LEISURE & ENTERTAINMENT

INTERNATIONAL GAMBLING REPORT 2021

Opportunities for gambling companies to win big

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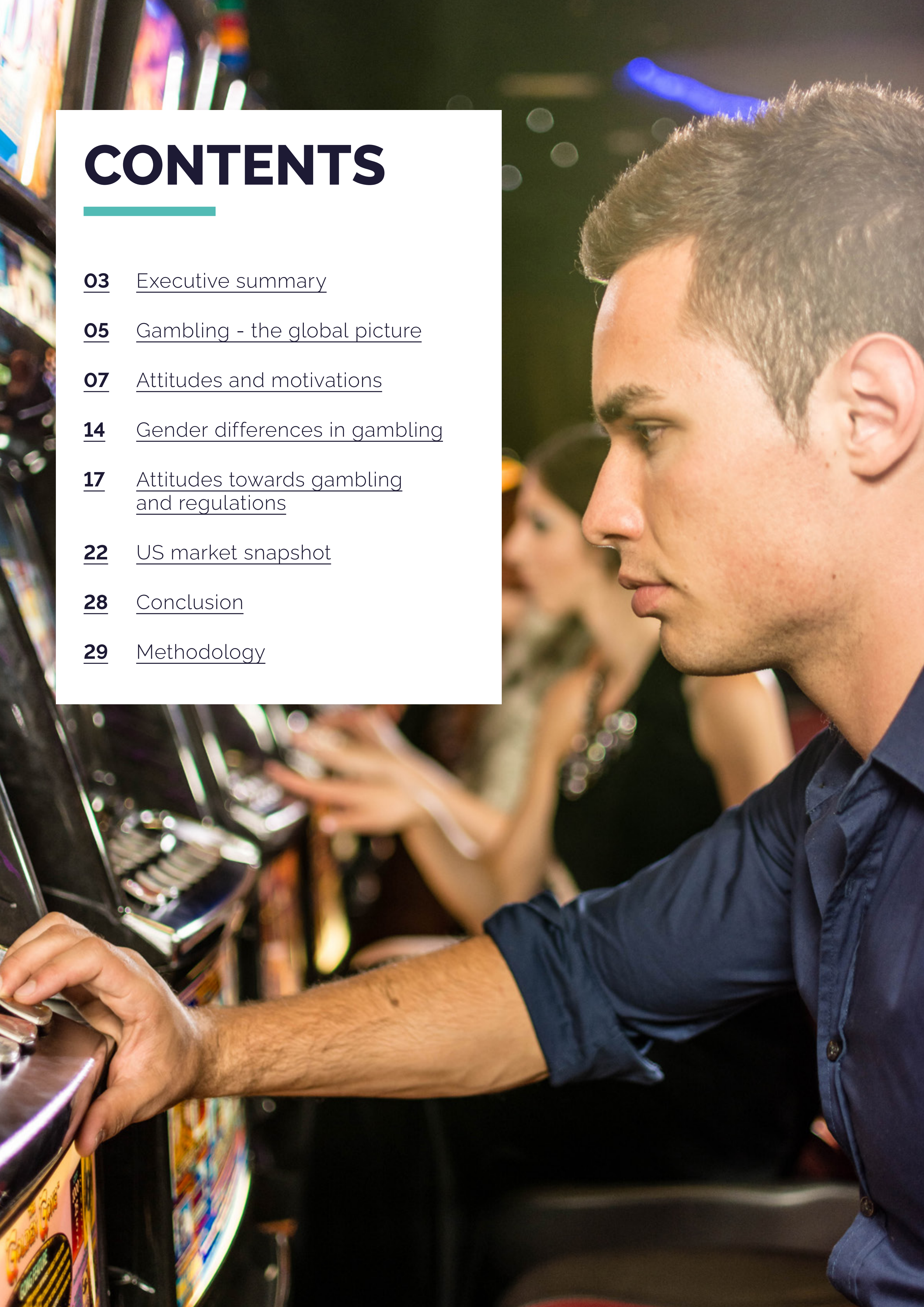


EXECUTIVE SUMMARY

Online on the march

Fueled by innovation, de-regulation in key markets, and the pandemic, it's clear that the popularity of online gambling globally has achieved new highs. Among those that have gambled in any form online in the past 12 months (17% of respondents globally), and driven largely by lottery and sports betting, 63% of gamblers globally now prefer online to offline. That level of preference is driven by countries such as Great Britain and Italy and an apparent greater level of acceptance of online gambling as a leisure activity.

However, the regulatory pendulum is not swinging evenly. While some countries are opening up to further liberalization – or the regulation of online for the first time – others are seeing regulatory pushback over issues such as advertising and promotions. Meanwhile, worries around increased gambling due to lockdown restrictions have also been a part of the debate, albeit with little evidence of increased harm.

Attitudes towards gambling vary, however, with Millennials more likely to view gambling as a fun pursuit compared with older cohorts and to talk about gambling within their offline and online social circles. Gender differences with regard to gambling are still prevalent. Globally, just 35% of all online gamblers are female and product preferences between genders remain.

Attitudes to regulation

Regulation and problem gambling remain hot topics with gambling consumers. Three in five consumers (57%) agreed that gambling firms don't take problem gambling seriously.

The argument in favor of legalization of online appears to be won, though, with only 23% agreeing that it should remain illegal. This is an important development given the extent to which legislators are likely to take note of public opinion on such issues.

The evolving US gambling landscape

The developing US state-by-state rollout of sports betting – and to a lesser extent online gaming – is reflected in changing attitudes on the part of US betting and gaming consumers. The percentage of online gambling participation among the survey respondents in the US is just 7% compared with 17% globally.

However, there may be potential there; the survey also shows that in terms of offline gambling participation, the US is slightly ahead of the global average (18% vs. 16%). The potential is also displayed in the data showing that US gamblers are more likely to participate in specific activities such as fantasy sports compared with the global average.

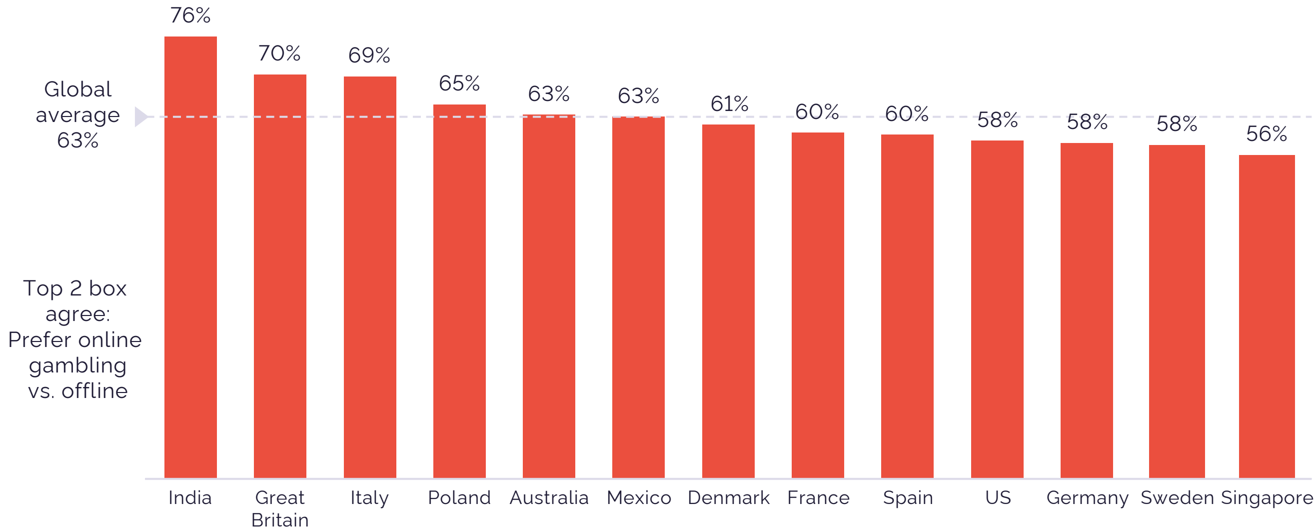
It's worth mentioning that attitudes towards online sports betting and gaming are now split between states where products are already regulated versus those where they are not. In the latter, a greater percentage (23%) believe regulations are too tight versus a much lower 12% in regulated states.

GAMBLING - THE GLOBAL PICTURE

Given the wide variety of regulatory regimes for online and land-based gambling across our survey markets, the relative homogeneity of the responses to whether respondents prefer online to offline is informative. Even in a country such as Singapore where online gambling - with few exceptions - is illegal, a majority (56%) of respondents who have tried it prefer to bet online. Compare this to the highest percentage of 76% in India.

Prefer online gambling to offline gambling – among those that have tried online

% of respondents – among online gamblers



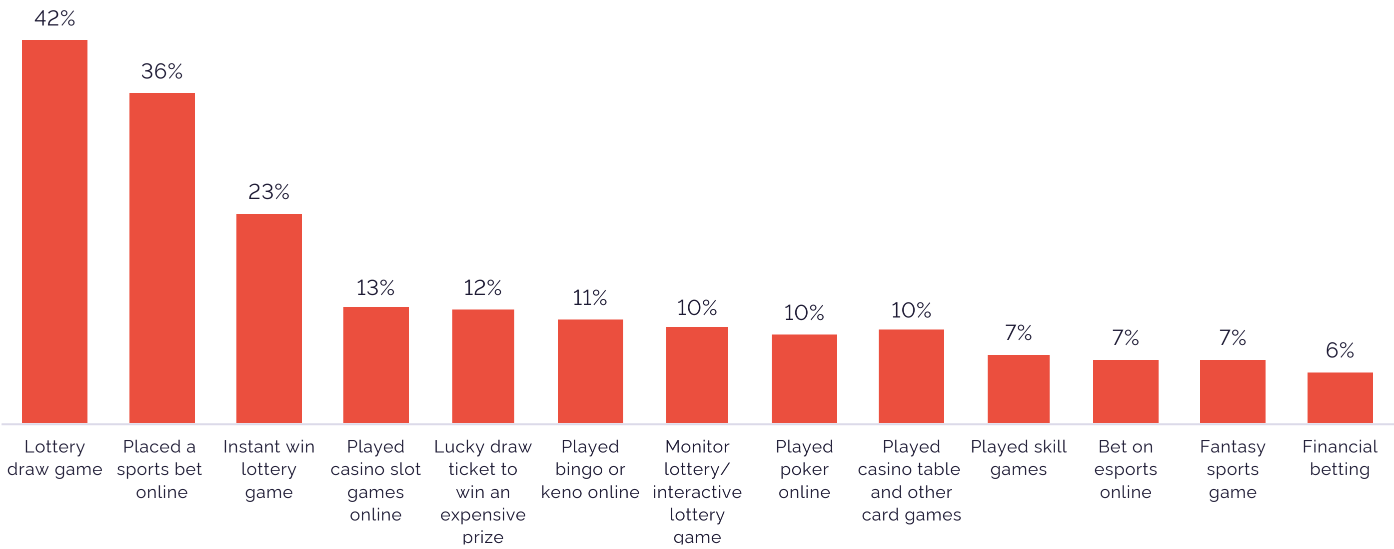
To what extent do you agree or disagree with the following statements? I prefer gambling online to offline.

