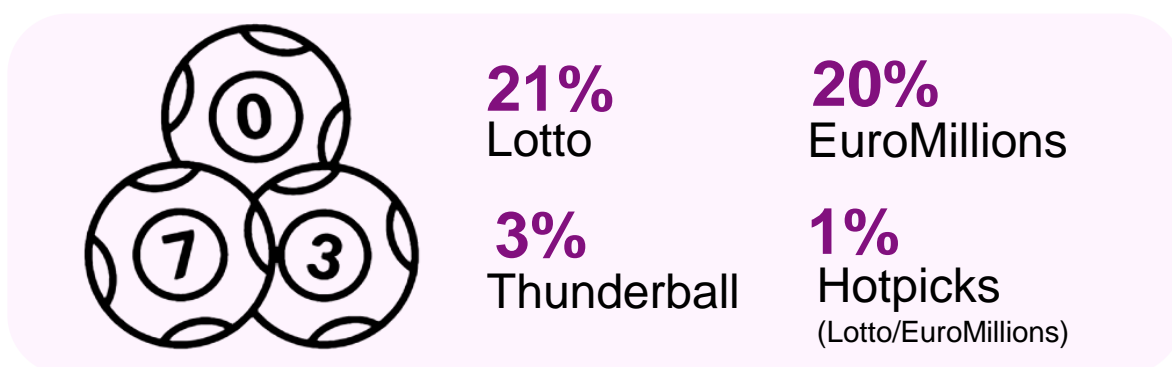


Table 1: Past four week gambling participation – All other activities (Telephone Survey; n=4,003)⁸

	Year to Dec 2015	Year to Dec 2016	Year to Dec 2017	Year to Dec 2018	Year to Dec 2019
Sports betting	3.5%	7.1%	6.4%	6.6%	6.7%
Private betting	3.5%	6.0%	4.4%	6.1%	5.6%
Fruit or slot machines	1.8%	4.5%	4.4%	3.7%	4.2%
Horse races	3.7%	4.6%	3.9%	3.8%	4.0%
Online games/instant wins	0.6%	1.7%	1.2%	1.2%	3.1%
Bingo	2.6%	3.5%	3.3%	2.6%	2.9%
Football pools	2.1%	1.8%	1.4%	1.4%	1.7%
Casino games	1.1%	2.3%	1.6%	1.6%	1.5%
Betting on other events	0.6%	0.9%	0.5%	1.0%	1.4%
Any other activity	0.3%	0.6%	0.5%	0.9%	0.8%
Machines in a bookmakers	1.0%	1.5%	1.4%	1.5%	0.8%
Dog races	0.7%	1.1%	1.1%	0.8%	0.7%
Poker at a pub/club	0.4%	0.6%	0.4%	0.8%	0.5%
Virtual dog or horse races	0.3%	0.4%	0.4%	0.3%	0.4%
Spread betting	0.2%	0.2%	0.3%	0.3%	0.3%

In terms of the individual National Lottery draws, the most popular games in 2019 were Lotto (played by 21% of all respondents) and EuroMillions, played by 20% of all respondents.

Figure 6: Past four week gambling participation – National Lottery draws (Telephone Survey; n=4,003)⁹



Overall, 10% of all respondents had participated in any betting activity¹⁰ in the previous four weeks. The most popular betting activity in 2019 was football (5.8%), followed by horse races (4.0%) and other sports (2.7%)¹¹, as can be observed in Figure 7.

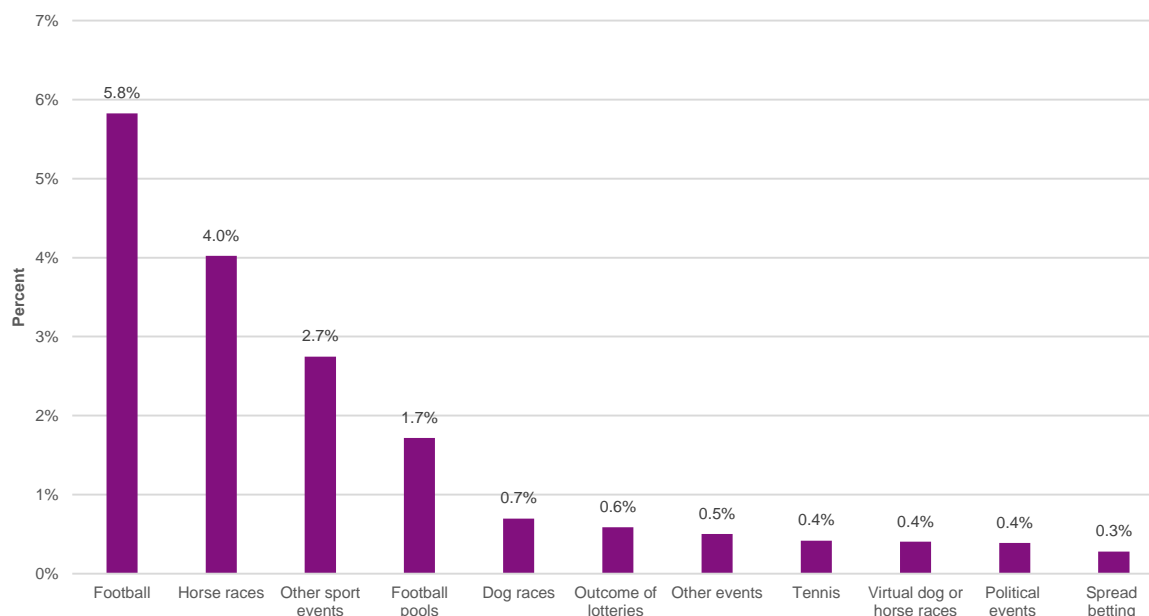
⁸ Data shown within Table 1 is reported to one decimal place due to the presence of small percentages.

⁹ A new National Lottery draw, Set for Life, was introduced in March 2019. Participation rates are not currently included due to 12 months' worth of data not being available

¹⁰ Betting activities includes betting on horse races, betting on dog races, betting on football, betting on tennis, betting on other sports events, betting on other events, betting on the outcome of lotteries, and betting on political events

¹¹ 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 7: Past four week betting participation by activity (Telephone Survey; n=4,003)¹²



How people gamble

For each activity undertaken that can be accessed through different methods, respondents are asked whether they participated in person only, online only, or both in person and online¹³.

Table 2 displays in person and online participation in the previous four weeks by those activities that can be accessed through multiple methods. The table shows that individuals playing bingo (81%) and National Lottery draws (73%) were most likely to participate in these activities in person. There has, however, been an increase in gamblers choosing to participate in National Lottery draws online (36%; a 5 percentage point increase from 2018). Those participating in football betting (83%), other sports betting (80%), and sports betting overall (81%) were most likely to have participated in these activities online.

Table 2: Online & in person participation in the past four weeks by activity (Telephone Survey; n=4,003)¹⁴

Year to December 2019		National Lottery draws	Another lottery	Bingo	Football pools	Horse races	Sports betting	Football betting	Other sports betting	Betting on other events	Casino games
Online	%	36%	50%	24%	55%	61%	81%	83%	80%	58%	74%
In person	%	73%	53%	81%	50%	49%	27%	26%	22%	53%	47%

Since 2018, there has been an increase in the proportion of individuals betting on sports online (81%; a 9 percentage point increase from 2018), and a decrease in in person participation (27%; a 13 percentage point decrease from 2018). Similar findings have also been observed amongst those betting on football: an increase in online participation (83%; a 16 percentage point increase) and a decrease in in person participation (26%; a 13 percentage point decrease).

A decrease for in person participation has been seen for betting on horse races (49%; a 15 percentage point decrease).

¹² Products with small base sizes (< 30) are not included in the chart. Other base sizes can be found in the technical annex accompanying this report. Data shown within Figure 7 is reported to one decimal place due to the presence of small percentages.

¹³ Table 2 below includes respondents who have participated both in person and online, therefore combined percentages may add up to more than 100%.

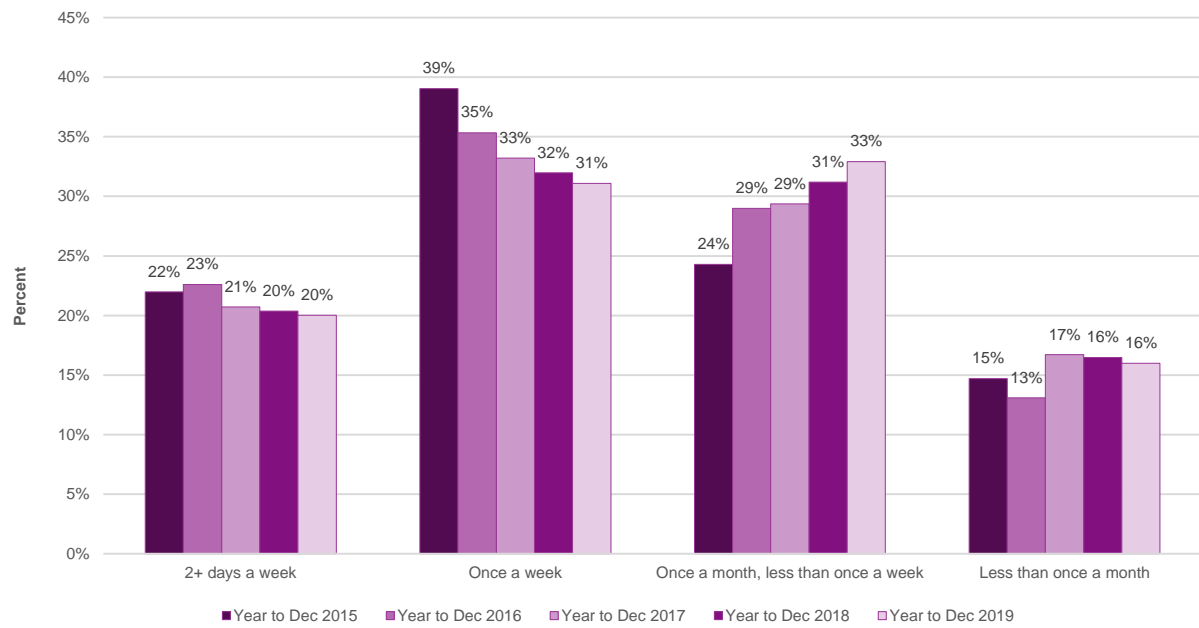
¹⁴ Individual bases vary depending on participation for each activity. Individual bases can be found in the accompanying 'Survey data on gambling participation' document.

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 8 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 month, less than once a week (33%), followed by 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% gamble on any individual activity two or more days a week, and 16% gamble less than once a month.

Figure 8: Most common frequency of gambling on any activity (Telephone Survey; n=1,860)



Problem and at-risk gambling

Problem gambling is defined as behaviour related to gambling which causes harm to the gambler and those around them¹⁵. This may include family, friends and others who know them or care for them. This section presents the official statistics on the prevalence of problem gambling, taken from the Health Survey England 2018, conducted by NHS Digital and released in December 2019. This is the only survey in England where both the full PGSI screen and the DSM-IV are used as the main measures of problem gambling. Data for Wales 2018 is not currently available, although will be released in 2020. Gambling questions were not included on the Health Survey for Scotland in 2018, so data will not be available for this year.

In addition, the Commission also tracks problem gambling data using its telephone survey, which acts as a more regular and up to date measure for identifying any changes in problem gambling trends. The telephone survey uses a short-form Problem Gambling Severity Index¹⁶ (PGSI mini-screen), which 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. Telephone survey data on problem gambling is also included below.

The Health Survey provides the Commission's most robust estimates of problem and at-risk gambling due to the use of a high quality random probability sampling approach, a large sample size and the availability of both PGSI and DSM-IV screens. This section of the report therefore presents the main measure of problem gambling rates.

Health Survey estimates

According to the latest Health Survey figures (England 2018), 2.7% of adults were considered low-risk gamblers, and a further 0.8% 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.

The data shows that 0.5% of respondents were classified as problem gamblers (gamblers who gamble with negative consequences and a possible loss of control). This is stable compared to the 2016 England figure (0.7%).

Figure 9: Low-risk, moderate-risk and problem gamblers in England 2018 (according to the DSM-IV or PGSI) (NHS Digital, 2019; n=6,927)



Quarterly telephone survey estimates

The Commission's regular telephone survey, which uses the PGSI mini-screen reported the low-risk rate to be 2.7% and the moderate-risk rate to be 1.2%. The problem gambling rate was 0.6%, however, as noted above, the Health Surveys should be considered the most robust source of statistics on problem and at-risk gambling.

Table 3: Low-risk, moderate-risk and problem gamblers (according to the PGSI mini-screen) (Telephone Survey; n=4,003)

Low-risk, moderate-risk and problem gamblers (according to the PGSI mini-screen) (2019)	
All respondents (n=4,003)	Year to December 2019 (%)
Low-risk	2.7
Moderate-risk	1.2
Problem gambler	0.6

¹⁵ Gamble Aware (<https://www.begambleaware.org/gambling-problems/>).

¹⁶ Developing a Short Form of the PGSI (Volberg, 2012).

Online gambling behaviour

This section reports data on online gambling behaviour in the year to December 2019, using data collected via the Commission’s 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 online¹⁷.

As of 2019, mobile phones have now become the most popular method of accessing online gambling, with 50% of all online gamblers doing so. This is a statistically significant increase of 6 percentage points from the 44% recorded in 2018 and represents a continuation of a trend of increasing mobile use for gambling in recent years. Younger age groups were more likely to have gambled online on a mobile phone, with 76% of 18-24 year olds, and 72% of 25-34 year olds having done so. This compares to 14% of those aged 65+. There have been increases in gambling via mobile in all age groups, with the exception of the 25-34 age category.

It can be observed that a larger proportion of males had gambled using mobiles (56%) than females (44%).

There have been declines in the use of laptops for gambling (38%; a 6 percentage point decrease from 2018), which may in part be off-setting the increase in mobile participation. There have also been decreases in the use of SmartTVs for gambling (2%; a 1 percentage point decrease from 2018).

Since 2015, there have been declines in the proportion of respondents using laptops (a 23 percentage point decrease) and PCs (a 12 percentage point decrease) to gamble, and a 27 percentage point increase for mobile phones.

Figure 10: Devices used for online gambling in the past four weeks (Online Tracker; n=3,597)

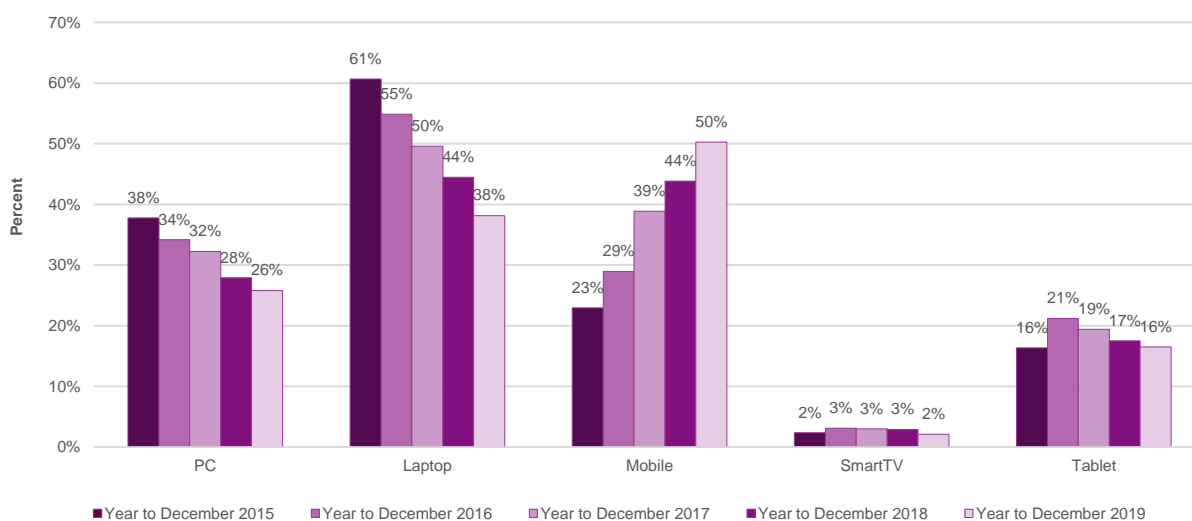


Figure 11 shows that those in the younger age groups are most likely to gamble with multiple devices, and the likelihood of using more than one device to gamble reduces with age. There have been observed increases in participation in gambling on mobile phones among all age groups, which are discussed in more detail on the following page. There has been significant decreases in participating in gambling on laptops among the 18-24 (43%, a 10 percentage point decrease), 55-64 (40%; a 7 percentage point decrease), and 45-54 (37%; an 11 percentage point decrease) age groups.

