

GLOBAL GAMBLING WHITEPAPER 2022

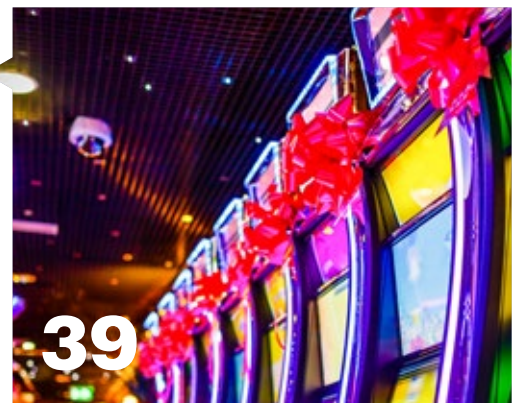
Global Gambling 2022: The consumer view in the gambling debate

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► Introduction

Welcome to this year's global gambling report, Global Gambling 2022: The consumer view in the gambling debate. This year's edition comes at another crucial juncture of the global betting and gaming sector. As a pastime, gambling has arguably never been more regulated than it has today with land-based and online regulatory structures now the norm across the globe.

Yet, it has also never been so much in the spotlight – and open to criticism. So much of what we hear about gambling comes from either the industry itself or from its legislators, with occasional interventions from the legislators and politicians.

But one voice that is often missed in the debate surrounding the future of the sector across the globe is that of the public. A survey such as this, then, adds insight into how both the consumers of gambling products and those who do not participate think about gambling and its place in society.

If the future of regulated gaming is to have legitimacy, it is only through the willingness of both constituent parts of the general public to allow regulated gambling to exist.

What the public thinks about gambling counts and, moreover, it is certain to inform the future shape and structure of how it is regulated.

This survey looks at some key areas of debate around gambling, from the opening up of the sports-betting and online opportunity in the US, to the issues that have emerged in the UK and Europe around gambling advertising through to the position of the lottery in the public consciousness, land-based gambling's place post-pandemic and the legitimacy of gambling.

We hope it adds to the debate.

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PART - 1

US Gambling catching the wave

The single biggest topic affecting the global betting and gaming sector in the past four years has been the liberalization of online sports-betting and to a lesser extent igaming, across dozens of US states since the fall of PASPA in May 2018.

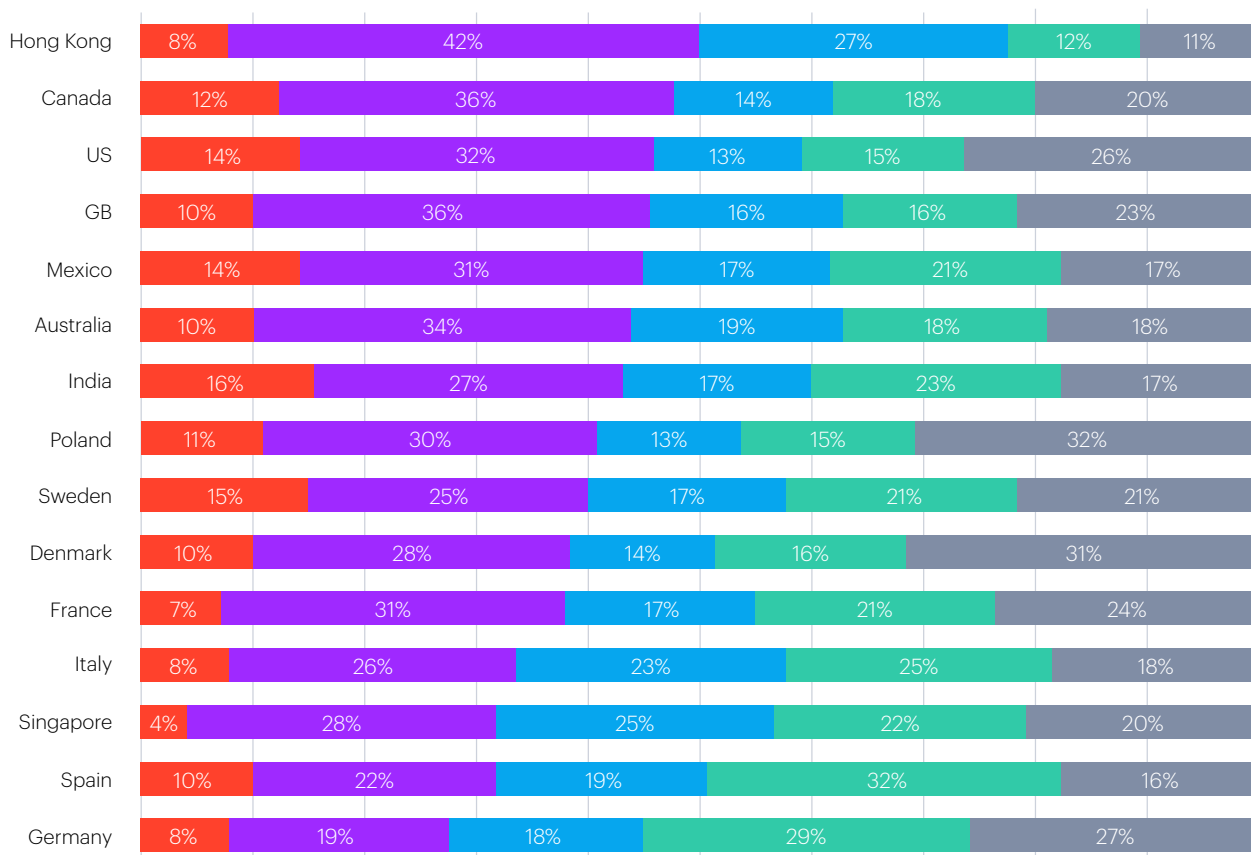
Pleasingly for the industry, the results from our survey seem to suggest the moves made in the intervening four or more years are broadly supported by public opinion.

In the US, asked whether they support the idea that people where they live should be allowed to bet on sports either online or in person, **46%** either strongly or tend to agree

with the statement while only **28%** either tend to or strongly disagree

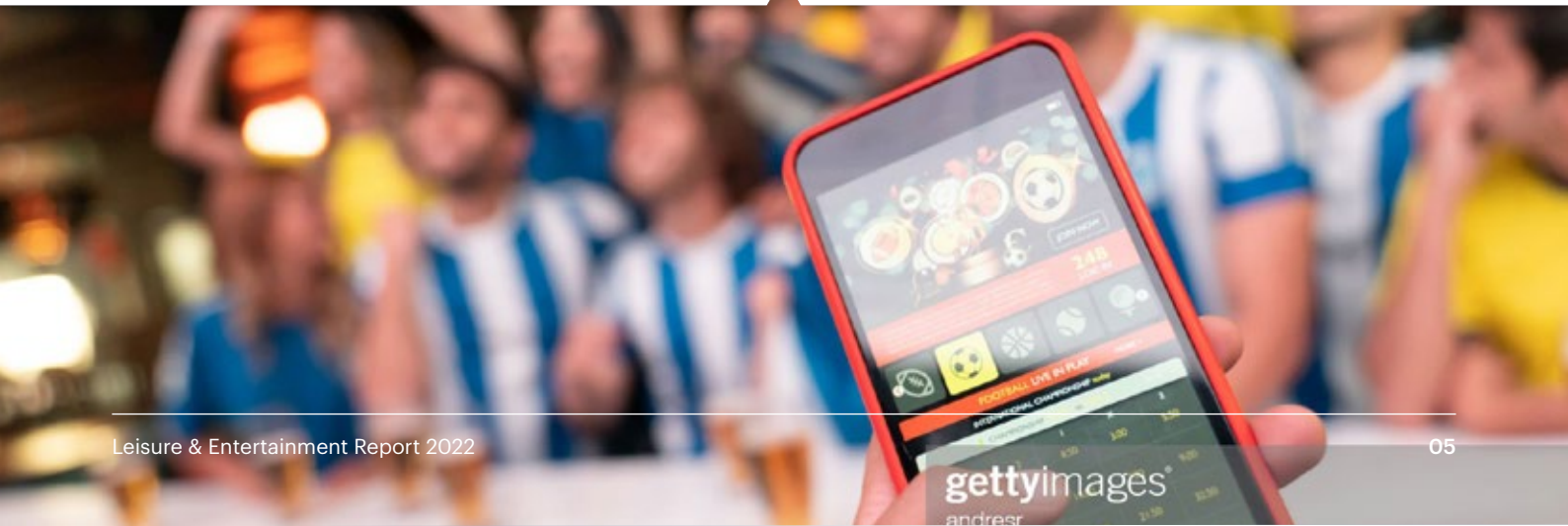
On this question, the US is only just behind Canada (**48%** combined agree) and level with Great Britain, with Hong Kong leading the way at **50%**.

'I support the idea that people where I live should be allowed to bet on sports online and in person' - Agreement by country



● Strongly agree ● Tend to agree ● Tend to disagree ● Strongly disagree ● Don't know

Agreement with the statement = % 'Strongly agree' or 'Strongly disagree' on a five point scale. Percentages may not total 100 due to rounding.





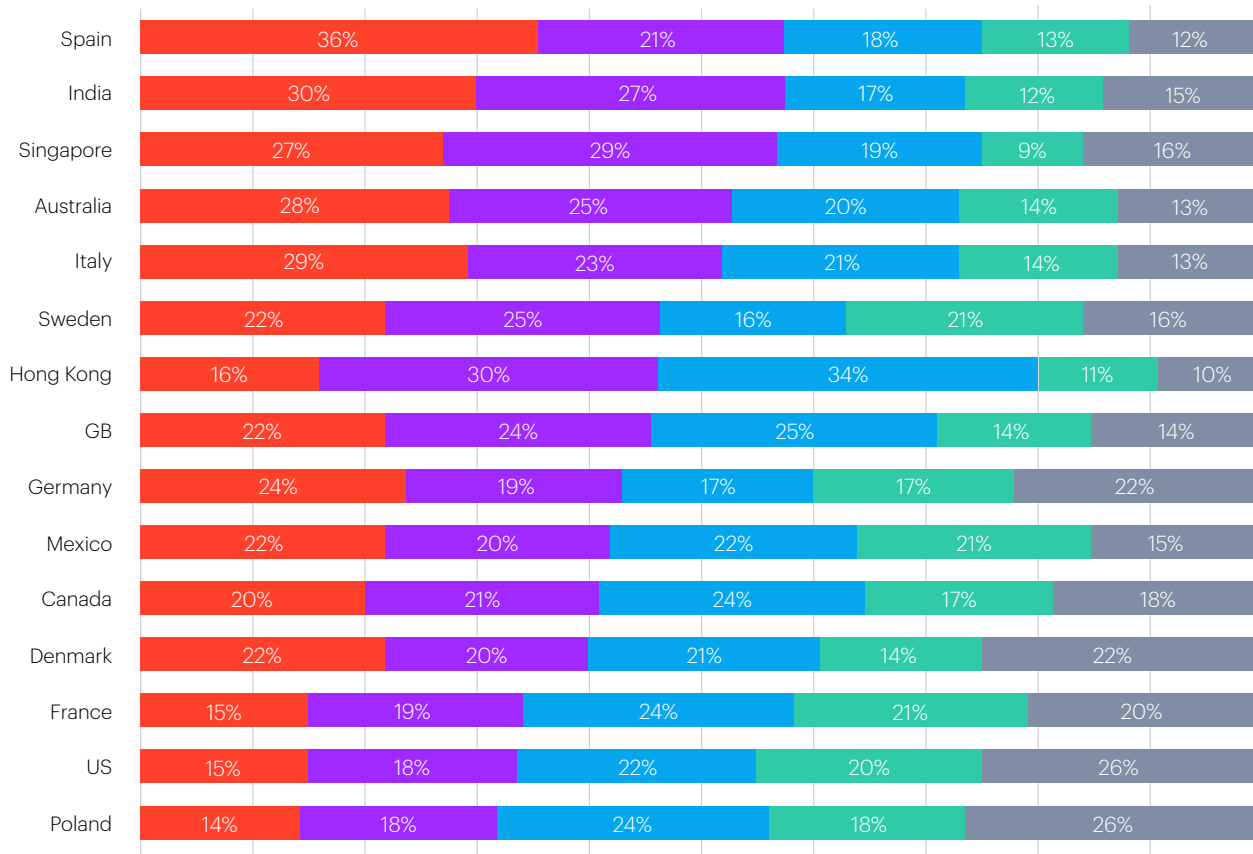
This, it should be added, is a survey of all respondents in the US, not just in states where sports-betting is already available. The reasonably high level of ‘don’t know’ responses at **26%** perhaps points to the transitional status of sports-betting in some large states, particularly California and Florida. It is also interesting to note that US men (**51%**) are more supportive than US women (**41%**).

On the proposition whether online gambling in particular should not be allowed, for instance, the polling finds that **33%** either strongly or tend to agree with the statement while **42%** disagree in total.

Again, against the global benchmark there was a relatively high percentage saying ‘don’t know’ at **26%**. The nearest geographic neighbour is Canada and it is worth comparing attitudes to whether online gambling should be allowed there. Most recently, in April Ontario opened up fully to online sports-betting and igaming.

Again, our data is countrywide as opposed to region-specific, but according to the respondents, **41%** in Canada either tend to agree or strongly agree that online gambling should not be allowed while those disagreeing, who are therefore in favour, stands at **43%**.

