Gambling participation in 2016: behaviour, awareness and attitudes

Annual report

February 2017
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Headline findings

48%
Proportion of people who have participated in any form of gambling in the past four weeks
(45% in year to December 2015)

97%
Proportion of online gamblers who gamble at home
(97% in year to December 2015)

33%
Proportion of people who have participated in gambling in the past four weeks, excluding those who had only played the National Lottery draw
(27% in year to December 2015)

43%
Proportion of online gamblers who have gambled using a mobile phone or tablet
(33% in year to December 2015)

17%
Proportion of people who had gambled online in the past four weeks
(15% in year to December 2015)

3
Average number of accounts held by online gamblers
(3.5 in year to December 2015)

0.7%
Proportion of respondents who were identified as problem gamblers
According to the short-form PGSI. None of the changes in the problem and at-risk gambling estimates are significant at the 95% level.

26%
Proportion of online gamblers who have bet in-play
(25% in year to December 2015)

5.5%
Proportion of respondents who were identified as low or moderate risk gamblers
According to the short-form PGSI. None of the changes in the problem and at-risk gambling estimates are significant at the 95% level.

34%
Proportion of people who think that gambling is fair and can be trusted
(39% in year to December 2015)

39%
Proportion of people who think that gambling is associated with crime
(40% in year to December 2015)
Executive summary

This report presents annual estimates of gambling behaviour in Great Britain in 2016, 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 by Populus. Datasets cover past-four week participation rates, problem gambling estimates, online gambling behaviour and perceptions and attitudes to gambling.

Overall gambling participation has increased, with 48% of people aged 16+ having participated in at least one form of gambling in the past four weeks. Men are more likely to have gambled than women, and those aged 35-64 are more likely to have gambled than those in younger age groups. This is predominantly driven by participation in the National Lottery. When people who have only participated in the National Lottery draws are excluded, participation is highest among 16-34 year olds.

The National Lottery draws remain the most popular activity, followed by scratchcards and other lotteries. There have been notable increases in both sports betting and private betting, likely driven by the UEFA European Football Championship 2016 and the Rio 2016 Olympics. 17% of people have gambled online, with younger age groups seeing the largest increases in participation. Betting activities, other lotteries and casino games have seen an increase in online participation. Rates of playing bingo in-person have increased.

An estimated 0.7% of people identified as a problem gambler according to the short-form Problem Gambling Severity Index (PGSI), with a further 5.5% identifying as at low or moderate risk.

Amongst online gamblers laptops remain the most popular device but use of tablets and mobile phones is increasing, with 43% of online gamblers using either device. Men are more likely to gamble using a mobile phone, whilst women are more likely to gamble using a tablet. The majority of online gamblers play at home, but younger age groups are more likely to also gamble in other locations – notably at work, whilst commuting, or in a pub or club. 26% of online gamblers have bet in-play, with rates highest in 18-24 year olds. On average online gamblers have three accounts with online gambling operators.

Awareness of self-exclusion has increased amongst those who have never excluded to 37%. Overall 6% of gamblers have ever self-excluded. Gamblers aged 25-34 are most likely to self-exclude. 10% of online gamblers make use of financial limits to manage their gambling. 23% of gamblers have read terms and conditions, of which 24% felt that they had been in a situation where terms and conditions had been unfair.

When asked about perceptions and attitudes to gambling responses indicated an increase in negative sentiment compared to 2015, with only 34% of people in Great Britain thinking that gambling is fair and can be trusted. 39% of people think that gambling is associated with criminal activity. In addition, 78% of people think that there are too many opportunities for gambling nowadays, with 69% of the opinion that gambling is dangerous for family life.

The report reflects headline findings of gambling participation and behaviour in Great Britain, and is accompanied by a detailed data file and technical annex.
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. The Act came fully into force on 1 September 2007. The Commission regulates commercial gambling in Great Britain, including arcades (excluding unlicensed Family Entertainment Centres), betting, bingo, casinos, gaming machine manufacturers and suppliers, gambling software providers, lottery operators and external lottery managers (excluding small society lotteries), Great Britain based remote gambling and overseas gambling companies (in line with the Gambling (Licensing and Advertising) Act 2014), and the National Lottery. The Commission does not regulate spread betting - this is the responsibility of the Financial Conduct Authority.

Methodology

This report summarises survey data collected by the Commission during 2016, and covers gambling participation and consumer behaviour. The data have been gathered via a combination of telephone and online surveys, as indicated in the table below and throughout this report.

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

Report conventions

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

The following conventions have been used in the tables:

- No observations (zero values)

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

Documents accompanying this report

- Gambling participation: activities and mode of access – February 2017 (Excel)
- Technical annex

Documents can be downloaded from www.gamblingcommission.gov.uk

1 The National Lottery Commission and Gambling Commission merged on 1 October 2013.
Online survey

The online survey is used to monitor online gambling behaviour and was launched following the introduction of regulation of overseas gambling companies (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. The survey sample is drawn in two different ways – 50% is taken from online panel members, and each wave contains 50% fresh sample sourced from online advertising. 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 2016, with trend data shown for year to December 2015.

The core content captured in the online survey is:
- Devices used for gambling online for individual activities
- Location of play for individual activities
- In-play betting
- Number of accounts held with operators
- Impact of social media and advertising on spend
- Participation in social gaming

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

Telephone survey

The telephone survey is the Commission’s main measure of past four week gambling participation, with surveys conducted on a quarterly basis in March, June, September and December of each year. Approximately 1,000 interviews are conducted each quarter with people aged 16+ in a standalone survey administered by Populus. The sample used is nationally representative of the population of Great Britain and the findings presented in this report are weighted in terms of demographic and socio-economic indicators. The results are reported on a rolling year basis to counteract seasonal trends in gambling participation. The data reported in this publication cover the year to December 2016, 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 (collected using the short-form PGSI)
- Perceptions and attitudes towards gambling

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2 In March 2016 the sample was broadened to include participants aged 16+.
3 The fruit or slot machines category and the sports betting category were expanded in March 2016 to provide more granularity in the data. Fruit and slot machines are now captured by location; in pubs, gaming centres or arcades, casinos, and bingo halls. Sports betting is now collected by type; football, tennis, and all other sports.
This section reports on gambling participation in the year to December 2016, using data collected via a quarterly telephone survey conducted by Populus. Surveys are conducted with people in Great Britain aged 16+. These questions ask respondents about their gambling participation in the past four weeks. Full data tables can be found in the accompanying data file ‘Gambling participation: activities and mode of access - February 2017’.