¹⁷ Respondents are able to select multiple devices over multiple activities.

Figure 11: Devices used for online gambling in the past four weeks by age¹⁸ (Online Tracker; n=3,597)

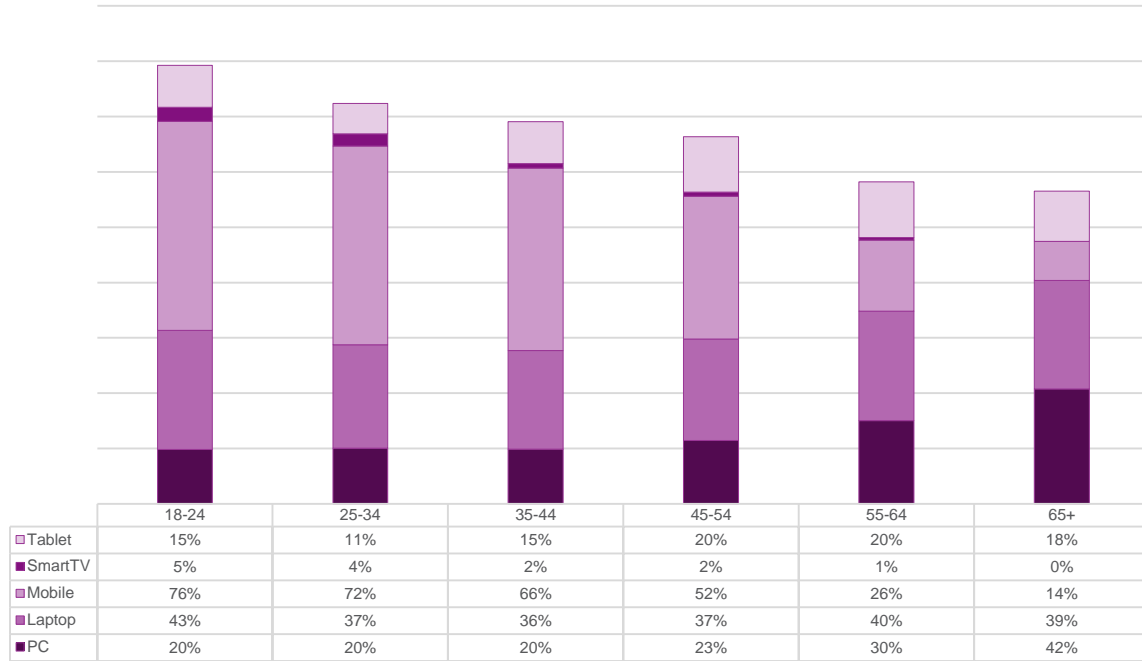
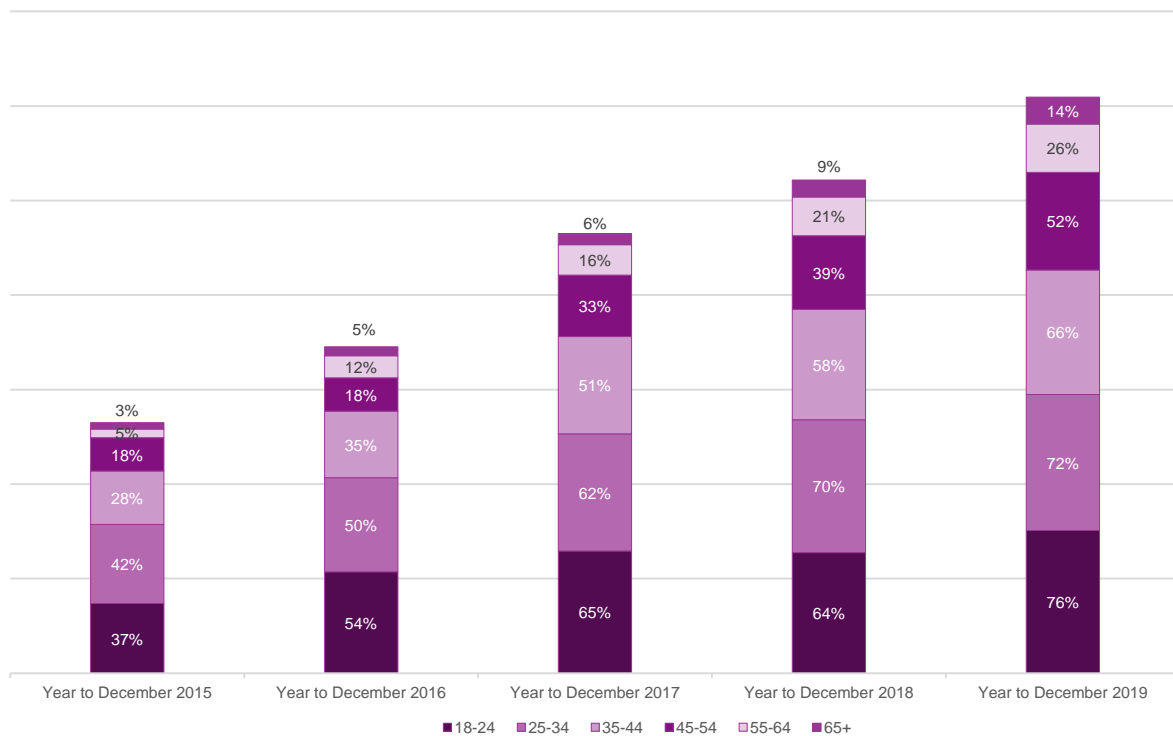


Figure 12 highlights the growth in mobile use by age group amongst online gamblers. There have been increases in participation in gambling on mobile phones among all age groups, with all groups except those aged 25-34 showing a statistically significant increase. The increase is most pronounced amongst those aged 45-54 (52%; a 13 percentage point increase), followed by those aged 18-24 (76%; a 12 percentage point increase), those aged 35-44 (66%; an 8 percentage point increase), 55-64 (26%; a 5 percentage point increase), and finally, those aged 65+ (14%; a 5 percentage point increase).

Figure 12: Use of mobile phone devices for gambling in the past four weeks by age¹⁹ (Online Tracker; n=3,597)



¹⁸ Figures add to >100% due to respondents being able to select more than one option.

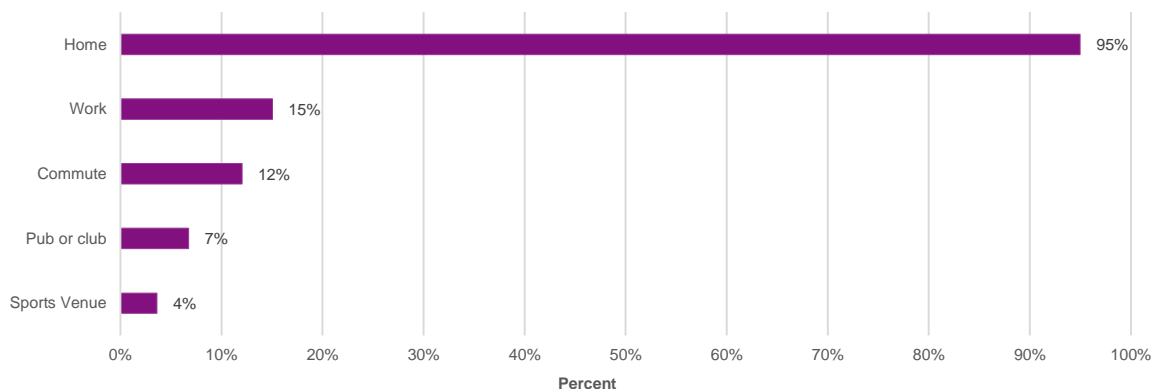
¹⁹ Percentages add to >100% as age groups are stacked

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 has remained the most popular location for online gambling with 95% of online gamblers reporting gambling at home. Male respondents had higher rates than females in terms of gambling outside of the home (on their commute, at work, at a venue or in a pub/club). The proportion of respondents gambling at work has increased (15%, a 3 percentage point increase since 2018).

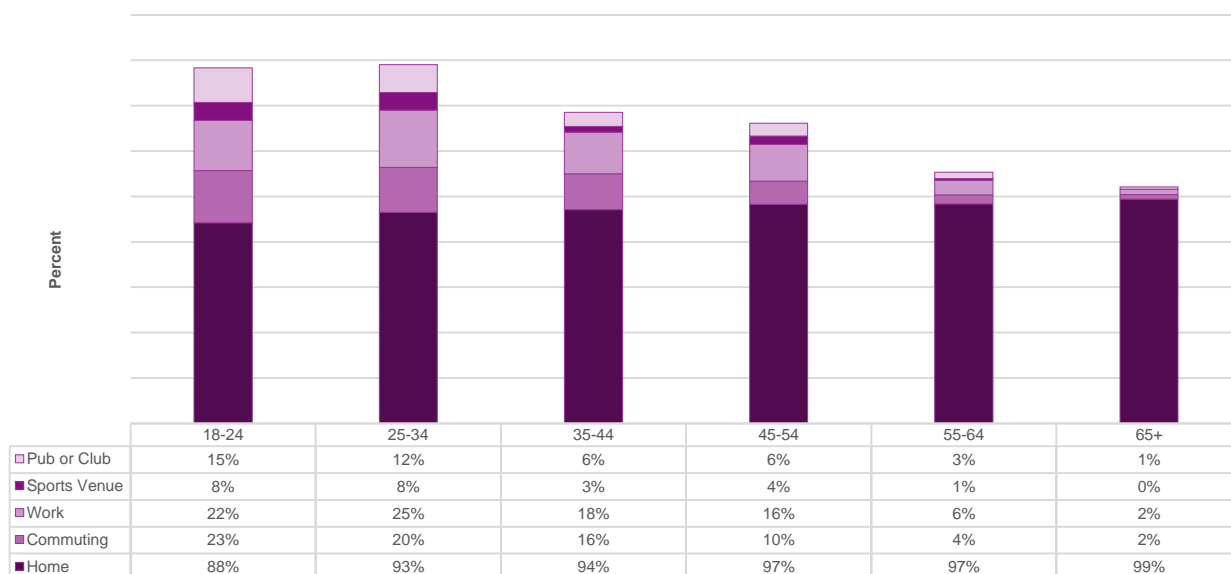
Figure 13: Location of online gambling in the past four weeks (Online Tracker; n=1,814)



As Figure 14 shows, rates of online gambling in the home are consistent across all age groups. There have been significant increases in the proportion of 45-54 year olds reporting gambling at work (16%; a 4 percentage point increase from 2018), which may be driving the overall increase in participating in gambling at work. There has also been a statistically significant decrease in the proportion of 35-44 year olds gambling in sports venues (3%; a 2 percentage point decrease from 2018).

It can be seen that younger age groups are more likely to also gamble in additional locations. Similar to last year, methods of gambling outside of the home are more popular for those aged 18-34. Gambling outside of the home is less popular for those in the older age groups.

Figure 14: Location of online gambling in the past four weeks by age²⁰ (Online Tracker; n=1,814)



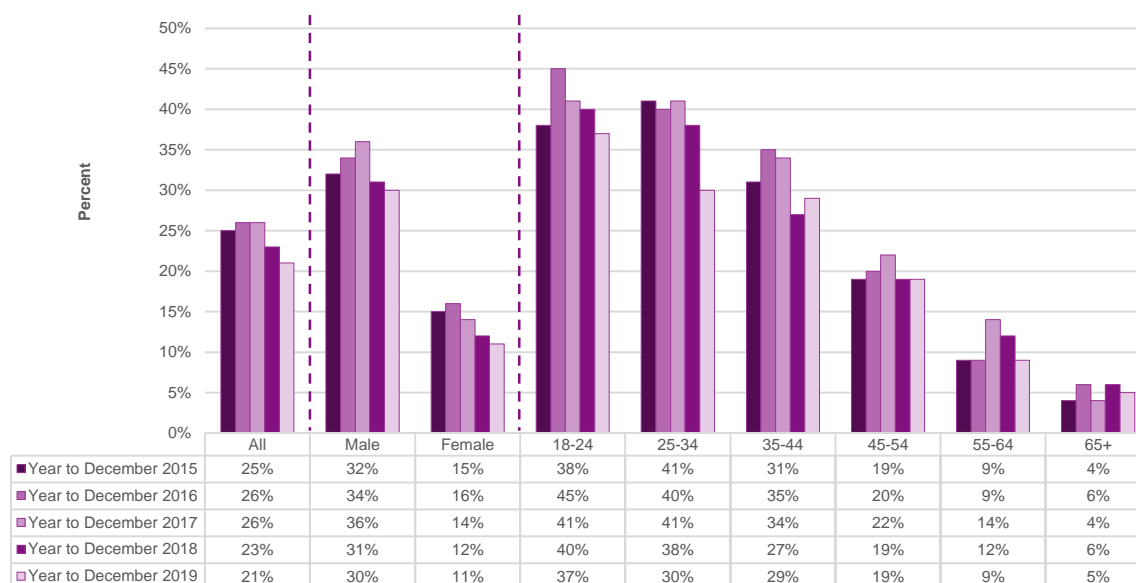
²⁰ Figures add to >100% due to respondents being able to select more than one option.

In-play betting

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

Just over one fifth (21%) of online gamblers had bet in-play during the last four weeks. Whilst participation in in-play betting overall has remained statistically stable, decreases in in-play participation have occurred among the 25-34 age group (30%; an 8 percentage point decrease from 2018).

Figure 15: Online gamblers' past four week in-play betting by gender and age (Online Tracker; n=1,814)

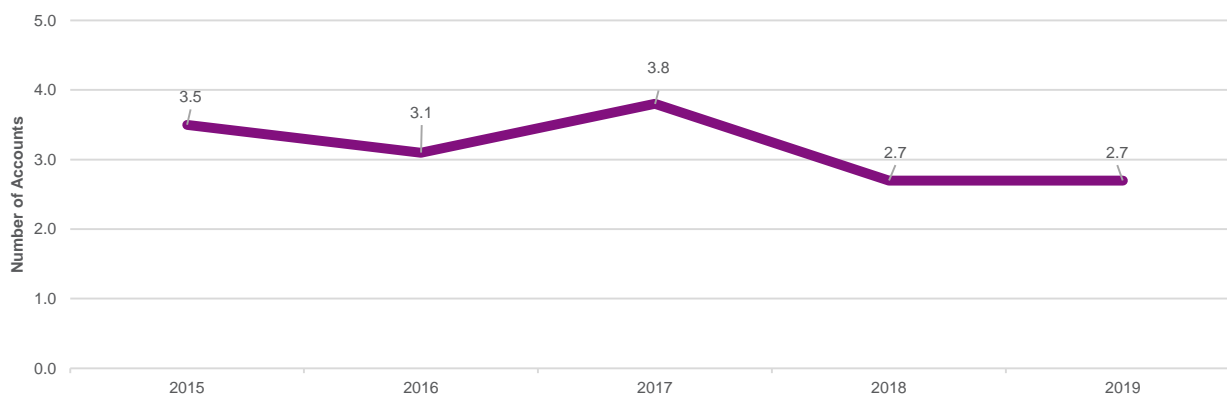


Number of accounts

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.