'Online gambling should not be allowed' - Agreement by country



● Strongly agree ● Tend to agree ● Tend to disagree ● Strongly disagree ● Don't know

Agreement with the statement = % 'Strongly agree' or 'Strongly disagree' on a five point scale.
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The data will encourage those pushing for further acceptance of online sports-betting and igaming. A similar outcome in the ballot in California this coming November, for instance, would mean that the online sports-betting proposal as put forward by the online operators including DraftKings and FanDuel would easily succeed.

In the data from our earlier survey in April, there is further evidence for the extent to which sports-betting, in particular,

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Still, it should be noted that despite the obvious advances being made by online sports-betting in the US, general attitudes towards gambling among US respondents are by no means an outlier in global terms.

On the proposition ‘gambling laws where I live fairly balance the opportunity to gamble with preventing excessive gambling’, meanwhile, only **18%** of all Americans agree while **30%** disagree and a majority of **51%** don’t know.

has been enthusiastically taken up by a large proportion of US respondents.

To the proposition that when a respondent has placed a sports bet, it makes a sport more interesting to watch, **51%** of gamblers agree up from **44%** in 2021. Likewise, to the proposition that when they bet on a sport it makes them more likely to watch the game, again **50%** agree up from **44%** last year.

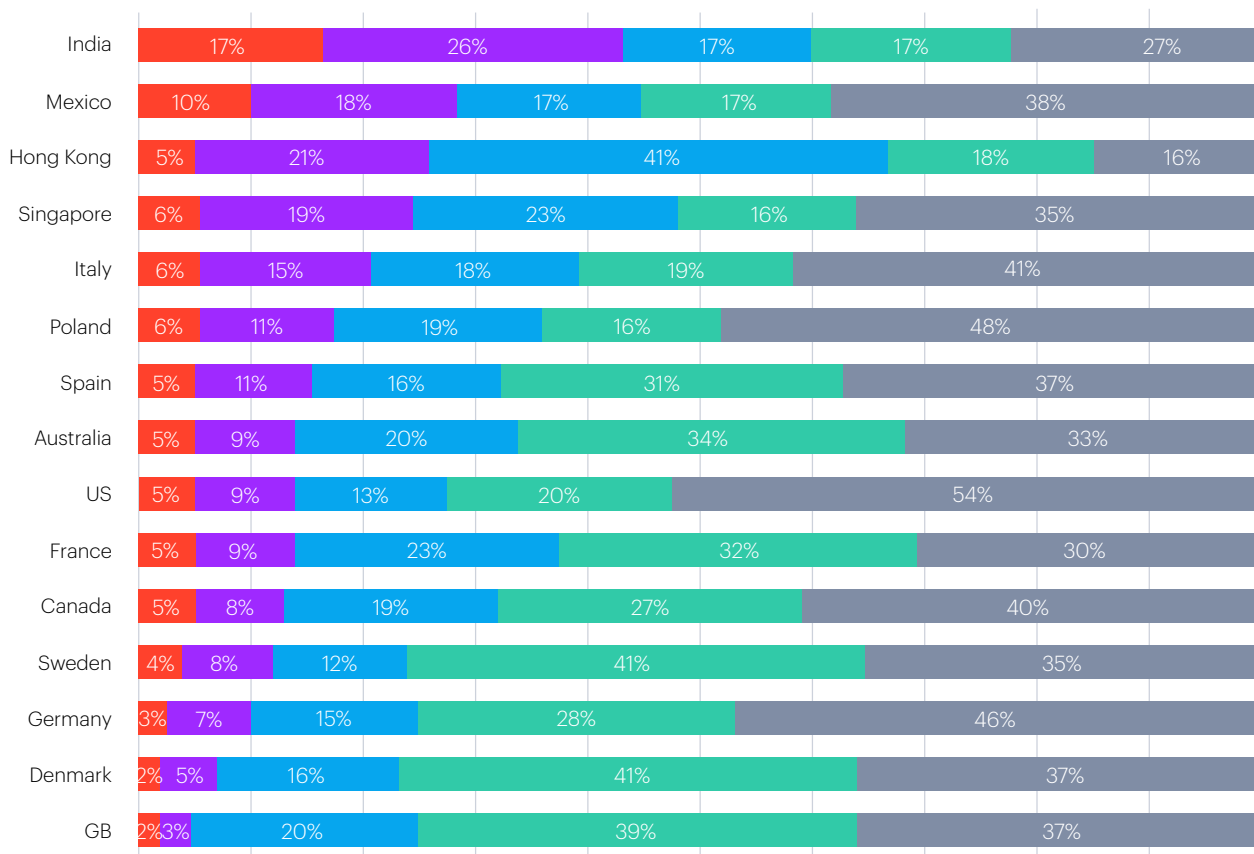
On a similar proposition that the rules and regulations around online gambling where they live are too strict, US respondents once again show a large percentage of don’t knows at **54%**. This is far ahead of every other country in the survey with the next biggest percentage of don’t knows being **48%** in Poland.

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'The rules and regulations around online gambling are generally too strict where I live' - Agreement by country



● Strongly agree ● Tend to agree ● Tend to disagree ● Strongly disagree ● Don't know

Agreement with the statement = % 'Strongly agree' or 'Strongly disagree' on a five point scale.
 Percentages may not total 100 due to rounding.



This is the highest level globally and once again points to the uncertainties that surround the status of online sports-betting generally across the US. In an environment where there is now de facto national advertising for sports-betting – particularly around live sports – the seeds of confusion are easily sown.

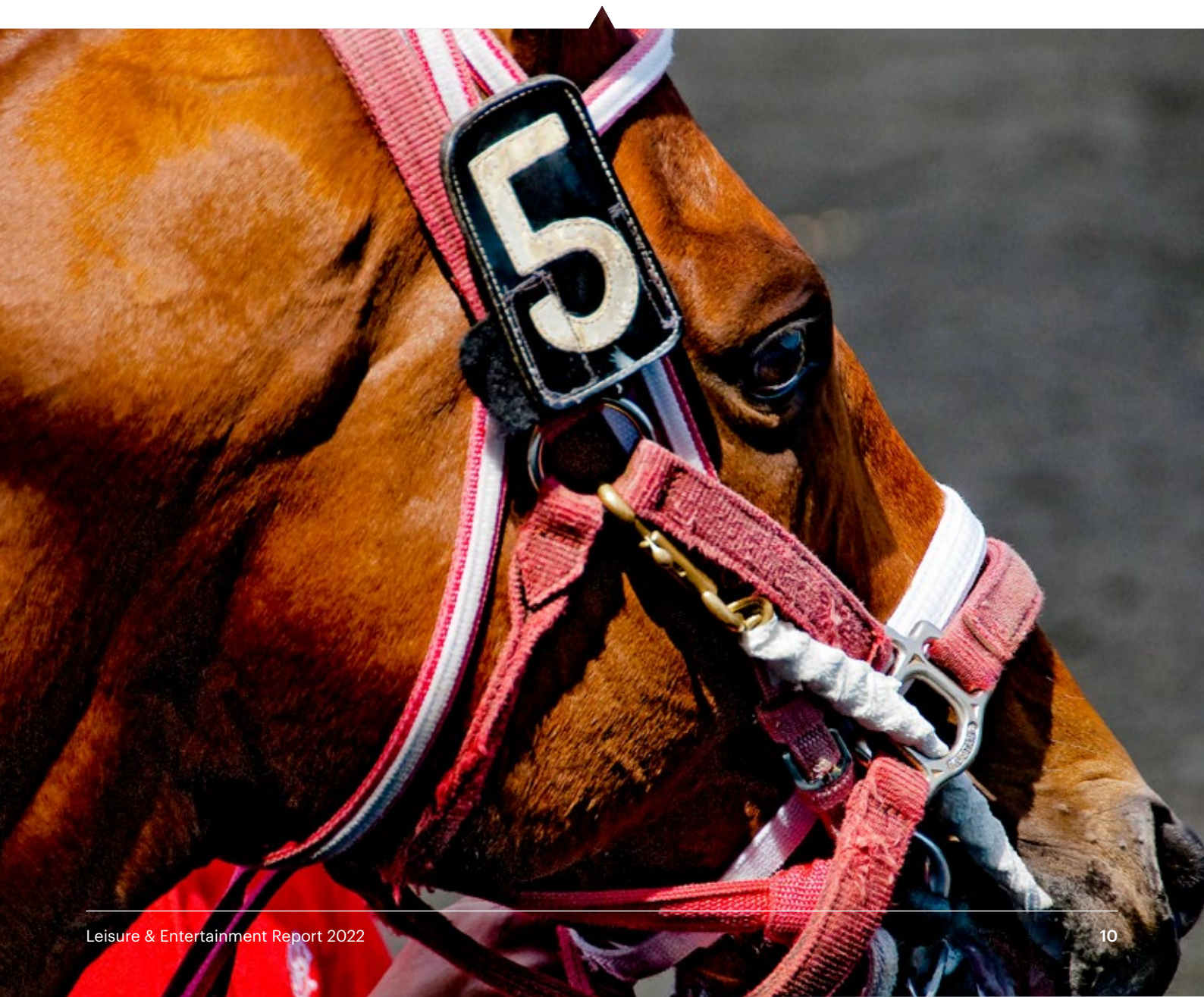
On the subject of advertising, one statistic to keep an eye on in future iterations of this survey is on the question of whether respondents believe there is too much advertising and sponsorship for sports betting.

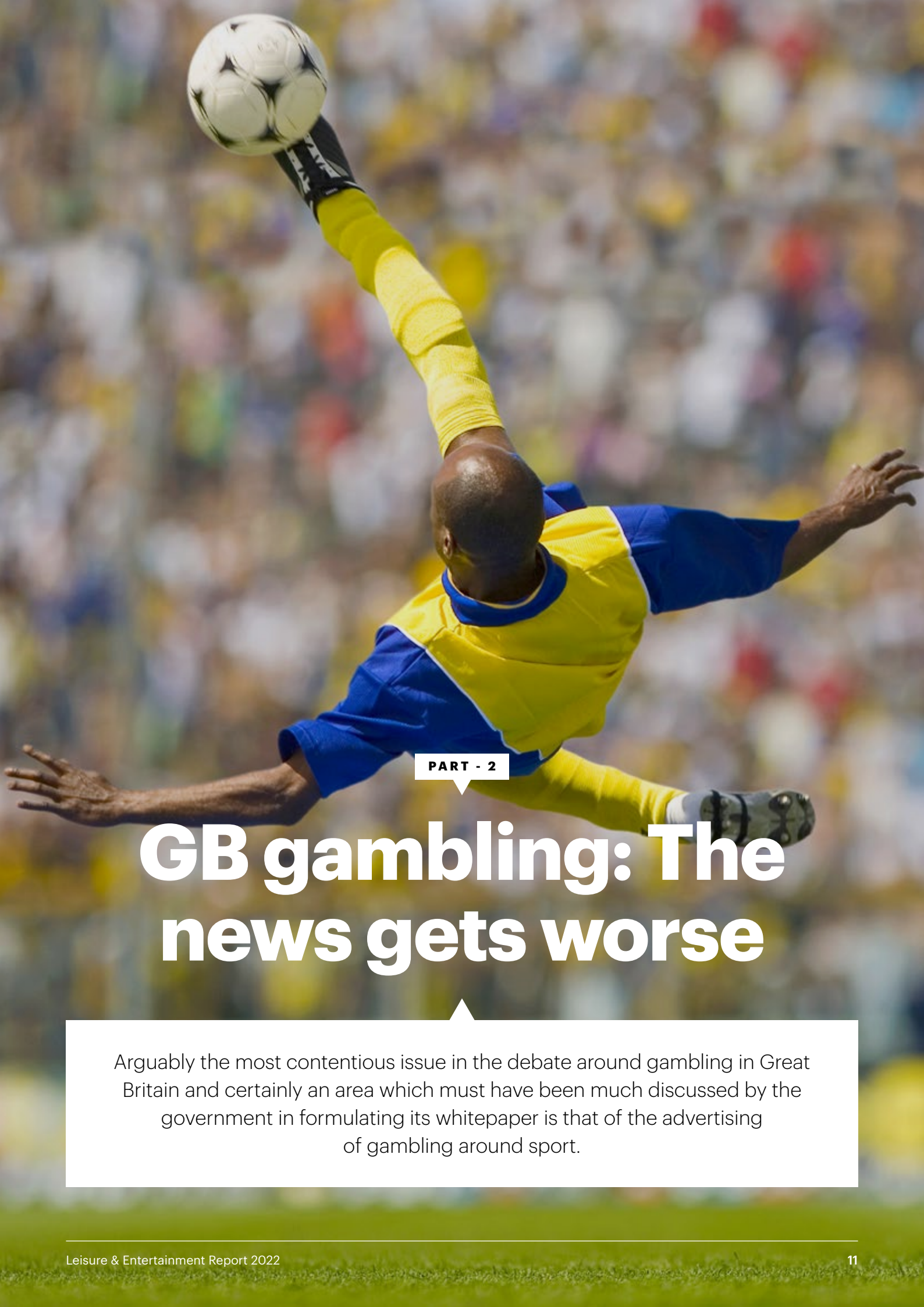
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There have been rumblings of discontent from the regulators, particularly in New Jersey, about the sheer quantity of gambling-related advertising seen in the state. In the rush to market, where grabbing early share is seen as a priority, operators should be aware that they need to take the public with them on this journey lest they suffer the backlash seen

elsewhere. The lesson from this data is that while it is too early to be ringing the alarm bells, those in charge would do well to be aware that public opinion can quickly turn and once an adverse viewpoint has taken hold, it can be hard to shift, particularly if linked to gambling-related harm.

