

## Gambling participation: activities and mode of access

October 2014

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### 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 the year to September 2014.

#### **Gambling participation in the past four weeks**

- An average of 55% of respondents had participated in at least one form of gambling in the previous four weeks. This compares to 55% in 2013.
- A larger proportion of male than female respondents had participated in gambling in the previous four weeks (60% of males and 51% of females).
- An average of 16% of respondents had participated in at least one form of online gambling in the previous four weeks. This compares to 15% in 2013.
- A larger proportion of male than female respondents had participated in online gambling in the previous four weeks (19% of males and 13% of females).
- If those respondents only playing the National Lottery online are excluded, the proportion of respondents who had participated in online gambling falls to 11%. This compares to 9% in 2013.

#### **Participation in each activity**

- The most popular gambling activity was National Lottery tickets (39% of respondents). This was followed by other lotteries (15%), scratchcards (10%) and Horse races (7%).
- No other individual activity was participated in by more than 4% of respondents.

#### **How people gamble**

- Overall, 71% of past four week gamblers had gambled 'in person only'. A further 17% had done so both 'online' and 'in person', and 13% had gambled 'online only'.
- 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, sports betting, and betting on other events.
- Among past four week bettors, betting in person at a bookmakers was the most common option for horse races and dog races, whilst betting online with a bookmaker was the most popular method for sports betting and betting on other events.

#### **Gambling involvement**

- The most common frequency of participation for past four week gamblers was 'once a week' with this being the most common frequency for eight activities, although for

seven activities respondents indicated that their participation was ‘once a month, less than once a week’.

## 2 Gambling participation in the past four weeks

2.1 Table 1 shows that during the year to September 2014 an average of 55% of respondents said they had participated in at least one form of gambling in the previous four weeks. This compares to 55% in 2013. A larger proportion of male than female respondents had participated: 60% of males and 51% of females. Those participating in gambling were more likely to be aged between 35-44, 45-54, 55-64 or 65+ (58%, 57%, 61% and 55% respectively of respondents in the age range). Respondents aged 18-24 or 25-34 were least likely to have participated (50% and 51% respectively).

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

Gambling participation by gender and age		2012	2013	Year to September 2014
All respondents	%	57	55	55
<i>male respondents</i>	%	60	60	60
<i>female respondents</i>	%	55	50	51
<i>18-24 year olds</i>	%	44	46	50
<i>25-34 year olds</i>	%	55	46	51
<i>35-44 year olds</i>	%	60	57	58
<i>45-54 year olds</i>	%	60	59	57
<i>55-64 year olds</i>	%	60	62	61
<i>65+ year olds</i>	%	60	58	55

See technical annex for base sizes.

2.2 Table 2 shows that during the year to September 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 to 15% in 2013. A larger proportion of male than female respondents had participated: 19% of males and 13% of females. Those participating in online gambling were more likely to be aged between 18-24, 25-34, 35-44 or 45-54 (19%, 20%, 19% and 18% respectively of respondents in the age range). Respondents aged 65+ remain least likely to have participated (9%).

**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	Year to September 2014
All respondents	%	14	15	16
<i>male respondents</i>	%	16	19	19
<i>female respondents</i>	%	12	11	13
<i>18-24 year olds</i>	%	14	15	19
<i>25-34 year olds</i>	%	19	18	20
<i>35-44 year olds</i>	%	20	22	19
<i>45-54 year olds</i>	%	16	17	18
<i>55-64 year olds</i>	%	12	13	14
<i>65+ year olds</i>	%	7	6	9

See technical annex for base sizes.

2.3 Of those participating in at least one form of online gambling in the year to September 2014, 33% had gambled only on National Lottery products. As a result, and as Table 3 shows, if those only playing National Lottery products online are excluded, the proportion of

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respondents who had participated in at least one form of online gambling in the previous four weeks falls from 16% to 11%. This figure of 11% compares to 9% in 2013.

**Table 3: Proportion of respondents participating in online gambling in the past four weeks, excluding those only playing National Lottery products**

<b>All methods of remote gambling</b>		<b>2012</b>	<b>2013</b>	<b>Year to September 2014</b>
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	11

## 3 Participation in each activity

**3.1** Table 4 shows the types of gambling activity that respondents had undertaken in the previous four weeks. Over the year to September 2014 the most popular gambling activity was National Lottery tickets (39% of respondents), followed by other lotteries (15%), scratchcards (10%) and Horse races (7%). No other individual activity was participated in by more than 4% of respondents.

