

Gambling participation: activities and mode of access

January 2015

1 Key findings

1.1 The following findings are based on a set of questions commissioned by the Gambling Commission in omnibus surveys conducted by ICM Research. These questions ask respondents about their gambling participation in the past four weeks. The data in this report is from the four quarterly surveys conducted in 2014¹.

Gambling participation in the past four weeks

- An average of 53% of respondents had participated in at least one form of gambling in the previous four weeks. This compares with 55% in 2013 and 57% in 2012.
- A larger proportion of male than female respondents had participated in gambling in the previous four weeks (57% of males and 50% of females).
- An average of 16% of respondents had participated in at least one form of online gambling in the previous four weeks.
- A larger proportion of male than female respondents had participated in online gambling in the previous four weeks (18% of males and 13% of females).
- If those respondents only playing the National Lottery are excluded, the proportion of respondents who had participated in gambling in the previous four weeks falls to 33%.
- When respondents only playing National Lottery products online are excluded, the proportion of respondents who had participated in online gambling falls to 10%.

Participation in each activity

- The most popular gambling activity was National Lottery tickets (37% of respondents). This was followed by other lotteries (13%), scratchcards (9%) and betting on horse races (7%).
- No other individual activity was participated in by more than 4% of respondents.

How people gamble

- Overall, 62% of past four week gamblers had gambled 'in person only'. A further 31% had gambled 'online only', and 7% had done so 'both online and in person'.
- For participation in all individual activities, respondents were more likely to report that they gambled 'online only' than they were to report they did the activity both online and in person.
- Participating 'online only' was the most popular method of gambling for spread betting and sports betting.

Gambling involvement

 The most common frequency of participation when looking at an aggregate of all activities for past four week gamblers was 'once a week'. For participation on all aggregated betting activities the most common frequency was 'less than once a month'.

¹ From January 2015 this data will presented in a combination of amended tables and charts. There have been no methodological changes made to the survey. The tables published previously, but not retained in this report, can be found in Annex B.

2 Gambling participation in the past four weeks

2.1 Table 1 shows that during 2014 an average of 53% of respondents said they had participated in at least one form of gambling in the previous four weeks. This compares with 55% in 2013 and 57% in 2012. A larger proportion of male than female respondents had participated: 57% of males and 50% of females. Those participating in gambling were more likely to be aged between 35-44, 45-54 or 55-64 (56%, 56% and 58% respectively of respondents in the age range). Respondents aged 18-24, 25-34 or 65+ were least likely to have participated (51%, 50% and 51% respectively).

Table 1: Proportion of respondents participating in at least one form of gambling by gender and age

<u> </u>				
Gambling participation by gender and age		2012	2013	2014
All respondents	%	57	55	53
male respondents	%	60	60	57
female respondents	%	55	50	50
18-24 year olds	%	44	46	51 ²
25-34 year olds	%	55	46	50
35-44 year olds	%	60	57	56
45-54 year olds	%	60	59	55
55-64 year olds	%	60	62	58
65+ year olds	%	60	58	51
00+ year olus	70	60	56	

See Annex A for base sizes.

2.2 Table 2 shows that during 2014 an average of 16% of respondents said they had participated in at least one form of online gambling in the previous four weeks. This compares with 15% in 2013 and 14% in 2012. A larger proportion of male than female respondents had participated: 18% of males and 13% of females. Those participating in online gambling were more likely to be aged between 18-24, 25-34 or 35-44 (18%, 20% and 19% respectively of respondents in the age range). Respondents aged 65+ remain least likely to have participated (8%).

Table 2: Proportion of respondents participating in at least one form of online gambling by gender and age

Online gambling participation by gender and age		2012	2013	2014
All respondents	%	14	15	16
male respondents	%	16	19	18
female respondents	%	12	11	13
18-24 year olds	%	14	15	18
25-34 year olds	%	19	18	20
35-44 year olds	%	20	22	19
45-54 year olds	%	16	17	16
55-64 year olds	%	12	13	13
65+ year olds	%	7	6	8

See Annex A for base sizes.