As it stands, the US is far below the levels of discontent seen in Europe (discussed later in this report). But the **45%** who already agree (**23%** strongly and **22%** tend to) that there is too much advertising and sponsorship is concerning high, with agreement among men even higher at **52%**. In comparison, only **21%** either tend to disagree or strongly disagree on the issue of advertising and sponsorship for sports betting with again a sizeable percentage of don't knows at **35%** (higher than in any other country).





PART - 2

GB gambling: The news gets worse

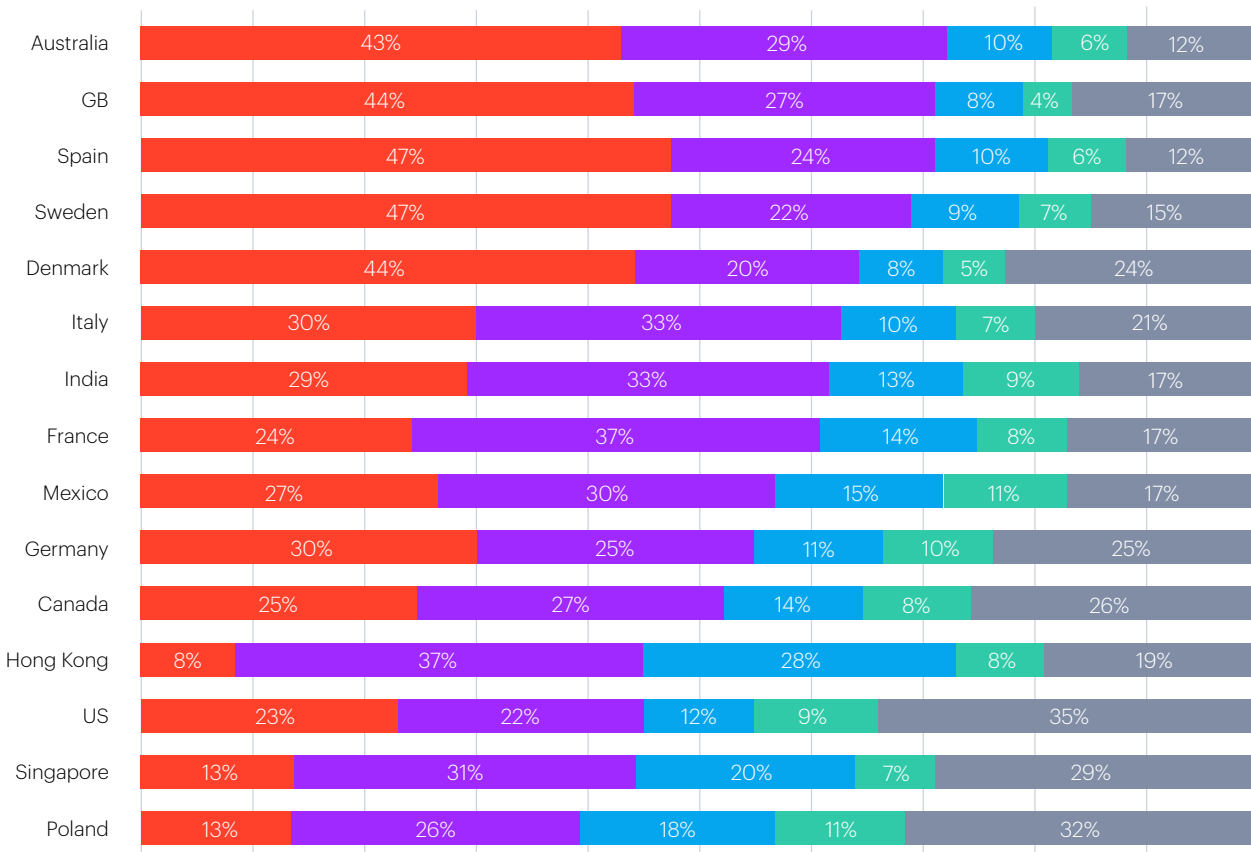
Arguably the most contentious issue in the debate around gambling in Great Britain and certainly an area which must have been much discussed by the government in formulating its whitepaper is that of the advertising of gambling around sport.

We can be pretty sure that further measures to halt the proliferation of gambling advertising were at some point due for inclusion in the whitepaper.

In fact, reports ahead of the publication of the whitepaper suggested there was some division within government specifically about the exclusion of gambling sponsorship of English Premier League shirts.

But going by the evidence from our respondents, government policy should only be heading in one direction. As it stands, fully **71%** of GB respondents agree with the statement that there is too much advertising and sponsorship for sports betting. The level of concern is even consistent among regular sports bettors (**65%** agree) though strength of agreement is less intense.

'There is too much advertising and sponsorship for sports betting' - Agreement by country



● Strongly agree ● Tend to agree ● Tend to disagree ● Strongly disagree ● Don't know

Agreement with the statement = % 'Strongly agree' or 'Strongly disagree' on a five point scale. Percentages may not total 100 due to rounding.

The data corroborates the findings from an earlier survey in April which showed that only **18%** of respondents say that it is appropriate for gambling companies to sponsor sports teams, competitions or athletes. This was the second-lowest figure globally, only behind Japan where most forms of gambling are banned.

Meanwhile, **60%** of GB respondents also feel they see too much gambling advertising.

The data from both surveys shows the extent to which the issue of gambling advertising is now central to the GB public's attitudes towards gambling generally.

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The debate continues

Those proposing further prohibitions definitely leant their voice to the idea that a ban of all gambling-related football shirt sponsorships should have been introduced. Back in June 2020, the cross-party grouping of MPs for gambling-related harm produced a set of proposals that would have included a total ban on gambling advertising. How such a ban might have been implemented is now perhaps moot.

► SPEAK TO A RESEARCHER

The relatively short history of UK gambling advertising is instructive. It only came in when the Gambling Act came into effect in 2007 and so the appearance of gambling ads on our screens, on billboards and, crucially, on the front of football shirts is a relatively new phenomenon. This perhaps helps explain the degree of apparent public revulsion; new to advertising generally, it is fair to say that the 2005 move

The difficulties of singling out a specific type of product in a very specific form of sponsorship might indeed have meant that the government decided to sidestep the issue to avoid the potential pitfalls. We know from reports, though, that the gambling operators argued vociferously against such a move and it is their viewpoint that appears to have held sway.

by the government opened the floodgates to gambling advertising and the operators weren't slow to flood the market with ads and official betting partnerships. But clearly even steps such as the removal of whistle-to-whistle advertising in televised football in Britain has not calmed public concern despite claims the ban has successfully reduced the exposure of minors to gambling ads.



Fuelling the flames

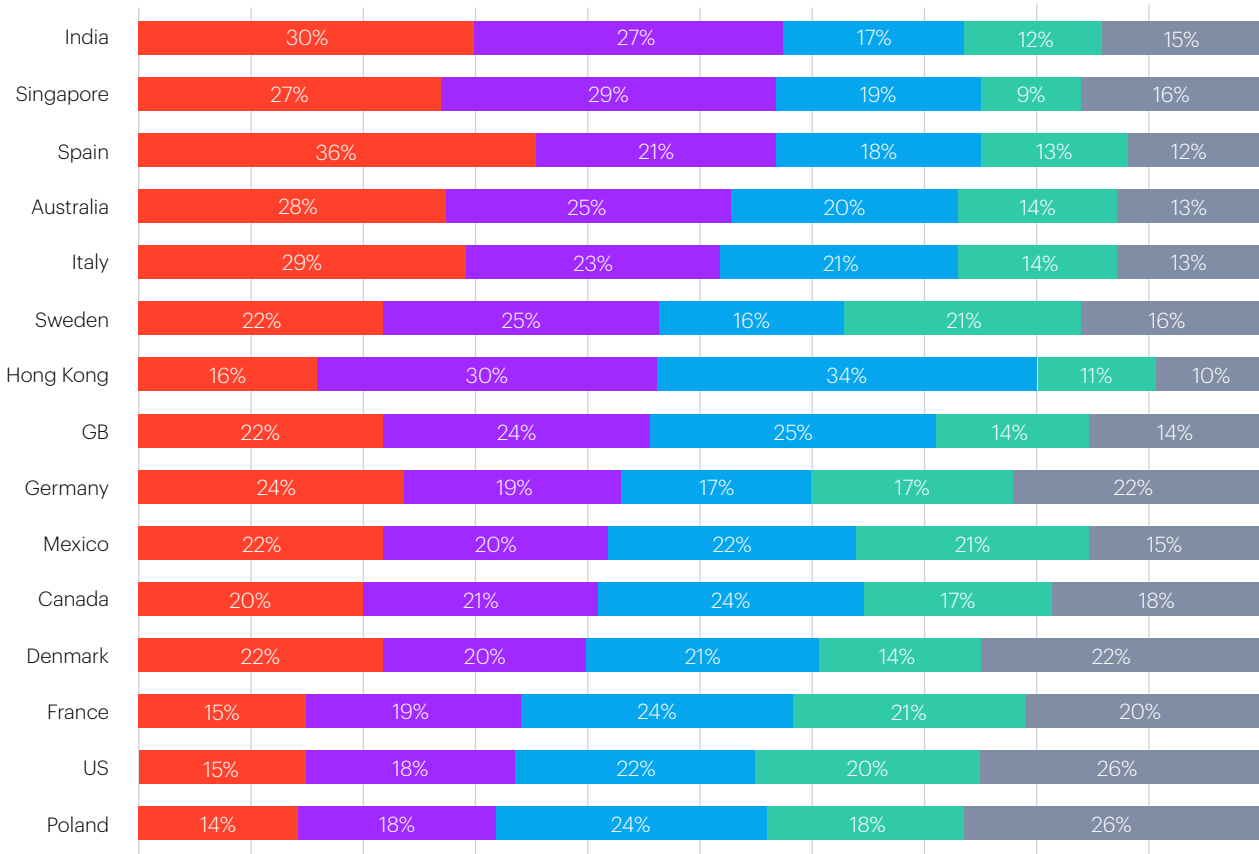
Indeed, it could be argued that the issue of the visibility of gambling advertising is perhaps the leading factor in what appears to be a wider disquiet around gambling on the part of our respondents.

Asked whether online gambling should not be allowed, a significant minority of **46%** either agree or strongly agree

with the statement while the size of the camp which disagrees with the statement is lower at **39%** while **14%** don't know. Agreement is higher among women (**54%**) and those aged 55+ (**58%**).

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'Online gambling should not be allowed' - Agreement by country



● Strongly agree ● Tend to agree ● Tend to disagree ● Strongly disagree ● Don't know

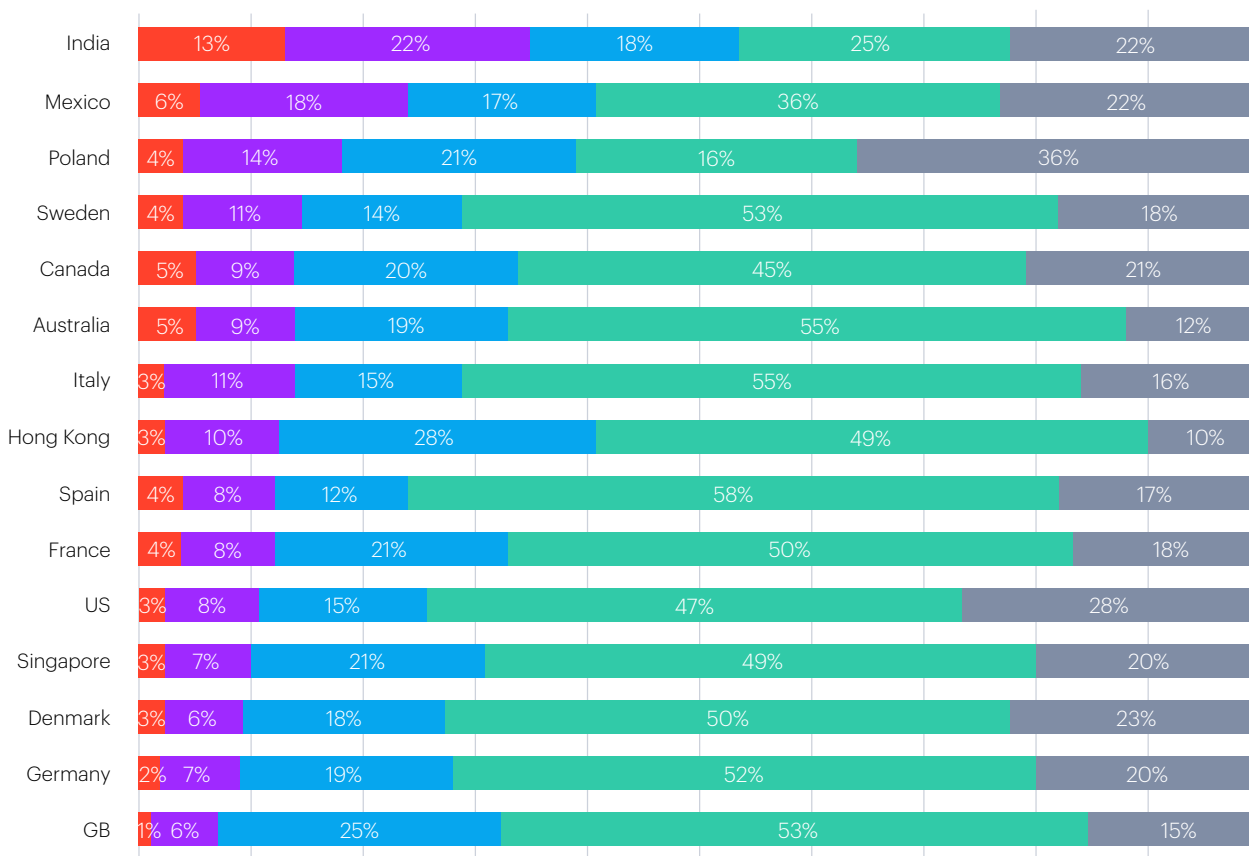
Agreement with the statement = % 'Strongly agree' or 'Strongly disagree' on a five point scale.
 Percentages may not total 100 due to rounding.