**Table 4: Proportion of respondents gambling by type of gambling activity**

<b>Gambling activity</b>		<b>2012</b>	<b>2013</b>	<b>Year to September 2014</b>
National Lottery draws	%	46	43	39
Scratchcards	%	11	10	10
Another lottery	%	12	13	15
Fruit or slot machines	%	2	2	3
Virtual gaming machines in a bookmakers	%	1	1	1
Bingo <sup>a</sup>	%	3	3	2
Football pools	%	3	3	3
Horse races <sup>b</sup>	%	4	4	7
Dog races <sup>b</sup>	%	0.5	1	1
Sports betting <sup>b</sup>	%	3	4	4
Betting on other events <sup>b</sup>	%	1	1	1
Virtual dog or horse races	%	0.2	0.5	0.3
Spread betting	%	0.3	0.3	0.1
Online slot machine style games/instant wins	%	0.3	0.6	0.9
Casino games <sup>c</sup>	%	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
<i>Any online betting<sup>d</sup></i>	%	4	3	4
<i>Any online gambling<sup>e</sup></i>	%	14	15	16
<b>Any gambling activity</b>	<b>%</b>	<b>57</b>	<b>55</b>	<b>55</b>

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 Overall, 71% of past four week gamblers had gambled 'in person only'. A further 17% of past four week gamblers had done so both 'online' and 'in person', and 13% had gambled 'online only'. These estimates include participation in activities that could only be undertaken in one mode (such as virtual gaming machines in a bookmakers). 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, sports betting, and betting on other events.

**Table 5: Mode of participation in each activity in the past four weeks**

Type of gambling activity		Whether online or in person			Bases (weighted)
		In person only	Online only	Both in person and online	
National Lottery draws	%	74	17	9	1576
Another lottery	%	80	18	2	581
Bingo <sup>a</sup>	%	71	29	1	91
Football pools	%	53	29	19	117
Horse races <sup>b</sup>	%	73	23	4	285
Dog races <sup>b</sup>	%	[79]	[21]	[-]	22
Sports betting <sup>b</sup>	%	42	49	9	171
Betting on other events <sup>b</sup>	%	44	46	10	43
Virtual dog or horse races	%	[81]	[19]	[-]	11
Spread betting	%	[-]	[100]	[-]	4
Casino games <sup>c</sup>	%	48	38	14	51
<b>Any gambling activity</b>	<b>%</b>	<b>71</b>	<b>13</b>	<b>17</b>	<b>2213</b>

4.2 Those who reported betting on any event in the past four weeks were asked whether this was in person at a bookmakers, with a bookmaker at the venue, by phone with a bookmaker, online with a bookmaker or with a betting exchange. Among past four week bettors, betting in person at a bookmakers was the most common option for horse races and dog races, whilst online with a bookmaker was the most popular method for sports betting and betting on other events.

**Table 6: Mode of participation in selected betting activities for past four week gamblers**

Type of betting activity		Method of betting					Bases (weighted)
		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	
Horse races	%	67	10	5	24	4	285
Dog races	%	[49]	[30]	[-]	[19]	[2]	22
Sports betting	%	46	7	1	53	10	171
Betting on non-sports events	%	47	11	3	51	15	43

## 5 Gambling involvement

For each activity undertaken in the past four weeks, respondents are asked how often they spent money on that activity. Table 7 shows the frequency of participation for each activity. The most common frequency of participation for past four week gamblers was 'once a week' with this being the most common frequency for eight activities, although for seven activities respondents indicated that their participation was 'once and month, less than once a week'.