How many people gamble

Overall of 48% of people said they have participated in at least one form of gambling in the previous four weeks (+3% from 2015). As figure 1 below shows, a larger proportion of men have participated than women, with 53% of men and 44% of women reporting participation in any form of gambling. Those participating in gambling are more likely to be aged between 35 and 64, with 53% of 55-64 year olds, 53% of 45-54 year olds and 49% of 35-44 years olds having gambled in the past four weeks. Whilst not as likely to have participated in gambling, younger age groups have seen large increases in participation, with 38% of 16-24 year olds and 48% of 25-34 year olds having gambled in the past four weeks (+5% and +10% respectively from 2015). This is likely due to the timing of the UEFA European Football Championship and the Rio 2016 Olympics, which both occurred in the summer of 2016, and prompted unusually high rates of betting activity, particularly amongst younger people.5

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5 Not statistically significant at the 95% level.

5 This was previously seen when one survey conducted in the year to December 2014 took place in a period covering the Grand National. This prompted a spike in overall participation (excluding National Lottery draw products), as well as for 18-24 year olds.
As participation in the National Lottery draws is so much higher than other gambling activities, changes in National Lottery participation can have a noticeable impact on overall participation rates. In 2016 15% of people had only gambled on the National Lottery draws in the past four weeks. Figure 2 below shows that this equated to 31% of people who had played in the past four weeks. Indeed, much of the decline in gambling participation since year to December 2013 can be attributed to falling participation in the National Lottery draws. It is therefore useful to remove the responses of respondents who have only participated in the National Lottery draws to highlight patterns across age and gender groups.

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*Figure 1: Past four week gambling participation by gender and age*\(^{\text{1,2}}\) (n=4,001)

*Figure 2: Proportion of gamblers participating in National Lottery draws only, any betting\(^4\), and any online gambling (n=1,935)*

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\(^{1}\) In March 2016 the sample was broadened to include participants aged 16+

\(^{2}\) One survey conducted in the year to December 2014 took place in a period covering the Grand National. This explains the spike in overall participation (excluding National Lottery draw products), as well as for 18-24 year olds.

\(^{4}\) Betting on horse races, betting on dog races, sports betting, betting on other events, virtual dog or horse races, spread betting, football pools.
Figure 3 below shows that when these respondents are excluded, the overall participation rate falls from 48% to 33%. Participation is again higher in men (37%) than women (30%). Trends across different age groups change, with 25-34 year olds and 16-24 year olds more likely to have gambled in the past four weeks (39% and 35% respectively).

On average, 17% of people have gambled online in the past four weeks, a slight increase following a consistent trend of 15% since 2013 (see figure 4 below). This is notably higher amongst men than women, with 21% of men and 14% of women reporting to have gambled online in the past four weeks. Younger age groups have the largest increases in online participation, with 16% of 16-24 years olds and 21% of 25-34 years old having gambled online (+7% and +5% from 2015). 35-44 year olds have the highest online participation rate at 22%.

When those who only participated in National Lottery draws are excluded the online gambling participation rate falls to 13% (+4% from 2015).

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

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

**Rates in 2015 appear to be anomalous and so should be treated with caution.
What people gamble on

Figure 5 below shows the types of gambling activity in which respondents had participated in the previous four weeks.

The most popular activities in 2016 were National Lottery draws (30%; -2% from 2015), scratchcards (12%; +3% from 2015) and other lotteries (12%; +1% from 2015). Despite remaining the most popular gambling activity there has been a continued decline in participation in the National Lottery draws coinciding with, amongst other factors, the increase in ticket price from £1 to £2 which was introduced in October 2013.

As figure 5 below shows, survey changes introduced in March 2016 might have improved data collection accuracy for fruit and slot machines and sports betting as there have been notable increases in participation in both of these categories; participation in fruit or slot machines was 5% in 2016 (+3% from 2015) and was 7% in sports betting (+3% from 2015). In the case of sports betting, it is important to note that both the UEFA European Football Championship and the Rio 2016 Olympics took place in summer 2016 and so at least part of the increase in participation in sports betting, along with private betting, can likely be attributed to these events. This increase is particularly prominent in those aged 25-34.

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

- National Lottery draws
- Scratchcards
- Another lottery
- Fruit or slot machines
- Machines in a bookmakers
- Bingo
- Football pools
- Horse races
- Dog races
- Sports betting
- Betting on other events
- Virtual dog or horse races
- Spread betting
- Online games/instant wins
- Casino games
- Poker at a pub/club
- Private betting
- Any other activity

Not statistically significant at the 95% level.

The fruit or slot machines category and the sports betting category were expanded to provide more granularity in the data. Fruit and slot machines are now captured by location; in pubs, gaming centres or arcades, casinos, and bingo halls. Sports betting is now collected by type; football, tennis, and all other sports.
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 both14.

Overall 82% of past four week gamblers have gambled in-person, whilst 37% have gambled online. Figures 6 and 7 below display in person and online participation in the past four weeks by those activities that can be accessed through multiple methods15.

Figure 6 shows that there has been a decrease in the popularity of playing in person for some activities, such as the National Lottery draws (79%, -5% from 2013), other lotteries (64%, -24% from 2013) and casino games (61%, -6%16 from 2013), as well as a number of betting activities. There are however some activities which have seen an increase in people playing in person, most notably bingo (85%, +16% from 2014). This year has also seen an increase in people placing bets on sporting events in person, which is again likely to have been driven by the quantity of high profile sporting events taking place in 2016.