To illustrate how perilous the situation is for the gambling operators, and arguably how toxic the subject of gambling has now become, it is worth looking at the questions around perception of the industry and the habit of gambling.

Asked whether most online gambling companies care about the wellbeing of their customers, an overwhelming **78%** of the public disagree with the statement while only **7%** agree. Agreement is only slightly higher among regular gamblers at **18%**.



'Most online gambling companies care about the wellbeing of their customers' - Agreement by country



● Strongly agree ● Tend to agree ● Tend to disagree ● Strongly disagree ● Don't know

Agreement with the statement = % 'Strongly agree' or 'Strongly disagree' on a five point scale.
 Percentages may not total 100 due to rounding.

On the related question of whether respondents think the big, regulated gambling companies where they live behave responsibly and act fairly, again a large percentage of **64%**

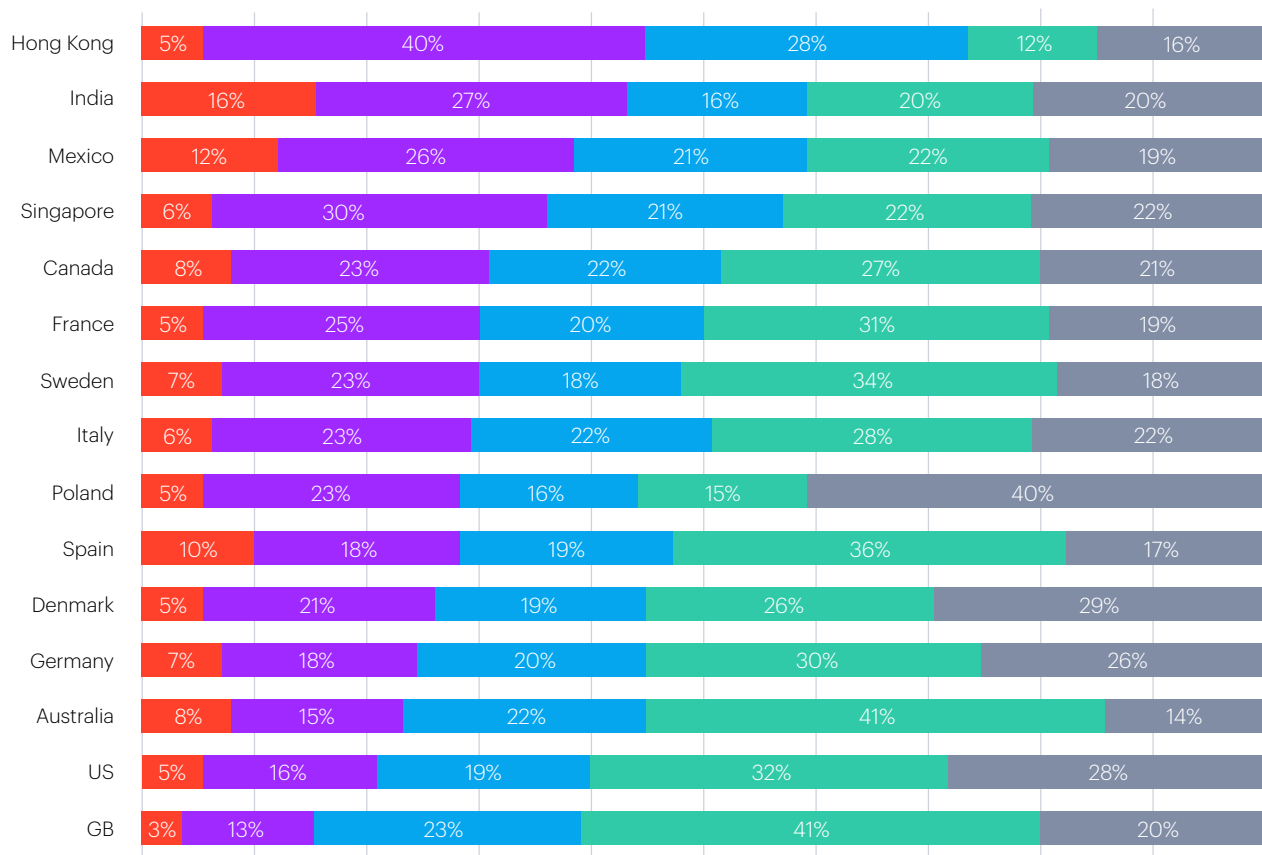
either tend to or strongly disagree. Among monthly gamblers in Great Britain we see **38%** agree and **49%** disagree.

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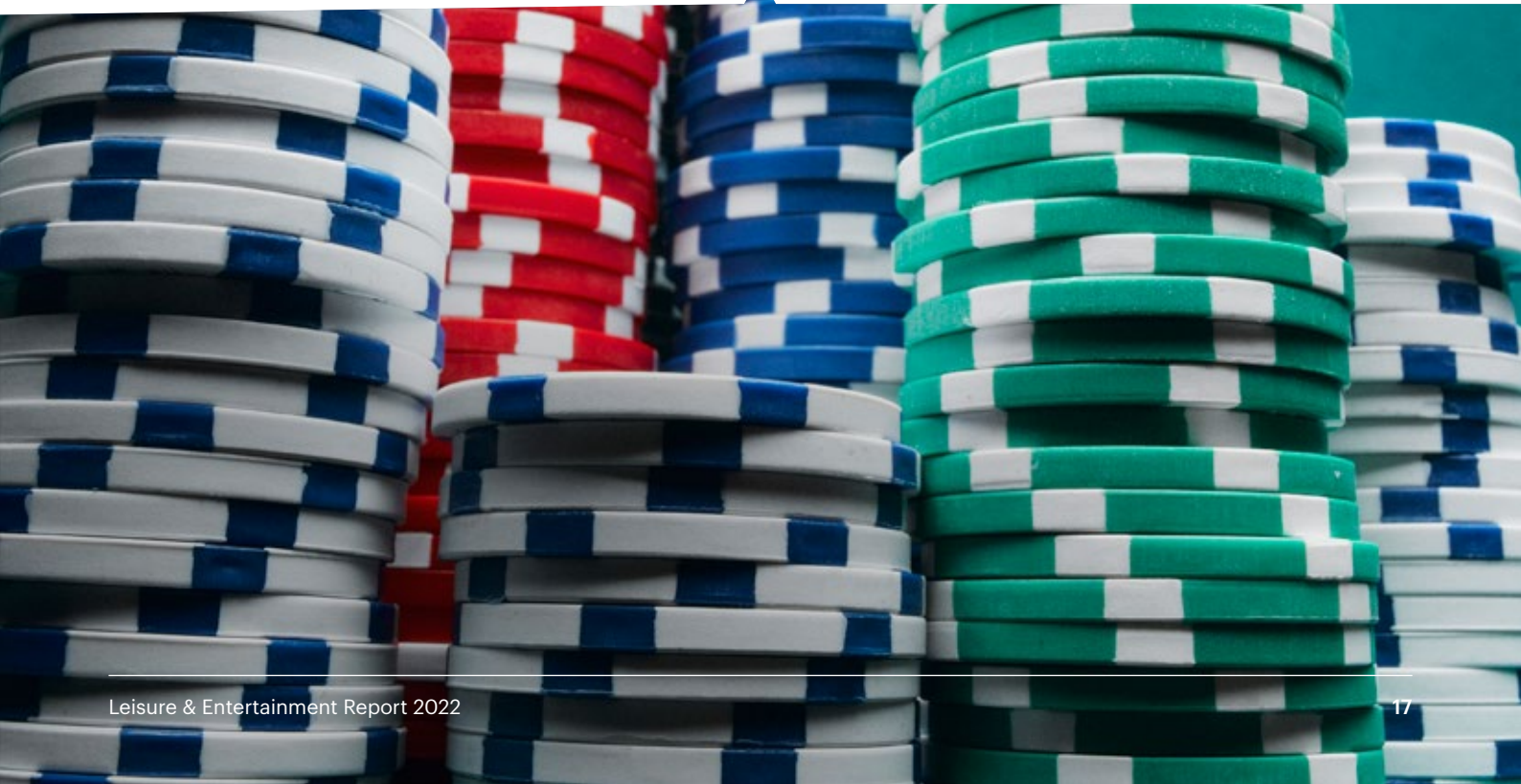
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'I trust the big, regulated gambling companies where I live to behave responsibly and act fairly' - Agreement by country



● Strongly agree ● Tend to agree ● Tend to disagree ● Strongly disagree ● Don't know

Agreement with the statement = % 'Strongly agree' or 'Strongly disagree' on a five point scale.
 Percentages may not total 100 due to rounding.





gambling

Again, the public mistrust was evident in the responses from another YouGov survey conducted earlier this year which finds that **21%** of respondents now feel all forms of gambling should be illegal, up from **16%** in 2021. That survey also sees that **54%** now feel the government should do more to protect gamblers.

The results suggest that regardless of how successful the industry might be in pushing back on the further imposition of measures from government, it is losing the battle of public opinion. This is significant. First, no industry can flourish when there is a lack of public trust.

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Consumer-facing businesses, after all, rely hugely on goodwill and once that has been lost, it makes life tougher.

But secondly, it also means that those who continue to fight for more stringent restrictions will feel they have the public behind them. The gambling industry may feel it has won some skirmishes around the whitepaper, but this data suggests it is losing the war. Arguably, the situation could also get worse with the anti-gambling sentiment being much more widespread among the major UK opposition parties. A change of government, in other words, is more likely to see a push for greater prohibitions rather than less.

A smiling woman wearing a white cap and a pink jacket is looking down at a golf club in a bag. The background is a bright, hazy outdoor setting, likely a golf course at sunrise or sunset.

PART - 3

Europe turns against gambling

The working assumption with online gambling is that once it has been legalised within any given state or country, its status is therefore set. There is, after all, not one example of a legislature reversing course. But going by the results of our survey, the industry might wish to revisit its previous assumptions as the evidence points to growing opposition to its regulated status.

When it comes to public attitudes to the legalisation of online gambling, it is clear that nothing should be taken for granted. Instead, the industry might be advised to view its regulated status across Europe as being much more provisional.

Italy is the longest-standing regulated point of consumption market in Europe having first legislated for online gambling in 2006. It has grown in popularity – at least in monetary terms – ever since and in 2021 igaming revenue hit **€3.46bn**, up **46.1%** from 2020.

In Spain, meanwhile, online gambling in all its forms has been legal since 2011 and it has similarly seen successive years of growth. In the year to December 2021, total GGR across all

products hit **€815m**, down **4.2%** on the year previous but with stakes rising **25%** year-on-year.

And yet, in both countries the sense of a backlash has been growing, especially when it comes to gambling advertising. In Italy, the government introduced a somewhat controversial – at least as far as the industry was concerned - ban on most forms of marketing and promotional activity.

Similarly, in Spain in late 2020 the government of the day moved to also constrain the marketing activities of the online operators, and likewise instituted a gambling advertising ban.

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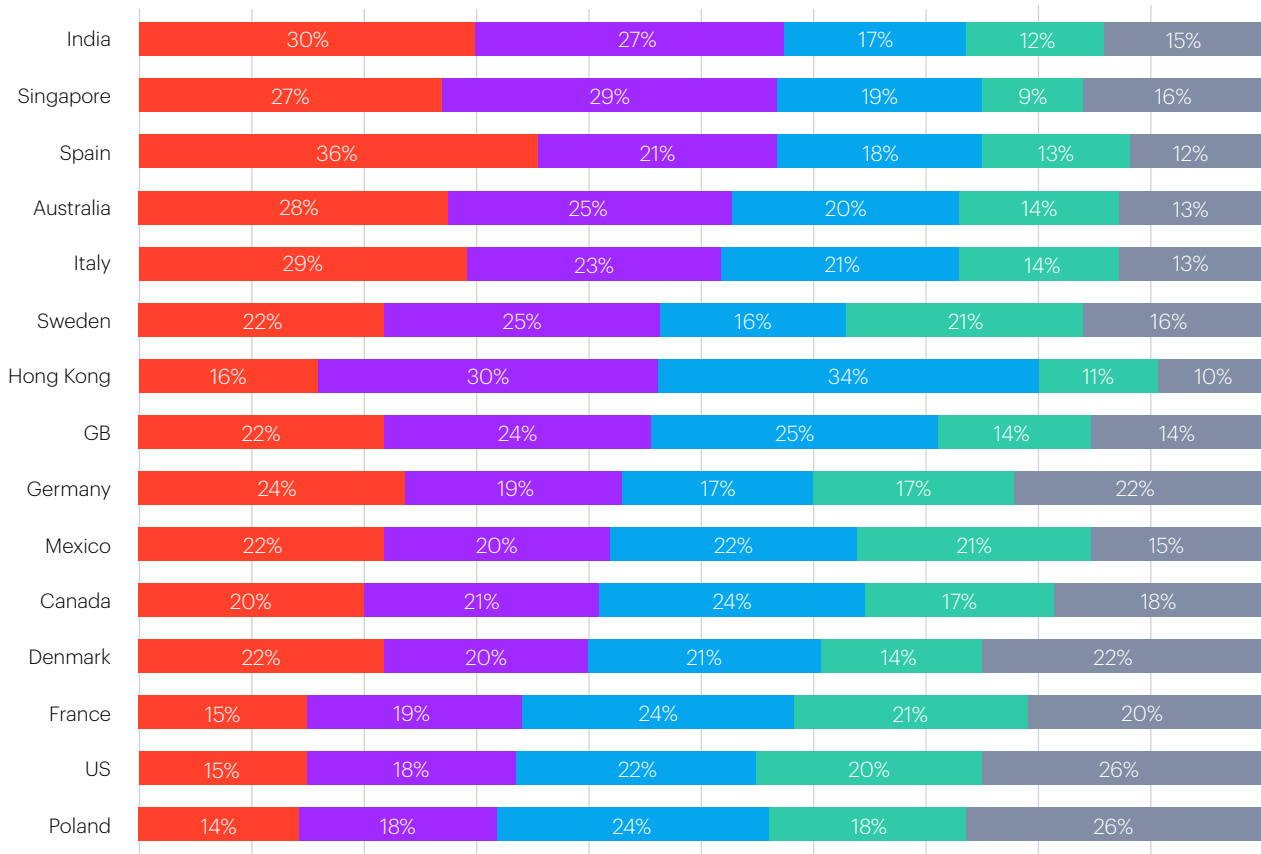


Status in play

The sense that online gambling's status in both Italy and Spain is much less settled than might be supposed is emphasised by the results from our survey.

