

Contacts of the Estonian residents with gambling 2017

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Background of the Survey

Parameters of the survey

Contracting entity. The Counselling Centre of Gambling Addiction. Representative of the contracting entity is Pille-Riin Kaare.

The survey was co-financed by the Ministry of Finance of the Republic of Estonia with the support of Estonian Association of Gaming Operators and AS Eesti Loto.

The goal of the survey. The goal of the survey is to provide an overview of the behaviour of the Estonian population in regard to playing-related behaviour, its current status and changes within the last years. The main areas of the study are as follows:

- . Distribution of the population on the basis of the previous experience with gambling;
- . Gambling addiction risk groups and their background;
- . Experience of gambling in the Internet and preferences.

Target group. Permanent citizens of Estonia at the age of 15–74.

Survey method. The survey method comprises a combination of a computer-assisted web interviewing (CAWI) and computer-assisted telephone interviewing (CATI), so that 50% of respondents were interviewed by CAWI and 50% by CATI method. For the performance of the CAWI pre-recruited population panel of the national survey was used, comprising about 20 000 people, who have agreed to participate in the survey, including all their social-demographic data.

Survey period. December 2016 – January 2017.

Ownership of data. The owner of the results of the survey is the contracting entity who orders the survey.

Sample profile

		Sample (N)	%
Indicator		2507	100%
Sex	Male	1200	48%
	Female	1307	52%
Age	15-19	119	5%
	20-29	422	17%
	30-39	466	19%
	40-49	433	17%
	50-59	407	16%
	60-74	662	26%
Nationality	Estonian	1712	68%
	Other	795	32%
Urbanisation	Tallinn	812	32%
	Tartu, Pärnu, Narva, Kohtla-Järve	451	18%
	Other city	411	16%
	Countryside	832	33%
Net income for one family member last month	Up to 399 eur	859	34%
	400-799 eur	937	37%
	800-1199 eur	460	18%
	More than 1200 eur	252	10%

The background image shows a blurred office scene with two people in business attire. A dark blue semi-transparent overlay covers the entire image. In the foreground, there are papers with bar charts and a pair of glasses. The word 'Results' is written in white on the right side of the overlay.