2.3 Of those who had participated in at least one form of gambling in the previous four weeks, 38% had gambled only on National Lottery draw products. Consequently, as Table 3 shows, when these respondents are excluded the proportion of respondents who had participated in at least one form of gambling in the previous four weeks falls from 53% to 33%. This figure of 33% compares with 30% in 2013 and 31% in 2012.

² One survey during 2014 took place in a period covering the Grand National. Participation in horse race betting in this quarter amongst those aged 18-24 was especially high and explains the overall increase in participation amongst this age group.

When those playing National Lottery draw products only are excluded, a larger proportion of male than female respondents had participated: 36% of males and 31% of females. Respondents aged 18-24 and 25-34 were more likely to have participated (46% and 37% respectively), and respondents aged 55-64 and 65+ were least likely to have participated (28% and 30% respectively).

Table 3: Proportion of respondents participating in at least one form of gambling by gender

and age, excluding those only playing National Lottery draw products

Gambling participation (excluding participation in National Lottery products only) by gender and age		2012	2013	2014
All respondents	%	31	30	33
male respondents	%	34	33	36
female respondents	%	28	27	31
18-24 year olds	%	36	37	46
25-34 year olds	%	33	28	37
35-44 year olds	%	32	29	32
45-54 year olds	%	28	28	32
55-64 year olds	%	26	28	28
65+ year olds	%	32	31	30

- 2.5 Of those participating in at least one form of online gambling in 2014, 33% had gambled only on National Lottery draw products. As a result, and as Table 4 shows, if those only playing National Lottery draw products online are excluded, the proportion of respondents who had participated in at least one form of online gambling in the previous four weeks falls from 16% to 10%. This figure of 10% compares with 9% in 2013 and 8% in 2012.
- When those respondents who had only gambled on National Lottery draw products online are excluded, a larger proportion of male than female respondents had participated: 12% of males and 8% of females. Respondents aged 18-24 and 25-34 were more likely to have participated (18% and 15% respectively), and those aged 55-64 and 65+ were less likely to have participated (7% and 5% respectively).

Table 4: Proportion of respondents participating in online gambling in the past four weeks, excluding those only playing National Lottery draw products

Online gambling participation (excluding participation in National Lottery products only) by gender and age		2012	2013	2014
All respondents	%	8	9	10
male respondents	%	10	12	12
female respondents	%	6	5	8
18-24 year olds	%	11	12	18
25-34 year olds	%	11	11	15
35-44 year olds	%	10	12	10
45-54 year olds	%	9	9	9
55-64 year olds	%	6	6	7
65+ year olds	%	3	3	5

3 Participation in each activity

3.1 Table 5 shows the types of gambling activity that respondents had undertaken in the previous four weeks. In 2014 the most popular gambling activity was National Lottery tickets (37% of respondents), followed by other lotteries (13%), scratchcards (9%) and betting on horse races (7%). No other individual activity was participated in by more than 4% of respondents. This is consistent with findings from 2012 and 2013.

Table 5: Proportion of respondents gambling by type of gambling activity

Gambling activity		2012	2013	2014	
National Lottery draws	%	46	43	37	
Scratchcards	%	11	10	9	
Another lottery	%	12	13	13	
Fruit or slot machines	%	2	2	2	
Virtual gaming machines in a bookmakers	%	1	1	1	
Bingo ^a	%	3	3	2	
Football pools	%	3	3	3	
Horse races ^b	%	4	4	7	
Dog races ^b	%	0.5	1	1	
Sports betting ^b	%	3	4	4	
Betting on other events ^b	%	1	1	1	
Virtual dog or horse races	%	0.2	0.5	0.2	
Spread betting	%	0.3	0.3	0.1	
Online slot machine style games/instant wins	%	0.3	1	1	
Casino games ^c	%	1	1	1	
Poker at a pub/club	%	0.4	0.5	0.4	
Private betting	%	3	3	4	
Any other activity	%	1	1	1	
Any online betting ^d	%	4	3	4	
Any online gambling ^e	%	14	15	16	
Any gambling activity	%	57	55	53	
Respondents give multiple responses where they participate in more than one activity					

Respondents give multiple responses where they participate in more than one activity.