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14 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.
15 Both charts include respondents who had participated both in person and online, therefore combined percentages may add up to more than 100%.
16 Not statistically significant at the 95% level.
Conversely, as figure 7 below displays, a number of activities have seen a surge in the popularity of playing online. This is most evident across betting activities, but can also be seen in other lotteries (38%, +22% from 2013) and casino games (63%, +11% from 2013). These diverging trends indicate a shift in channel for many gamblers, either by existing gamblers moving from more traditional in person gambling to online methods, or newcomers choosing to gamble online as opposed to in person.

**How often people gamble**

For each activity undertaken in the past four weeks, respondents are asked how often they spent money on that activity. The data displayed below shows the highest frequency with which people gambled on any individual activity.

As figure 8 shows the highest frequency of gambling on any individual activity in the past four weeks was most commonly once a week (35%, -4% from 2015), followed by once a month but less than once a week (29%, +5% from 2015), two or more days a week (23%, +1% from 2015) and less than once a month (13%, no change from 2015).

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17 Not statistically significant at the 95% level.
Problem and at-risk gambling

Problem gambling is defined as behaviour related to gambling which causes harm to the gambler and those around them. This may include family, friends and others who know them or care for them. This section presents problem gambling tracker data collected via the Commission’s telephone survey. Problem gambling status has been identified using the short-form Problem Gambling Severity Index (PGSI mini-screen). This instrument is formed of three questions, which are scored on a 4-point scale from never to almost always, asked to all participants who have gambled at least once in the last 12 months. Respondents are categorised by their total score as either problem gambler, moderate risk gambler, low risk gambler, or non-problem gambler. These scores have been analysed to provide overall problem gambling and at-risk rates as well as by gender and age. However, as advised following the development of the mini-screen these scores have not been used to report or track changes in any further socio demographic groups.

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.

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

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

Developing a Short Form of the PGSI (Volberg, 2012).
At-risk gambling

As table 1 below shows, 5.5% of people aged 16+ identified as low or moderate risk gamblers. Men are more likely to be categorised as at-risk gamblers than women, with 7.7% of men identifying as such compared to 3.5% of women. 25-34 year olds were most likely to identify as at-risk (9.5%), followed by 16-24 year olds (7.9%).

Table 1: At-risk gambling by gender and age (n=4,001)

<table>
<thead>
<tr>
<th>Low or moderate risk gambling (according to the short-form PGSI) by gender and age (%)</th>
<th>Year to Dec 2013</th>
<th>Year to Dec 2014</th>
<th>Year to Dec 2015</th>
<th>Year to Dec 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>All respondents</td>
<td>4.1</td>
<td>3.8</td>
<td>2.2</td>
<td>5.5</td>
</tr>
<tr>
<td>male respondents</td>
<td>5.8</td>
<td>5.2</td>
<td>3.2</td>
<td>7.7</td>
</tr>
<tr>
<td>female respondents</td>
<td>2.5</td>
<td>2.5</td>
<td>1.3</td>
<td>3.5</td>
</tr>
<tr>
<td>16-24 year olds</td>
<td>7.9</td>
<td>9.4</td>
<td>2.8</td>
<td>7.9</td>
</tr>
<tr>
<td>25-34 year olds</td>
<td>2.8</td>
<td>5.2</td>
<td>3.9</td>
<td>9.5</td>
</tr>
<tr>
<td>35-44 year olds</td>
<td>4.2</td>
<td>4.3</td>
<td>2.4</td>
<td>3.3</td>
</tr>
<tr>
<td>45-54 year olds</td>
<td>2.9</td>
<td>1.8</td>
<td>1.9</td>
<td>3.4</td>
</tr>
<tr>
<td>55-64 year olds</td>
<td>4.8</td>
<td>1.8</td>
<td>2.1</td>
<td>3.2</td>
</tr>
<tr>
<td>65+ year olds</td>
<td>3.2</td>
<td>2.1</td>
<td>0.7</td>
<td>2.7</td>
</tr>
</tbody>
</table>

There appears to have been increases in at-risk gambling in both genders since year to December 2015, which could be linked to increased participation in certain activities as discussed above. However, it is important to note that due to the base sizes involved the estimates below are subject to some volatility and as such trend data should be treated with caution as none of the changes are statistically significant at the 95% level.

Problem gambling

Overall 0.7% of respondents identified as problem gamblers, with men more likely than women to be categorised as such (1.2% compared to 0.1%). 16-24 year olds are most likely to be categorised as problem gamblers (1.4%), followed by 35-44 year olds (1.1%) and 25-34 year olds (0.8%).

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

<table>
<thead>
<tr>
<th>Problem gambling (according to the short-form PGSI) by gender and age (%)</th>
<th>Year to Dec 2013</th>
<th>Year to Dec 2014</th>
<th>Year to Dec 2015</th>
<th>Year to Dec 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>All respondents</td>
<td>0.5</td>
<td>0.5</td>
<td>0.5</td>
<td>0.7</td>
</tr>
<tr>
<td>male respondents</td>
<td>0.9</td>
<td>0.8</td>
<td>1.0</td>
<td>1.2</td>
</tr>
<tr>
<td>female respondents</td>
<td>0.1</td>
<td>0.2</td>
<td>0.0</td>
<td>0.1</td>
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<tr>
<td>16-24 year olds</td>
<td>0.8</td>
<td>1.2</td>
<td>1.1</td>
<td>1.4</td>
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<tr>
<td>25-34 year olds</td>
<td>1.1</td>
<td>0.0</td>
<td>0.7</td>
<td>0.8</td>
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<td>35-44 year olds</td>
<td>0.4</td>
<td>0.4</td>
<td>0.4</td>
<td>0.4</td>
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<tr>
<td>45-54 year olds</td>
<td>0.0</td>
<td>0.7</td>
<td>0.3</td>
<td>0.3</td>
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<tr>
<td>55-64 year olds</td>
<td>0.5</td>
<td>0.7</td>
<td>0.9</td>
<td>0.2</td>
</tr>
<tr>
<td>65+ year olds</td>
<td>0.4</td>
<td>0.2</td>
<td>0.1</td>
<td>0.4</td>
</tr>
</tbody>
</table>
This section reports data on online gambling behaviour in the year to December 2016, 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 play20), they are asked which devices they use to gamble online21. As figure 9 below shows, laptops remain the most popular method of accessing online gambling (55%, -6% from 2015). This is followed by desktop PCs (34%, -4% from 2015), and then mobile phones (29%, +6% from 2015) and tablets (21%, +5% from 2015). Male online gamblers are more likely to do so using a mobile phone than females (32% compared to 25%), whilst female online gamblers are more likely to use a tablet device than males (23% compared to 20%).