In 2019, 44% of online gamblers were registered online with one gambling company, however, the average number of accounts held in 2019 was three, which has remained stable compared to 2018.

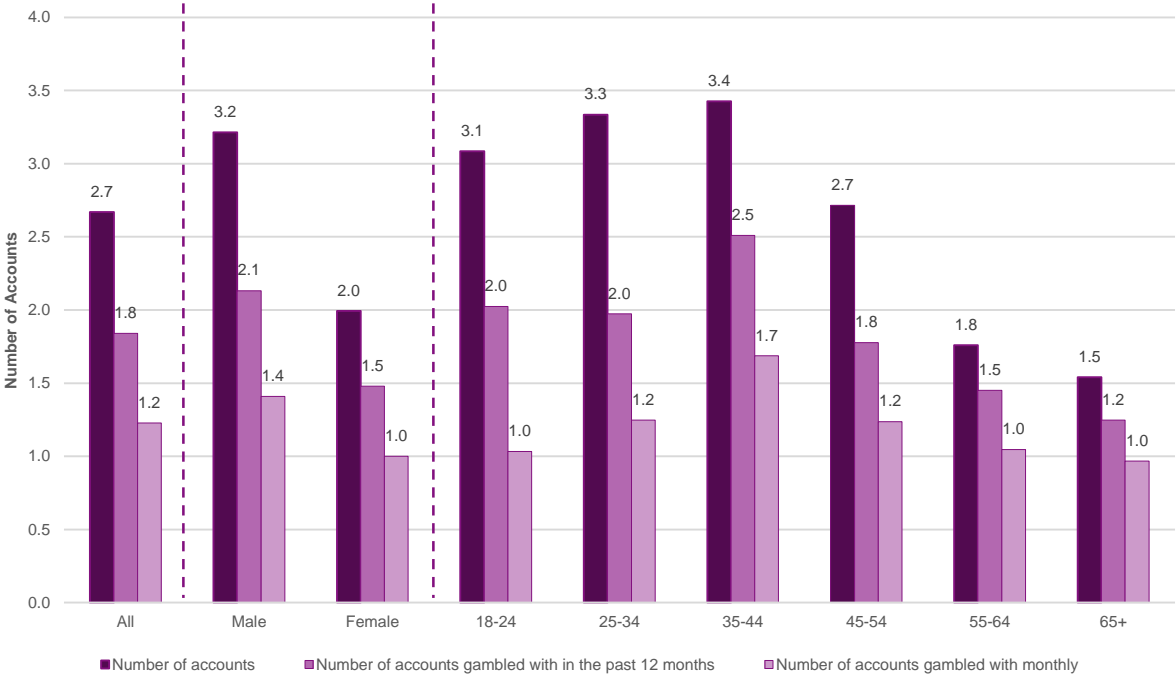
Figure 16: Average number of accounts 2015-2019 (Online Tracker n=1,953)²¹



²¹ Average number of accounts refers to accounts held by respondents, but not necessarily gambled with frequently.

Figure 17 illustrates that on average, males have more accounts than females (three accounts compared to two), and younger gamblers (those aged 18-44) tend to hold more accounts on average than those aged 55+.

Figure 17: Average number of accounts held by online gamblers by gender and age (Online Tracker; n=1,953)



Overall, just under half (44%) of gamblers held just one online account; and this was increasingly common for those in the older age groups. 56% of gamblers held more than one online account. Younger gamblers were more likely to hold more than five accounts; 20% of those aged 18-24 held five or more accounts (a 5 percentage point increase from 2018), whereas this was the case for just 5% of those aged 65+.

It can also be observed that, among gender and age groups, there is more variation in the number of accounts held and less variation in terms of active accounts (accounts gambled with monthly).

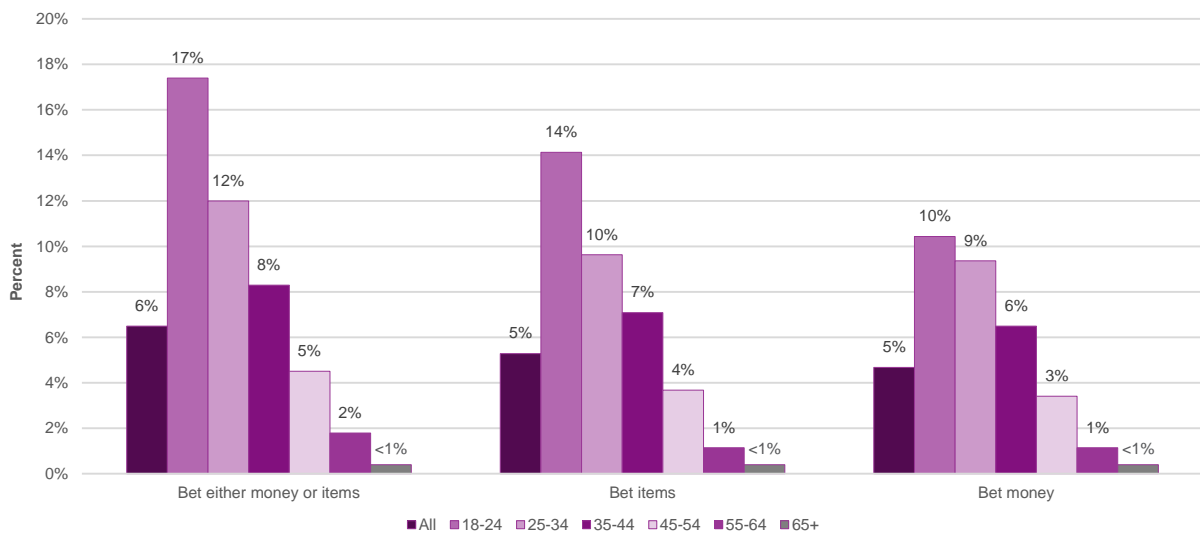
eSports

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, 6% of respondents had ever bet on eSports, with 4% doing so in the past 12 months. Participation rates for those who had ever bet on eSports were highest among those aged 18-24 (17%) and 25-34 (12%) and lowest for those aged 65+ (<1%).

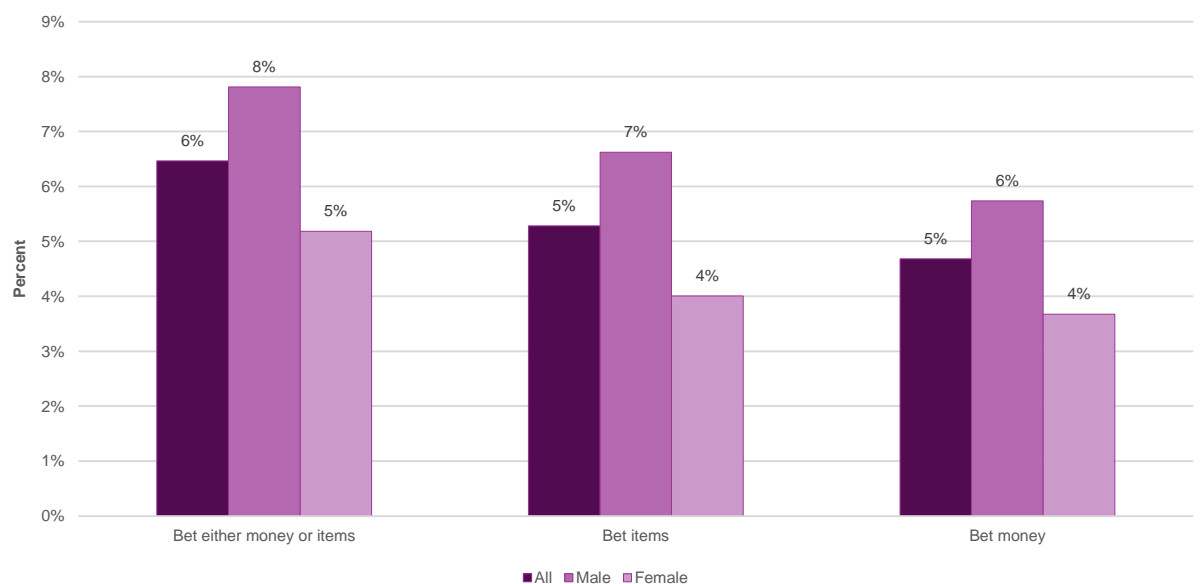
Participation for betting on eSports with items has decreased significantly amongst those in the 25-34 age category (10%; a 4 percentage point decrease from 2018).

Figure 18: Ever bet on eSports using money or items by age (Online Tracker; n=4,145)



Engagement in eSports betting was highest for males; 8% had ever bet on eSports using either money or in play items compared to 5% of females.

Figure 19: Ever bet on eSports using money or items by gender (Online Tracker; n=4,145)



Consumer analysis

The Commission's online survey also contains questions asked to both gamblers and non-gamblers about wider gambling issues and topics of interest to consumers, including: self-exclusion and gambling management tools, information to players, terms and conditions, complaints, social media & advertising and social gaming. These are asked on a quarterly basis, biannually or annually 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. Prior to 2019, these questions were asked on a quarterly basis to any gambler who had participated in any gambling activity in the past 12 months. In 2019, the frequency of these questions was reduced to bi-annual.

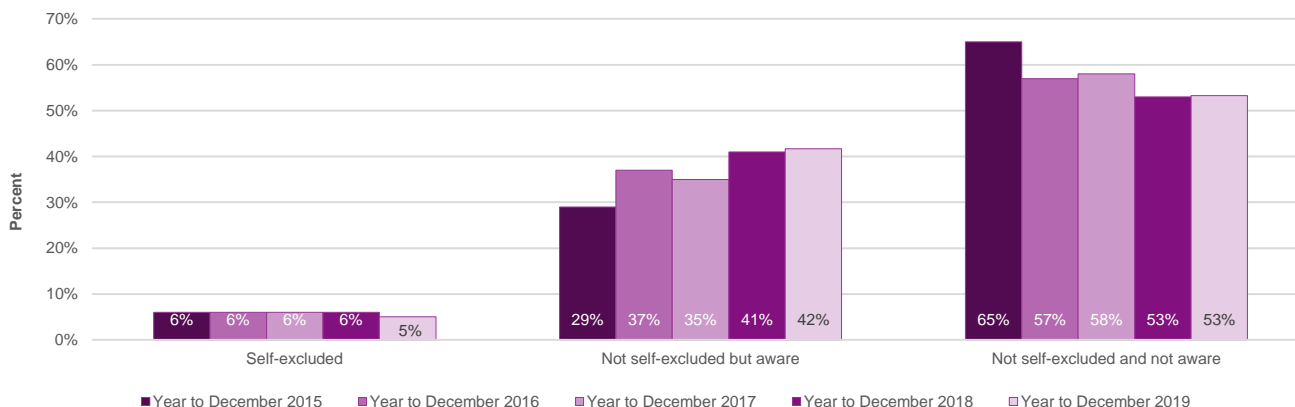
Figure 20: Gamblers' awareness and use of self-exclusion in 2019 (Online Tracker; n=3,138)



Overall, 5% of gamblers have ever self-excluded. Additionally, 42% of gamblers are aware of self-exclusion but have not self-excluded. Over half of gamblers are not aware of self-exclusion (53%, which has remained stable from 2018).

Overall, 47% of gamblers had either used or were aware of the self-exclusion facility, a significant increase over a five year period (35% in 2015).

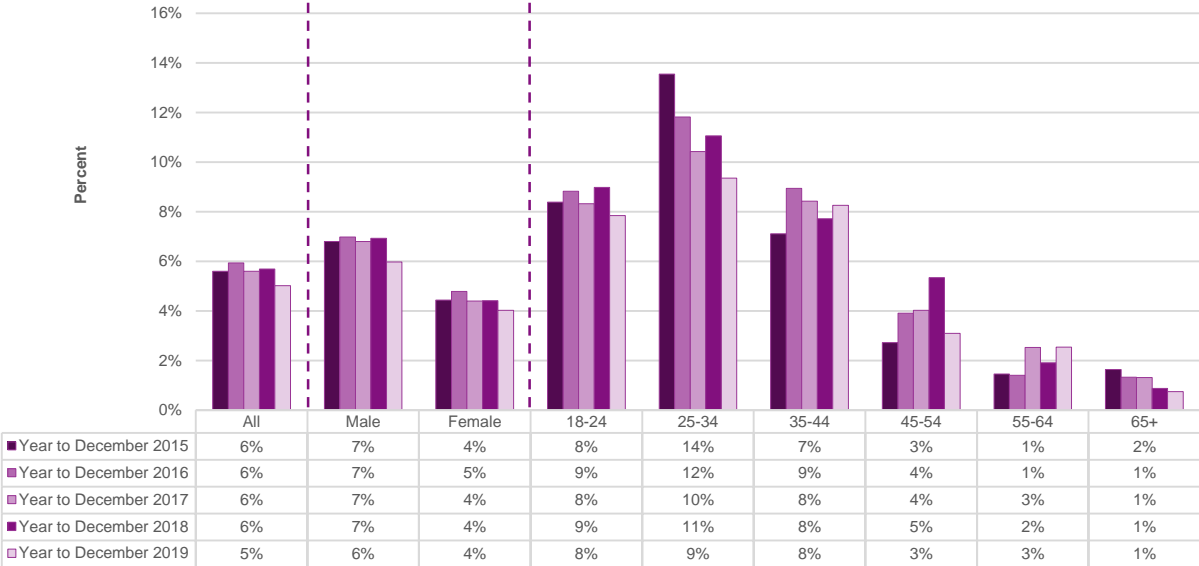
Figure 21: Gamblers awareness and use of self-exclusion (Online Tracker; n=3,138)



Figures show that, among gamblers, higher proportions of men have self-excluded compared to women, with 6% 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 (9%), followed by those in the 18-24 and 35-44 age groups (8%).

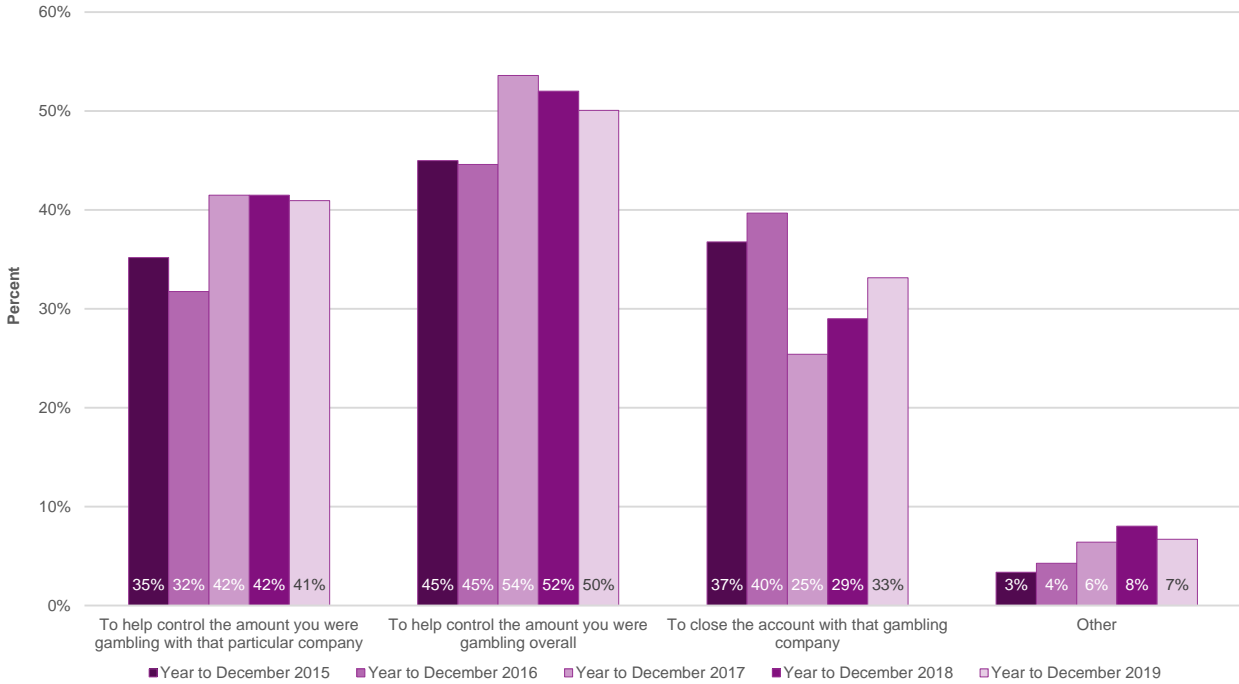
Rates of self-exclusion have decreased among those in the 45-54 age group (3%, a 2 percentage point decrease from 2018).