**Table 7: Frequency of gambling in the past four weeks by activity type**

Type of gambling activity and mode			Frequency of participation				Bases (weighted)
			2+ days a week	Once a week	Once a month, less than once a week	Less than once/month	
National Lottery draws	In person	%	17	48	25	9	1294
	Online	%	18	42	34	7	403
Another lottery	In person	%	4	25	38	33	479
	Online	%	4	25	54	17	115
Bingo	In person	%	13	35	32	20	65
	Online	%	[20]	[27]	[45]	[7]	27
Football pools	In person	%	17	54	19	10	83
	Online	%	24	42	24	9	55
Virtual dog or horse races	In person	%	[14]	[19]	[-]	[67]	9
	Online	%	[-]	[100]	[-]	[-]	2
Spread betting	In person	%	[-]	[-]	[-]	[-]	0
	Online	%	[24]	[17]	[34]	[25]	4
Casino games	In person	%	11	15	10	65	32
	Online	%	[34]	[6]	[28]	[32]	27
Any other activity	In person	%	[18]	[36]	[6]	[40]	27
	Online	%	[66]	[19]	[15]	[-]	4
Scratchcards		%	17	28	41	15	399
Fruit or slot machines		%	19	26	29	26	100
Virtual gaming machines in a bookmakers		%	24	40	19	17	60
Online slot machine style games/instant wins		%	19	27	42	12	36
Poker at a pub/club		%	[12]	[36]	[30]	[23]	14
Private betting		%	3	14	20	62	168

**5.1** Table 8 shows the frequency of participation for each betting activity undertaken in the past four weeks. When interpreting this table caution should be applied due to the small base sizes involved.

**Table 8: Frequency of gambling in the past four weeks by activity type (betting)**

Type of gambling activity and mode			Frequency of participation				Bases (weighted)
			2+ days a week	Once a week	Once a month, less than once a week	Less than once/month	
Horse races	In person at bookmakers	%	12	14	9	64	192
	In person at track/course/ venue	%	[2]	[32]	[-]	[66]	28
	On the phone to the bookmakers	%	[4]	[13]	[40]	[44]	14
	Online with a bookmaker	%	15	18	11	57	69
	Online with a betting exchange	%	[5]	[21]	[19]	[55]	10
Dog races	In person at bookmakers	%	[16]	[66]	[-]	[17]	11
	In person at track/course/ venue	%	[-]	[-]	[11]	[89]	7
	On the phone to the bookmakers	%	[-]	[-]	[-]	[-]	0
	Online with a bookmaker	%	[-]	[-]	100	[-]	4
	Online with a betting exchange	%	[-]	100	[-]	[-]	1
Sports betting	In person at bookmakers	%	5	46	26	24	79
	In person at track/course/ venue	%	[-]	[-]	[15]	[85]	11
	On the phone to the bookmakers	%	[-]	[59]	[-]	[41]	2
	Online with a bookmaker	%	9	30	38	23	90
	Online with a betting exchange	%	[10]	[36]	[19]	[36]	16
Betting on other events	In person at bookmakers	%	[23]	[15]	[5]	[57]	21
	In person at track/course/ venue	%	[19]	[45]	[36]	[-]	5
	On the phone to the bookmakers	%	[-]	[32]	[-]	[68]	1
	Online with a bookmaker	%	[20]	[26]	[19]	[35]	22
	Online with a betting exchange	%	[64]	[-]	[-]	[36]	6

## 6 Future publications

- 6.1** This data is published quarterly, based on an updated annual sample of interviews. The next publication will include average figures for the four quarters up to January 2014 (that is, an average of March 2014, June 2014, September 2014 and December 2014).

Gambling Commission October 2014

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## 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.
- 1.3 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 most recent quarterly surveys. A full breakdown of base sizes is provided below.
- 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).
- 2.4 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](http://www.icmresearch.co.uk).

### 3 Confidence levels and sample sizes

Dataset	Group	Sample size (weighted)	Maximum margin of error at 95% confidence level
Year to September 2014	All respondents	4,004	+/- 1.55%
	<i>male respondents</i>	1,962	+/- 2.21%
	<i>female respondents</i>	2,042	+/- 2.17%
	<i>18-24 year olds</i>	481	+/- 4.46%
	<i>25-34 year olds</i>	641	+/- 3.87%
	<i>35-44 year olds</i>	761	+/- 3.55%
	<i>45-54 year olds</i>	681	+/- 3.75%
	<i>55-64 year olds</i>	600	+/- 3.99%
	<i>65+ year olds</i>	840	+/- 3.38%



## 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 [\*]
5. 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