Figures are rounded to the nearest whole number, with the exception of values less than 0.5 which are shown to the nearest decimal place.

a Includes bingo played at a club or online.

b Includes bets made online, by telephone, or in person, with a bookmaker or a betting exchange. One survey took place in a period covering the Grand National which explains the spike in horse race betting. Analysis of the data does however show that this has no impact on overall gambling rates.

c Includes casino games played in a casino or online.

d Includes online bets on horse races, dog races, other sports or non-sports events with a bookmaker or betting exchange, and betting on virtual dog/horse races online.

e Includes online play in any activity.

4 How people gamble

- **4.1** For each activity undertaken that can be accessed through different methods³, respondents are asked whether they participated in person only, online only, or both. When interpreting this table caution should be applied due to the small base sizes involved for some activities.
- **4.2** Overall, in 2014 62% of past four week gamblers had gambled 'in person only'. A further 31% of past four week gamblers had gambled 'online only', and 7% had done so 'both online and in person'.
- 4.3 Respondents were more likely to state that they participated in the majority of individual activities 'in person only' than 'online only'. Participating 'in person only' was the most popular mode of gambling for the majority of activities, notably virtual dog or horse races (89%), other lotteries (78%) and the National Lottery draws (75%).
- 4.4 However as Chart 1 shows, between 2012 and 2014 there has been a decrease in the popularity of playing 'in person only' for some activities, including football pools (a decrease from 72% in 2012 to 52% in 2014), other lotteries (from 88% in 2012 to 78% in 2014) and bingo (from 75% in 2012 to 68% in 2014). Conversely, 'in person only' participation has increased in other activities, such as betting on dog races (an increase from 79% in 2012 to 93% in 2014), betting on horse races (from 58% in 2012 to 73% in 2014) and casino games (from 43% in 2012 to 55% in 2014).

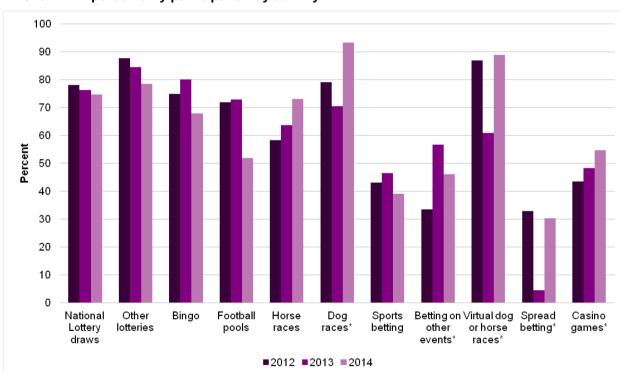


Chart 1: In person only participation by activity

Accompanying data can be found in Table 8 in Annex B *Data drawn from small base sizes

4.5 For participation in all individual activities, respondents were more likely to report that they did these activities 'online only' than they were to report that they did the activity 'both online and in person'. Participating 'online only' was the most popular method of gambling for spread betting (48%) and sports betting (54%).

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³ See survey questions in Annex A for activity list

As Chart 2 shows, between 2012 and 2014 there has been a decrease in the popularity of playing 'online only' for some activities, including casino games (a decrease from 49% in 2012 to 30% in 2014) and betting on other events (from 54% in 2012 to 42% in 2014). Some activities however have seen an increase in 'online only' participation, notably football pools (an increase from 19% in 2012 to 34% in 2014), bingo (from 18% in 2012 to 31% in 2014) and other lotteries (from 10% in 2012 to 19% in 2014).