The popularity of lotteries across the globe is predictable given they are the prevalent form of regulated online products available globally. In terms of products played in the last 12 months, buying a lottery ticket online, buying an instant win lottery ticket online and buying a lucky draw ticket for an expensive prize all feature in the top four with 42%, 23% and 12% of consumers doing so respectively.

Sports betting's place in second spot with 36% is again no surprise given it is also a product more readily taken up by legislators in favor of what are often perceived to be harder forms of online gaming products. Online sports betting is also more of a mass participation product in contrast to products such as slots (13%), bingo and keno (11%), table games and other card games (10%), and poker (10%).

Gambling incidence by online type

% of respondents – among online gamblers



You previously said that you have gambled online for money in the past 12 months… Which, if any, of the following have you done? Please select all that apply.

ATTITUDES AND MOTIVATIONS

The good news for the operators and proponents of regulated gambling is that by far the largest motivation for gambling is that it's a fun thing to do - two in five (41%) gamblers cite this reason.

Drilling down into gambling motivations, we see similarities in the top motivators across respondents by gambling type played. For those that play the lottery, it is not surprising to see that fantasizing about winning is the top driver (42%), followed by gambling for fun and playing to win big. Promoters of regulated sports betting will be happy that 57% of sports betting respondents said the top motivation for participation is gambling for fun, followed next by enhancing the sports experience (34%).

Top three motivators among gamblers playing the following types
% of respondents – among online gamblers

	Lottery Draw	Sports	Bingo/Keno	Online Slots	Poker	Esports	Fantasy Sports
Top Motivator	42% Fantasize of winning	57% Fun thing to do	50% Fun thing to do	53% Fun thing to do	61% Fun thing to do	55% Fun thing to do	47% Fun thing to do
#2 Motivator	38% Fun thing to do	34% Enhance my experience	39% Fantasize of winning	37% Fantasize of winning	33% Enhance my experience	38% Enhance my experience	39% Play to win big
#3 Motivator	35% Play to win big	26% Fantasize of winning	34% Play to win big	36% Play to win big	32% Play to win big	38% Play to win big	33% Enhance my experience

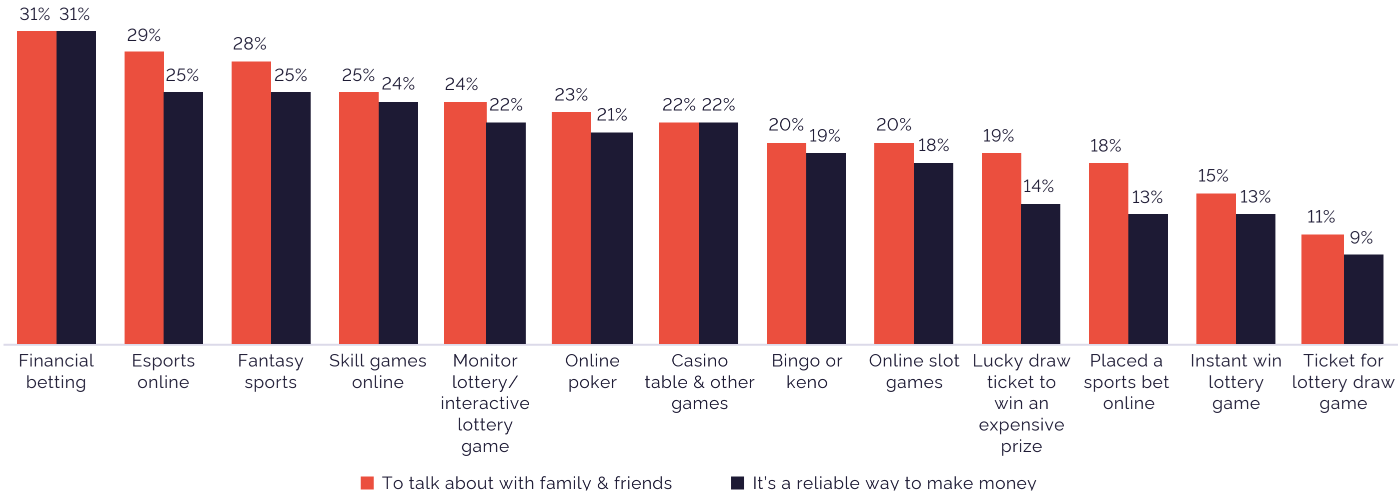
Which, if any, of the following have you done?
Which of the following motivates you to participate in gambling for money online?

Playing to win big is a top motivator (39%) for fantasy sports online gamblers

When it comes to secondary motivators such as social aspects and the perceived ability to make money, these drivers are far more important among players of games of skill and other emerging gaming types, such as financial betting, esports gambling and fantasy sports.

Gambling motivations globally by online game type played

% of respondents – among online gamblers



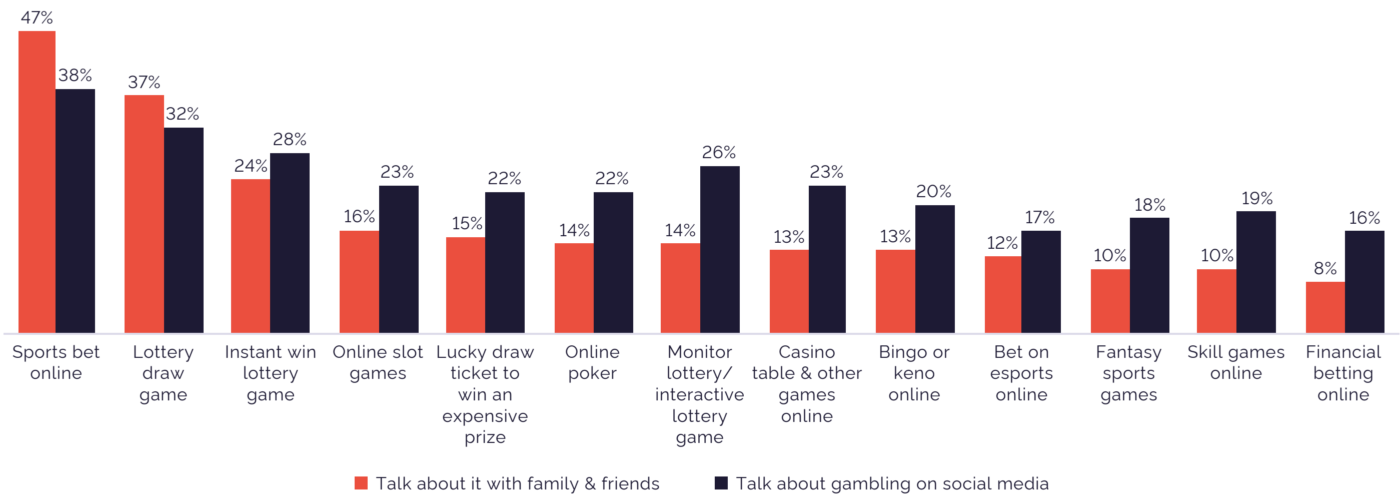
Which, if any, of the following have you done?
Which of the following motivates you to participate in gambling for money online?

While not the majority, there are many who talk about their gambling experiences both online and offline. Among those sharing their gambling experiences with family and friends, almost half (47%) place sports bets online. Among those who share gambling experiences on social media, 38% do so.

One noticeable theme in the data is that players of all games, with the exception of sports betting and lottery draw games, are more likely to say they talk about gambling on social media than they are to talk about it with family and friends.

Gambling type incidence among those talking about gambling

% of respondents – among online gamblers



Which, if any, of the following have you done?
To what extent do you agree or disagree with the following statements?

Differences in online gambling behavior by markets

The global popularity of lottery products – prize draws or instant tickets – and sports betting is clear from the table of the top three most popular online products by country. In six of 13 countries, online lottery is the most popular online product, and a further four have it as the second most popular product. Sports betting is also the most popular online product in six countries while it is the second most popular in a further six countries. Lottery instants are the third most popular online product in eight of the 13.

The only standout from this lottery/sports hegemony is India where fantasy games are the most popular online product, followed by skill games. Again, this is likely down to the nature of the regulatory picture in India where gambling products are strictly limited to skill games including fantasy sports while lotteries are run by the individual states.