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20 The phrasing of these questions is the same in both the online and telephone surveys.
21 Respondents are able to select multiple devices over multiple activities.
PC and laptop use is broadly similar across all age groups, however figure 10 below shows that online gamblers aged 18-44 are most likely to gamble with further devices in addition to this, particularly mobile phones. As the trend line displays, this is consistent with findings from 2015 albeit with some age groups (18-24, 35-44 and 55-64) showing an increase in the range of devices used.

Figure 10: Devices used by age group (n=3,863)

Figure 11 below displays the increase in mobile and tablet use by age group. The largest percentage point increases in online gambling using a mobile phone were seen in those players aged 18-24 (54%, +17% from 2015), 25-34 (50%, +8% from 2015) and 35-44 (35%, +7% from 2015). Conversely, the largest percentage point increases in the use of tablet devices can be seen in older age groups, with the largest increase being seen in 55-64 year olds (19%, +8% from 2015).

Figure 11: Increased use of mobile and tablet devices by age (n=3,863)
Location of online gambling

Given the increase in use of portable devices such as mobile phones and tablets, online gamblers are also asked about the location of their gambling; whether they gamble at home, whilst commuting, whilst they are at work, at a sports venue or track, or in a pub or club. As figure 12 below shows, the most popular location for online gambling is still the home with 97% of online gamblers doing so (no change from 2016). When looking at online gambling outside of the home, men are most likely to gamble at work (13%) whilst women are most likely to gamble whilst commuting (10%).

Gambling online at home is broadly consistent across all age groups, however younger age groups are more likely to gamble in additional locations. Figure 13 shows that this trend is relatively consistent with findings from 2015, although play in multiple locations has broadened for 18-24 and 35-44 year olds and slightly narrowed for 25-34 and 45-54 year olds. In line with the increase in online gambling using a mobile phone seen in those aged 18-44 years old, there has also been a parallel increase in gambling at work (19%, +4% \(^{22}\) from 2015) and gambling whilst commuting (22%, +3% \(^{22}\) from 2015) among 18-24 years olds. Additionally, the data shows an increase in gambling whilst commuting by 35-44 year olds (15%, +4% from 2015), along with in pubs and clubs (12%, +4% from 2015) and at sports venues or tracks (9%, +4% from 2015).

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\(^{22}\) Not statistically significant at the 95% level.
Devices used and location of online gambling by activity

Figure 14 below maps the proportion of online gamblers using more than one device to access online gambling and of those playing in more than one location by activity. The chart shows a cluster of online betting activities towards the top right hand side of the graph, with betting on dog races showing one of the highest rates of multiple device use at 30% and the highest rate of play in multiple locations at 29%. Spread betting has the highest rate of multiple device use at 33% with 22% of spread bettors gambling in multiple locations. The cluster sitting in the middle of the distribution is made up of online casino style games including poker, roulette, cards and dice, and fruit and slot machine style games. Towards the bottom left of the graph, and with lower rates of multiple device use and gambling in multiple locations sit online participation in lotteries and bingo activities.

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 participated in a betting activity online in the past four weeks are asked whether they have bet in-play.

Overall rates of in-play betting have remained stable, with 26% of online gamblers having bet in-play in the past four weeks (+1%23 from 2015). There has however been an increase in in-play betting amongst 18-24 year olds (45%, +7% from 2015), as shown in figure 15 below.24

Figure 14: Devices used and location of online gambling by activity (n=3,863)

Figure 15: Past four week in-play betting amongst online gamblers by gender and age (n=3,863)

---

23 Not statistically significant at the 95% level.
24 This is likely due to the timing of the UEFA European Football Championship and the Rio 2016 Olympics, which both occurred in the summer of 2016, and prompted unusually high rates of betting activity, particularly amongst younger people.
Online gamblers are asked how many online accounts they have with gambling companies, covering all activities including betting, bingo and lotteries, and how many of those they spend money with regularly – either in the past 12 months or on a monthly basis. On average gamblers had 3 online accounts with gambling companies in 2016, a slight decrease from the 3.5 reported in 2015. As figure 16 below shows, men have more accounts than women (3.5 compared with 2.5), and those aged 25-34 and 35-44 have the highest average number of accounts.

Figure 16: Average number of accounts by gender and age (n=3,863)

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Overall</th>
<th>Males</th>
<th>Females</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24 year olds</td>
<td>2.8</td>
<td>3.2</td>
<td>2.4</td>
</tr>
<tr>
<td>25-34 year olds</td>
<td>3.0</td>
<td>3.3</td>
<td>2.7</td>
</tr>
<tr>
<td>35-44 year olds</td>
<td>3.2</td>
<td>3.4</td>
<td>2.9</td>
</tr>
<tr>
<td>45-54 year olds</td>
<td>3.1</td>
<td>3.3</td>
<td>2.8</td>
</tr>
<tr>
<td>55-64 year olds</td>
<td>2.9</td>
<td>3.1</td>
<td>2.7</td>
</tr>
<tr>
<td>65+ year olds</td>
<td>2.8</td>
<td>3.0</td>
<td>2.6</td>
</tr>
</tbody>
</table>

Figure 17: Number of accounts by age (n=3,863)