100 90 80 70 60 Percent 50 40 30 20 10 0 Other Bingo Sports Betting on Virtual dog Football Dog National Horse Spread Casino Lottery lotteries pools races races betting other or horse betting* dames' draws events* races* ■2012 ■2013 ■2014

Chart 2: Online only participation by activity

Accompanying data can be found in Table 9 in Annex B *Data drawn from small base sizes

As Chart 3 shows, between 2012 and 2014 there has been a decrease in the popularity of playing 'both online and in person' for a number of activities, including betting on horse races (a decrease from 10% in 2012 to 3% in 2014) and bingo (from 7% in 2012 to 1% in 2014). Some activities have however seen an increase in 'both online and in person' participation, notably spread betting (an increase from 0% in 2012 to 22% in 2014), casino games (from 7% in 2012 to 16% in 2014) and football pools (from 9% in 2012 to 15% in 2014).

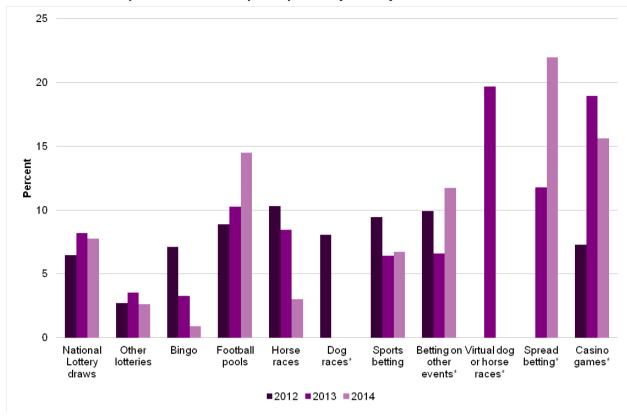


Chart 3: Both in person and online participation by activity

Accompanying data can be found in Table 10 in Annex B

5 Gambling involvement

- 5.1 For each activity undertaken in the past four weeks, respondents are asked how often they spent money on that activity. The tables in this section provide data on overall frequency of play.
- As Table 6 shows, the most common frequency of gambling on any activity for past four week gamblers in 2014 is 'once a week' (39%), followed by 'once a month, less than once a week' (26%), 'less than once a month' (18%) and '2+ days a week' (17%). This is broadly consistent with the data from 2012 and 2013.

Table 6: Frequency of gambling on any activity in the past four weeks

Most common frequency of gambling on any activity		2012	2013	2014
2+ days a week	%	22	19	17
Once a week	%	44	45	39
Once a month, less than once a week	%	23	25	26
Less than once a month	%	11	11	18

5.3 Table 7 shows that the most common frequency of gambling on any betting activity for past four week gamblers in 2014 is 'less than once a month' (53%), followed by 'once a week' (20%), 'once a month, less than once a week' (19%) and '2+ days a week' (8%). In 2012 the most common frequency of betting was 'once a week' (31%), and 'less than once a month (30%) in 2013.

^{*}Data drawn from small base sizes

Table 6: Frequency of gambling on any betting activity in the past four weeks

Most common frequency of betting ^a		2012	2013	2014
2+ days a week	%	20	22	8
Once a week	%	31	28	20
Once a month, less than once a	%			
week		21	20	19
Less than once a month	%	28	30	53

a Betting on horse races, betting on dog races, sports betting or betting on other events.

6 Future publications

- 6.1 This report is now to be published annually, based on an updated annual sample of interviews. The next annual report will be released in January 2016, covering the period of January 2015 to December 2015.
- 6.2 The next publication will be an excel data file containing updated figures for the four quarters up to April 2015 (that is, an average of June 2014, September 2014, December 2014 and March 2015).