Differences in online product popularity by country
% of respondents – among online gamblers

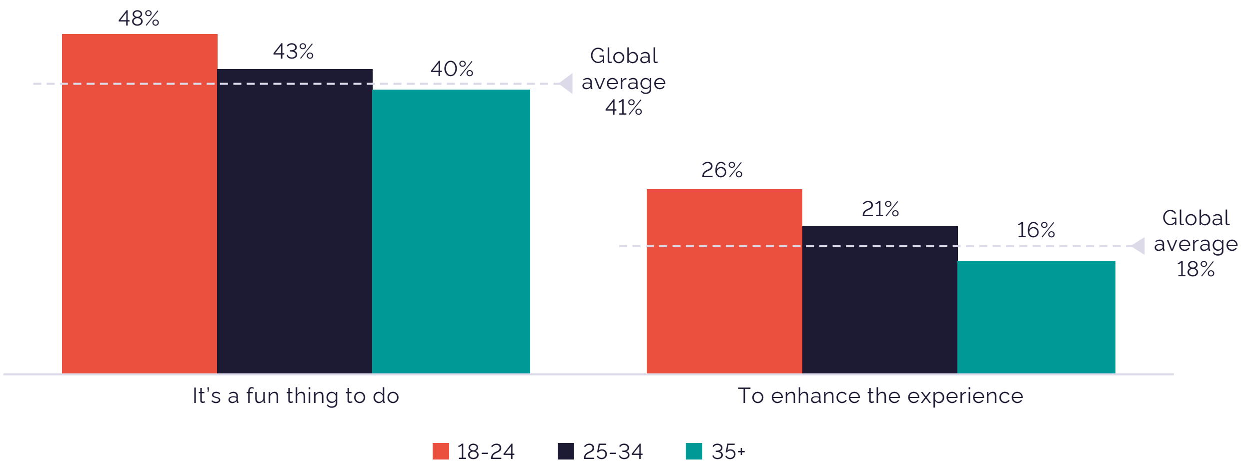
Market	Most popular	2nd most popular	3rd most popular
Great Britain	61% Lottery Draw	40% Sports	30% Lottery Instant
Germany	58% Lottery Draw	21% Sports	16% Lottery Instant
France	36% Lottery Draw	32% Sports	25% Lottery Instant
Italy	57% Sports	22% Poker	22% Lottery Instant
Denmark	36% Lottery Draw	33% Sports	15% Lottery Instant
Sweden	34% Sports	31% Lottery Instant	29% Lottery Draw
Spain	42% Sports	39% Lottery Draw	19% Poker
Poland	50% Lottery Draw	37% Sports	26% Lottery Insurance
US	32% Sports	31% Lottery Draw	23% Slots
Mexico	37% Sports	24% Lottery Draw	22% Lottery Instant
India	37% Fantasy Sports	28% Skill Games	27% Lottery Instant
Australia	49% Sports	46% Lottery Draw	19% Lucky Draw
Singapore	44% Lottery Draw	30% Sports	17% Lottery Instant

Which of the following have you done?

Millennials/Gen Z attitudes and behaviors

Compared with the 41% figure for all age groups that view gambling as a fun thing to do, among the 18-24 age group the percentage rises to 48%. That percentage then falls to 40% for those aged 35+. Further, 26% of the 18-24 age group say that betting enhances the experience of sports, compared with just 18% of online gamblers globally.

Gambling motivations globally by age
% of respondents – among online gamblers

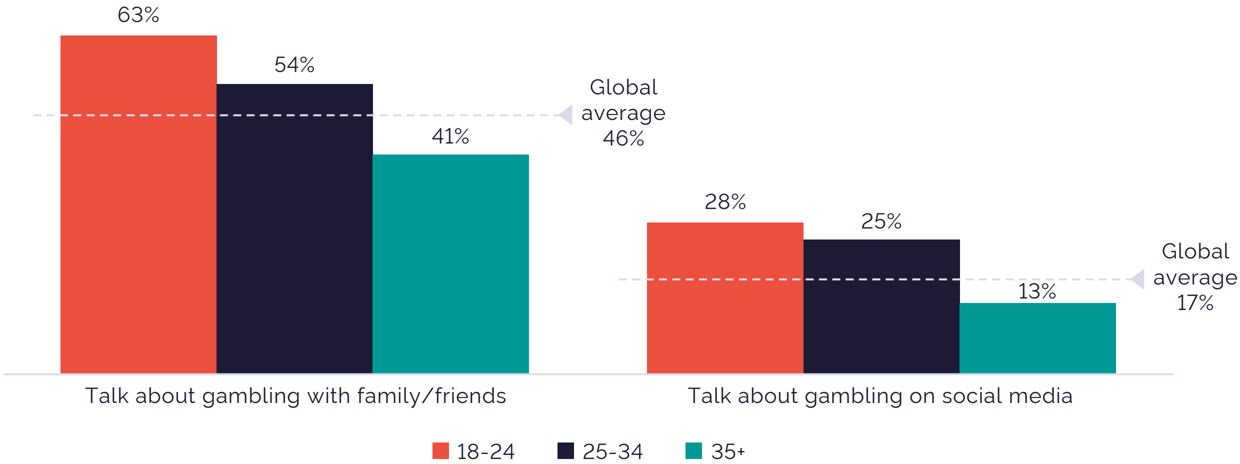


Which of the following motivates you to participate in gambling for money online? Please select all that apply.

Similarly, it is younger generations who are less likely to perceive the attachment of any stigma to gambling. 63% of millennial gamblers say that they talk about gambling with their friends, family and colleagues - seventeen points higher than the average for global online gamblers. Again, this should give encouragement to those looking at liberalizing gambling laws in that so many see gambling as a recreational pursuit.

Millennials more likely to discuss gambling in their social circles

Gambling motivations globally by age
% of respondents – among online gamblers

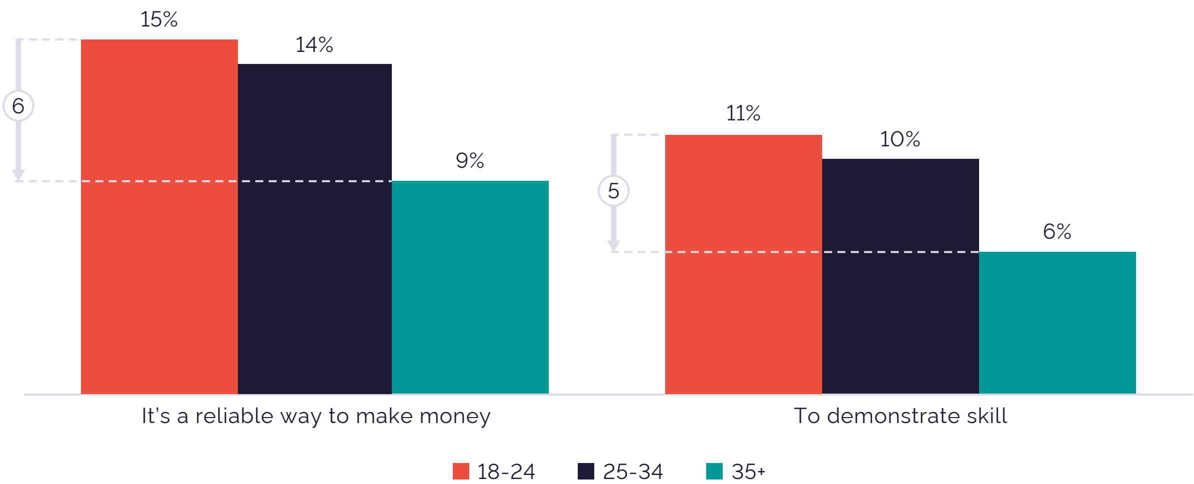


To what extent do you agree or disagree with the following statements? By gambling we mean any act of wagering money on an event's outcome with the intent of winning a prize or cash.

This optimism around gambling's recreational aspects should be only slightly tempered by findings suggesting that younger cohorts are a little more enamored of the idea that gambling is a reliable way to make money - 15% of 18-24 year olds say this is one of their main motivations, compared with 11% of the total. Likewise, younger generations are unsurprisingly more likely to see gambling as a way to demonstrate skill (11% for 18-24 years olds) compared with other age groups (just 6% of those 35+).

Millennials' motivations to gamble

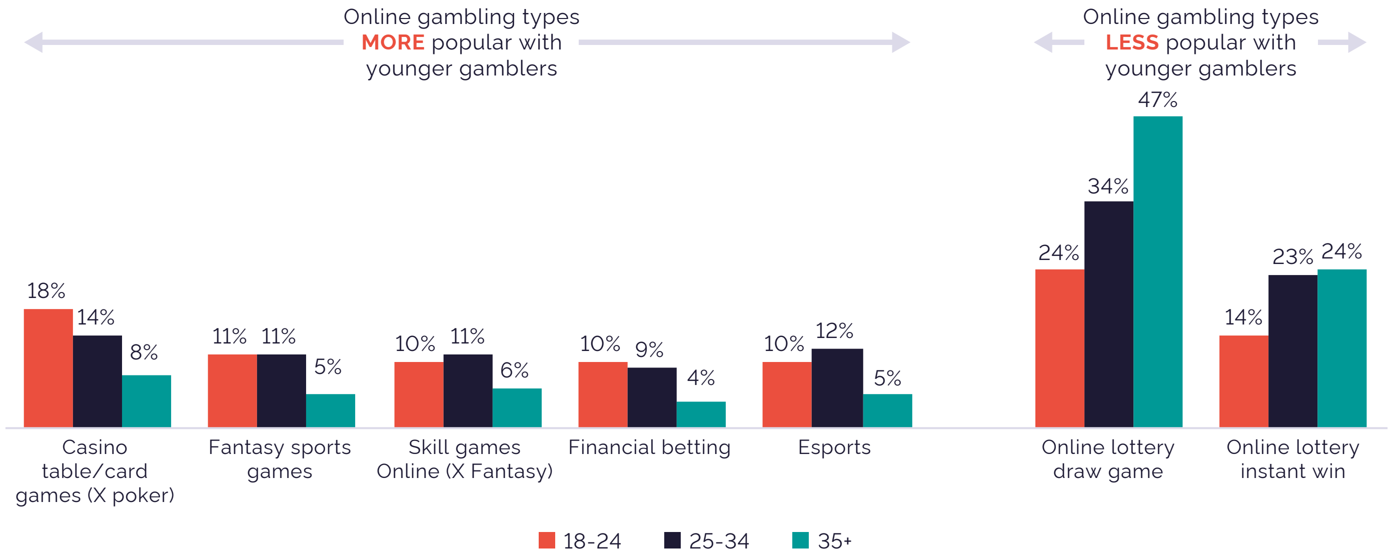
Gambling motivations globally by age
% of respondents – among online gamblers



Which of the following motivates you to participate in gambling for money online? Please select all that apply.

When broken down by products, younger cohorts skew towards the type of games where skill is at least part of the appeal - in particular fantasy games, casino card games, and esports; products where skill is very much a part of the culture.