Figure 22: Self-exclusion among all gamblers by gender and age (Online Tracker; n=3,138)



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 common reason given for self-exclusion was to help control the amount being gambled overall (50%), followed by, to help control the amount being spent with a particular company (41%).

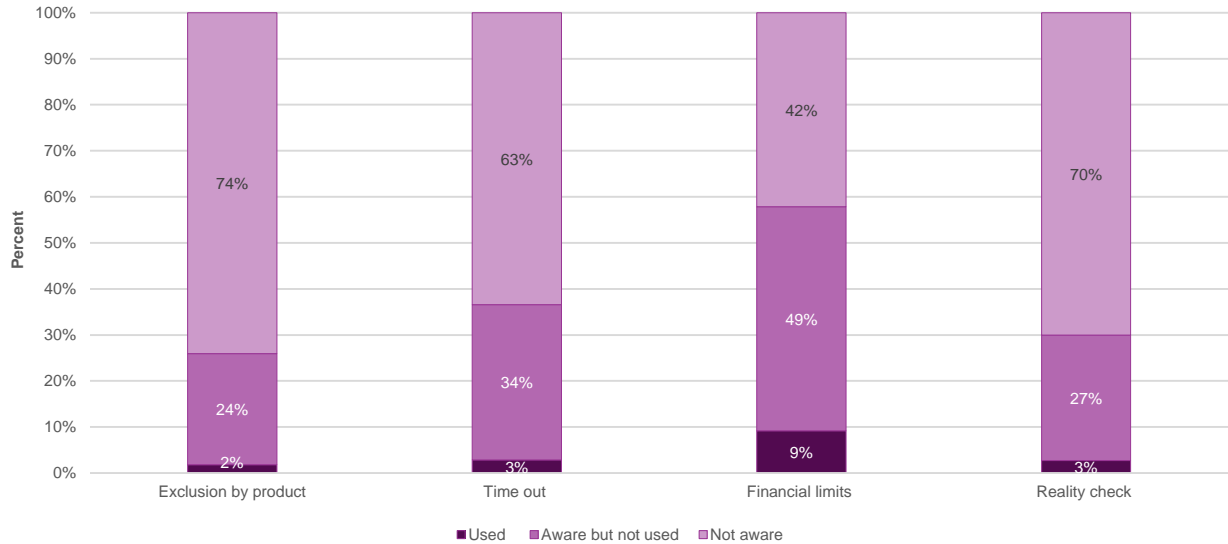
Figure 23: Reasons for self-excluding (Online Tracker; n=142)



Gamblers were also asked if they have used a selection of gambling management tools. Financial limits were the most used tool in 2019 with 9% of gamblers having used them, an equal proportion to that observed in 2018.

Since 2018, the proportion of respondents that were aware of reality checks as a gambling management tool (but who have not used them) has decreased (27%; a 3 percentage point decrease). Additionally, the proportion of gamblers being unaware of reality checks as a gambling management tool has increased (70%; a 3 percentage point increase).

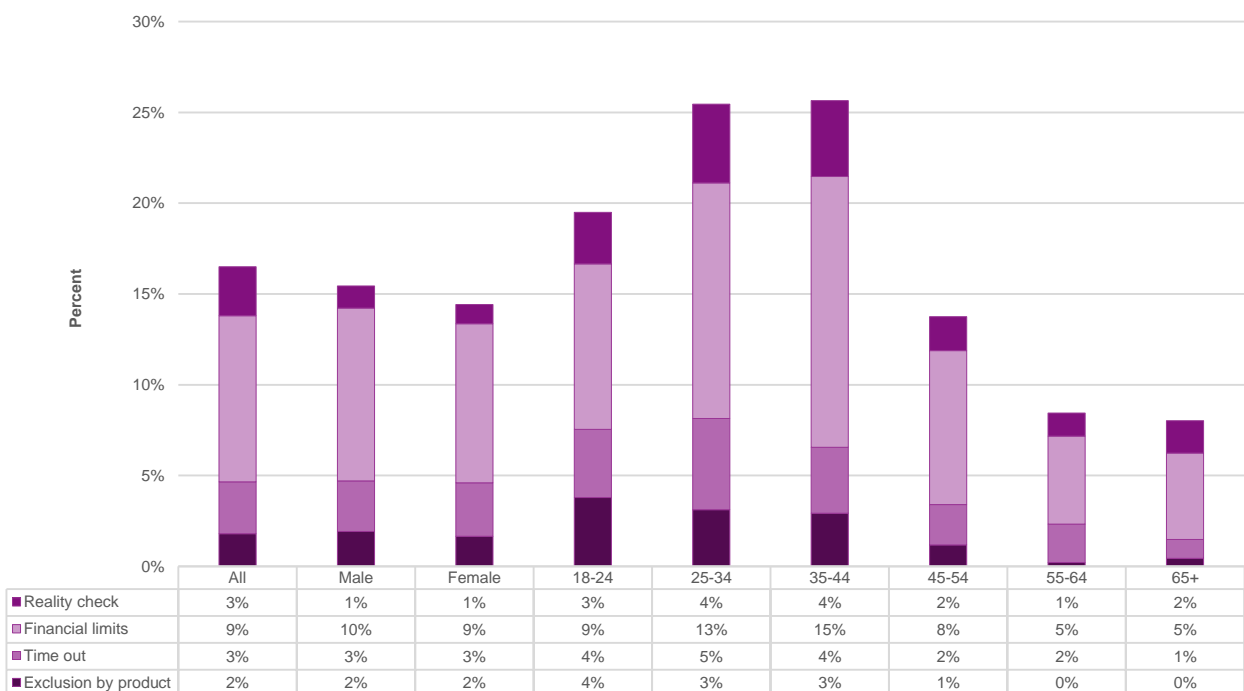
Figure 24: Use and awareness of gambling management tools (Online Tracker; n=3,138)



There has been a decrease in the proportion of both males and females having reality checks about their gambling (both 1%, down from 3% in 2018). There has also been a decrease in the use of reality checks amongst those aged 25-34 (4%; a 3 percentage point decrease from 2018).

Compared to last year, those aged 35-44 were more likely to use financial limits as a gambling management tool (15%; a 4 percentage point increase from 2018). There have also been declines in the percentage of males using exclusion by product as a gambling management tool (2%; a 1 percentage point decrease from 2018).

Figure 25: Gamblers use of gambling management tools by gender and age (Online Tracker; n=3,138)

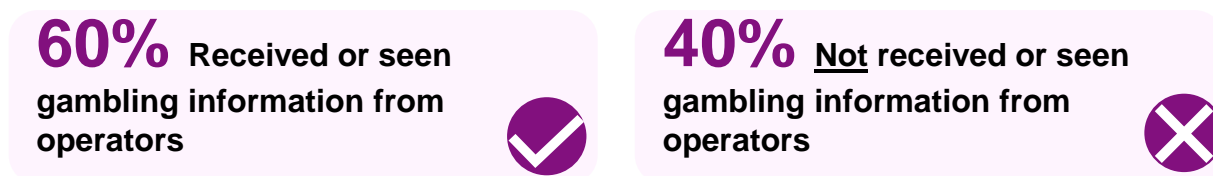


Information for players

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, 60% of gamblers had either received at least one piece of gambling related information from an operator or seen a piece of information online or inside/outside a gambling premises, which is similar to levels observed in 2018.

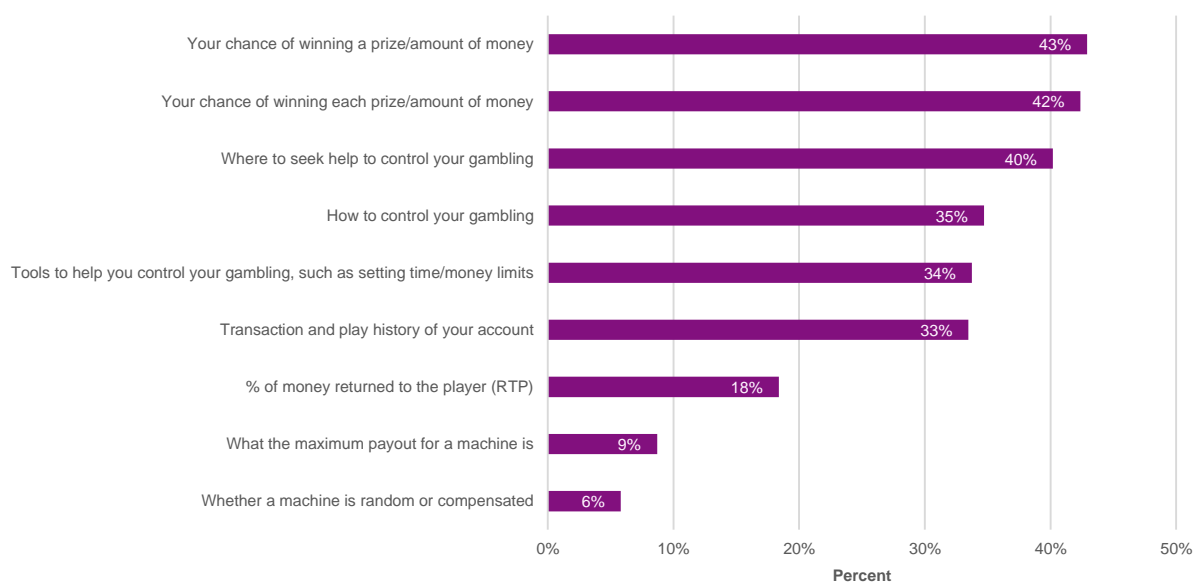
Figure 26: Proportion of gamblers who have either received or seen at least one piece of gambling related information from an operator (Online Tracker; n=3,138)



The information that respondents were most likely to have seen was in relation to your chance of winning a prize (43%, the same proportion as in 2018) and your chance of winning each prize (42%, the same proportion as 2018).

There has been an increase in the proportion of respondents seeing information about where to seek help to control your gambling (40% a 2 percentage point increase from 2018), and a decrease in the proportion of respondents seeing information on whether a machine is random or compensated (6%, a 1 percentage point decrease from 2018).

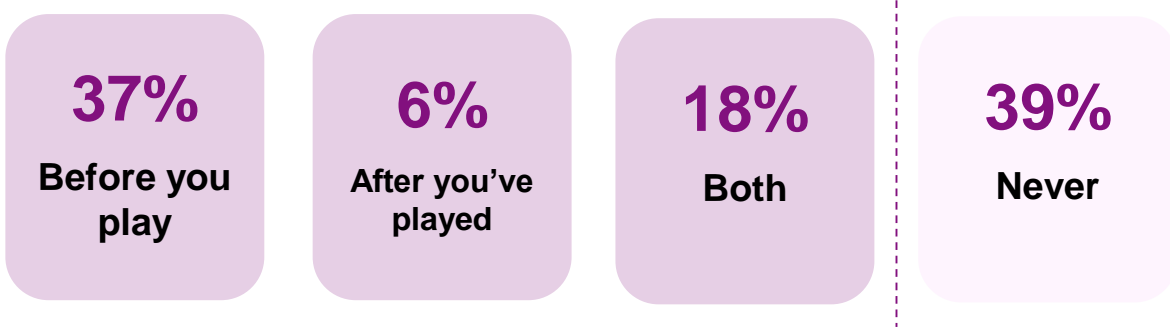
Figure 27: Proportion of gamblers who have seen or received different types of information about gambling²² (Online Tracker; n=3,137)



²² '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.

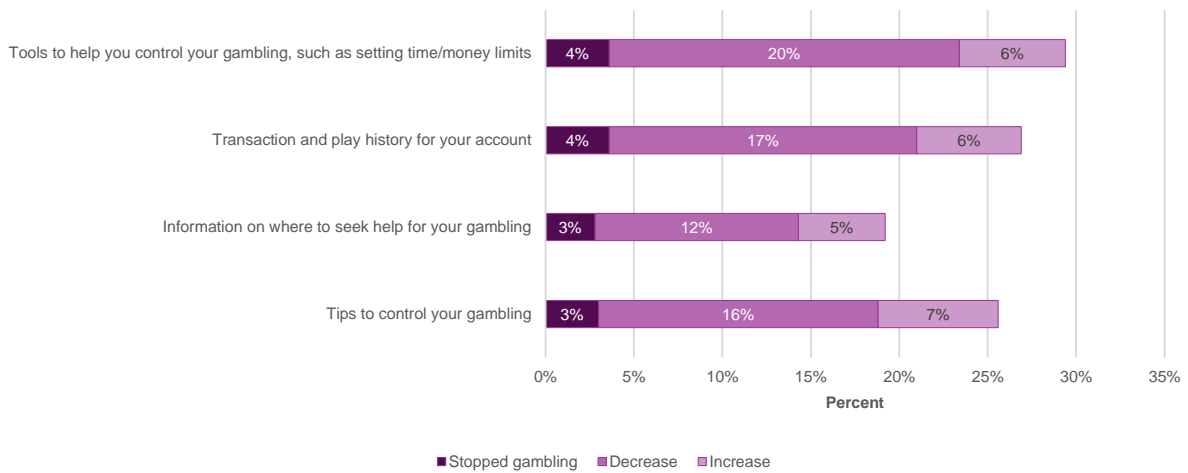
All those who have seen ‘percentage of money returned to player’, ‘your chances of winning any prize’, ‘your chances of winning each prize’, ‘whether a machine is random or compensated’ or ‘what the maximum pay-out for a machine is’ were asked at what point they consulted the information they had seen. In total, 55% said that they consulted the information before play and 24% consulted the information after play, both stable compared to the previous year.

Figure 28: Time of consulting the information seen (Online Tracker; n=740)



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 29: Impact on frequency of gambling based upon information received from gambling companies (Online Tracker; bases vary from n=990-1,198 for each of the four information options)



There have been observed decreases in the proportion of respondents saying that the information caused them to increase their gambling frequency for the following information types: ‘Information on where to seek help for your gambling’ (5%; a 3 percentage point decrease from 2018), ‘Transaction and play history for your account’ (6%; a 4 percentage point decrease from 2018) and ‘Tools to help you control your gambling, such as setting time/money limits’ (6%; a 4 percentage point decrease from 2018).