Gambling Commission January 2015

Keeping gambling fair and safe for all

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Annex A – Technical Annex

1 Question history and previous datasets

1.1 These questions were introduced in March 2012 and replace the previous 'all gambling' and 'remote' question sets. These new questions were devised to align better with the questions in the British Gambling Prevalence Survey 2010, and to better distinguish between gambling activities (i.e. what respondents are doing) and gambling mode (i.e. how they are doing it). Respondents are also now asked about the frequency of their gambling participation. Previous reports can be accessed on the Gambling Commission's Website.

2 Methodology, dataset and reporting conventions

- 2.1 Each survey is conducted once a quarter (in March, June, September and December) with a nationally representative sample (in terms of age, gender, social classification and region) of adults (over 18-year-olds). To ensure consistency and comparability, both surveys usually take place at the same time of the week in each quarter. The overall sample size is relatively robust, especially when measured on a regular basis over time. However, when analysing specific forms or methods of gambling, the sample numbers are lower, with consequential increased margins of error in the percentages given. Where figures do not add up to 100% it is because respondents refused to answer, answered 'don't know', were permitted to give multiple responses, or because of rounding (the figures in this report have been rounded to the nearest whole number, with the exception of values less than 1%).
- 2.2 In order to minimise sample volatility, all the data contained within this report are shown as annual figures by averaging the results for the four quarterly surveys for each year. A full breakdown of base sizes for 2014 is provided below.
- 2.4 New reporting procedures were introduced in January 2015 in order to make better use of the data available and allow greater presentation of trend data, particularly on mode and frequency of play. The tables used in previous reports but not retained in this report can be found in Annex B and have been updated with data from the most recent four quarterly surveys in order to maintain comparability with previous publications.
- 2.3 The following conventions have been used in the tables:
 - No observations (zero values).
 - [] Estimates in square brackets warn of small base sizes (less than 30).

3 Confidence levels and sample sizes

3.1 ICM Research interviewed the following random samples of adults (18+) by telephone. Interviews were conducted across the country and the results have been weighted to the profile of all adults. ICM is a member of the British Polling Council and abides by its rules. Further information is available at www.icmresearch.co.uk.

Dataset	Group	Sample size (weighted)	Maximum margin of error at 95% confidence level
	All respondents	4,004	+/- 1.55%
714	male respondents	1,793	+/- 2.31%
December 2014	female respondents	2,211	+/- 2.08%
nbe	18-24 year olds	283	+/- 5.83%
cer	25-34 year olds	496	+/- 4.40%
	35-44 year olds	634	+/- 3.89%
r 5	45-54 year olds	858	+/- 3.35%
Year to	55-64 year olds	710	+/- 3.68%
ŕ	65+ year olds	1023	+/- 3.06%

4 Survey questions

Q1. In the past four weeks, have you spent money on any of the following...

- 1. Tickets for the National Lottery draws (Lotto, EuroMillions, Thunderball, Daily Play, Hotpicks) [#]
- 2. Scratchcards [*]
- 3. Tickets for a charity lottery or other lottery? [#]
- 4. Fruit or slot machines [*]
- Virtual gaming machines in a bookmaker's to bet on virtual roulette, poker, blackjack or other games? [*]
- 6. Bingo, including bingo played online? [#]
- 7. The football pools [#]
- 8. Betting on horse races [+]
- 9. Betting on dog races [+]
- 10. Betting on sports events [+]
- 11. Betting on other events [+]
- 12. Betting on virtual dog or horse races [#]
- 13. Spread betting [#]
- 14. Online fruit/slot machine style games or online instant win games? [*]
- 15. Roulette, poker, cards or dice in a casino or online? [#]
- 16. Playing poker in a pub tournament/league, or at a club? [*]
- 17. Private betting (sweepstakes, bets between friends) or gambling (playing card games for money) with friends, family or colleagues [*]
- 18. Another form of gambling activity [#]
- 19. Don't know (do not read out) [*]
- 20. Refused (do not read out) [*]
- 21. None of these (do not read out) [*]

[*]: Follow up 'mode' question not required. Go straight to Q3.