Online gambling incidence globally by age
% of respondents – among online gamblers

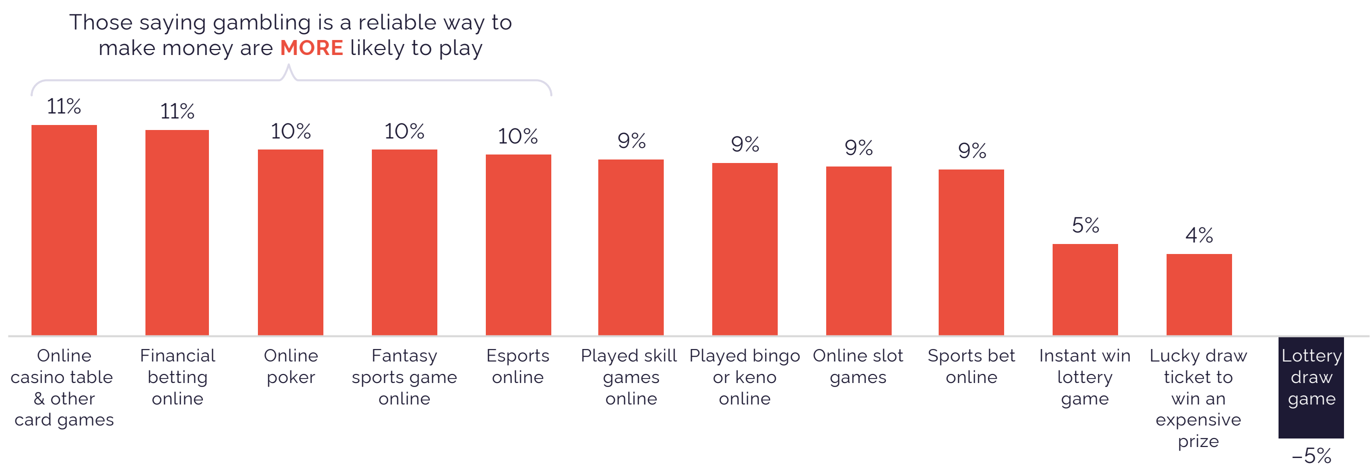


Which, if any, of the following have you done?

A pertinent issue for regulators and their governing legislators is the relative lack of popularity for online lottery products among younger generations.

Furthermore, those that believe gambling is a reliable way to make money are unsurprisingly more likely to gamble overall. Specifically, these respondents are ten points more likely to play skill games such as online table games, financial betting, online poker, fantasy and esports.

NET difference in gambling incidence – comparing those saying gambling is a reliable way to make money vs. all online gamblers
Among all online gamblers



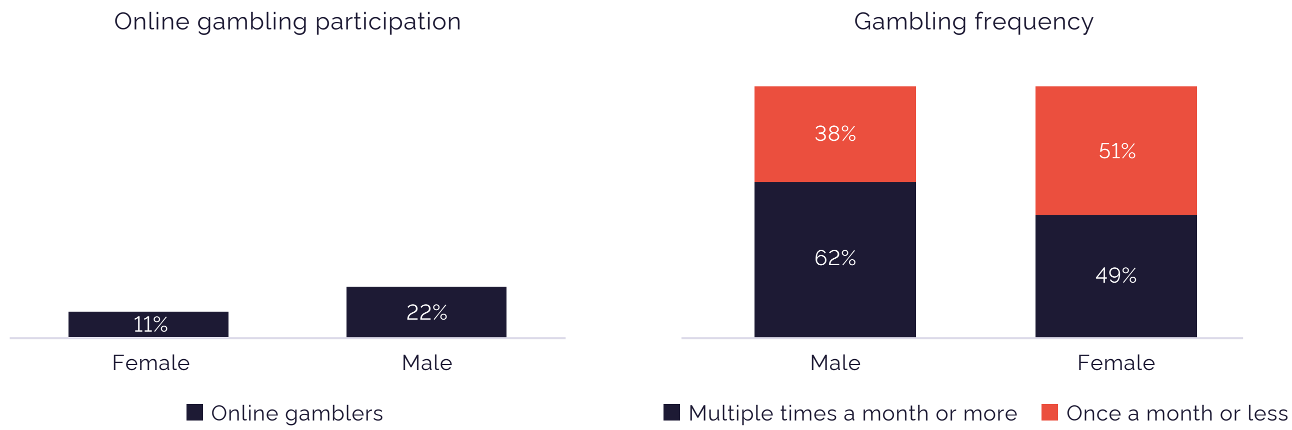
Which , if any of the following, have you done?
Which of the following motivates you to participate in gambling for money online?

GENDER DIFFERENCES IN GAMBLING

Female participation is a segment often overlooked when analyzing gambling habits. Clearly, there is a gender gap – half the amount of women gamble (11% of the total population in the study) as men (22%). Cultural issues no doubt come into play, as can be seen below – while Great Britain and Italy share similarly open systems and the availability of a wide variety of products, the rate of female participation in Great Britain is 44%, double the equivalent rate in Italy.

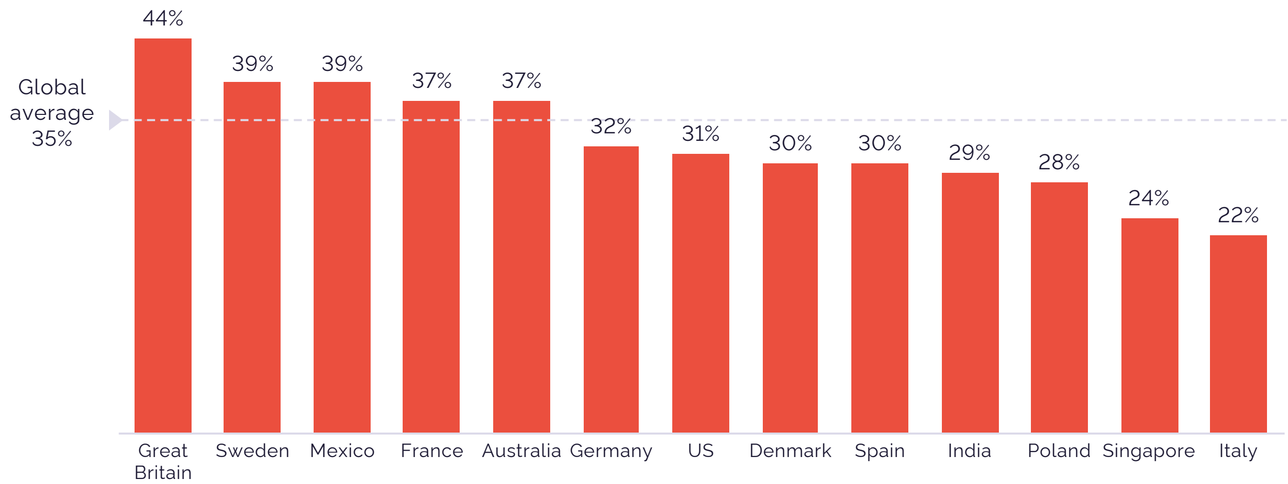
Differences in online gambling participation by gender

Online gambling participation vs. gambling frequency
% of respondents globally by gender



Which, if any, of the following have you done?
How often, if at all, do you typically gamble or place a bet NOT including playing the lottery, for money online, using a website or app?

Percent of total gamblers that are female by country
Avg across markets

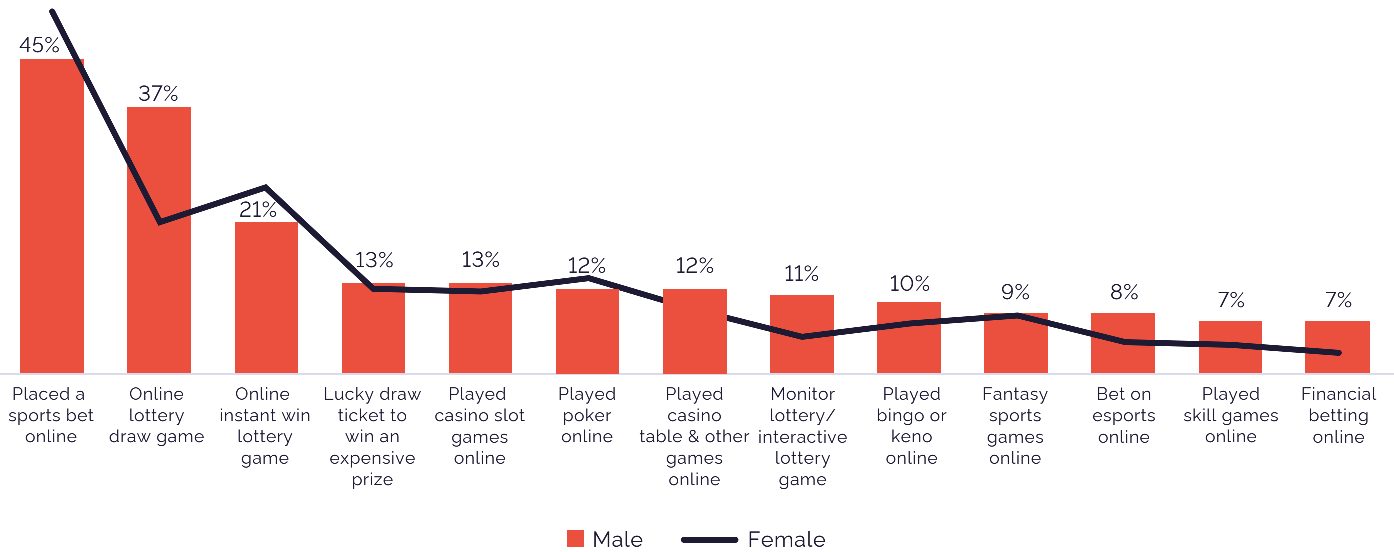


Have you gambled for money at all in the past 12 months?

Lastly, the data may reaffirm certain gender stereotypes. Participation among female gamblers is higher among many lottery games, as well as bingo and keno, while participation levels lag behind those of males for nearly every other online product type.