Figure 30: Impact on the amount spent on gambling based upon information received from gambling companies (Online tracker; bases vary from n=990-1,198 for each of the four information options)



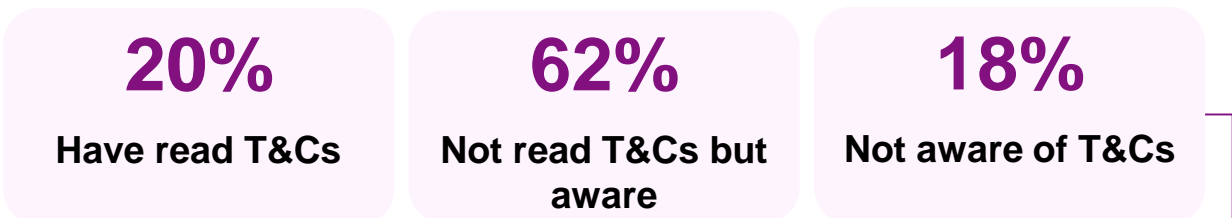
A significant decline can be seen in the proportion of respondents saying that they had increased their gambling spend as a result of receiving information, across all four types of information to receive.

Terms and conditions

The online survey includes 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 (62%) have not read the terms and conditions despite being aware of their availability. 18% did not know that terms and conditions were available.

Figure 31: Gamblers' use and awareness of terms and conditions (Online tracker n=3,138)



Women are less likely to be aware of terms and conditions than men, with 22% of women not aware compared to 14% of men.

Those aged 65+ are most likely to be unaware of terms and conditions (30%) whereas 12% of those aged 18-24 are unaware.

Figure 32: Proportion of gamblers unaware that terms and conditions were available (Online tracker n=3,138)

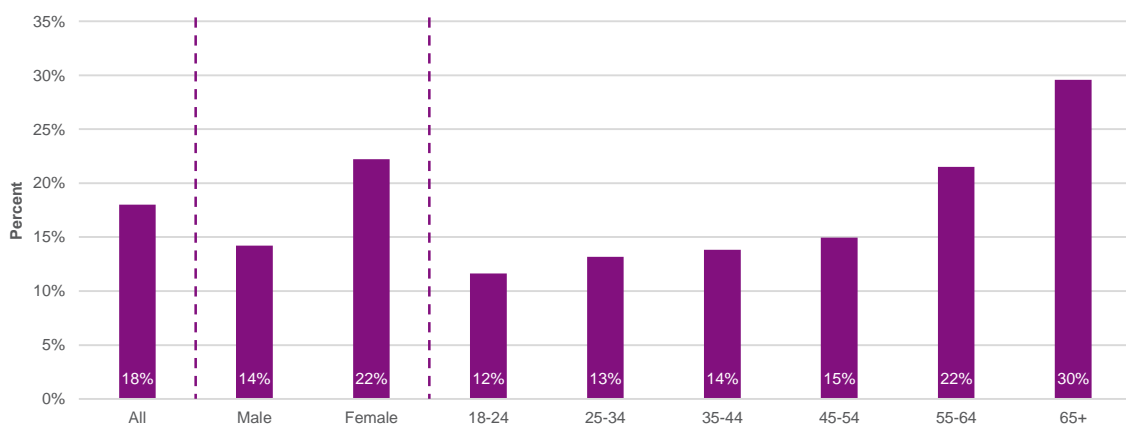


Figure 33: Proportion of gamblers (who had read terms and conditions) who found them to be helpful/unfair (Online Tracker; n=656)



Figure 33 shows that of those gamblers who have ever read terms and conditions, 65% found them helpful (a 4 percentage point increase from 2018) and 26% reported having been in a situation where they have felt that a gambling operator’s terms and conditions have been unfair.

Complaints

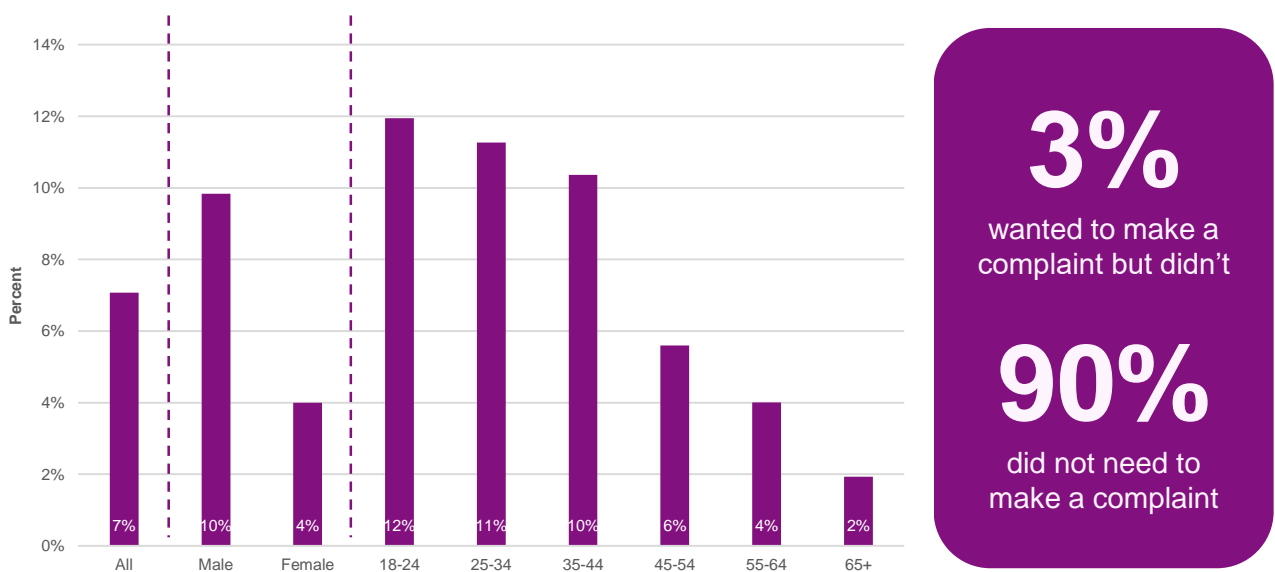
Complaints from consumers are an important measure for any industry. Any gambler, whether they have gambled online or in premises has the right to make a complaint about a personal gambling transaction, in the first instance, directly to the relevant gambling business. If a consumer and gambling business 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, 7% of gamblers reported having ever made a complaint, with a further 3% wanting to make a complaint but didn’t. By comparison, 90% of gamblers had not needed to make a complaint.

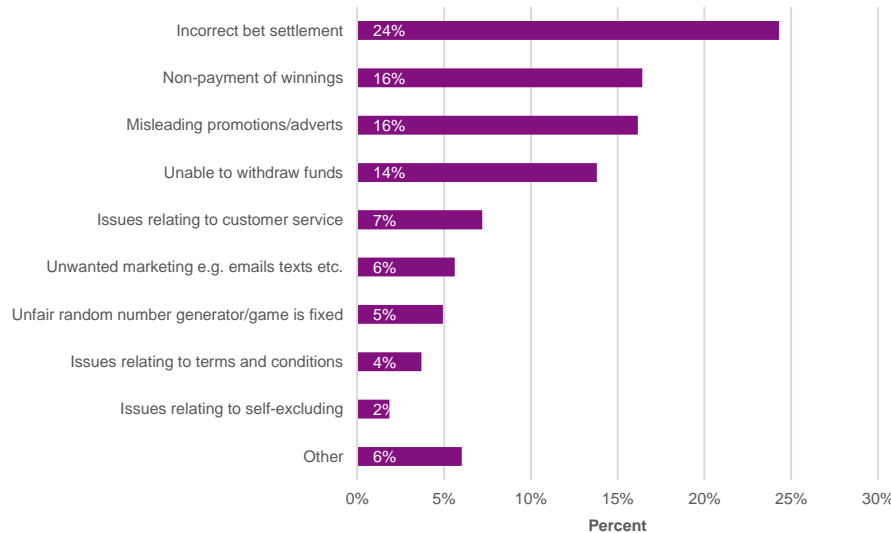
Figure 34 shows that men were more likely to have made a complaint about a personal gambling experience than women, with 10% of men having made a complaint compared with 4% of women. Younger age groups were more likely than average to have made a complaint, with 12% of 18-24 year olds, 11% of 25-34 year olds and 10% of 35-44 year olds reporting having ever made a complaint.

Figure 34: Proportion of gamblers who have ever made a complaint by gender and age (Online Tracker; n=3,138)



Gamblers who have ever made a complaint were asked what their most recent complaint was regarding. Figure 35 shows that the most common reason for the most recent complaint was in relation to incorrect bet settlement (24%), which is an 11 percentage point increase from 2018. Other common reasons for complaining among gamblers include: non-payment of winnings (16%), misleading promotions/adverts (16%) and being unable to withdraw funds (14%).

Figure 35: Reasons for most recent complaint (Online Tracker; n=201)



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 bi-annual 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, and Instagram. Overall, 23% of online gamblers followed a gambling company on any of these social media platforms in 2019 (a 3 percentage point decrease from 2018). The most pronounced decreases have been amongst those aged 45-54 (17%; a 6 percentage point decrease from 2018) and 55-64 (7%; an 8 percentage point decrease from 2018).

Figure 36: Proportion of online gamblers following gambling companies on social media by gender and age (Online Tracker; n=1,953)

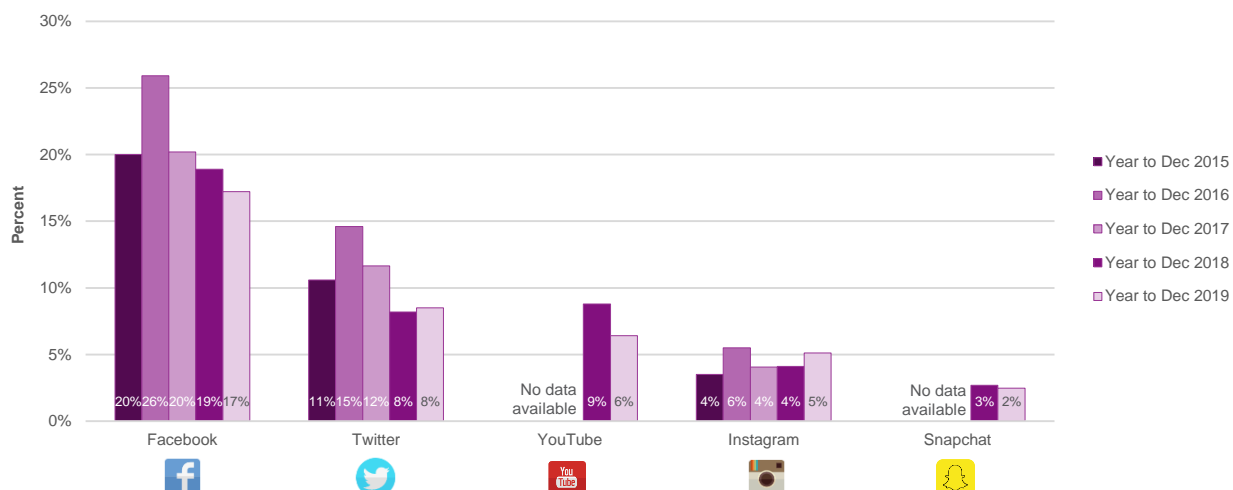


Figure 37 displays the results for each social media platform. During 2018, the list of social network platforms was expanded to cover YouTube²³ and Snapchat²⁴.

Facebook remains the most popular social media platform in which online gamblers follow gambling companies, with 17% doing so. This is followed by Twitter (8%), YouTube (6%, a 3 percentage point decrease from 2018), Instagram (5%) and Snapchat (2%).

These figures are consistent with findings from the latest Adult's Media Use and Attitudes Report²⁵ (Ofcom, 2019) which identifies that whilst Facebook is the most popular social media platform, use has decreased among adult internet users aged 16+ since 2017.

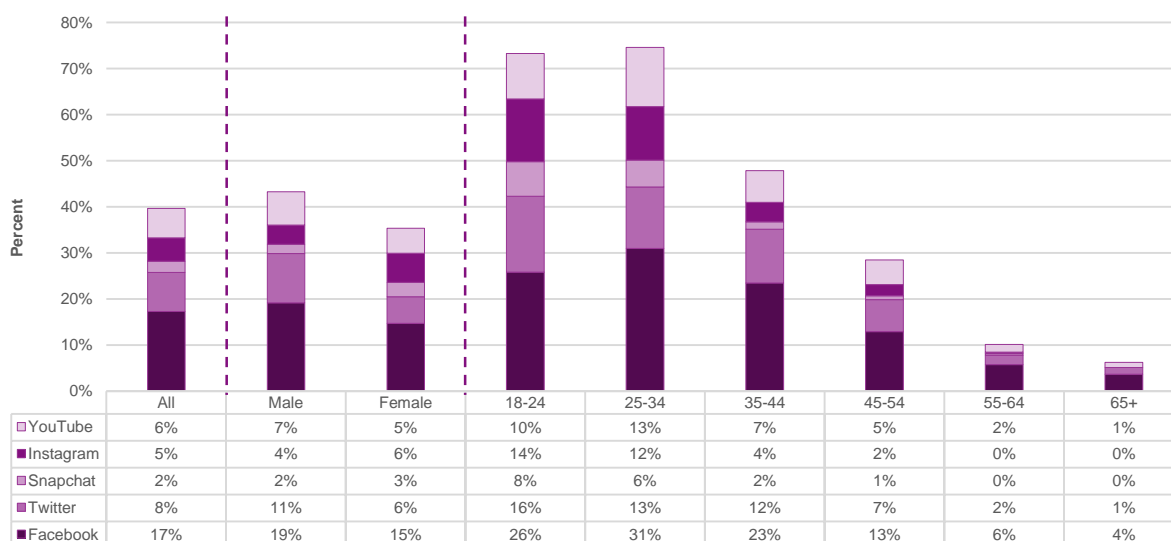
Figure 37: Proportion of online gamblers following gambling companies on social media by platform (Online Tracker; n=1,953)



As Figure 38 shows, Facebook was the most popular social media platform on which to follow a gambling company across both genders and all age groups.

A significant decrease was seen in terms of those following gambling companies on Facebook for those aged 55-64 (6%; a 6 percentage point decrease from 2018) and amongst females (15%; a 3 percentage point decrease from 2018). Additionally, the overall decrease seen in individuals following gambling companies on YouTube is likely to be explained by a significant decrease amongst those aged 18-24 (10%; a 9 percentage point decrease from 2018) and males (7%; a 4 percentage point decrease from 2018). There have been increases in the proportion of individuals aged 25-34 (12%; a 5 percentage point decrease from 2018) and females (6%; a 2 percentage point increase) following gambling companies on Instagram.

Figure 38: Following gambling companies on social media by platform, gender and age (Online Tracker; n=1,953)



²³ New YouTube category was added in 2018

²⁴ New Snapchat category was added in 2018

²⁵ Ofcom 2019 (https://www.ofcom.org.uk/data/assets/pdf_file/0021/149124/adults-media-use-and-attitudes-report.pdf)

Respondents of the online survey were asked about advertisements²⁶ and sponsorships²⁷ to help understand people’s awareness of gambling related media. Figure 39 shows that overall, 86% of respondents have ever seen any gambling advertisements and 82% have ever seen any gambling sponsorships. This equates to 87% of respondents who have ever seen any gambling advertisements or gambling sponsorships. These levels of awareness are consistent with those seen in 2018.

Figure 39: Proportion of respondents who have seen or heard any gambling advertisements, or gambling sponsorships, or both (Online Tracker; n=4,196)



Figure 40 shows that across all demographic groups, slightly 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 89% of men and 83% of women reporting they have seen or heard gambling advertisements.

A significant decrease in visibility of gambling sponsorships amongst those aged 25-34 (77%; a 5 percentage point decrease from 2018) has been seen.