For those who endorse activities marked [#]

Q2v1. And, in the last 4 weeks, did you spend money on [activity endorsed at Q1] in person, online or both...?

- 1. In person
- 2. Online
- 3. Both

For those who endorse activities marked [+]

Q2v2. And in the last 4 weeks, did you spend money on [activity endorsed at Q1]...?

- 1. In person at a bookmakers
- 2. In person at the venue or track
- 3. On the phone with a bookmaker
- 4. Online with a bookmaker
- 5. Online with a betting exchange

[For each activity endorsed, asked separately by mode of access]

Q3. Thinking about [activity endorsed and mode of access] how often do you spend money on this activity? [unprompted]

- 1. Everyday/almost every day
- 2. 4-5 days a week
- 3. 2-3 days a week
- 4. About once a week
- 5. 2-3 days a month
- 6. About once a month
- 7. 6-11 times a year
- 8. 1-5 times a year

Annex B

1 Accompanying Tables

1.1 The following tables accompany the findings discussed in this report.

Table 7: Proportion of respondents participating in online gambling in the past four weeks, excluding those only playing National Lottery products

All methods of remote gambling		2012	2013	2014
Those participating in at least one form of online gambling (excluding those only playing National Lottery products) as a percentage of all respondents	%	8	9	10

Table 8: In person only participation by activity

In person only participation in each activity		2012	2013	2014
National Lottery draws	%	78	76	75
Another lottery	%	88	85	78
Bingo	%	75	80	68
Football pools	%	72	73	52
Horse races	%	58	64	71
Dog races	%	[79]	[71]	93
Sports betting	%	43	46	39
Betting on other events	%	[33]	57	44
Virtual dog or horse races	%	[87]	[61]	[89]
Spread betting	%	[33]	[4]	[30]
Casino games	%	[43]	48	55

Table 9: Online only participation by activity

Online only participation in each	Online only participation in each activity		2013	2014
National Lottery draws	%	15	16	18
Another lottery	%	10	12	19
Bingo	%	18	17	31
Football pools	%	19	17	34
Horse races	%	23	21	23
Dog races	%	[9]	[23]	7
Sports betting	%	46	42	53
Betting on other events	%	[54]	37	40
Virtual dog or horse races	%	[13]	[20]	[11]
Spread betting	%	[67]	[84]	[48]
Casino games	%	[49]	33	30

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Table 10: Both in person and online participation by activity

Both in person and online participation in each activity		2012	2013	2014
National Lottery draws	%	6	8	8
Another lottery	%	3	4	3
Bingo	%	7	3	1
Football pools	%	9	10	15
Horse races	%	10	8	3
Dog races	%	[8]	[0]	0
Sports betting	%	9	6	7
Betting on other events	%	[10]	7	12
Virtual dog or horse races	%	[0]	[20]	[0]
Spread betting	%	[0]	[12]	[22]
Casino games	%	[7]	19	16

2 Additional Tables

- 2.1 The data presented in this report was previously released in quarterly participation survey reports. In order to make better use of the data available, these quarterly reports have been replaced with a more extensive annual report containing amended data tables and charts displaying trend data on frequency and mode of play from the past three years.
- **2.2** The following tables were included in previous quarterly reports:

Table 11: Mode of participation in each activity in the past four weeks

		Wheth			
Type of gambling activity	In person only	Online only	Both in person and online	Bases (weighted)	
National Lottery draws	%	75	18	8	1499
Another lottery	%	78	19	3	517
Bingo ^a	%	68	31	1	99
Football pools	%	52	34	15	109
Horse races ^b	%	73	24	3	263
Dog races ^b	%	[93]	[7]	[0]	21
Sports betting ^b	%	39	54	7	166
Betting on other events ^b	%	46	42	12	41
Virtual dog or horse races	%	[89]	[11]	[0]	8
Spread betting	%	[30]	[48]	[22]	6
Casino games ^c	%	55	30	16	49
Any gambling activity	%	62	31	7	2138