Participation among female gamblers is higher among many lottery games, as well as bingo and keno

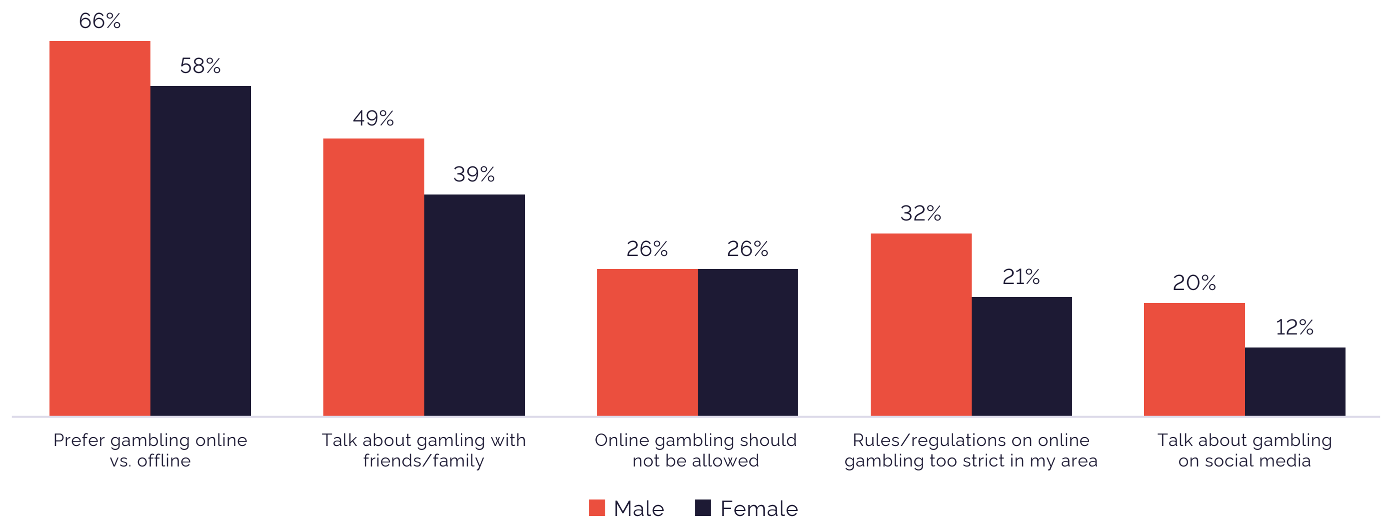
Gambling participation by gender by online type
% of respondents globally – among online gamblers



You previously said that you have gambled online for money in the past 12 months. Which, if any, of the following have you done?

In terms of broader attitudes to gambling, women are just as likely as men to agree that online gambling should not be permitted (26% for both). In other aspects there was more of a divide, albeit only slight – for example, 66% of men prefer online gambling over offline compared with 58% of women.

Global attitudes towards gambling by gender
Among online gamblers



To what extent do you agree or disagree with the following statements? Top 2 box agreement.

Women are just as likely as men to agree that online gambling should not be permitted (26% for both)

ATTITUDES TOWARDS GAMBLING AND REGULATIONS

It's no surprise to find that gambling is a polarizing subject across all geographies. It is, after all, the reason why the regulation of gambling is always a subject of discussion, and our survey data shows just why the arguments over regulation are unlikely to ever subside.

The percentage of respondents globally who agreed with the statement that online gambling should be illegal was 23%, while a further 33% expressed no opinion and 44% disagreed with the statement. Where there is more agreement – and where the regulators will be taking note and operators should be much more aware – is around what should be done about problem gambling.

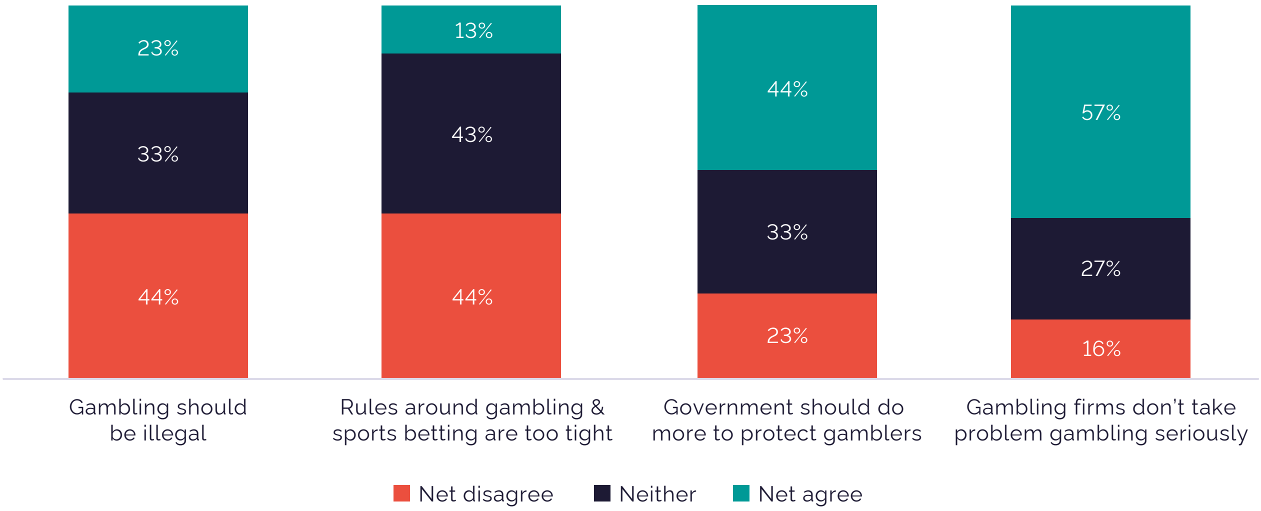
Nearly three in five respondents (57%) agree that gambling firms don't take problem gambling seriously, while only 16% disagree. This presents a clear challenge for gambling operators. How can they persuade people that they are doing more to both understand and potentially avoid the worst aspects of gambling harms? This is important because voters' attitudes influence legislators.

Similarly, governments and regulators also have a job to do to persuade a larger proportion of the public they are doing enough themselves to protect gamblers. In total, 44% of respondents said governments should do more to protect gamblers while only 23% disagreed with the statement. Meanwhile, if the argument is about further loosening of regulation, then clearly there is little by way of public appetite. Only 13% said that the rules around gambling and sports betting are too tight while 44% disagreed with that statement.

It suggests that operator trade bodies and associations might struggle to get any true support for measures which would be seen as liberalizing a gambling market further.

Is regulation necessary?

Global attitudes towards gambling legality and regulation
% of respondents



Do you agree or disagree with the following statements?

Similar points to the last can be made from the evidence of attitudes to key issues around gambling among both gamblers and non-gamblers. While support for the banning of online gambling is highest among non-gamblers (46%), it should be noted that there isn't truly widespread support for liberalizing gambling much further. Only 28% of gamblers believe that the restrictions on their pursuit are too harsh. Meanwhile, 26% of gamblers believe online gambling should be banned and only a quarter of gamblers (26%) – i.e. the segment more likely to have direct experience – believe online gambling companies care about gamblers' well-being.

Again, this is more than just about public relations. It suggests that gambling companies need to do more to persuade more people – including large proportions of their own customers – that they really do have policies on gambling harms and aren't there just to make money from their customers. In fact, of all the findings from the survey, this is perhaps the most salient to the future of the sector in every country.

Global attitudes towards gambling legality and regulation

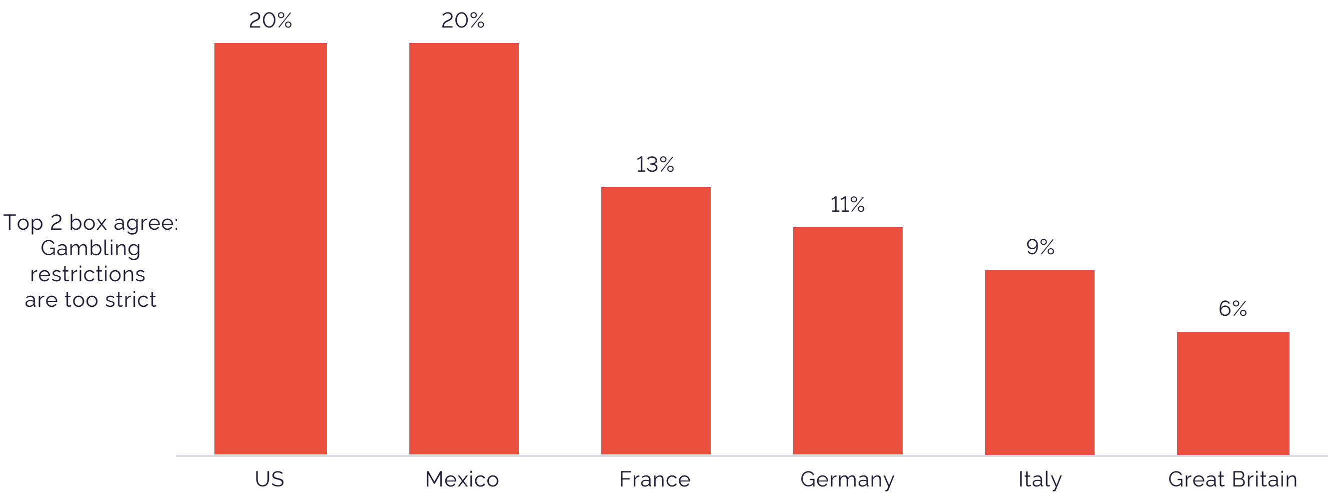
% of respondents – gamblers & non-gamblers

To what extent do you agree or disagree with the following statements?
Have you gambled for money at all in the past 12 months?

There are some notable differences between key markets when it comes to whether the public believes restrictions on gambling are too strict. Notably, the US has the highest level of support on this question (20%), which is not surprising given the progress being made on state-by-state regulation there. As will be seen in the next question, attitudes to gambling in Europe – where online gambling as a regulated business has been more established and grey markets have been a feature for many years – have hardened in comparison. While in France there are still many restrictions around online gaming, explaining perhaps the 13% who believe the rules are too strict, in Great Britain and Italy, there are very few arguing that restrictions are too tight.

Global attitudes towards gambling legality by country

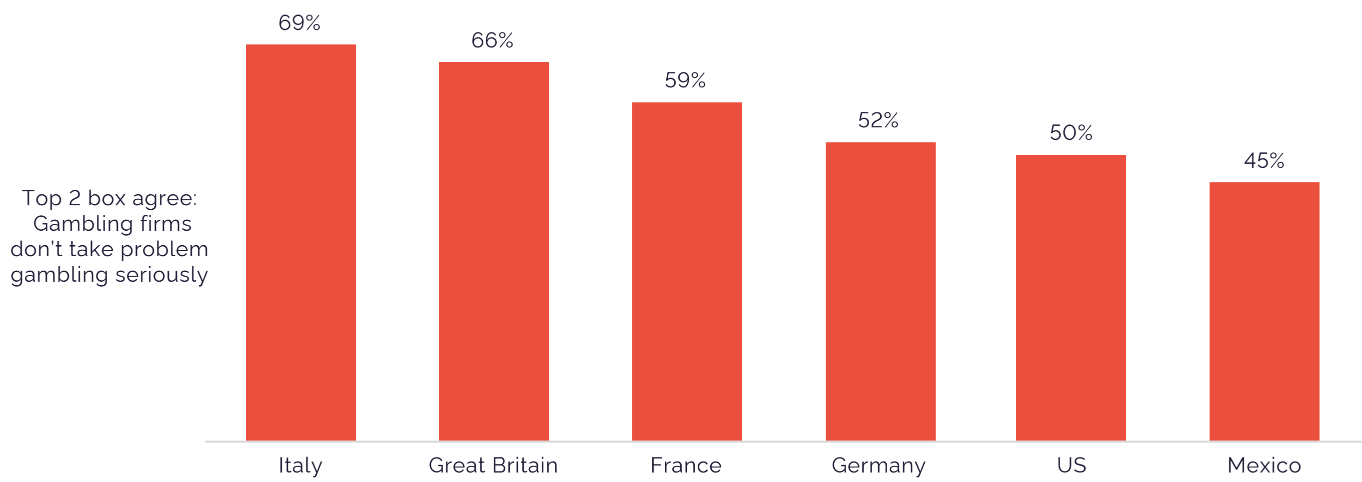
% of respondents agreeing gambling restrictions are too strict



To what extent do you agree or disagree with the following statements?