Figure 40: Seen or heard any gambling advertising and sponsorships by age and gender (Online Tracker; n=4,196)

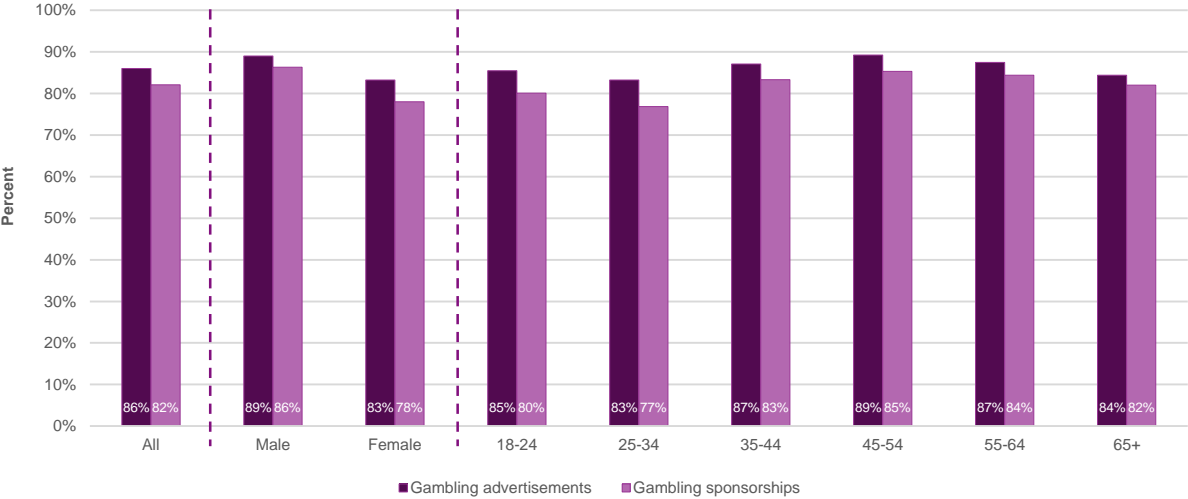
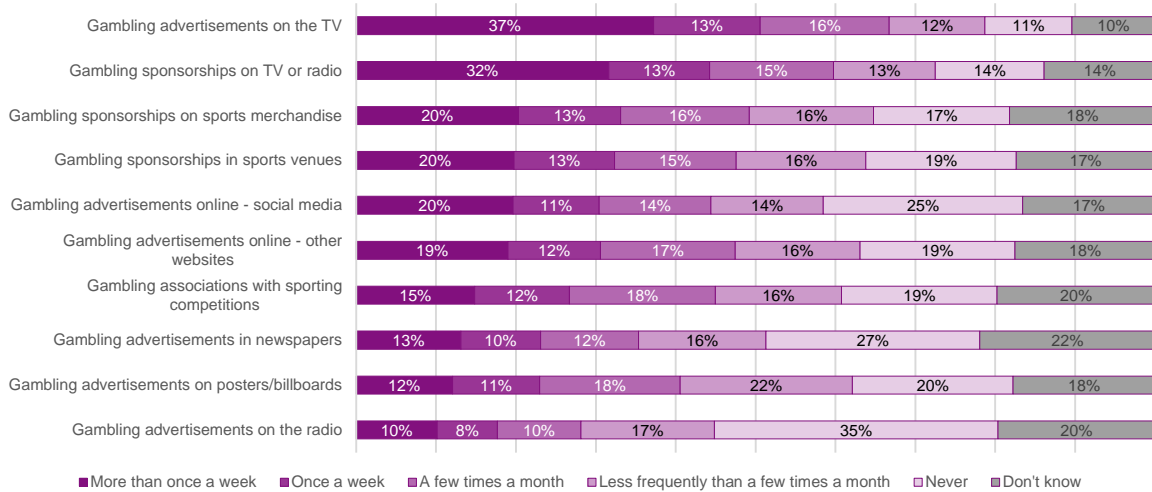


Figure 41 shows that gambling advertisements were most likely to have been seen on TV, with 78% having ever done so (a 2 percentage point decrease from 2018). This is closely followed by gambling sponsorships on TV or radio (73%), gambling sponsorships on sports merchandise (65%), gambling advertising online (through ‘other websites’) (64%), gambling adverts on posters/billboards (63%), and on social media (59%; a 3 percentage point decrease from 2018). Respondents were least likely to have seen/heard gambling adverts on the radio (45%) and in newspapers (51%; a 3 percentage point decrease from 2018).

²⁶ 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
²⁷ Gambling advertisements refer to the promotion of gambling via a variety of media.

Figure 41: Seen or heard any gambling advertising and sponsorships by frequency (Online Tracker; n=4,196)²⁸

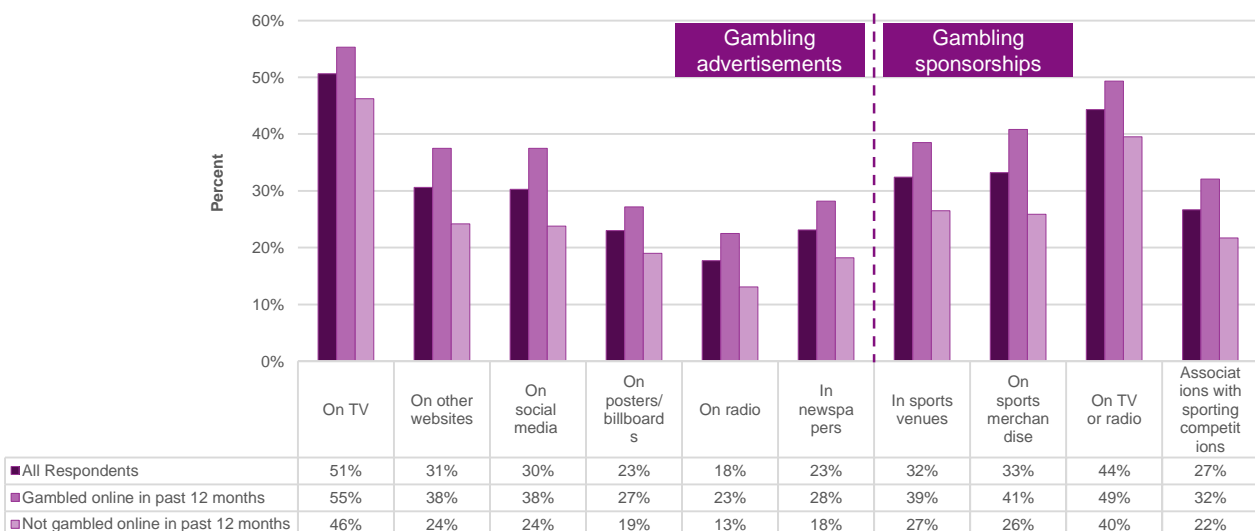


When looking at the types of advertisements and sponsorships that were seen more frequently i.e. once a week or more, gambling advertisements were most likely to have been seen on television (51%) followed by gambling sponsorships on television or radio (44%).

Since 2018, there have been significant decreases in the proportions of respondents seeing the following at least once a week: gambling advertisements on TV (51%; a 3 percentage point decrease), on social media (30%; a 3 percentage point decrease), other websites (31%; a 3 percentage point decrease), gambling advertisements on posters/billboards (23%; a 3 percentage point decrease) and gambling advertisements in newspapers (23%; a 3 percentage point decrease). There has also been a decrease in sponsorships on TV or radio (44%; a 3 percentage point decrease).

As Figure 42 shows, online gamblers are 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. Seeing gambling sponsorships on sports merchandise sees the largest difference between online gamblers and those who have not gambled online, with 41% 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 sponsorships on sports merchandise.

Figure 42: Seen or heard any gambling advertising and sponsorships at least weekly by gambling status (Online Tracker; all respondents n=4,196, gambled online in past 12 months n=1,953, not gambled online in past 12 months n=2,243)



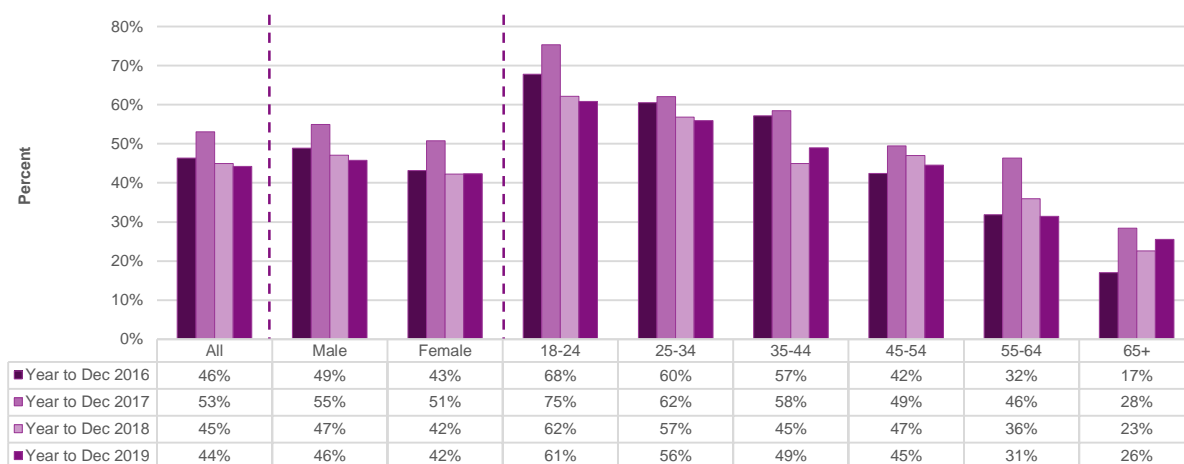
²⁸ Figures may not add to 100% due to rounding.

There have been significant decreases in the proportion of non-gamblers reporting seeing advertising and sponsorships at least weekly on the following: TV (46%; a 4 percentage point decrease), on other websites (24%; a 4 percentage point decrease), on posters/billboards (19%; a 2 percentage point decrease), in newspapers (18%; a 4 percentage point decrease), and sponsorships on TV or radio (40%; a 3 percentage point decrease). Amongst those who had gambled online in the past 12 months, there has been a decrease in the proportion reporting seeing gambling advertising on posters/billboards (27%; a 3 percentage point decrease).

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

As Figure 43 shows, across all online gamblers, 44% have been prompted to spend money on gambling as a result of seeing various forms of advertising. It can be observed that those in the younger age groups were more likely overall to be prompted to spend money on gambling by advertising than those in the older age groups.

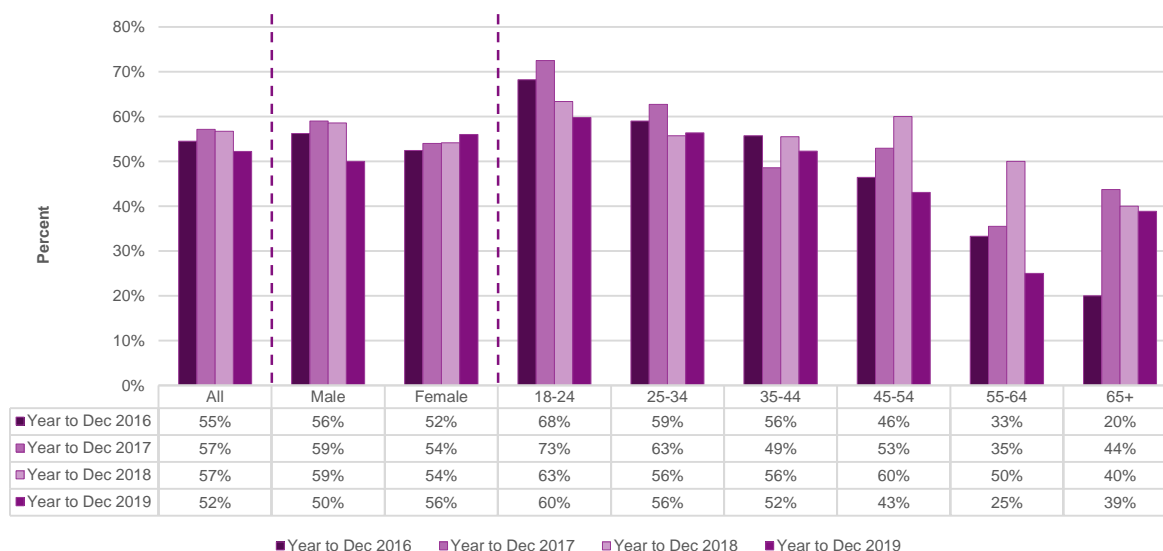
Figure 43: Proportion of online gamblers prompted to spend money on gambling by advertising by gender and age (Online Tracker; n=1,953)



As Figure 44 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 is 52% (a 5 percentage point decrease from 2018).

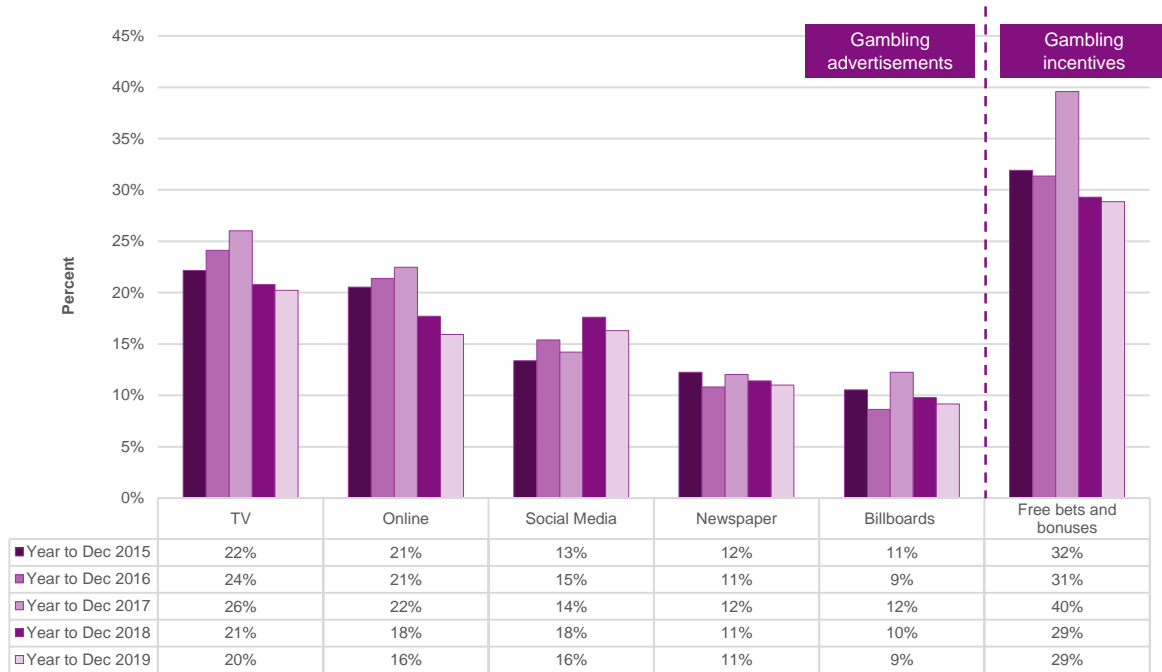
Significant decreases were seen amongst males (50%; a decrease of 9 percentage points from 2018) and 45-54 year olds (43%; a decrease of 17 percentage points).

Figure 44: 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 (Online Tracker; n=406)



Focusing on advertising in particular, Figure 45 shows that in 2019 online gamblers were most likely to be prompted to spend money on gambling by promotions for free bets and bonuses (29%). Respondents were least likely to be prompted to gamble by advertisements on billboards.

Figure 45: Proportion of online gamblers prompted to spend money on gambling by types of advertising (Online Tracker; n=1,953)



Social gaming

Some games that can be played online often look like gambling but do not meet the legal definition of gambling. These 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.