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Number of accounts</th>
<th>Number of accounts gambled with in the past 12 months</th>
<th>Number of accounts gambled with monthly</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24 year olds</td>
<td>2.8</td>
<td>1.5</td>
<td>1.3</td>
</tr>
<tr>
<td>25-34 year olds</td>
<td>3.0</td>
<td>1.6</td>
<td>1.4</td>
</tr>
<tr>
<td>35-44 year olds</td>
<td>3.2</td>
<td>1.7</td>
<td>1.5</td>
</tr>
<tr>
<td>45-54 year olds</td>
<td>3.1</td>
<td>1.6</td>
<td>1.4</td>
</tr>
<tr>
<td>55-64 year olds</td>
<td>2.9</td>
<td>1.5</td>
<td>1.3</td>
</tr>
<tr>
<td>65+ year olds</td>
<td>2.8</td>
<td>1.5</td>
<td>1.3</td>
</tr>
</tbody>
</table>

Around half of online gamblers only have one online account, with 11% having more than 5 accounts. 14% of male online gamblers have more than 5 accounts (+1% from 2015), as opposed to 7% of females (no change from 2015). As figure 17 below shows, 25-34 and 35-44 year olds are most likely to have more than 5 online accounts (16% for both in year to December 2016), followed by 18-24 year olds (11%) and 45-54 year olds (11%).

None of the percentage point changes in this section are significant to the 95% level.
Consumer interest and awareness

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

Self-exclusion and gambling management tools

If a gambler thinks that they are spending too much time or money gambling – whether online or in gambling premises – and wish to be supported in their decision to stop they can ask to be self-excluded from a gambling company. 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. The headline findings are shown in figure 18 below.

Figure 18: Awareness and use of self exclusion (n=6,104)

Aside from the overall increase in awareness of self-exclusion, none of the percentage point changes in this section are significant to the 95% level.

Limit setting and reality check are also available on machines in bookmakers.

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26 Limit setting and reality check are also available on machines in bookmakers.

27 Limit setting and reality check are also available on machines in bookmakers.

---
Overall 6% of gamblers have ever self-excluded from a gambling company. This is consistent with the self-exclusion rate observed in 2015 but, as figure 19 below shows, there has been an increase in awareness of self-exclusion. In 2016 37% of gamblers who did not self-exclude were aware of self-exclusion despite not using it (+8% from 2015).

As shown in figure 20 below, men are more likely to self-exclude than women, with 7% ever having done so in 2016 compared to 5% of women. 25-34 year olds are most likely to self-exclude (14%, -2% from 2015). Some age groups have seen an increase in self-exclusion, including 35-44 year olds (9%, +2% from 2015) and 45-54 year olds (4%, +1% from 2015). On average those who have self-excluded have done so from 2 gambling companies. 24% have self-excluded from 3 or more companies.
Whilst self-exclusion is a facility to manage potentially problematic gambling, not everyone will use it for that reason. Gamblers who say that they have self-excluded in the survey are therefore also asked why they chose to self-exclude. Figure 21 below shows that the most common reason for using self-exclusion was to control the amount of money being gambled overall (45%, no change from 2015), followed by people using self-exclusion to close their account with a gambling company (40%, +3% from 2015).

Along with self-exclusion by operator, respondents are also asked whether they have used or are aware of a variety of other gambling management tools. These results are shown in figure 22 below, and indicate that financial limits are the most used with 10% of gamblers having done so (+1% from 2015), and with a further 47% aware of them despite not making use of them (-3% from 2015). Self-exclusion by product has the lowest use and awareness rates, which are 2% (no change from 2015) and 25% (+4% from 2015) respectively. An explanation for this is that unlike the other tools referenced exclusion by product is not a tool the Commission requires operators to provide.
Men are more likely to use financial limits and to exclude by product than women, whilst rates for time outs and reality checks are similar for each gender. 25-34 year olds are most likely to use any of the gambling management tools compared with other age groups, as shown in figure 23 below.

Respondents who had made use of any of the tools were again asked why they chose to do so, with the majority stating that this was to control their gambling and the amount of money that they were spending in a certain session or to avoid gambling on a specific product. This question was asked openly, and a selection of responses is illustrated below.

“Financial Limit was to stop me spending more than a fixed amount each month, it’s difficult to keep track of how much you put into an account, once winnings are added or days go by without placing a bet and I found I put more in some months than I would normally allow myself.”

“To remind me how long I have been playing.”

“I set a limit on my account just in case I got hacked or I played while drunk so I could limit the amount I would lose.”
In June 2016 questions were added to the online survey in response to the Commission’s concerns about potential breaches of consumer law in the gambling industry, originally raised by gambling consumers. In the June wave of the survey, gamblers were asked whether they had ever read terms and conditions for gambling products and, if they had, whether they found them to be helpful. Follow-up questions were then added in July to capture qualitative feedback from gamblers who had not read terms and conditions, and those who felt they had been in a situation where a gambling company’s terms and conditions had been unfair.

As figure 24 below shows, 23% of gamblers had ever read terms and conditions, although the majority had not despite being aware of their availability. 21% of gamblers did not know that terms and conditions were available.

Figure 24: Use and awareness of terms and conditions (n=1,173)
Women are less likely to read terms and conditions, with 19% having ever done so compared to 27% of men. 36% of respondents who weren’t aware that terms and conditions were available were aged 65+, and 28% were retired with a private pension. Lower income groups are also less likely to have read terms and conditions – 44% of gamblers who were not aware that terms and conditions were available had a household income of less than £21,000.

Figure 25 below displays the top ten reasons why people (including those who had not gambled in the past 12 months) have not read terms and conditions provided by gambling companies, coded from open responses. The most common reason is that they are too long winded or there is too much to read, with 20% of respondents stating this in their answers. The selection of quotes below provide some insight into the responses.

“I expect that they are written in ‘legalese’ and that I would not fully understand them.”