Results

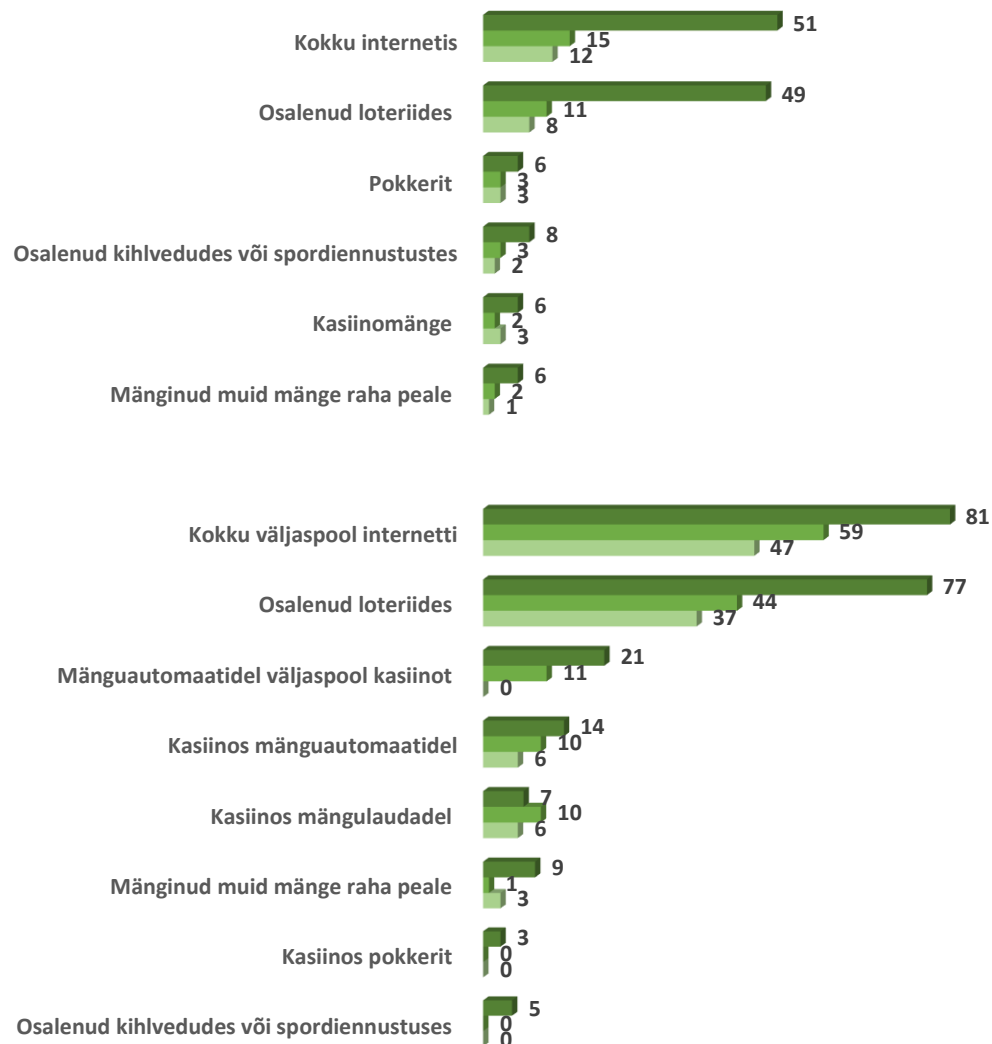
A background image featuring a pair of black-rimmed glasses and a black pen resting on a document. The document contains a bar chart with several blue bars of varying heights. The entire image has a dark blue overlay.

1. Distribution of the population based on contact with gambling

Playing for money in various forms of gambling

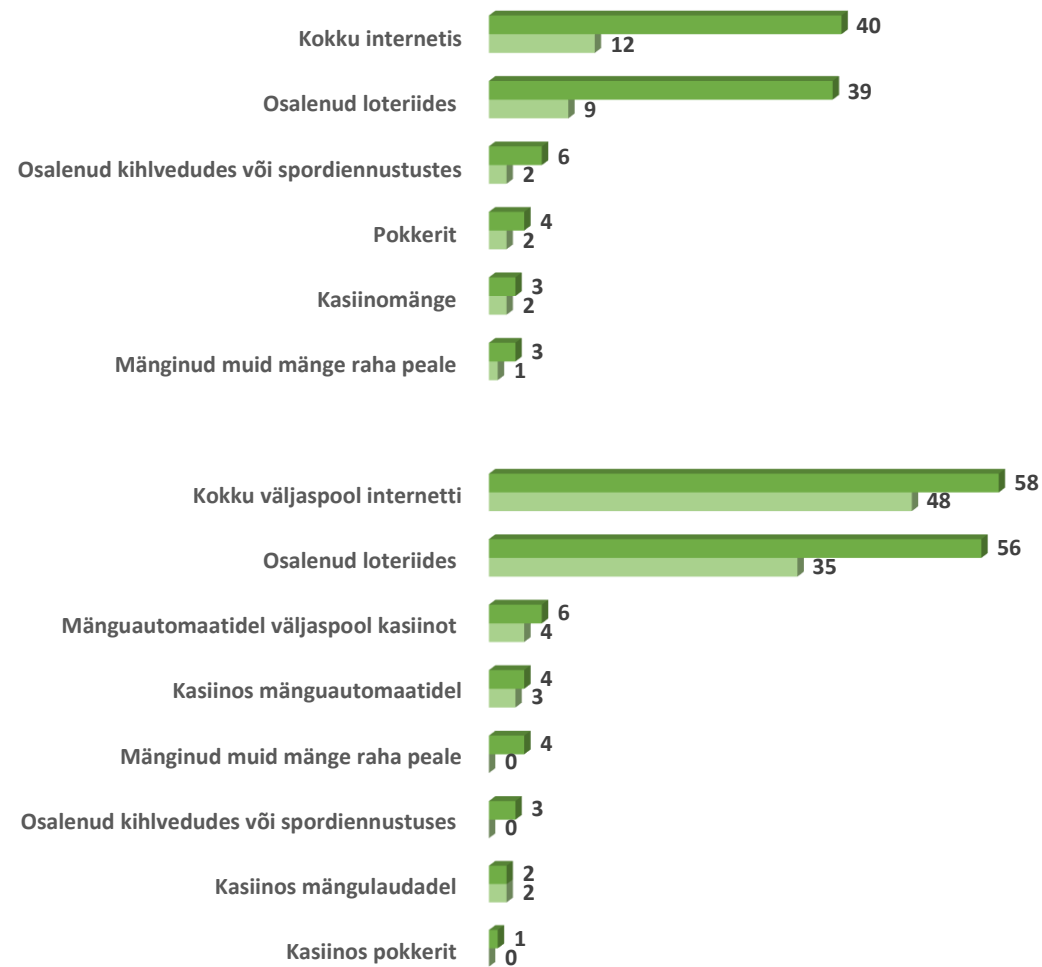
% of all inhabitants 15-74 years of age, N=2507