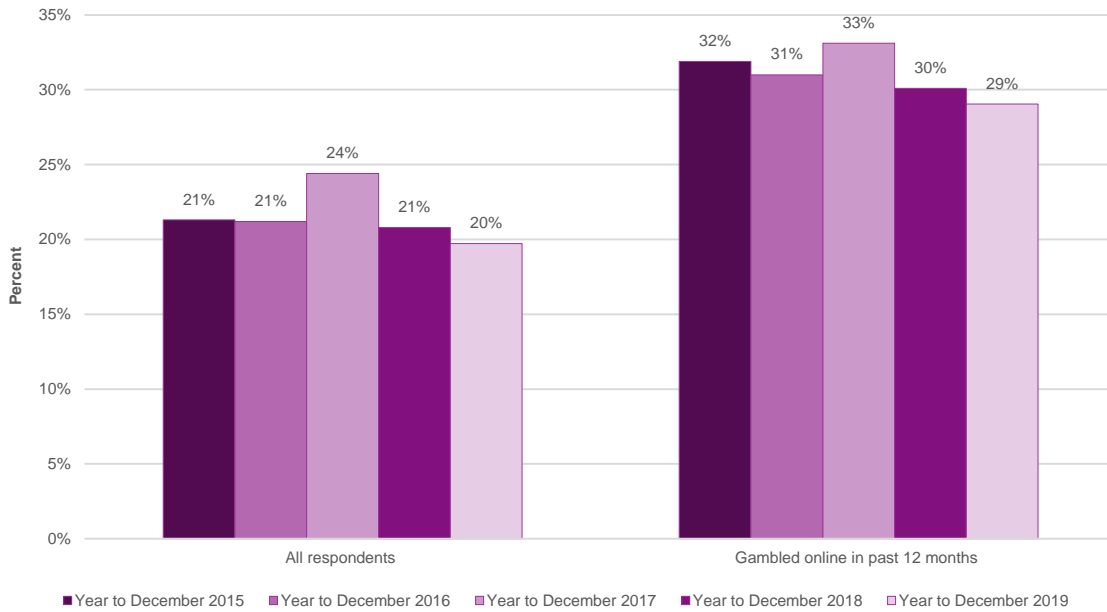
The boundaries between social gaming and commercial gambling have become increasingly blurred as a result of:

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

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

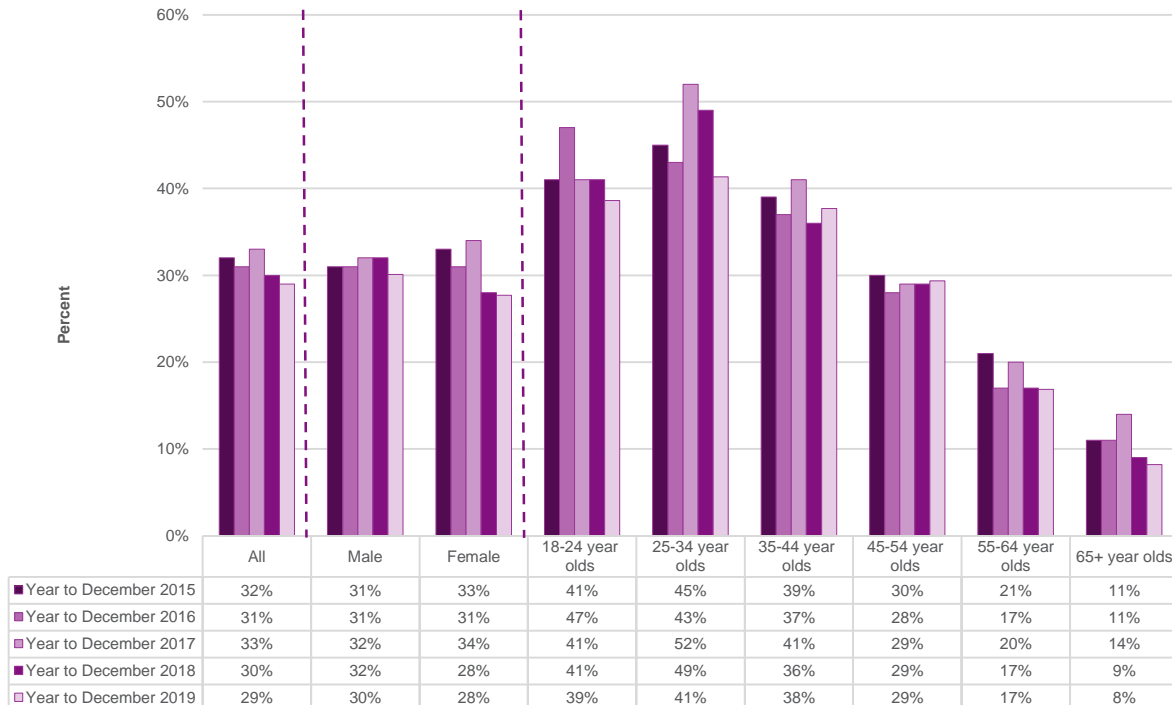
Of all respondents asked, 20% had participated in online gambling-style games. This figure increased to 29% among those who had gambled online in the past 12 months. Both of these figures have remained stable from 2018.

Figure 46: Ever participated in online gambling style games (Online Tracker; all respondents n=4,145, gambled in past 12 months n=2,078)



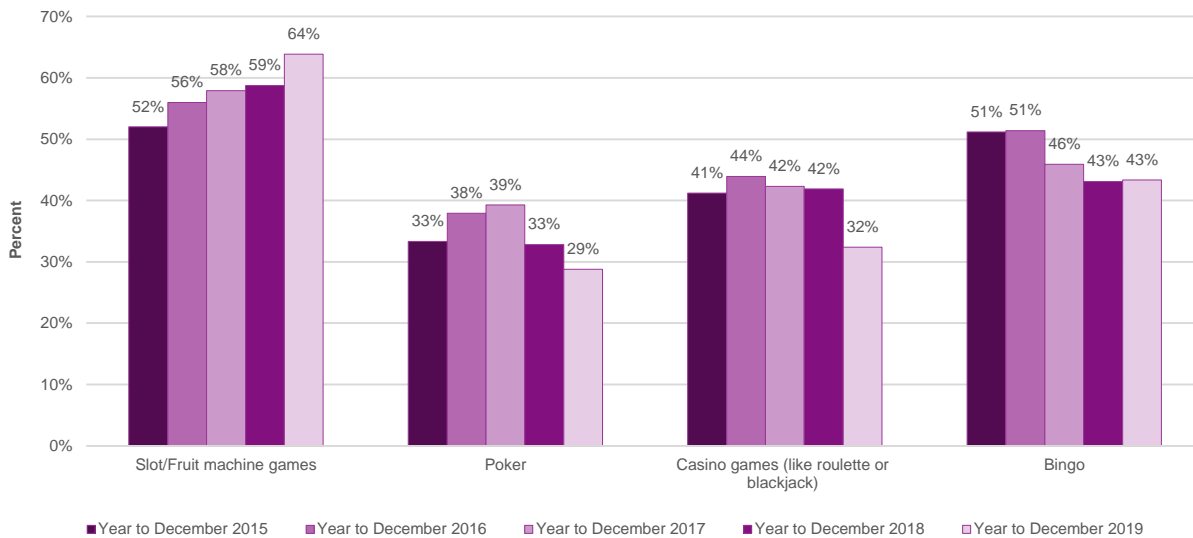
Participation in online gambling-style games among online gamblers was highest for those aged 25-34 (41% of all those who had gambled online in the last 12 months). However, since 2018, a significant decrease of 8 percentage points has been seen in this age group. Participation between 2018 and 2019 was stable across all other age and gender categories.

Figure 47: Ever participated in online gambling-style games amongst online gamblers by gender and age (Online Tracker; n=2,078)



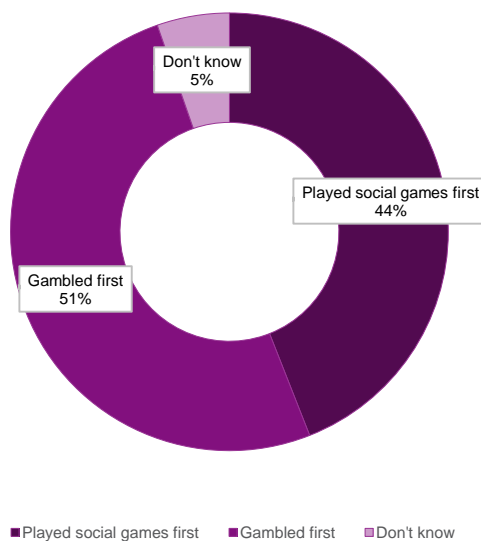
The most popular gambling-style games were slot or fruit machine style games, with 64% of social gamers having played these in the last four weeks. Levels of participation across all game types were comparable to 2018, with the exception of casino games seeing a decline (32%; a 10 percentage point decrease from 2018). Since 2015, the proportion of respondents playing fruit or slot machine games has increased significantly, from 52% to 64%. In contrast, since 2015, a significant decline in playing casino games (a 9 percentage point decrease from 2015) and bingo (an 8 percentage point decrease from 2015) has been seen.

Figure 48: Past four week participation in online gambling-style games amongst online gamblers by game type (Online Tracker; n=418)



Amongst social gamers who had also gambled, 51% stated that the first activity that they undertook was gambling to win money. 44% reported playing online gambling games first. The remaining 5% could not remember which activity they had done first, all of which have remained stable from 2018.

Figure 49: First activity participated in (Online Tracker; n=500)



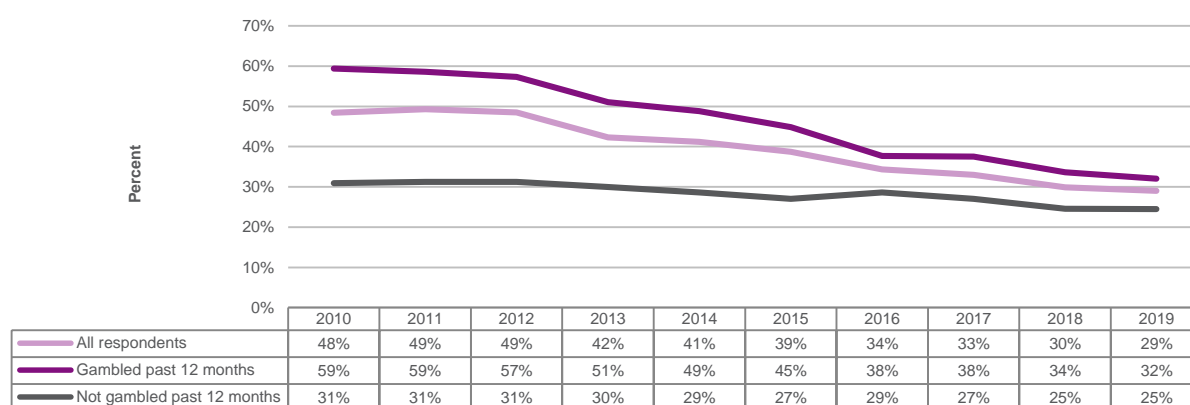
Perceptions and attitudes

Perceptions

The Commission has been tracking public perceptions of gambling for over a decade, 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.

Figure 50 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.

Figure 50: Agree that gambling is conducted fairly and can be trusted – Percentage agreeing with statement (Telephone Survey; n=4,003)

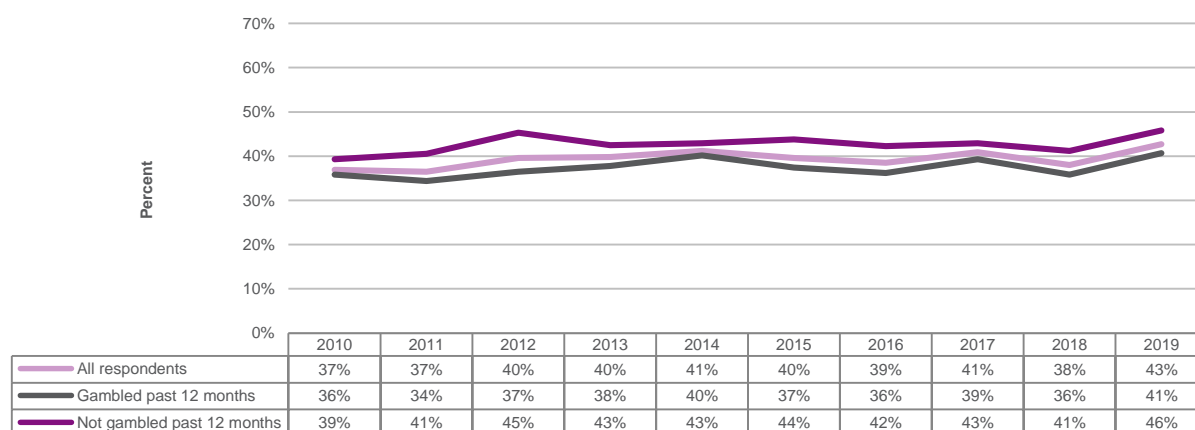


Overall, 29% of respondents agreed with the statement that gambling was fair and can be trusted in 2019. Gamblers' attitudes remain more positive than non-gamblers, with a higher percentage of gamblers agreeing with the statement that gambling is fair and can be trusted (32%) compared with 25% of non-gamblers.

Although there has not been a significant change in the results between 2018 to 2019, there has been a significant decline in agreement over the past ten years. It can be seen that this overall ten year decline appears to be mainly driven by a change in agreement amongst gamblers.

Figure 51 shows the percentage of respondents who agreed, either strongly or slightly, with the statement that gambling in this country is associated with criminal activity.

Figure 51: Agree that gambling is associated with criminal activity – Percentage agreeing with statement (Telephone Survey; n=4,003)



Overall, 43% of respondents agreed with the statement that gambling was associated with criminal activity, a significant increase of 5 percentage points since 2018.

The 5 percentage point increase continues when looking at both gamblers (36%) and non-gamblers (41%) agreeing that gambling is associated with criminal activity.

Respondents who agreed that gambling was associated with criminal activity were asked which crimes they associated with gambling. Of those providing a response (414 respondents), gambling addicts stealing to carry on gambling was most commonly mentioned (34%), followed by fraud (19%) drug dealing/trafficking/prostitution (18%) and money laundering (17%).

Attitudes towards gambling

As well as overall perceptions of gambling this section includes more specific public attitudes and opinions towards gambling in Great Britain.