On the issue of problem gambling, it is in countries where there are the most liberalized regimes that people believe that gambling firms don't take problem gambling seriously enough. In Italy, 69% agree with this statement while in Great Britain this stands at 66%. However, it is notable that in the US this figure is 50%. If there is to be any public backlash against the fight for market share currently taking place in the US, then this is maybe the first signs of public disquiet.

Attitudes towards gambling regulations by country
% of respondents agreeing gambling firms don't take problem gambling seriously

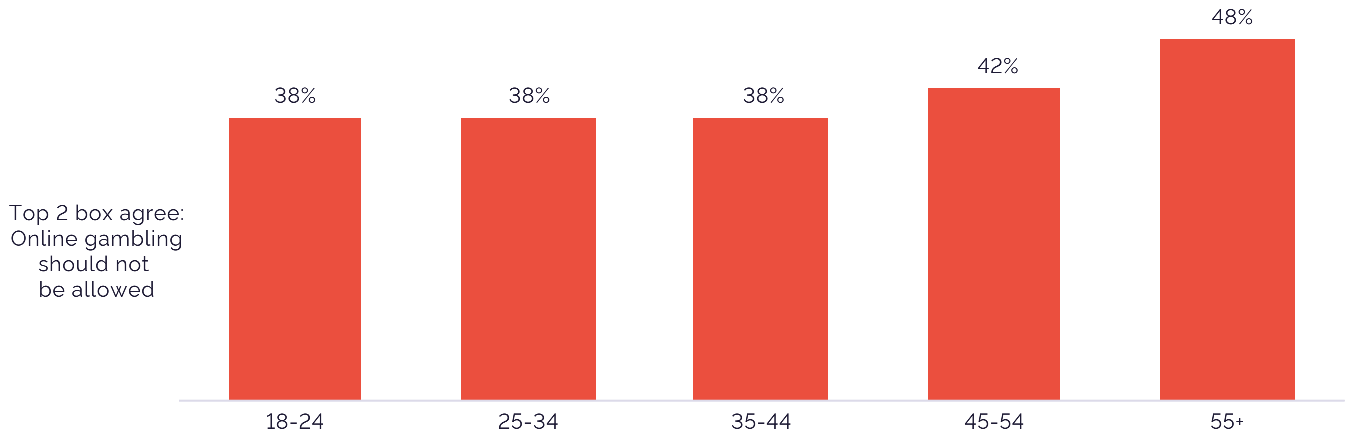


To what extent do you agree or disagree with the following statements?

Globally, 63% of people believe that gambling firms don't take problem gambling seriously enough

When looking at the attitudes towards gambling globally by age cohort we see the greatest support among younger generations. In each of the three youngest age groups, covering people aged between 18-44, there is 38% agreement that online gambling should be illegal, a full ten points lower than the oldest cohort, 55+, where nearly half of global respondents say online wagering should not be allowed.

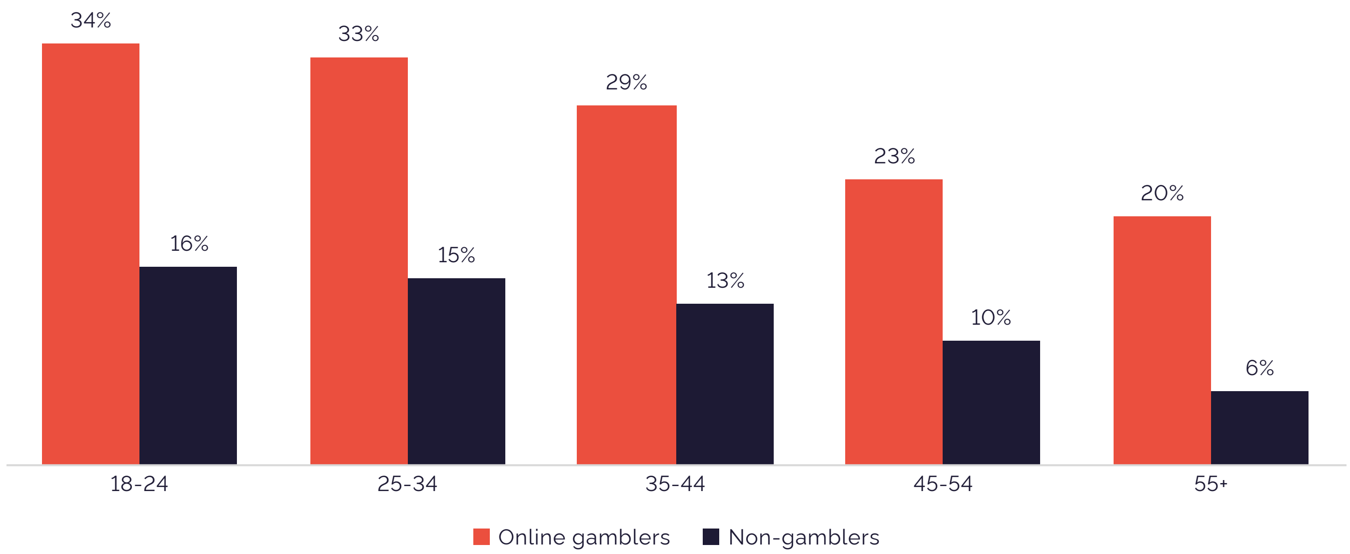
Global attitudes towards gambling legality by age cohort
% of respondents agreeing online gambling should not be allowed



To what extent do you agree or disagree with the following statements?

The idea that younger generations view online gambling more favorably is further supported by the data below which looks at attitudes towards online gambling companies across age cohorts. While most respondents globally do not agree that online gambling companies are looking out for customers' wellbeing, younger age groups are far more likely to view these companies' actions favorably. This is true among both online gamblers and non-gamblers.

Global attitudes towards online gambling companies by age cohort
% of respondents agreeing - "most online gambling companies care about the wellbeing of their customers"



To what extent do you agree or disagree with the following statements?
"Most online gambling companies care about the wellbeing of their customers"

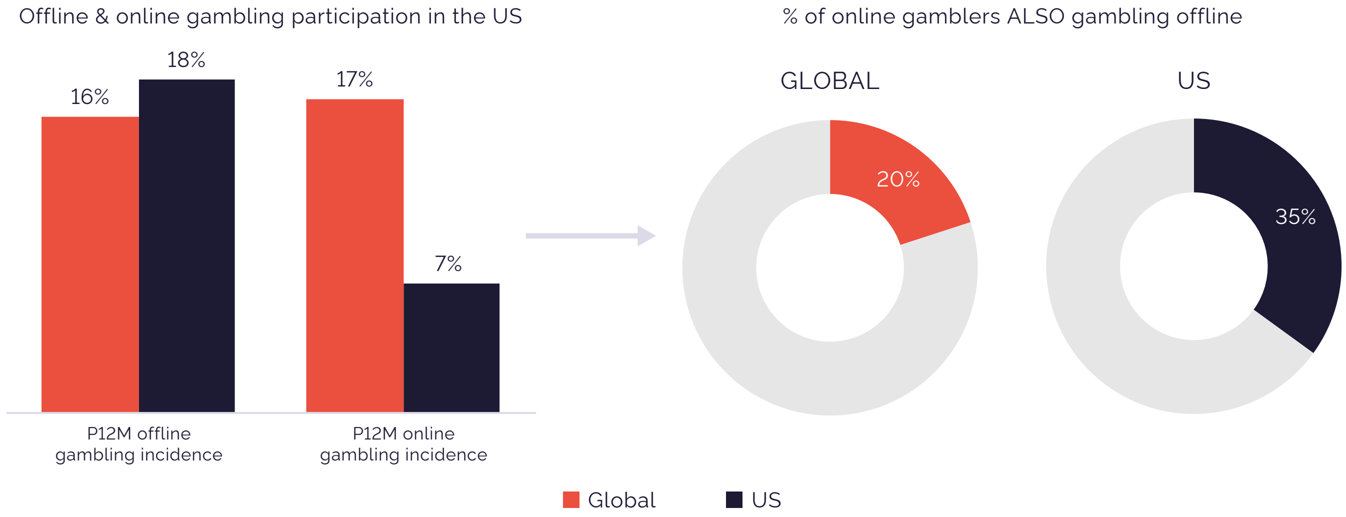
US MARKET SNAPSHOT

The piecemeal progress of state-by-state legislation in the US with less than 20 states so far online with either sports betting or online gaming - and with the most populous states of New York, Florida, Texas, and California not yet included - means it is not surprising that the incidence of online gambling in the US is fully ten percentage points lower than the global average (7% versus 17%).

The survey also shows the potential for online betting in the US. With further regulatory progress all but guaranteed, it can be seen from the levels of offline gambling participation that there is a lot to play for. At 18%, US offline gambling is above the global average of 16%.

This is also highlighted by the data from our question on how many online gamblers are also betting offline. While globally the percentage of omni-channel customers stands at 20%, in the US this stands at 35%. Such data suggests the fears of anti-online gambling proponents that online cannibalizes offline gambling are overblown, though we do need to consider the potential impact of COVID-19 restrictions on this data. Indeed, recent first-quarter results commentary from casino gaming groups such as Caesars, MGM Resorts International and Penn National Gaming in the US suggests that adding online sports betting increases spend among their customer bases.