In Italy, a majority of **52%** of respondents either strongly agree or tend to agree that online gambling should be illegal while in Spain that figure is **57%**. In comparison, those that either tend to or strongly disagree in both countries was **35%** and **31%** respectively.

'Online gambling should not be allowed' - Agreement by country



● Strongly agree ● Tend to agree ● Tend to disagree ● Strongly disagree ● Don't know

Agreement with the statement = % 'Strongly agree' or 'Strongly disagree' on a five point scale. Percentages may not total 100 due to rounding.

Such findings should be flashing warnings signs for the operators across Europe. Such is the contentious nature of gambling, there is always a level of opposition to any form of legalisation on moral or religious grounds.

But that is rarely a majority opinion and across the history of online gambling regulation across Europe, there has always been a broad level of support.

To be clear, in neither Italy nor Spain are there any murmurings of politicians actually seeking to revisit their country's laws on the issue.

But these results do indicate that there might be broad public support should any party seek to further restrict the activities of online operators and a lack of support for any relaxation of the rules.





Not just outliers

Italy and Spain may be outliers in terms outright majorities seemingly having turned against online gambling, but there are also significant minorities against online gambling across regulated Europe.

In Sweden, which regulated online gambling at the start of 2019 and where restrictions on online gambling activity have also recently been the subject of debate, the percentage who either strongly or tend to agree that online gambling should not be allowed stands at **47%**. In Denmark, which regulated in 2012, the percentage of those either strongly or who tend to be against online gambling stands at **42%**.

As discussed earlier in this report, the percentage in GB stands at **46%**. For Germany, meanwhile, where the latest Federal Treaty only came into force in July 2021, the percentage who either strongly or tend to disagree stands at **43%**.

There is better news for the industry in France (a combined **34%**) and Poland (**32%**) but it should be noted that the full range of online products are not regulated in each country.

There might have been an argument of a difference in view among the public between online gaming – that is, casino and poker – versus sports betting. But in the answers to the separate proposition of whether people in their country/state should be allowed to bet on sports either online or in person, a similar trend of dwindling support across regulated Europe can be seen.

In Spain, those who either tend to disagree or strongly disagree stands at **51%** while in Italy it stands at **58%** while those who either strongly or tend to agree stands a **32%** and **34%**. It should be noted, as well, that in each country those that strongly disagree heavily outweighs those that strongly agree – by **32%** to **10%** in Spain and by **25%** to **8%** in Italy.

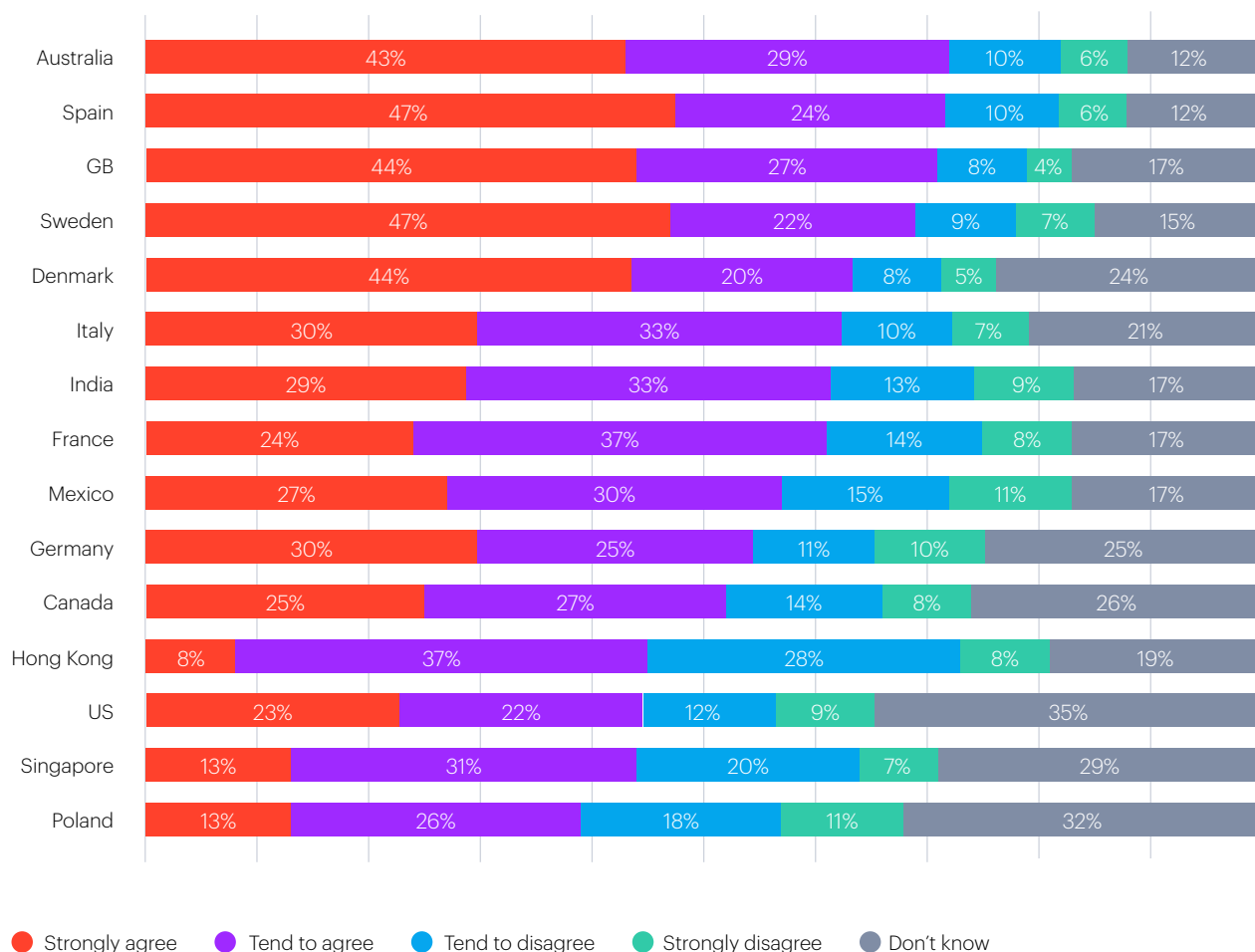


As with the UK, it is not hard to divine what might be one important factor in the rise of opposition to liberal online gambling laws – the contemporaneous rise of gambling advertising. In Spain the percentage of people who agree with the statement that there is too much advertising and sponsorship for sports betting stands at **71%** while in Italy this figure is at **63%** - and this despite the ban on gambling

advertising and sponsorship of football shirts coming into force in early 2019.

Notably, in this aspect the figures for Denmark and Sweden all but match those of Italy and Spain with those that agree at **69%** and **64%** respectively.

'There is too much advertising and sponsorship for sports betting' - Agreement by country



Agreement with the statement = % 'Strongly agree' or 'Strongly disagree' on a five point scale. Percentages may not total 100 due to rounding.

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An obvious outcome of this widespread dislike of pervasive gambling advertising will be more bans and limits. Given the current backdrop, such an outcome might be welcomed by an industry which, it could be argued, needs some time in the shade in order to let some of the apparent dislike of manifestations of gambling dissipate.

More proactively, the industry should perhaps consider its lobbying options at this time. Over the years, a lot of effort has been put into the effort to persuade legislatures to open up their countries to online gambling. Perhaps an equal effort might be needed to ensure that status remains in the years to come.

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PART - 4

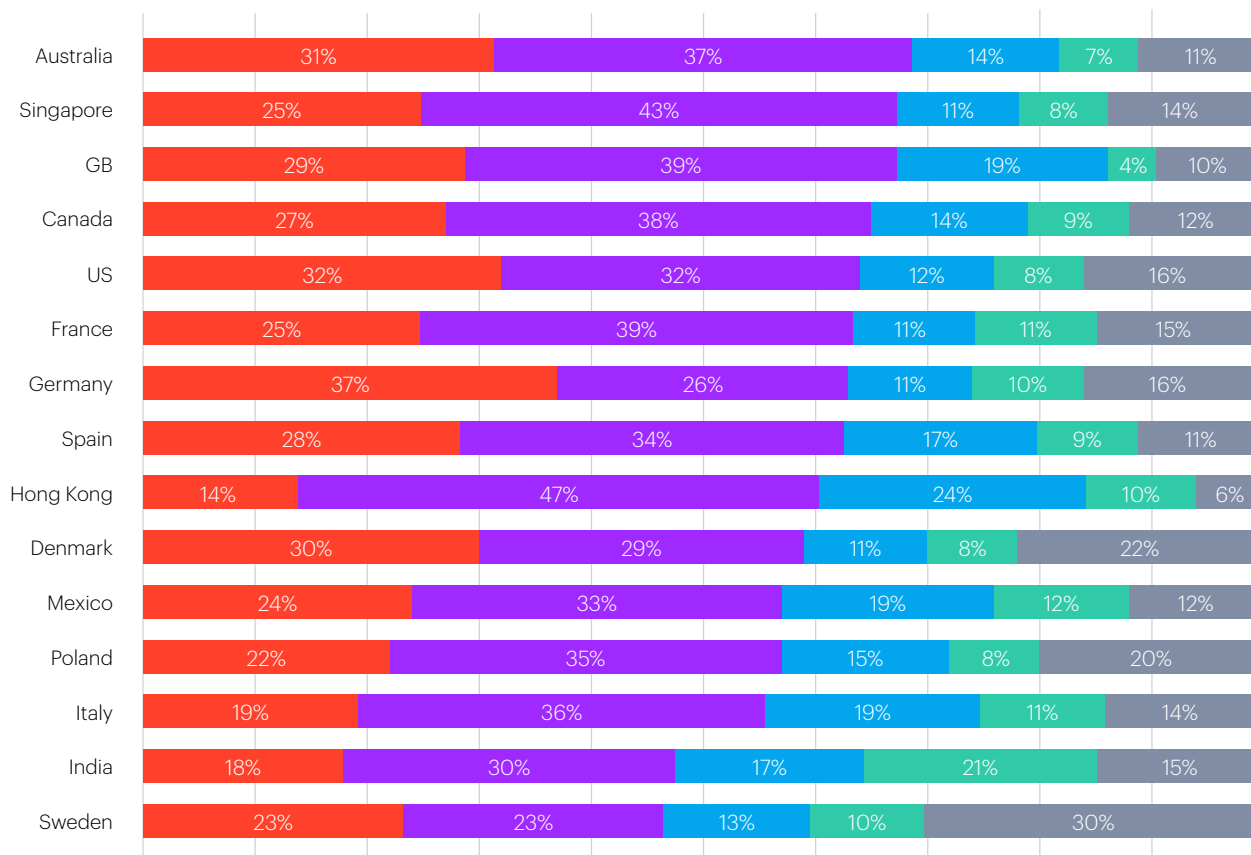
Lottery: A broadly acceptable pastime

When compared to the current travails of the online gambling sector in Europe, the lottery sector can be said globally to enjoy broad legislative and state support and very rarely raises the ire of the wider public.

Indeed, such is the status of lottery, and in most countries (and states) its close association with local or national government or state-supported bodies, that for a significant minority of respondents to our survey, it isn't even considered to be gambling at all.

Asked to respond to the statement that that they consider lottery to be gambling, in Mexico **31%** either strongly or tend to disagree, in Italy the percentage is **30%**, in Spain it is **26%**, GB **23%** and in the US it is **20%**.

'I consider playing the lottery to be gambling' - Agreement by country



● Strongly agree ● Tend to agree ● Tend to disagree ● Strongly disagree ● Don't know

Agreement with statement = % 'Strongly agree' or 'Strongly disagree' on a five point scale.
 Percentages may not total 100 due to rounding.





The ambivalent attitude of lottery comes despite its gradual and piecemeal move into the digital arena and the disruptions caused by the recent pandemic experience.