“Too long and I wasn’t doing anything which could contravene the terms and conditions”

“Terms & Conditions (for anything) are usually ridiculously long-winded and take forever to read. With the small amounts I gamble, I don't really feel like I need to read them. If I were to ever gamble with big bucks, I'd definitely consider reading them though.”
24% of respondents who had read a gambling company’s terms and conditions stated that they had been in a situation where they felt that they were unfair. As figure 26 and the responses below show, the most common examples of this are wagering requirements which must be fulfilled before winnings can be claimed, unfair availability of and qualification for free bets, and feeling that the odds are stacked against the player.

*Figure 26: Top ten reasons for terms and conditions being found to be unfair (n=105)*

- Have to wager a certain amount before you can claim prizes / winnings
- Unfair limits on the availability of / qualifying for a free bet
- Too difficult to win / stacked against you / in the companies favour
- Poor odds given
- Issues regarding tax on winnings
- Extra time is not included in bet / void after 90 minutes
- Very complicated / unclear / technical jargon
- No free phone / have to all premium number
- They accept bets when races have begun, instantly voiding the bet
- They are able to close accounts / ban you when they like

*“When you deposit, you have to receive a bonus, then you cannot withdraw any funds until you have wagered maybe up to 200 times your bonus!”*

*“The way the sign-up bonuses work. Too high betting requirements. I think they try to get you addicted to gambling.”*

*“Disallowing me the introductory free bet just because someone in my household had already done the same offer”*
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 February and August of each year, with the questions asked to all online gamblers.

Respondents are asked whether they follow a gambling company on Facebook, Twitter, LinkedIn, Google+ and Instagram. Overall 26% of people in year to December 2016 were following gambling companies on Facebook (+6% from 2015), making it the most popular social media platform. As figure 28 below shows, this is followed by Twitter (15%, +4% from 2015), Google+ (6%, no change from 2015) and Instagram (6%, +2% from 2015).

Overall 26% of people in year to December 2016 were following gambling companies on Facebook (+6% from 2015), making it the most popular social media platform. As figure 28 below shows this is followed by Twitter (15%, +4% from 2015), Google+ (6%, no change from 2015) and Instagram (6%, +2% from 2015).

This is broadly consistent with findings from the latest Adult’s Media Use and Attitudes Report (Ofcom, 2016)28, which identifies Facebook as the most popular social media platform, followed by Twitter.

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28 Adult’s Media Use and Attitudes (Ofcom, 2016).
Respondents who do follow gambling companies on social media and who have gambled online in the past 12 months, are asked whether or not social media posts or various forms of advertising have prompted them to spend money on gambling. Online gamblers are more likely to be prompted to spend money on gambling by advertising than social media posts, with 46% in 2016 saying that they had been, compared to 21% by social media posts. As figure 30 below shows, the impact of advertising is particularly high for 18-24 years olds (with 68% of online gamblers in this age group saying that they have been prompted to gamble by advertising across all mediums), 25-34 year olds (60%) and 35-44 year olds (57%). Being prompted by social media posts is also highest in these age groups.

Exploring advertising in particular, shown in figure 31 below, online gamblers are most likely to be prompted to gamble by adverts on television (24%, +2% from 2015), followed by adverts online (21%, no change from 2015) and advertising on social media (15%, +2% from 2015).

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29 Social media posts refers to editorial content and other posts on social media, although may include some elements of advertising.  
30 Covers all advertising on all mediums, including pop up and side bar advertising on social media sites.  
31 Not statistically significant at the 95% level.  
32 Not statistically significant at the 95% level.
However, online gamblers were most likely to be prompted to spend money on gambling by promotions for free bets and bonuses with 31% reporting this in the year to December 2016 (-1%33 from 2015).

Figure 31: Proportion of online gamblers prompted to spend money on gambling by advertising (n=2,067)

Social gaming

Some games that can be played online often look like gambling but do not meet the legal definition of gambling. They may involve a game of chance for a prize and may use gambling-related items or mechanics such as cards or dice, but offer a prize which is not money or money’s worth. Some of these games are ‘social’ in the sense that interaction with other people is a key feature of the gaming or gambling.

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

• The growth in use of social media for social gaming and gambling
• An increasing convergence between the products of traditional gambling and social gaming businesses
• Significant investment by companies developing new products or ways of marketing existing products.

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 quarterly basis.

Overall 21% of respondents had played online gambling-style games in 2016 (no change from 2015). As figure 32 below shows, when looking just at people who had gambled online in the past 12 months 31% had also played online gambling-style games in 2016 (-1%33 from 2015).

Figure 32: Participation in online gambling-style games (n=8,378)

Not statistically significant at the 95% level.
Among all respondents men were more likely to have participated in social gaming than women, with 23% having done so compared to 19%. However, amongst online gamblers the rates were equal at 31% for both men and women. Across all respondents rates by age group have remained relatively consistent, however there has been an increase in participation by 18-24 year old online gamblers (47%, +6% from 2015). This has taken place alongside a decline in social gaming for online gamblers in all other age groups. This trend is displayed in figure 33 below.

Figure 33: Participation in online gambling-style games amongst online gamblers by gender and age (n=8,378)

![Bar chart showing participation by gender and age group for online gamblers in 2015 and 2016.]

Slot or fruit machine style online games are the most popular game type, with 56% of social gamers having played them in the past four weeks in year to December 2016 (+4% from 2015). As figure 35 shows, this is followed by bingo games (51%, no change from 2015), casino games (44%, +3% from 2015) and poker (38%, +5% from 2015).

Figure 35: Past four week participation in online gambling-style games by game type (n=1,778)

![Bar chart showing past four week participation by game type for online gamblers in 2015 and 2016.]

34 Not statistically significant at the 95% level.
Amongst social gamers who had also gambled 49% stated that gambling to win money or money’s worth was the first activity that they undertook, whilst 47% reported that they had played online gambling-style games first\textsuperscript{35}. As figure 36 below shows, these rates are stable compared to 2015.

\textsuperscript{35} The remaining 4\% could not remember which they had done first.
Perceptions and attitudes

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 3 and figure 37 below firstly show the percentage of respondents who agreed (either strongly or slightly), that gambling in this country is conducted fairly and can be trusted.