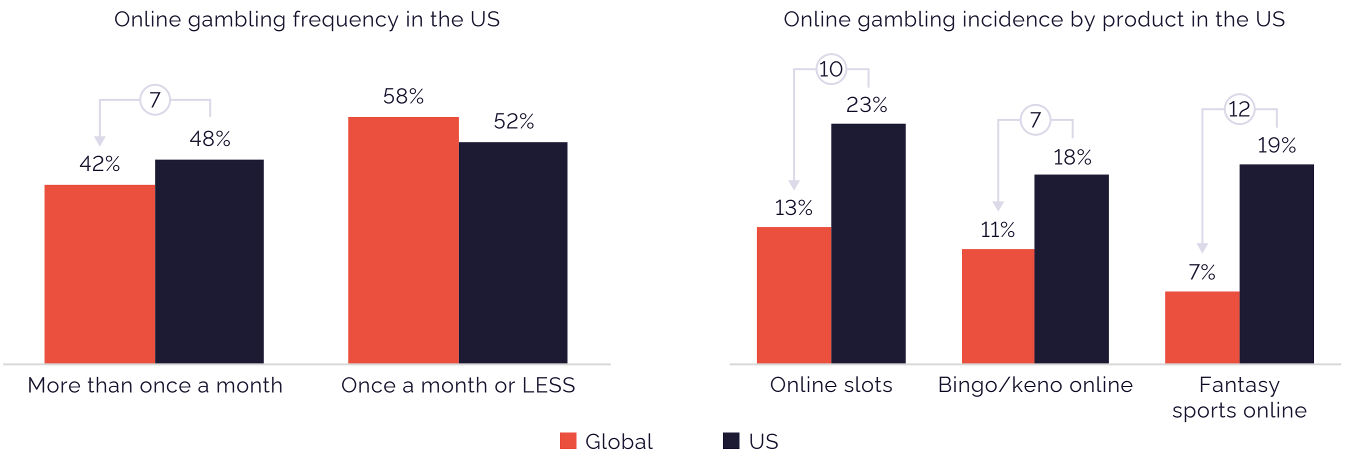
Offline & online gambling globally vs. US
% of respondents



How often, if at all, do you typically gamble or place a bet NOT including playing the lottery, for money online, using a website or app?

Added to this, it is interesting to see that American online gamblers also gamble more frequently than their global peers with 48% gambling multiple times monthly compared with a global figure of 42%. This greater frequency can be explained in part by the product types that resonate more with US gamblers, such as online fantasy sports and online slots.

Online gambling globally vs. US
% of online gamblers

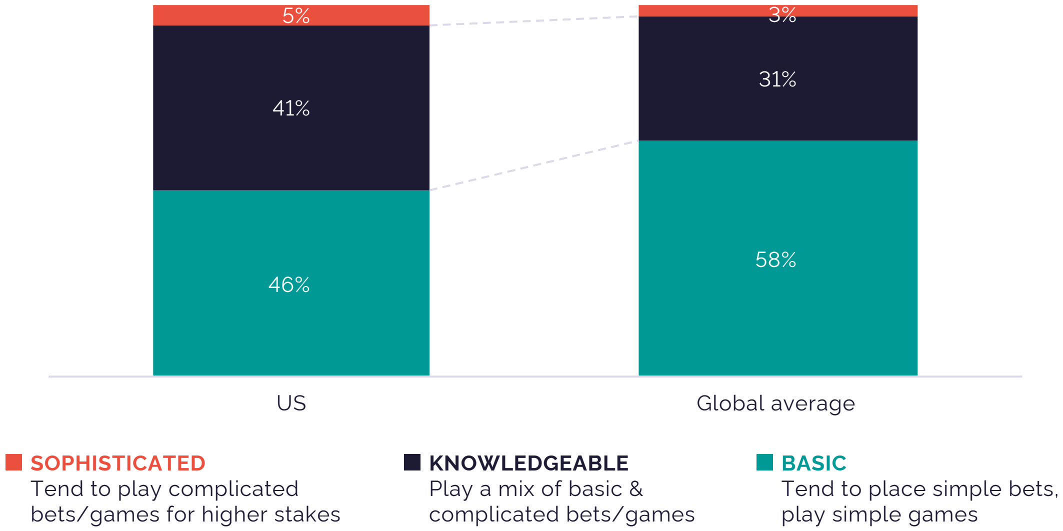


How often, if at all, do you typically gamble or place a bet NOT including playing the lottery, for money online, using a website or app?

American online gamblers gamble more frequently than their global peers

Given the frequency of gambling participation in the US, it is perhaps unsurprising that more US gamblers see themselves as being knowledgeable than the global average (41% to 31%). This could be explained by the publicity given to post-PASPA legislation in various states and suggests that the education job around online is easier in the US than might be the case in countries where regulated online gambling is a new phenomenon.

Gambling types (self-identified) – US vs. global
% of respondents

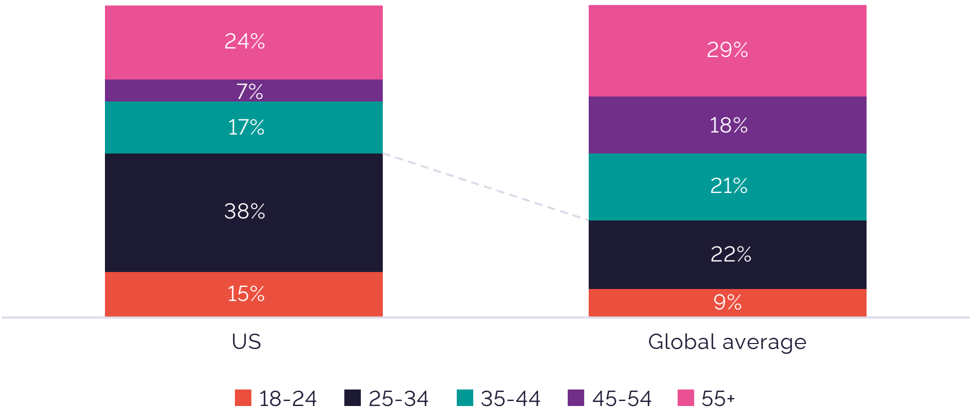


Which, if any, of the following best describes you when it comes to gambling?

Of course, the thriving grey/black market in the US also plays a role here, though to an unquantified degree. While regulated online sports betting and online gaming is new to many states, unregulated online activity is not and has been widespread across the US for many years now. This is also reflected in the demographic data in the US which shows the US skews much younger than the global comparators. Over half (53%) of American gamblers are in the 18-34 age range, compared with 31% globally. Offshore bettors are more likely to skew to younger cohorts because it is an online business; likewise, the DFS demographic also skews younger due to the online nature of this fantasy engagement.

Age distribution of online gamblers in the US

% of respondents

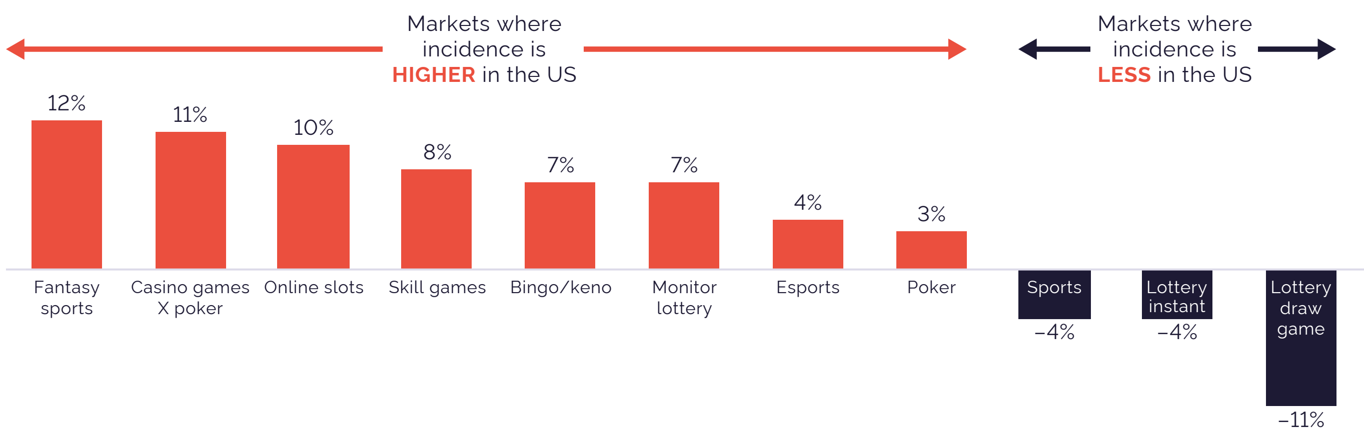


You previously said that you have gambled online for money in the past 12 months… Which, if any, of the following have you done?

Another unsurprising finding from the survey is that US gamblers are more likely to engage in fantasy sports games than is the case globally. Given the popularity of daily fantasy sports in the US, this is only to be expected. A more surprising finding is that Americans are less likely to bet on sports than the global average. However, this is likely a function of the state-by-state situation and the lack of regulated online betting in a majority of states.

Online gambling incidence – NET point difference between the US & global averages

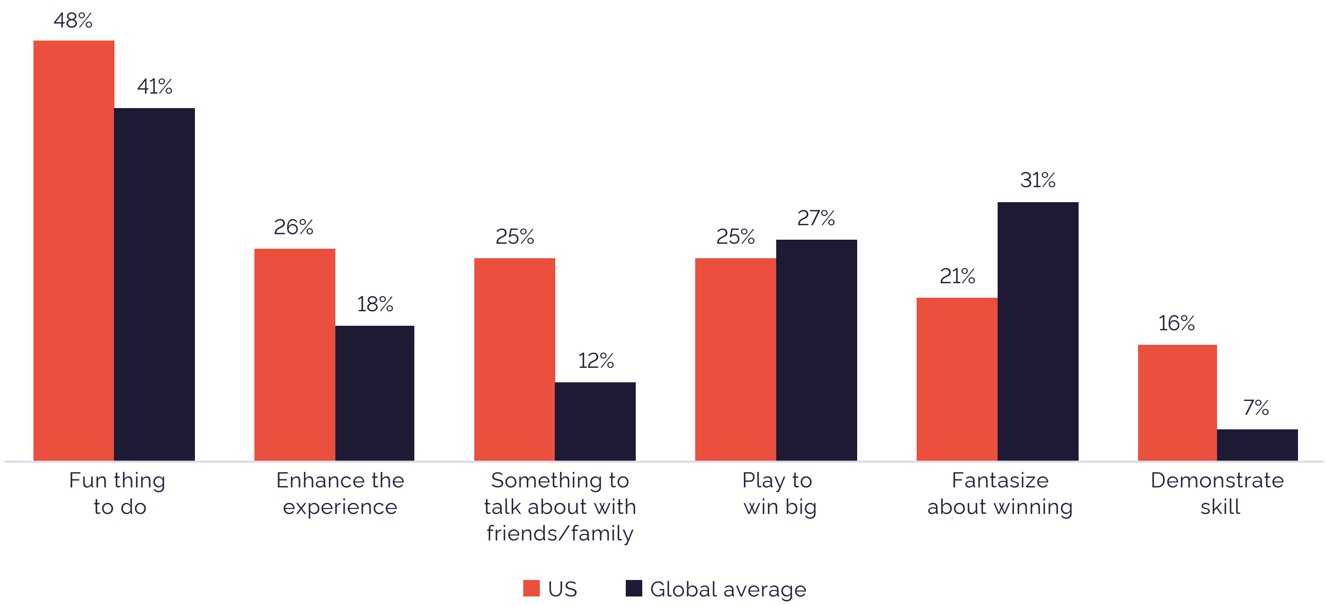
% of respondents among online gamblers



You previously said that you have gambled online for money in the past 12 months… Which, if any, of the following have you done?