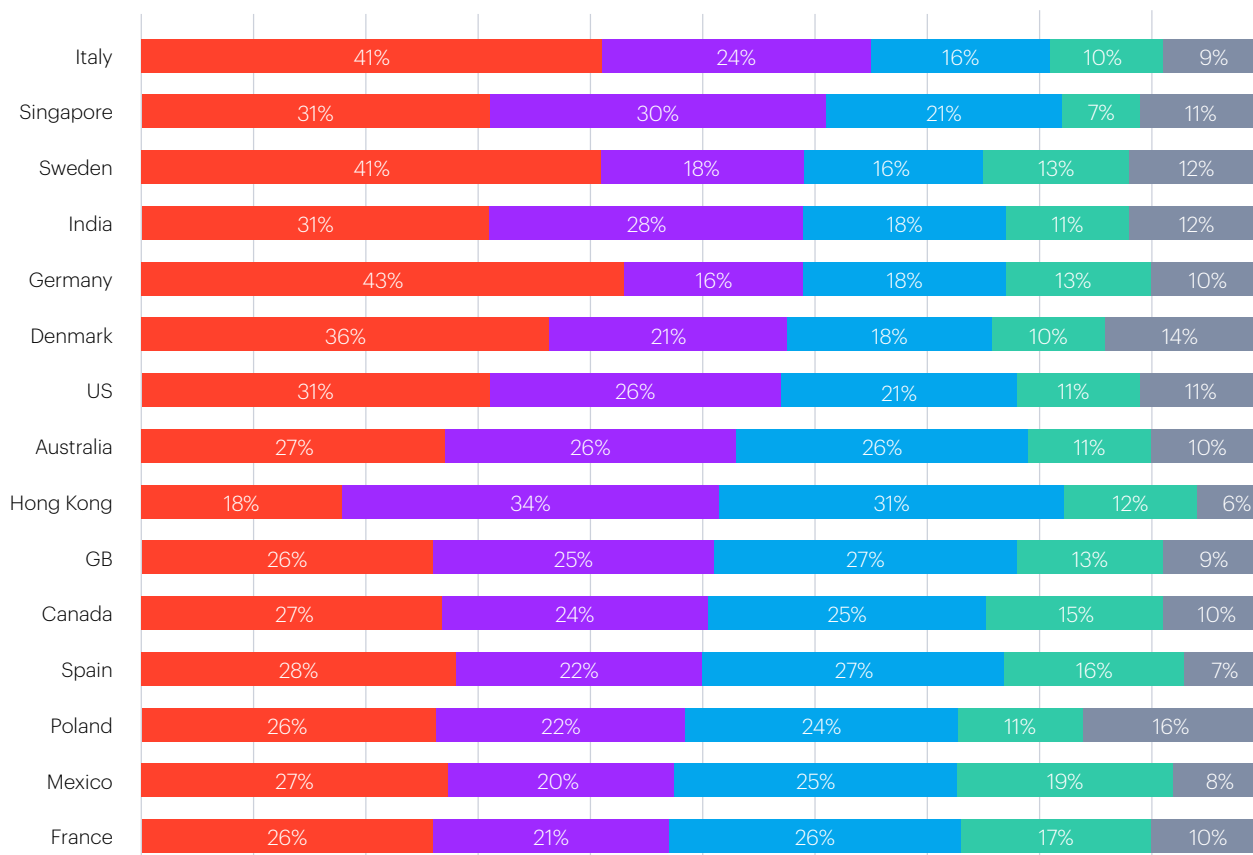
Indeed, if anything the challenge that lies ahead for lottery operators is to remain relevant with the wider public. For a product which has a presumed wide level of support as something that should be widely available, it is surprisingly unpopular in terms of people actually taking part.

Asked to respond to the proposition that lottery isn't of any interest to them, the percentage of those that either strongly or tend to agree with the statement is rarely much below **50%**.

In Italy, **65%** express no interest in lottery while in Singapore the percentage stands at **61%**. In Germany the same percentage stands at **59%** and in the US it is **57%**.

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'The lottery isn't of any interest to me' - Agreement by country



● Strongly agree ● Tend to agree ● Tend to disagree ● Strongly disagree ● Don't know

Agreement with the statement = % 'Strongly agree' or 'Strongly disagree' on a five point scale. Percentages may not total 100 due to rounding.

Of those countries where there is a relative enthusiasm for the lottery, notable among the leaders is GB where the lottery is in the process of switching providers from Camelot to Allwyn (formerly Sazka).

The survey found that **40%** in GB either tend to or strongly disagree that the lottery isn't of any interest to them. The switch to Allwyn will be completed by the end of 2022 and it will be instructive to see what a switch in providers – and the likely attendant publicity and advertising – does for its

popularity. Currently **42%** in GB say it is currently well run while **21%** disagree, but **43%** say it is becoming less popular.

Other countries where the lottery remains relatively popular include Spain, where **43%** either tend to or strongly disagree that the lottery is of no interest to them, Mexico (**44%** combined) and the highest in terms of strongly disagree with **19%**, France (**43%** combined) and Canada (**40%** combined).



Delivering the bad news

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There is worse news for the lottery operators and by extension the governments which rely on the income generated.

The range of responses for those that strongly or tend to agree with the statement that they 'regularly play lottery' doesn't get above **34%** which is the percentage for Spain. Next comes Canada with **32%** (and the highest who strongly agree with **12%**), Mexico and Hong Kong with **32%**, and GB with **29%**, dropping to just **11%** of GB 18-24s

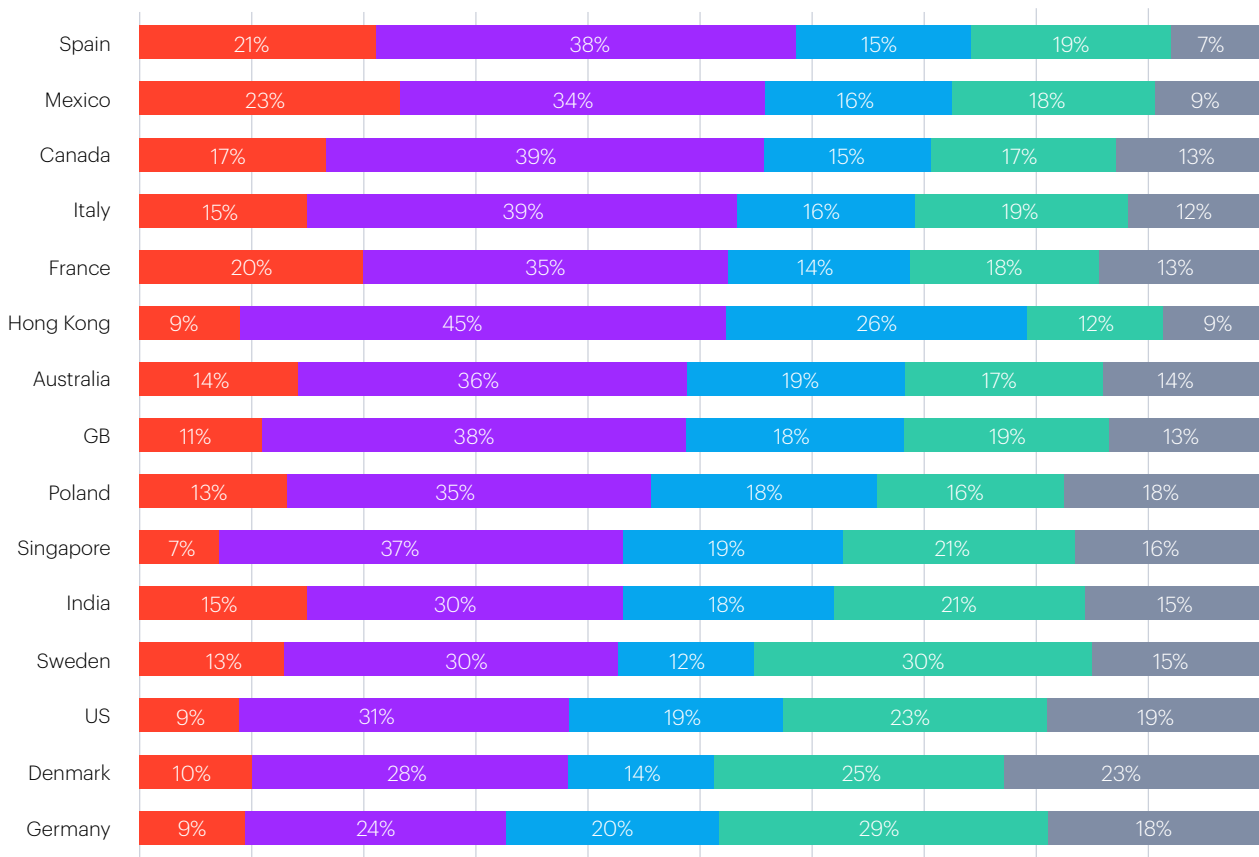
Speak to sales

Such low participation rates stand in contrast to the popularity of the inherent pull of lottery products in that it is exciting to know they can produce a life-changing win.

In Spain, **59%** either strongly or tend to agree with this statement, making Spaniards the most optimistic about lottery globally, followed by Mexico with **57%**, France with a combined **55%** and Hong Kong and Italy with **54%**.

Launch a survey

'It is exciting to know that when playing the lottery, I have a chance to win a life-changing prize' - Agreement by country



● Strongly agree ● Tend to agree ● Tend to disagree ● Strongly disagree ● Don't know

Agreement with the statement = % 'Strongly agree' or 'Strongly disagree' on a five point scale. Percentages may not total 100 due to rounding.

The challenge for lotteries is to see if they can build on this optimistic view of what it offers into greater participation, with the aforementioned move towards greater digital involvement likely offering the best route.

This is particularly the case in the US where according to our survey self-proclaimed lottery participation is the equal second-lowest globally at **18%**, the same level as Poland and only just ahead of Italy at **15%**. In the case of the latter, the challenge will be to attempt to drag the popularity of lottery

up from the depths at the same time that, as detailed elsewhere in this report, there is widespread antipathy to other forms of online gambling. It should also be noted that, as seen in Great Britain, in some countries there is a perception among many that the lottery is becoming less popular (Mexico **46%** agree, GB **43%**, Italy **38%**). But a perception that it is a good source of money for local good causes is a real positive in some countries (GB **58%** agree, Canada **45%**, Mexico **40%**, Spain **39%**, Australia **37%**, US **35%**).





PART - 5

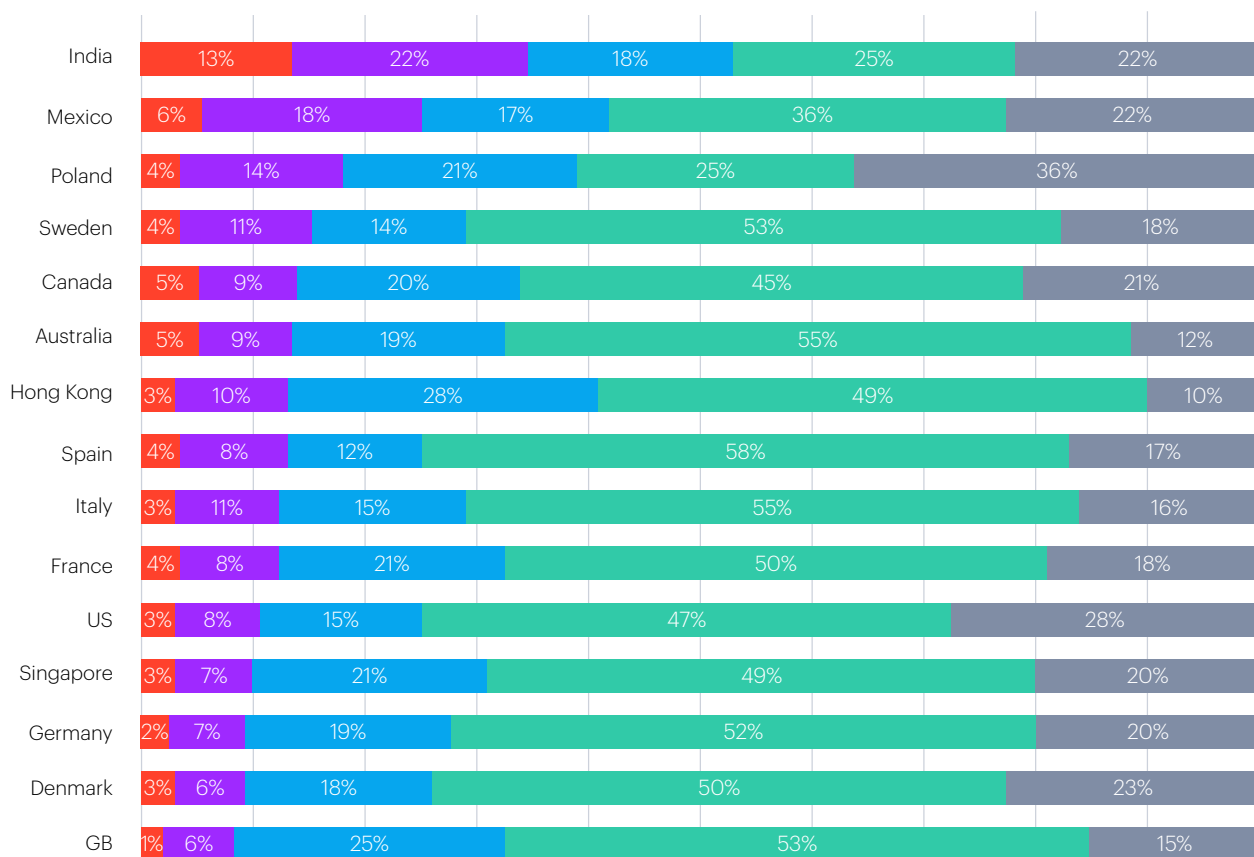
Gambling's image problem

The gambling sector clearly has an image problem. In the eyes of the general public, even among those who gamble, the view of the sector is almost universally poor.