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

<table>
<thead>
<tr>
<th>In this country, gambling is conducted fairly and can be trusted (%)</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>All respondents</td>
<td>48.8</td>
<td>49.6</td>
<td>48.4</td>
<td>49.3</td>
<td>48.5</td>
<td>42.3</td>
<td>41.2</td>
<td>38.7</td>
<td>34.3</td>
</tr>
<tr>
<td>Gambled past 12 months</td>
<td>60.7</td>
<td>60.3</td>
<td>59.4</td>
<td>58.6</td>
<td>57.3</td>
<td>51.0</td>
<td>48.8</td>
<td>44.8</td>
<td>37.7</td>
</tr>
<tr>
<td>Not gambled past 12 months</td>
<td>39.5</td>
<td>39.7</td>
<td>39.6</td>
<td>39.4</td>
<td>39.7</td>
<td>39.0</td>
<td>31.2</td>
<td>27.2</td>
<td>28.6</td>
</tr>
</tbody>
</table>

Overall, 34% of people in Great Britain felt that gambling was fair and could be trusted in 2016 (-5% from 2015). Whilst participation in gambling is associated with a more positive perception of this, the data below shows that there has been a declining trend in people’s confidence, which appears amongst both gamblers and non-gamblers until 2015. There has actually been an increase in positivity amongst non-gamblers (29%, +2% from 2015) alongside a substantial decrease in gamblers (38%, -7% from 2015). These findings could be linked to consumers’ concerns about the fairness of terms and conditions, and the odds offered by gambling companies, as outlined earlier in this report.
Table 4 and figure 38 below outline the percentage of respondents who agreed (either strongly or slightly) that gambling in Great Britain is associated with criminal activity.

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

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>All respondents</td>
<td>42.0</td>
<td>41.3</td>
<td>36.9</td>
<td>36.5</td>
<td>39.6</td>
<td>39.8</td>
<td>41.2</td>
<td>39.6</td>
<td>38.5</td>
</tr>
<tr>
<td>Gambled past 12 months</td>
<td>40.3</td>
<td>38.2</td>
<td>35.8</td>
<td>34.4</td>
<td>36.5</td>
<td>37.8</td>
<td>40.2</td>
<td>37.4</td>
<td>36.2</td>
</tr>
<tr>
<td>Not gambled past 12 months</td>
<td>44.6</td>
<td>46.7</td>
<td>39.3</td>
<td>45.5</td>
<td>45.3</td>
<td>42.5</td>
<td>42.9</td>
<td>43.8</td>
<td>42.3</td>
</tr>
</tbody>
</table>

Overall 39% of people in Great Britain agreed that gambling is associated with criminal activity in 2016 (-1% from 2015). None of the percentage point changes between 2015 and 2016 on table 4 are significant to the 95% level. Again, gamblers’ perceptions are more positive than non-gamblers, although the trend since 2008 has seen a lot more fluctuation. The proportion of people who associate gambling with crime has fallen amongst gamblers (36%, -1% from 2015) and non-gamblers (42%, -2% from 2015).

A range of crimes were mentioned in response to this question, predominantly including theft, fraud, money laundering and match-fixing.
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\(^{36}\).

The ATGS-8 statements were added to the Commission’s telephone survey in March 2016 to provide an up to date score for the first time since 2010. Total scores range between 8 and 40, with a score of 24 representing the exact mid-point and an overall neutral opinion towards gambling. Scores above 24 are interpreted as representing more positive attitudes overall, whilst scores below 24 represent more negative attitudes overall. Table 5 and figure 39 below show the mean overall ATGS-8 score as well as the individual scores for each attitude statement across age and gender groups.

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

<table>
<thead>
<tr>
<th>Agree with statement</th>
<th>All</th>
<th>Male</th>
<th>Female</th>
<th>16 – 24</th>
<th>25 – 34</th>
<th>35 – 44</th>
<th>45 – 54</th>
<th>55 – 64</th>
<th>65+</th>
</tr>
</thead>
<tbody>
<tr>
<td>People should have the right to gamble whenever they want</td>
<td>3.7</td>
<td>3.8</td>
<td>3.5</td>
<td>3.8</td>
<td>3.8</td>
<td>3.7</td>
<td>3.6</td>
<td>3.7</td>
<td>3.6</td>
</tr>
<tr>
<td>There are too many opportunities for gambling nowadays</td>
<td>1.8</td>
<td>1.9</td>
<td>1.7</td>
<td>2.1</td>
<td>1.9</td>
<td>1.7</td>
<td>1.7</td>
<td>1.6</td>
<td>1.8</td>
</tr>
<tr>
<td>Gambling should be discouraged</td>
<td>2.4</td>
<td>2.6</td>
<td>2.3</td>
<td>2.5</td>
<td>2.6</td>
<td>2.4</td>
<td>2.4</td>
<td>2.4</td>
<td>2.4</td>
</tr>
<tr>
<td>Most people who gamble do so sensibly</td>
<td>3.0</td>
<td>3.1</td>
<td>3.0</td>
<td>3.0</td>
<td>3.0</td>
<td>3.1</td>
<td>3.0</td>
<td>3.1</td>
<td>3.1</td>
</tr>
<tr>
<td>Gambling is dangerous for family life</td>
<td>2.2</td>
<td>2.2</td>
<td>2.1</td>
<td>2.3</td>
<td>2.3</td>
<td>2.2</td>
<td>2.2</td>
<td>2.1</td>
<td>2.0</td>
</tr>
<tr>
<td>On balance, gambling is good for society</td>
<td>2.3</td>
<td>2.3</td>
<td>2.2</td>
<td>2.5</td>
<td>2.5</td>
<td>2.3</td>
<td>2.2</td>
<td>2.2</td>
<td>2.1</td>
</tr>
<tr>
<td>Gambling livens up life</td>
<td>2.7</td>
<td>2.5</td>
<td>2.5</td>
<td>2.9</td>
<td>2.9</td>
<td>2.7</td>
<td>2.6</td>
<td>2.6</td>
<td>2.4</td>
</tr>
<tr>
<td>It would be better if gambling was banned altogether</td>
<td>3.5</td>
<td>3.7</td>
<td>3.3</td>
<td>3.6</td>
<td>3.7</td>
<td>3.6</td>
<td>3.5</td>
<td>3.5</td>
<td>3.4</td>
</tr>
<tr>
<td><strong>Total ATGS-8 score</strong></td>
<td><strong>21.5</strong></td>
<td><strong>22.6</strong></td>
<td><strong>20.6</strong></td>
<td><strong>22.7</strong></td>
<td><strong>22.5</strong></td>
<td><strong>21.5</strong></td>
<td><strong>21.1</strong></td>
<td><strong>21.1</strong></td>
<td><strong>20.7</strong></td>
</tr>
</tbody>
</table>