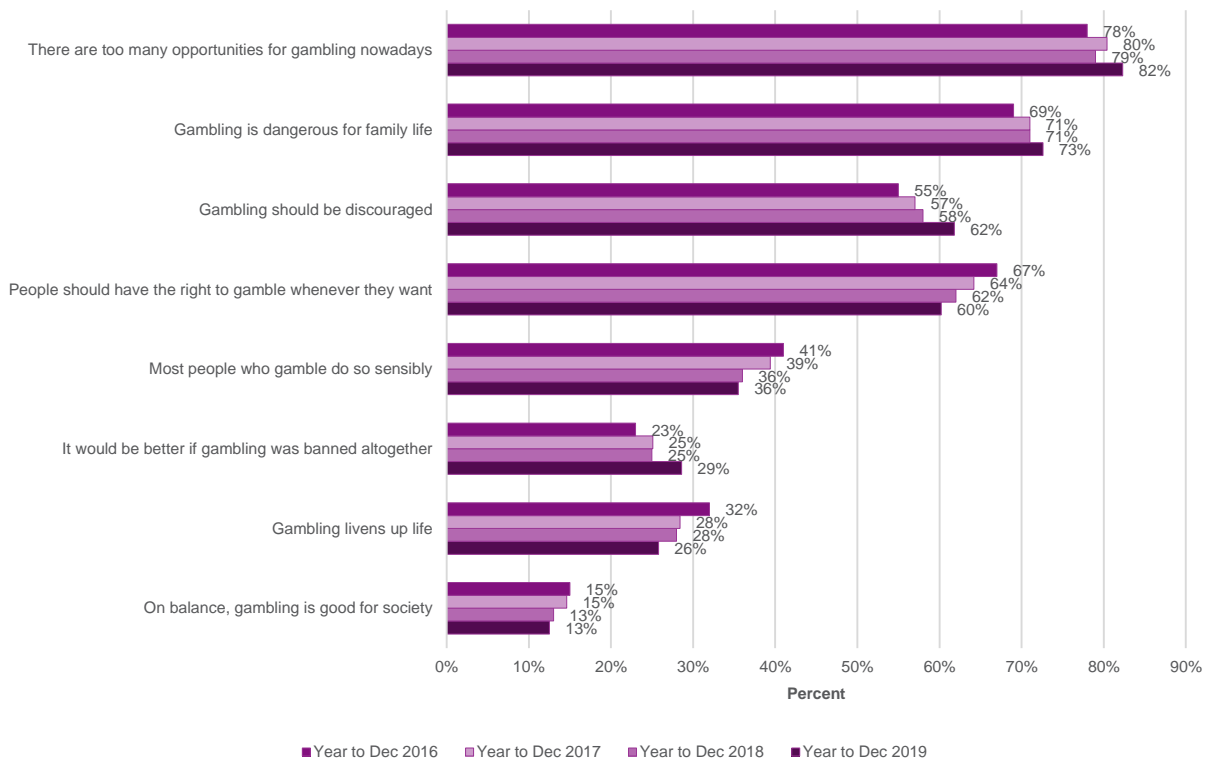
Respondents were asked about a series of attitudinal statements, originating from a shortened version of the Attitudes Towards Gambling Scale (ATGS-8)²⁹ and the extent to which they agree with them was measured. This scale, consisting of a series of 8 statements, was developed with each statement expressing an attitude towards gambling, with five response options on a likert scale from *strongly agree* to *strongly disagree*.

82% of respondents agreed that there are too many opportunities for gambling nowadays (a significant increase of 3 percentage points since 2018), whilst 73% agreed that gambling is dangerous for family life.

There was a significant increase in respondents stating that gambling should be discouraged (62%; a 4 percentage point rise since 2018) and a significant increase in respondents stating that it would be better if gambling was banned altogether (29%; a 4 percentage point increase from 2018).

There has been a significant decline in the proportion of respondents agreeing that 'gambling livens up life' (26%; a 2 percentage point decrease from 2018).

Figure 52: Proportion of respondents agreeing with individual attitude statements by year (Telephone Survey; n=4,003)



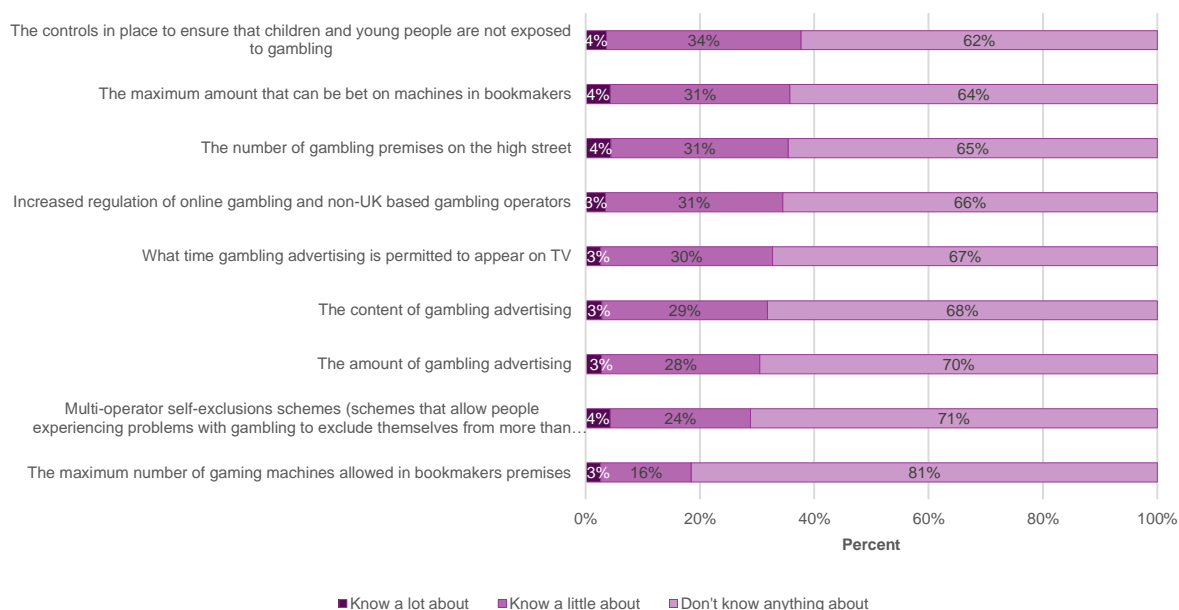
²⁹ In the 2007 British Gambling Prevalence Survey (BGPS) questions were developed for the first time to capture this data. Due to constraints on questionnaire space in the 2010 BGPS, the number of attitude items was reduced, and the scale was redeveloped as a shortened eight item scale called the ATGS-8. The ATGS-8 statements were added to the Commission's telephone survey in March 2016.

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.

Figure 53: Awareness of gambling policy issues (Online Tracker; n=2,078)³⁰



The two policy issues that the general public were most aware of were the controls in place to ensure that children and young people are not exposed to gambling, with 38% stating that they knew a lot or a little about the topic, and the maximum amount that can be bet on machines in bookmakers, with 35% stating that they knew a lot or a little about the topic (a 6 percentage point decrease from 2018). This was followed by the number of gambling premises on the high street (35%) and increased regulation of online gambling and non-UK based gambling operators (34%). Similar to 2018, the issue that the public knew least about was the maximum number of gaming machines allowed in bookmakers' premises, with 19% (a 2 percentage point decrease from 2018) stating that they knew a lot or little about the issue.

This was followed 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.

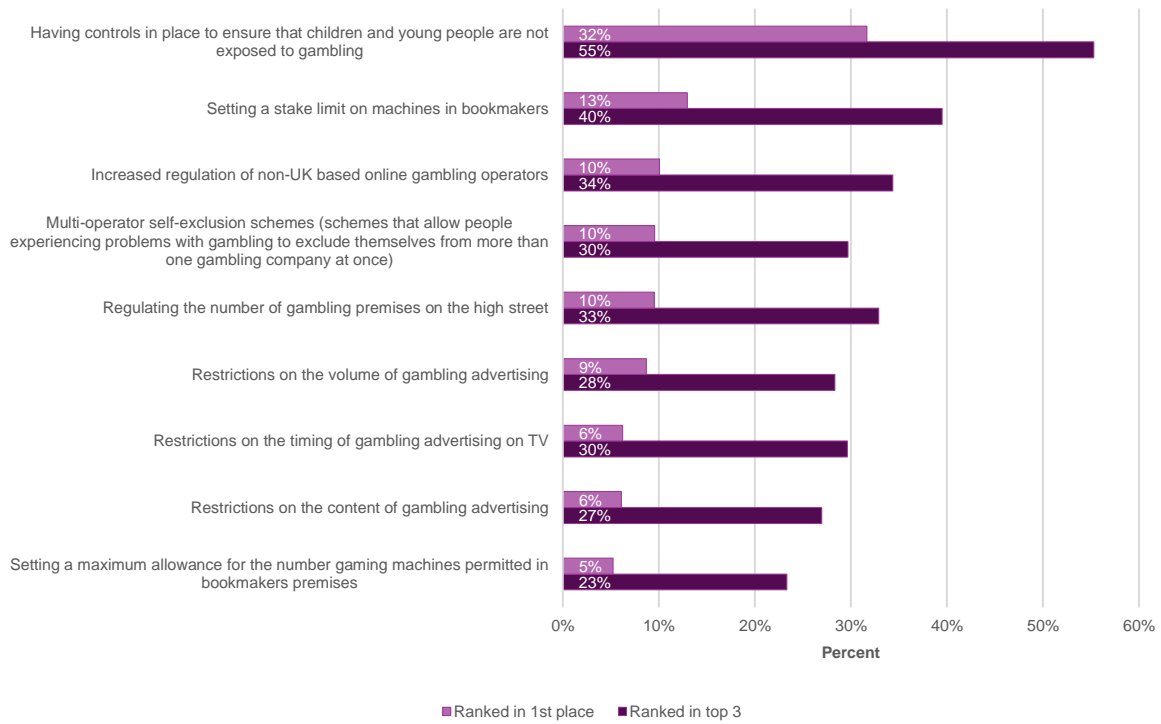
The issue that most people ranked as the highest importance was having controls in place to ensure that children and young people are not exposed to gambling (32% ranked this in first place, and 55% ranked it in their top three issues).

Since last year, the percentage of respondents ranking the importance of setting a stake limit on machines in bookmakers has remained stable, with 13% ranking it as the most important issue, and 40% ranking it among the top three issues.

The only policy issue seeing a significant increase in importance is restriction on the content of gambling advertising (6%; a 1 percentage point increase since 2018) ranking in first place.

³⁰ Figures may not add to 100% due to rounding.

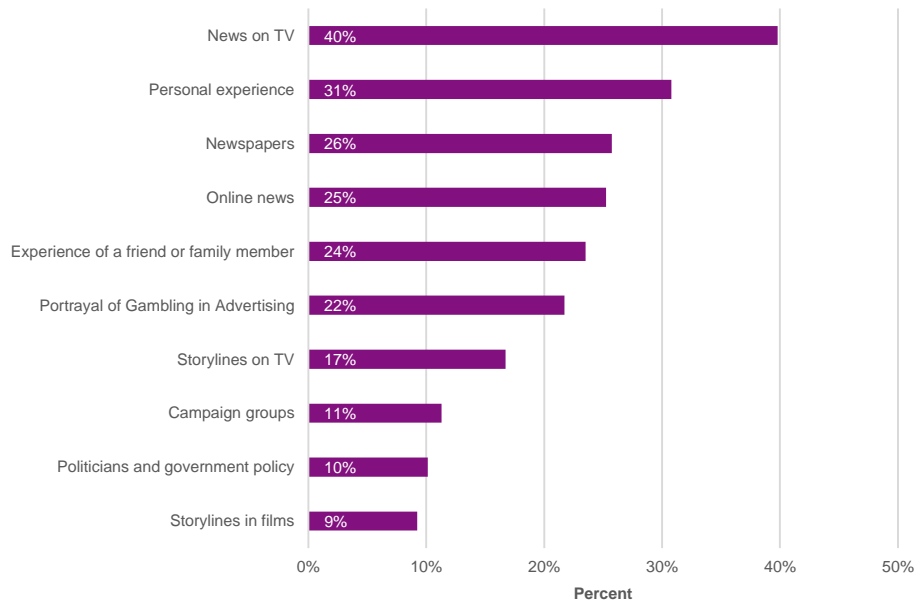
Figure 54: Ranked importance of gambling policy issues (Online Tracker; n=2,078)



Respondents were then asked about what channels had informed their overall opinion of gambling on society. News on TV (40%) most often informed people’s opinions, followed by personal experience (31%) and newspapers (26%). Significant declines were seen in the portrayal of gambling in advertising (22%; a 3 percentage point decrease from 2018) and politicians and government policy (10%; a 2 percentage point decrease since 2018) in informing public opinion.

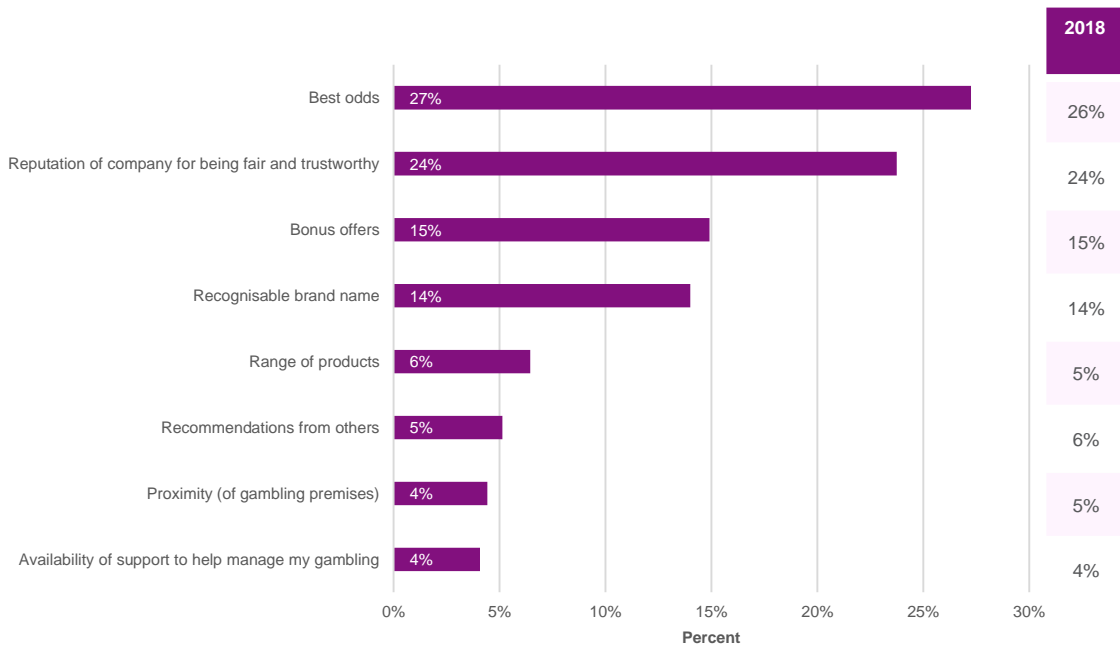
Figure 55: Channels informing public opinion (Online Tracker; n=2,093)

News on TV
was most likely
to inform
opinions around
gambling (40%)



Gamblers were also asked about which factors were important when selecting a company to gamble with for the first time. The most important factor was operators who offered the best odds, selected by 27% 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.

Figure 56: The most important factor to gamblers when selecting an operator for the first time (Online Tracker; n=3,031)



Appendix – Methodology

This appendix provides further explanation of the methodologies used for each section of this report, including sample sizes and margins of error.

Gambling participation

Gambling participation data is collected on a quarterly basis using a bespoke telephone survey administered by Populus³¹. The results cover the calendar years 2016 – 2019 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+³² in Great Britain.

Telephone survey sample is generated through Random Digit Dialling³³ (RDD) of Great Britain 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 sample). 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 telephone survey questionnaire document is released in conjunction with this report.

³¹ 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.

³² In March 2016 the sample was broadened to include participants aged 16+

³³ Random Digit Dialling (RDD) is a method for sampling of telephone surveys which involves the random generation of telephone numbers. This method is effective in the GB population due to the high rate of telephone ownership and the fact that it allows the sampling of individuals who are ex-directory.

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)³⁴. 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)

The Health Surveys provides the Commission's most robust estimates of problem and at-risk gambling due to the use of a high quality random probability sampling approach, a large sample size and the availability of both PGSI and DSM-IV screens. The latest data available from the Health Surveys is from the Health Survey England 2018, which is included within this report.

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'.

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

³⁴ Developing a Short Form of the PGSI (Volberg, 2012).

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 2019, 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. 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. 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 online survey questionnaire document is released in conjunction with this report

GAMBLING COMMISSION

Making gambling fairer and safer

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