A look at the data on the question of whether most gambling companies care about the well-being of their customers, the verdict is strongly negative in almost all territories.

'Most online gambling companies care about the wellbeing of their customers' - Agreement by country



● Strongly agree ● Tend to agree ● Tend to disagree ● Strongly disagree ● Don't know

Agreement with the statement = % 'Strongly agree' or 'Strongly disagree' on a five point scale. Percentages may not total 100 due to rounding.

Those who either strongly agree or tend to agree with this statement are low across the board. The lowest of these totals is Great Britain where only **7%** agree to any extent with this statement. Only slightly better are Denmark and Germany with **9%**, Singapore with **10%**, the US (perhaps surprisingly) with **11%**, France and Spain with **12%** and Canada with **14%**. The highest levels of agreement are to be found in India (very much the outlier with **35%**) and Mexico with **24%**, before the percentage that agree falls to **18%** in Poland.

Moreover, this isn't a situation where there is only a tendency to disagree with that statement. Opinions on this issue appear to be much more polarized with those that strongly disagree outweighing all other answers across the board.

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This goes far beyond just an image problem. Another question in the survey asks whether respondents trust the big, regulated gambling companies where they live to behave responsibly and act fairly. It should be emphasized that this is the regulated sector featuring some big household names.

Here again, the data shows a profound lack of faith in the gambling operators. In GB, those that agree with the statement is **16%** while those that strongly disagree is a whopping **41%** while those that tend to disagree amounts to a further **23%**.

In Spain, **58%** strongly disagree that gambling companies care about the wellbeing of their customers. In Australia and Italy that percentage is **55%**, in GB and Sweden it is **53%** and in Germany it is **52%**.

This goes to the heart of all the issues the sector is facing when it comes to the questions covered elsewhere in this survey about gambling regulation and the use of advertising. The lack of trust is stark; the sector has lost the confidence of the public. Even among monthly gamblers agreement remains low in some countries that most online gambling companies care about customer wellbeing with GB & France at **18%** but in contrast agreement in US and Poland are **40%** or more.

It's repeated globally. In Australia, those that agree with the statement comes in at **23%** against a total of **63%** who disagree. In the US, those percentages are **21%** versus **51%**, in Canada it is **31%** versus **49%**, in Spain it is **28%** versus **55%** and in Italy it is **29%** versus **50%**.

Thankfully the reality is likely better than feared because among monthly gamblers a majority agrees in almost all countries (except in UK **38%** and Australia **47%**).

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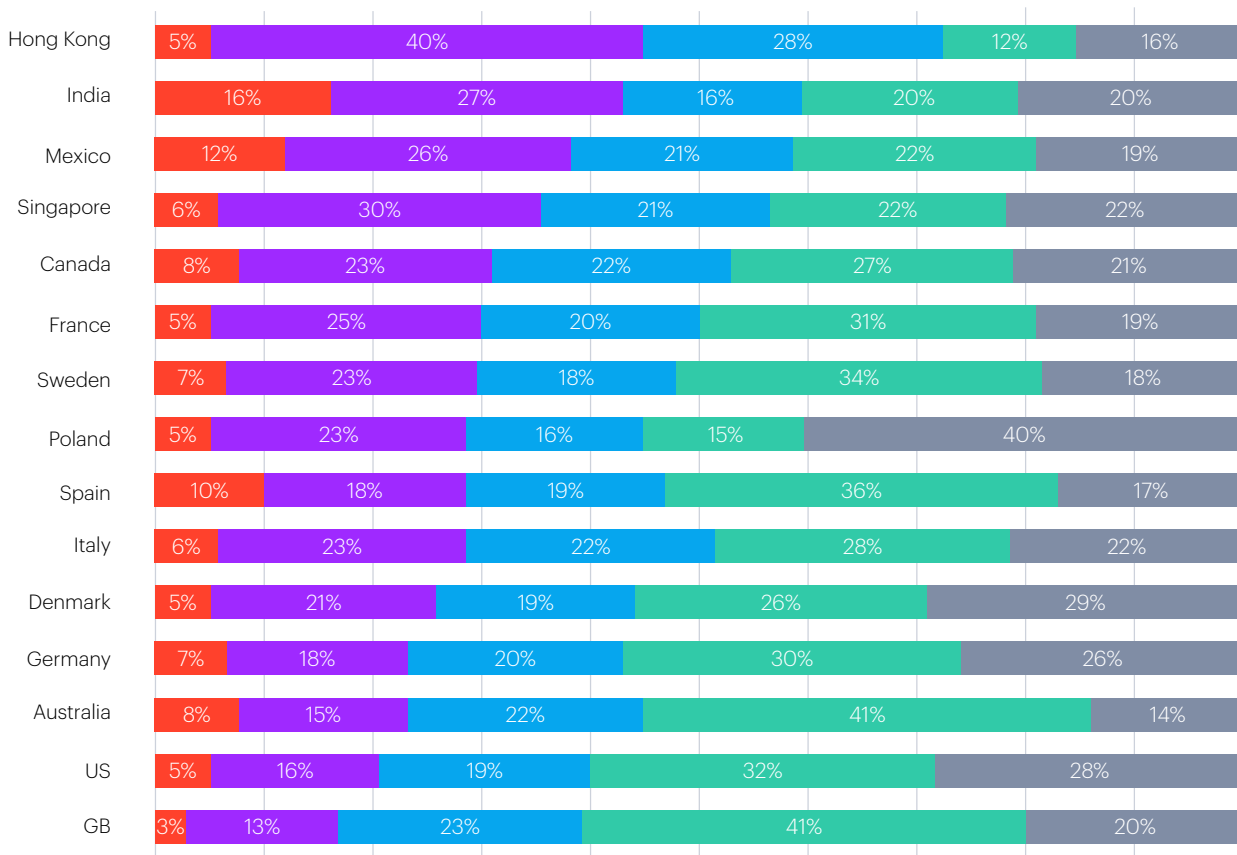
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'I trust the big, regulated gambling companies where I live to behave responsibly and act fairly' - Agreement by country



● Strongly agree ● Tend to agree ● Tend to disagree ● Strongly disagree ● Don't know

Agreement with the statement = % 'Strongly agree' or 'Strongly disagree' on a five point scale.
 Percentages may not total 100 due to rounding.

The outlier at the national level, again, is India (**43%** agree versus **36%** that don't) and Hong Kong (**45%** agree versus **40%** disagree) which are the only countries where more

people trust gambling operators to act responsibly than those who don't.



Not just skin deep

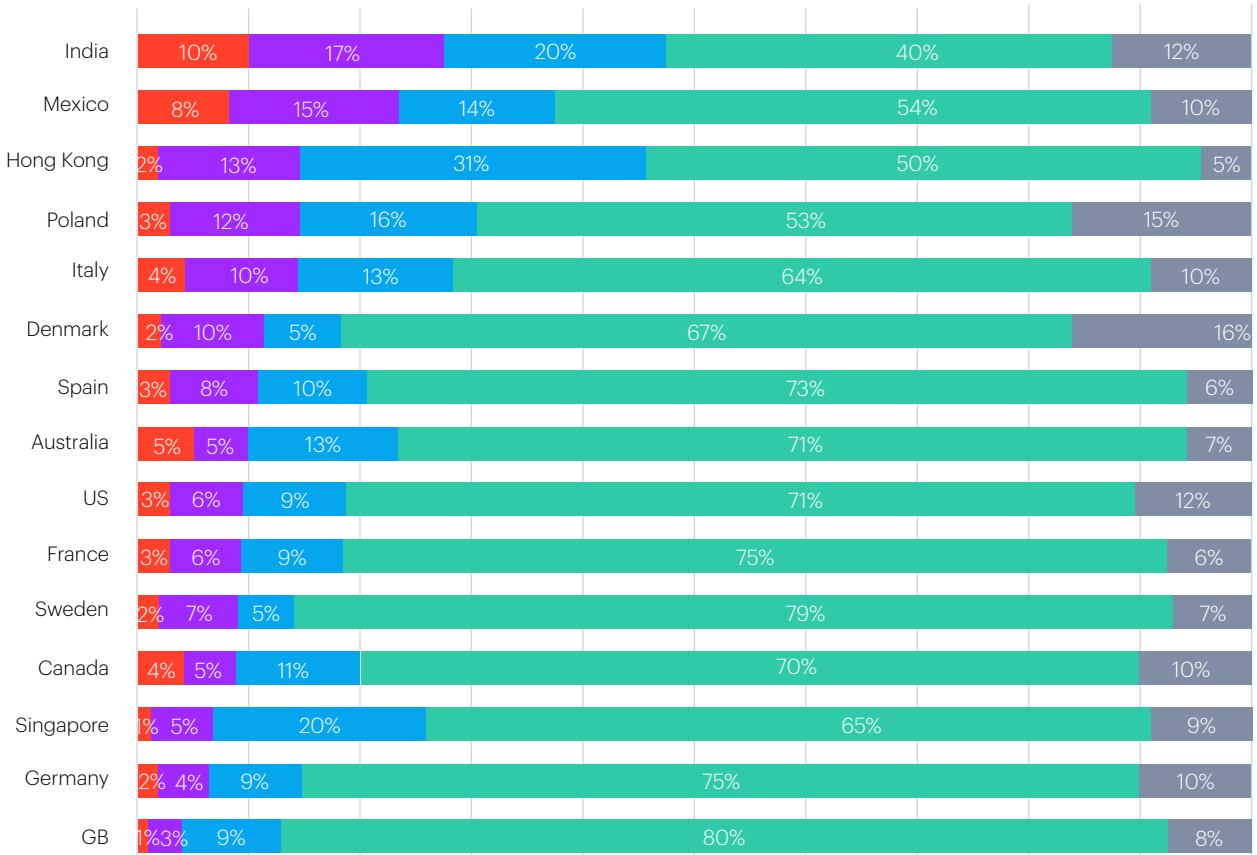
What the survey has uncovered about the visibility of gambling as a pastime – as opposed to perceptions around the advertising of it – provide a counterpoint to the arguments about gambling's acceptability.

Asked whether they talk about gambling with their family and friends, globally we find **40%** of those who have gambled in the past 12 months do so, rising to **51%** of monthly bettors.

Gamblers in GB are among the least likely to do so (**28%** of annual gamblers vs **40%** of monthly bettors).

What is intriguing is that this discussion of gambling is much less likely to make it onto social media. Focusing on those who bet monthly we see just **9%** in GB say they 'talk about gambling on social media' but this rises to **15%** in France, **24%** in Germany, **30%** in Italy and **37%** in the US.

'I talk about gambling on social media' - Agreement by country



● Strongly agree ● Tend to agree ● Tend to disagree ● Strongly disagree ● Don't know

Agreement with the statement = % 'Strongly agree' or 'Strongly disagree' on a five point scale.
 Percentages may not total 100 due to rounding.

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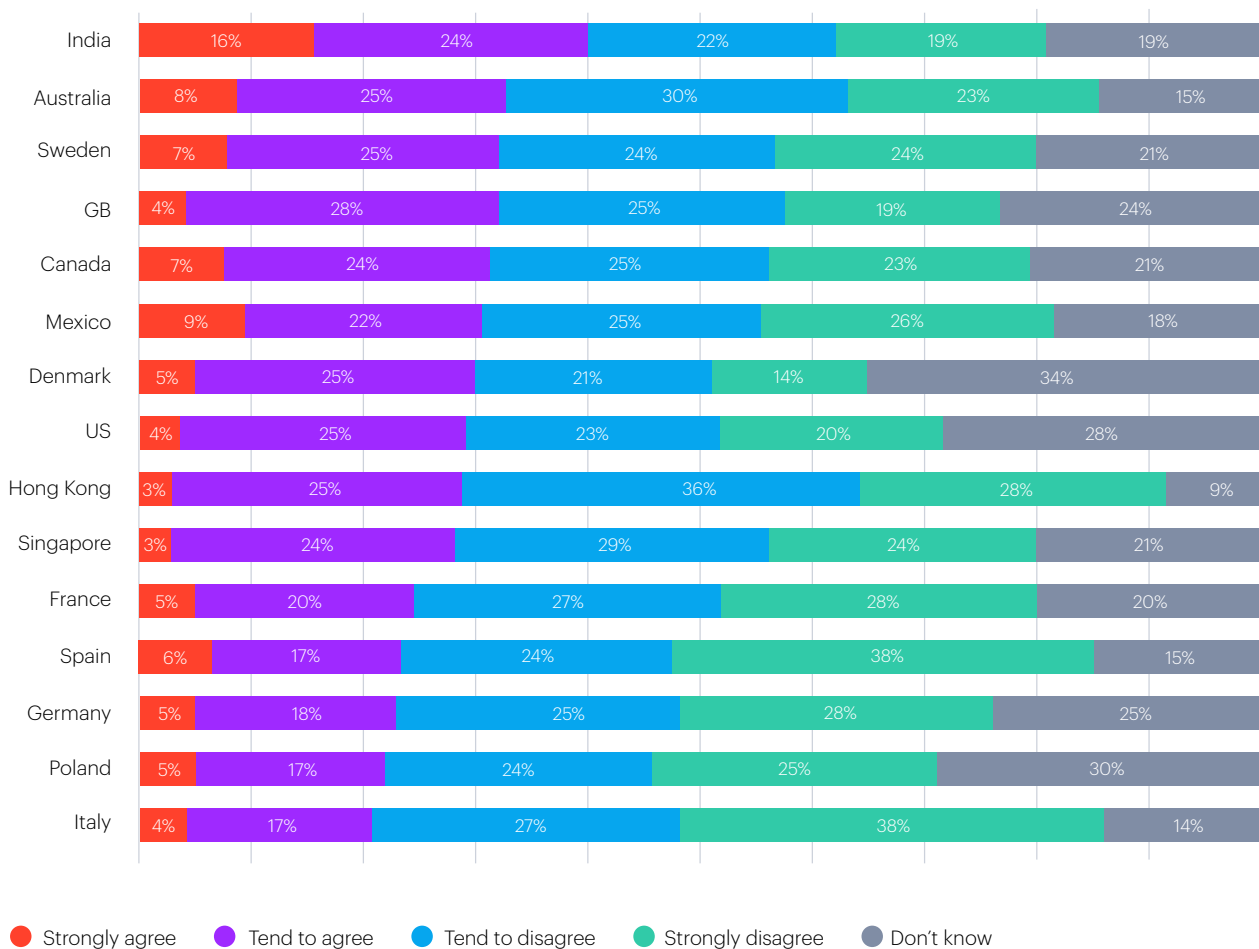
Of course, the issues around gambling and social media might be more about the wider questions being asked about social media content per se than anything endemic about gambling.