The total ATGS-8 score for all respondents is 21.5, which is to the negative side of the neutral point of 24 (indicated on figure 32 below). On average men expressed more positive attitudes to gambling than women on all of the individual attitudes statements and therefore had a higher overall score of 22.6 compared to 20.6 for women. Younger people were generally more positive than older people, although the total score for all age groups was below the neutral point.

### Figure 39: Total ATGS-8 score by gender and age (n=4,001)

![Figure 39: Total ATGS-8 score by gender and age (n=4,001)](image)

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\(^{36}\) British Gambling Prevalence Survey (2010).
Due to the data being collected using different methodologies it is not possible to make a definitive comparison to the ATGS-8 score reported in the BGPS 2010. However, indicative high level comparisons are shown in figure 40 below and suggest that attitudes have become more negative since the last time the ATGS-8 was administered. It also shows that attitudes are more negative amongst non-gamblers than gamblers.

Supporting this, figure 41 below shows the proportion of respondents who agreed with each individual attitudes statement. In 2016 78% of people agreed that there are too many opportunities for gambling nowadays, whilst 69% agree that gambling is dangerous for family life. However, 67% agree that people should have the right to gamble whenever they want. Only 15% of people agree that gambling is good for society, and 23% feel that it would be better if gambling was banned altogether.

The findings generated by the ATGS-8 appear to broadly corroborate those seen in the Commission’s longstanding perceptions data, and strengthen the suggestion that public concerns are increasing and tolerance decreasing.
Public opinion on gambling policy

In October 2016 further questions capturing the opinions and attitudes of the Great British public were included in the Commission’s online survey to 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 currently topical gambling policy issues. The questions were asked to all respondents in each wave of data collection.

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 42 below along with rates of public awareness.

Figure 42: Awareness of gambling policy issues (n=2,079)

The policy issue with highest rates of awareness amongst the general public is the number of gambling premises on the high street, with 48% of people stating that they knew a lot or a little bit about this topic. This was followed by the content of gambling advertising (43%) and the controls in place to ensure that children and young people are not exposed to gambling (41%).

This was followed by a question used to ascertain how important the public feels that various regulatory measures covering each of the nine issues are. Respondents were asked to rank each issue in order of importance. Figure 43 below shows the results of this ranking exercise – in which the issue most often ranked as the highest importance, by 30% of people, was having controls in place to ensure that children and young people are not exposed to gambling. This was also most often ranked in respondents’ top three. This is followed by the increased regulation of non-UK based online gambling operators, which 12% of people ranked as most important, followed by setting stake limits on machines in bookmakers and regulating the number of gambling premises on the high street which were both ranked as most important by 11% of people.
Finally, respondents were asked which communications channels had informed their overall opinion of gambling and its impact on society. Figure 44 below shows that opinions were predominantly informed by personal experience – either that of the respondents themselves (40%) or of a friend or family member (33%). Other common channels include the portrayal of gambling in advertising (35%) and television news (34%).
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 Populus. The results cover the calendar years 2013 – 2016 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+ in Great Britain.

Telephone survey sample is generated through Random Digit Dialling (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

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37 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.

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

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

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

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

**Gambling participation**

Rates of problem gambling are also collected on a quarterly basis in the telephone survey, using the short form Problem Gambling Severity Index (PGSI mini-screen). 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:

<table>
<thead>
<tr>
<th>Score</th>
<th>Categorisation</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Non-problem gambler</td>
</tr>
<tr>
<td>1</td>
<td>Low-risk gambler</td>
</tr>
<tr>
<td>2-3</td>
<td>Moderate-risk gambler</td>
</tr>
<tr>
<td>4+</td>
<td>Problem gambler</td>
</tr>
</tbody>
</table>

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.

Developing a Short Form of the PGSI (Volberg, 2012).
Online gambling behaviour

As well as collecting data on overall gambling participation, the Commission collects more in-depth data from online gamblers specifically about their online gambling behaviour. This is done via a quarterly online survey conducted by Populus as part of their online omnibus survey. Results cover the calendar year 2016, with surveys again taking place in March, 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.

Online survey sample is sourced through a 50/50 split of panel and freshly sourced sample. The sample sourced fresh is recruited through a range of websites. The sample is subject to quotas in-line with those used for the telephone survey which are outlined above. On introduction respondents are screened to ensure they are 18+ and fit in remaining unfilled quotas.

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
• 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 interest and awareness

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, annually or in a succession of monthly dip surveys depending on the nature of the questions. Some are generated on an ad-hoc basis in response to changes in trends observed through either the telephone survey or the core online survey, or in line with emerging issues in the gambling industry.

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

• Awareness and use of self-exclusion and gambling management tools
• Use and understanding of terms and conditions
• Advertising and social media
• Social gaming

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.
Consumer 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:

1. Whether gambling is fair and can be trusted
2. Whether gambling is linked to crime

From 2012 – 2014 this survey was administered by ICM as part of their telephone omnibus survey. In 2015 the survey was administered as a standalone survey by NatCen.

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

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

This section also includes data from wider questions on public opinions, captured using the Commission's online survey.
Keeping gambling fair and safe for all

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