The popularity of gambling in the US would appear to be reinforced by its status as a mainstream leisure activity. More Americans see gambling as a fun activity than is the case globally (48% to 41%). US gamblers also see their activity as enhancing the experience (26% to 18%) and as a subject of conversation (25% to 12%). All this data would support claims of the proponents of further sports betting and online gambling that the regulation of these products is a relatively safe course of action.

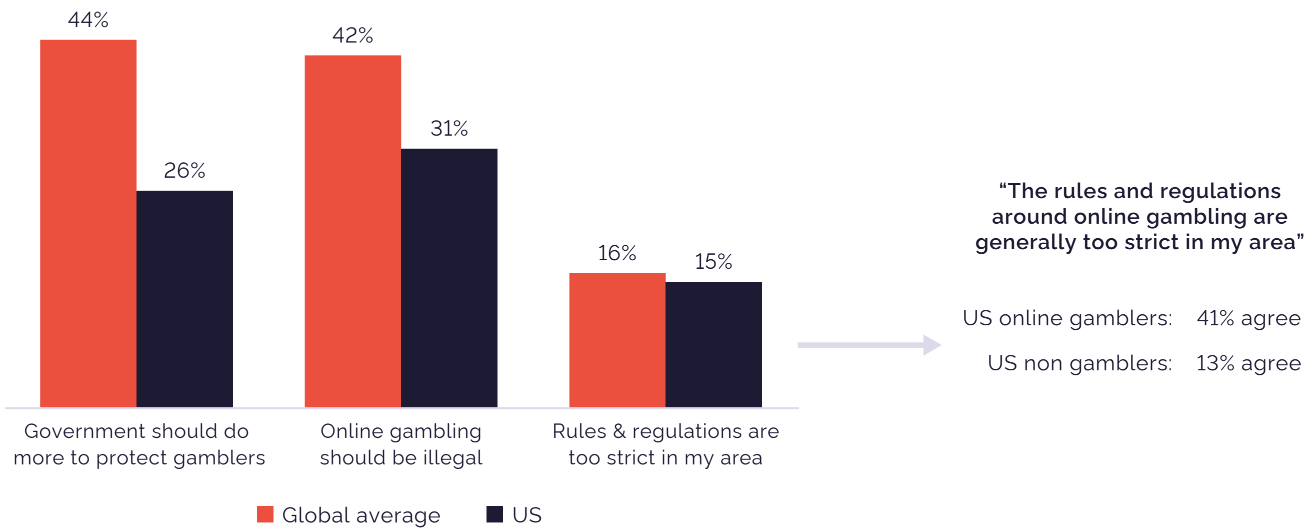
Motivations for online gambling in the US
% of respondents – among online gamblers



Which of the following motivates you to participate in gambling for money online?

The inherent acceptability of gambling to a wider US constituency than elsewhere is backed up by the data on attitudes to regulation. As has been stated previously, the anti-government-interference line is strong when it comes to gambling, with fewer people believing the government should do more to protect gamblers (26%), much less than is the case globally (44%). Even in Canada, which is currently also restricted but soon to open up, only 38% agree but just 14% say rules around gambling are too tight.

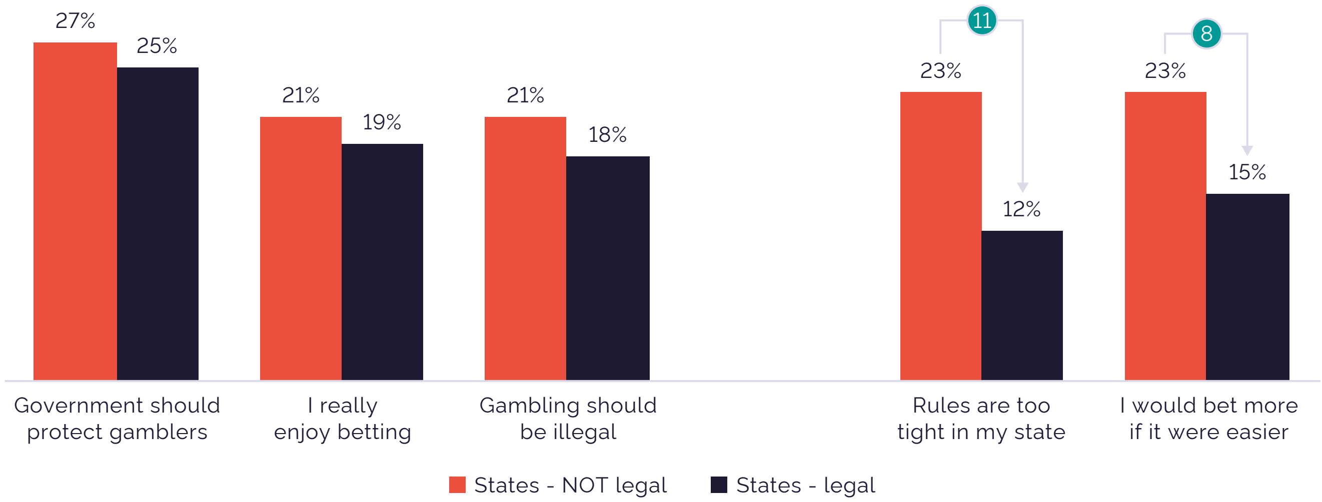
Attitudes towards gambling regulation in the US
% of respondents



To what extent do you agree or disagree with the following statements?

When it comes to the opinions and perceptions of gambling in states where sports betting is regulated and those where it isn't, the data demonstrates no apparent difference between respondents in either category except on the crucial questions of whether regulations are too tight and whether it should be easier for people to be able to bet.

Attitudes towards gambling and regulation in the US
% of respondents in regulated and unregulated states



Do you agree or disagree with the following statements?

CONCLUSION

This survey comes at an important time in the evolution of online gambling across the globe. It provides a snapshot of opinion towards the regulation of the sector and suggests rising levels of acceptance, albeit with important caveats.

Key to this is the public's perception of the industry. The sector needs to be sensitive to how it is perceived. There are large constituencies of the public who are worried about the growth of the sector and whether it does enough to ensure that gambling harms are minimized.

Responsible gambling looms large, both as a political issue and, for the companies that are talking to the wider investment community, for environmental, social and governance reasons.

The opportunities for the sector are obvious from the movements in new markets with the US being the most prominent. But from a wider perspective, the audience for gambling is also changing. Attitudes to online gambling, and indeed lottery in general, are different among younger cohorts and often split by gender.

These broad demographic trends affect not only how the activity is viewed but also the type of games that are played. These are changes that legislators and regulators will need to be aware of and able to adapt to in order to effect regulation that captures the largest possible audience for an industry that is now clearly moving towards acceptance as a mainstream leisure and tax generating activity. For operators the demand for fun and entertainment will grow alongside the need for a positive and safe experience.

METHODOLOGY

The insights in this study were drawn from two sources - YouGov's proprietary syndicated gambling tracking study, **Global Gambling Profiles** (GGP), and a recent global **RealTime** survey to drill down even further on the topic of online gambling.

Global Gambling Profiles is the first multi-market gambling tracking product of its kind. GGP was designed in a way that allows clients to analyze gambling trends longitudinally across both a nationally representative sample and an active gambler sample (bet in past 30 days) across the 24 markets it covers. Around 45,000 interviews are completed every month. Global Gambling Profiles is further bolstered by connecting respondent level data to YouGov's core proprietary data solutions, **BrandIndex** and **Profiles**, allowing us to merge the responses to our gambling tracker to the thousands of consumer attributes that we collect on an ongoing basis including demographics, psychographics, attitudes, interests, brand/category behaviors and media consumption.

Our RealTime survey focused on online gambling, particularly homing in on participation trends (overall and by game type), motivations, driving behaviors, and general attitudes towards online gambling and regulation. This survey was fielded the week of March 22nd through the week of April 12th, 2021, covering 13 global markets and over 17,300 respondents worldwide. From our survey, 17% of respondents self-identified as online gamblers in the past 12 months, having wagered at least once on any online game type including lottery, sports betting, online casino games and fantasy sports.

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. For this paper, the following population representation was used:

Region	Market	Population sampled representation	Sample size (n=)
North America	US	National representative - 18 years of age +	2,107
	Mexico	National (Urban focus) - 18+	1,052
Europe	Great Britain	National representative - 18+	2,025
	France	National representative - 18+	1,034
	Germany	National representative - 18+	2,107
	Spain	National representative - 18+	1,017
	Denmark	National representative - 18+	1,013
	Italy	National representative - 18+	1,046
	Poland	National representative - 18+	1,005
	Sweden	National representative - 18+	1,046
APAC	Australia	National representative – 16+	2,008
	India	National online (Urban only) - 18+	1,004
	Singapore	National representative - 18+	1,034

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ABOUT YOUGOV

YouGov is an international research data and analytics group headquartered in London. Our data-led offering supports and improves a wide spectrum of marketing activities for our customer base that includes media owners, brands and media agencies. We work with some of the world's most recognized brands.

Our line of products and services include YouGov BrandIndex, YouGov Profiles, YouGov RealTime, YouGov Custom Research, YouGov Crunch and YouGov Direct.

With 15 million panellists in more than 55 countries, YouGov's market research covers in GB, the Americas, Mainland Europe, the Middle East, and Asia-Pacific. Our panellists come from all ages, socio-economic groups, and other demographic types – allowing us to create representative samples of whole populations and different sections of society.

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