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Table 12: Mode of participation in selected betting activities for past four week gamblers

Type of betting activity		In person at bookmakers	In person at track/ course/ venue	On the phone to the bookmakers	Online with a bookmaker	Online with a betting exchange	Bases (weighted)
Horse races	%	67	10	4	25	3	263
Dog races	%	[58]	[37]	[0]	[5]	[2]	21
Sports betting	%	40	8	1	54	10	166
Betting on non- sports events	%	[49]	[12]	[9]	[49]	[13]	41

Table 13: Frequency o	f gambling in	the p			tivity type of participat		
			F				
Type of gambling activity and mode			2+ days a week	Once a week	Once a month, less than once a week	Less than once/ month	Bases (weighted)
National Lottery	In person	%	17	46	27	11	1234
draws	Online	%	16	41	35	8	381
Α Ι	In person	%	17	27	41	15	372
Another lottery	Online	%	4	22	39	35	419
Dingo	In person	%	2	23	55	19	111
Bingo	Online	%	8	33	27	32	97
Football pools	In person	%	18	34	32	16	58
Football pools	Online	%	10	32	34	24	68
Virtual dog or horse	In person	%	12	31	51	6	32
races	Online	%	19	47	24	10	72
Carood botting	In person	%	19	43	28	10	52
Spread betting	Online	%	[19]	[0]	[0]	[81]	7
Casina gamas	In person	%	[0]	[100]	[0]	[0]	1
Casino games	Online	%	[42]	[0]	[58]	[0]	3
Any other activity	In person	%	[31]	[18]	[24]	[27]	4
Any other activity	Online	%	[18]	[22]	[48]	[11]	29
Scratchcards		%	17	12	14	17	57
Fruit or slot machines		%	19	37	0	34	30
Virtual gaming machines in a bookmakers		%	[24]	[12]	[27]	[36]	25
Online slot machine style games/instant wins		%	19	3	14	21	63
Poker at a pub/club		%	12	19	30	7	44
Private betting		%	[3]	[52]	[15]	[12]	21

Table 14: Frequency of gambling in the past four weeks by activity type (betting)

Table 1	4. I requestey of gambing in t	Frequency of participation					
Type of gambling activity and mode			2+ days a week	Once a week	Once a month, less than once a week	Less than once/ month	Bases (weighted)
	In person at bookmakers	%	10	11	11	68	176
ses	In person at track/course/ venue	%	[2]	[0]	[26]	[72]	27
Horse races	On the phone to the bookmakers	%	[5]	[6]	[26]	[63]	11
오	Online with a bookmaker	%	12	13	13	61	65
	Online with a betting exchange	%	[16]	[0]	[14]	[70]	8
	In person at bookmakers	%	[16]	[37]	[18]	[29]	12
Dog races	In person at track/course/ venue	%	[0]	[0]	[10]	[90]	8
	On the phone to the bookmakers	%	[-]	[-]	[-]	[-]	0
	Online with a bookmaker	%	[0]	[100]	[0]	[0]	1
	Online with a betting exchange	%	[9]	[31]	[17]	[42]	17
	In person at bookmakers	%	7	30	32	31	66
Sports betting	In person at track/course/ venue	%	[0]	[7]	[21]	[72]	14
	On the phone to the bookmakers	%	[0]	[59]	[0]	[41]	2
	Online with a bookmaker	%	5	36	34	25	90
	Online with a betting exchange	%	[9]	[31]	[17]	[42]	17
Betting on other events	In person at bookmakers	%	[13]	[13]	[21]	[53]	20
	In person at track/course/ venue	%	[64]	[14]	[0]	[22]	5
	On the phone to the bookmakers	%	[0]	[72]	[0]	[28]	4
Setti	Online with a bookmaker	%	[22]	[29]	[13]	[36]	20
Ш	Online with a betting exchange	%	[37]	[0]	[0]	[63]	5