Long regarded as a 'sin' activity - alongside drinking and smoking - it will probably take a few more years of surveys to understand whether old attitudes to the activity have lived on even as the activity itself, via online, has entered the modern age.

Indeed, the data for the proposition about whether most people who gamble do so sensibly and without it causing any harm to them or others sees a majority of people either tend to or strongly disagree.

But this data is more evenly split; in GB, for instance, **32%** agree with the statement while **44%** disagree. In the US the split is **29%/43%** while in Canada it is **31%/48%**.

Most people who gamble do so sensibly and without it causing any harm to them or others' - Agreement by country



Agreement with the statement = % 'Strongly agree' or 'Strongly disagree' on a five point scale. Percentages may not total 100 due to rounding.

The dilemma, it might be said, is that the more gambling seeks legitimacy via regulation and inevitably greater visibility for its marketing efforts, the less the public likes what it sees.

limelight, particularly measures to curb advertising, might be seen as one of taking the heat out of some of the questions raised here about public attitudes to gambling operators.

As with the debate around advertising discussed in our European analysis, it might be said that some time out of the



PART - 6

Retail gambling returns to normal

The situation with regard to the progression of the Covid pandemic is obviously still fluid and it would be wrong to put too much emphasis on responses to the question as to whether, thinking about Covid, respondents would be happy to visit a casino in their country.

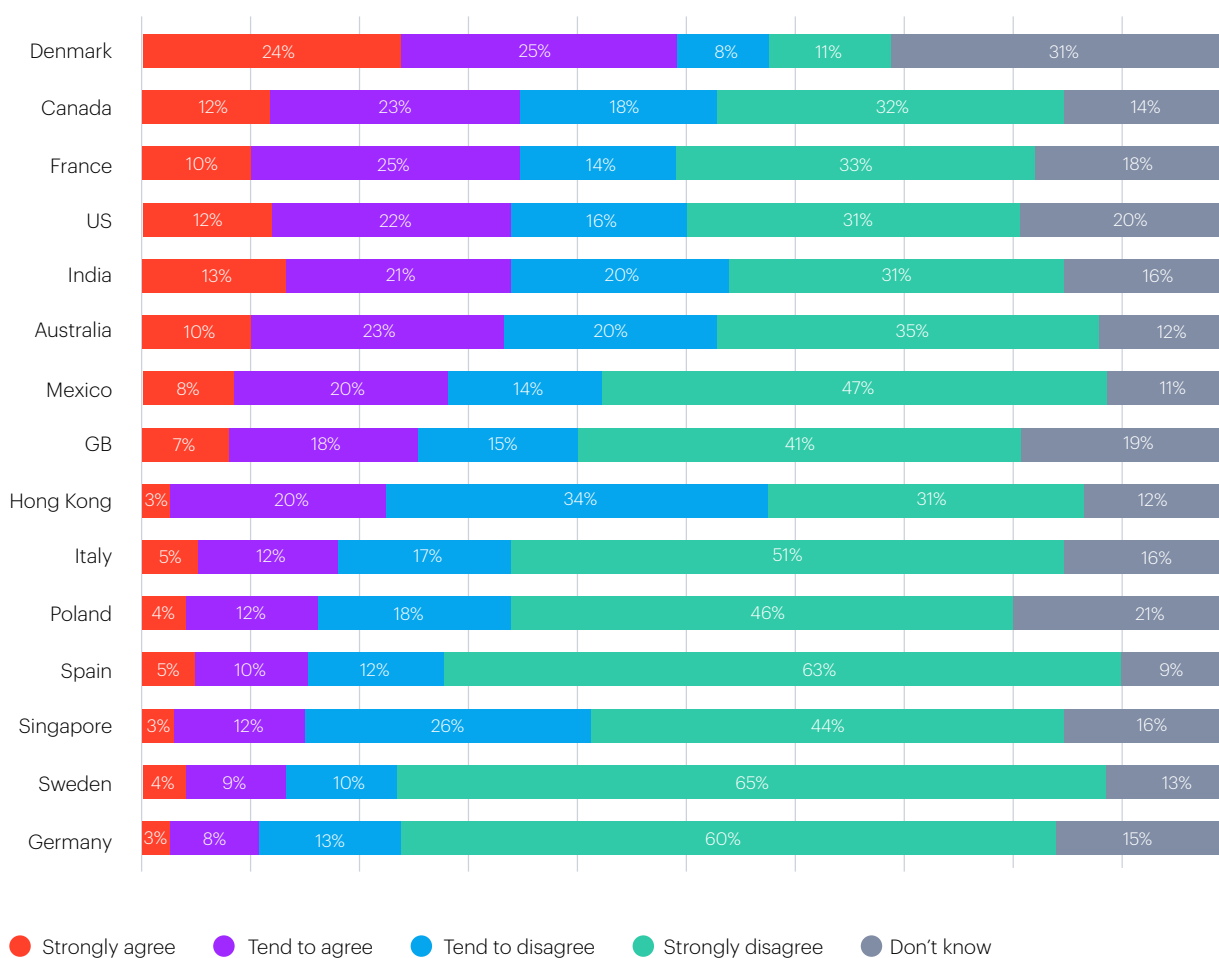
But still, even in countries where the bounce back from the worst depths of lockdown has been significant, such as the US, there remains a reluctance to visit a casino. Those that tend to disagree with the statement stands at **16%** while those that strongly disagree is **31%**.

The US does have among the highest percentage of respondents who strongly agree at **12%** with **22%** saying they tend to agree. Total agreement (happiness to visit) jumps to **63%** among monthly US gamblers but still **35%** of them disagree showing they remain worried.

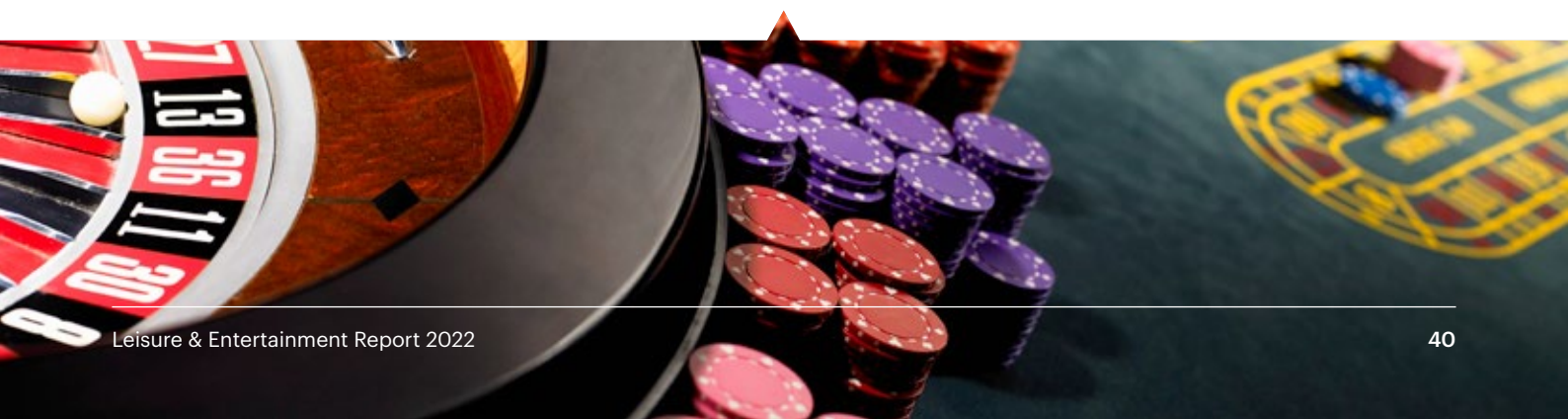
Similarly enthusiastic is Australia where, at the same time as the pandemic the casino industry has been mired in anti-money laundering scandals. Neither crisis has particularly dented the enthusiasm of Australians to visit a casino with **10%** saying they strongly agree that they would be happy to visit a casino and a further **23%** tending to agree. Agreement among monthly bettors rises to **54%**.

Canada also displays similar percentages in agreement with the proposition at **12%** strongly agreeing and **23%** tending to agree.

'Thinking about Covid-19, I would now be quite happy to visit a casino in my country' - Agreement by country



Agreement with the statement = % 'Strongly agree' or 'Strongly disagree' on a five point scale. Percentages may not total 100 due to rounding.





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Among those countries where there is a greater reluctance to visit casinos, Hong Kong and Singapore show perhaps a surprising lack of willingness to visit casinos with Hong Kong seeing **31%** strongly disagreeing that they would be happy to visit a casino in light of Covid and Singapore showing **44%** who strongly disagree while a further **26%** tend to disagree. Concern is slightly lower among monthly bettors but in Hong Kong and Singapore it remains high at **42%** and **54%** respectively.

Of course, with regard to Hong Kong the ongoing restrictions in Macau – including another closure of casinos in early July 2022 – means the reluctance to visit is effectively part of Chinese policy.

Speak to sales

Things are better with regard to official policy in Singapore, but a high degree of wariness over Covid appears to still be in evidence. This is problematic for markets already missing tourist traffic and hoping for higher local visitor levels.

As for those countries where the population has clearly decided they are over Covid, Denmark stands out. There only 11% strongly disagrees with the idea that visiting a casino in person is a good idea and a further **8%** tend to disagree. Those strongly in favour of visiting a casino stands at **24%**, the highest in our survey, with a further **25%** tending to agree (rising to **65%** total agreement among monthly bettors) In contrast scores in next door Sweden are considerably lower with agreement at only **13%** of the public and **29%** of monthly bettors.

Launch a survey

An aerial photograph of a soccer field with several players scattered across the green grass. The field is surrounded by a concrete walkway and a blue safety fence. The lighting suggests it's daytime.

Summary

The issues discussed within the report show the extent to which the debate around the regulation of gambling around the globe has moved on a pace.

Whether it is down to the pace of change in the US around sports-betting and igaming or due to the impact of technology in the way people gambling, it is fair to say that this survey shows the extent of the debate and the speed with which opinions can be formed around key issues such as advertising and legitimacy.

A question that is perhaps central to all the issues raised in this report is the extent to which public opinion on gambling drives the debate – or whether the debate drives public opinion. There can be no doubt that gambling is now much more visible, as a result of the legislative and regulatory progress made in recent years.

The double-edged sword is that with that greater exposure comes greater scrutiny. The challenge for the sector, globally, is to meet that scrutiny head on. Responsible gambling will be central to the sector's future health. Get it right on this crucial area and the sector will be able to help form public attitudes.

There is a lot to play for. The gambling industry can rely on the fact, as is demonstrated by the responses to the questions within our survey, that it has a definite and accepted place in society and with wider acceptance of regulated gambling the prize.

While the sector will always be a target for some, it has its own fate in its hands when it comes to managing its reputation. This survey offers hope that the consumers across the globe are willing to listen.

Methodology

The insights in this report are drawn from a recent global **YouGov Custom Research** survey exploring gambling attitudes and behaviors. This research was conducted across 18 global markets and fielded between 20th May and 3rd June 2022.

The YouGov panel provides a naturally accurate and representative view of the population. Data is adjusted using a mild weighting team using interlocking demographic characteristics — methodology considered advanced in the market research space.

Please find the sample details used for this report below.

Market	Sample type	Sample size
Australia	Nat Rep	1031
Canada	Nat Rep	1036
China	Online Rep	1030
Denmark	Nat Rep	1110
France	Nat Rep	1047
GB	Nat Rep	2065
Germany	Nat Rep	1073
Hong Kong	Online Rep	508
India	National Urban Rep	1009
Indonesia	Online Rep	1044
Italy	Nat Rep	1036
Mexico	Nat Rep (with urban bias)	1062
Poland	Nat Rep	1008
Singapore	Nat Rep	1055
Spain	Nat Rep	1036
Sweden	Nat Rep	1073
UAE	Nat Rep	1069
US	Nat Rep	1552

To enrich this study, this report draws on data from **YouGov Global Gambling Profiles**, our gambling audience intelligence tool that can identify trends and cross-analyze gambling data against key metrics, including demographics, media consumption, sports and teams followed, and more.

For further information or for any questions about the data used in this report, please **get in touch**.

Thank you

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