Total who have gambled (lifetime)



■ 2017 ■ 2014 ■ 2012

Gambled past 2 years

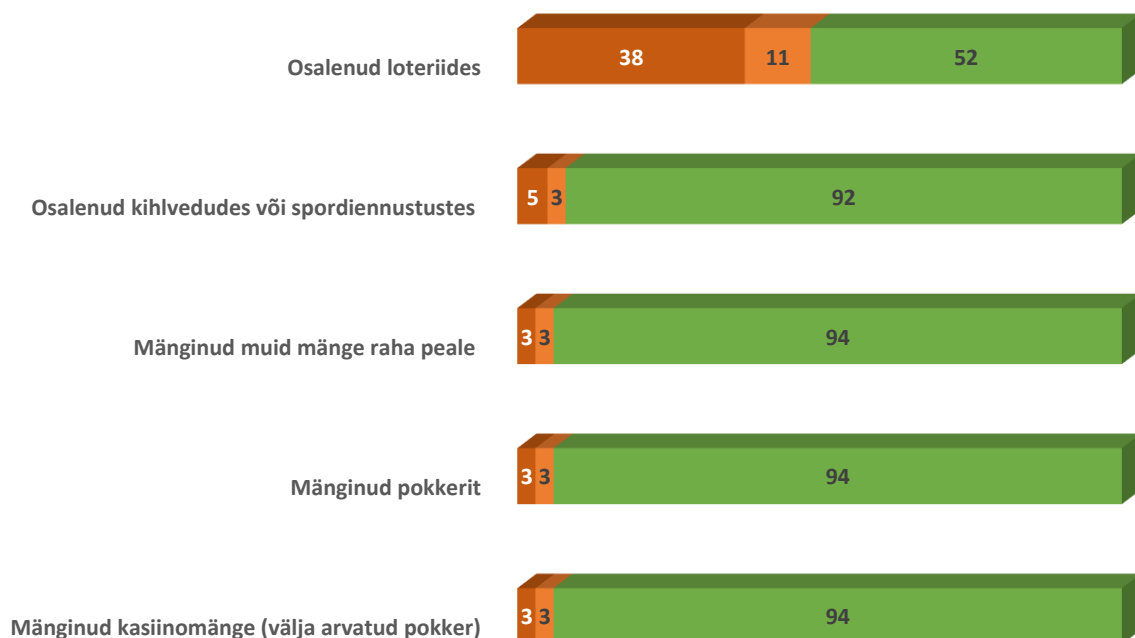


■ 2017 ■ 2014

Playing for money in various forms of gambling

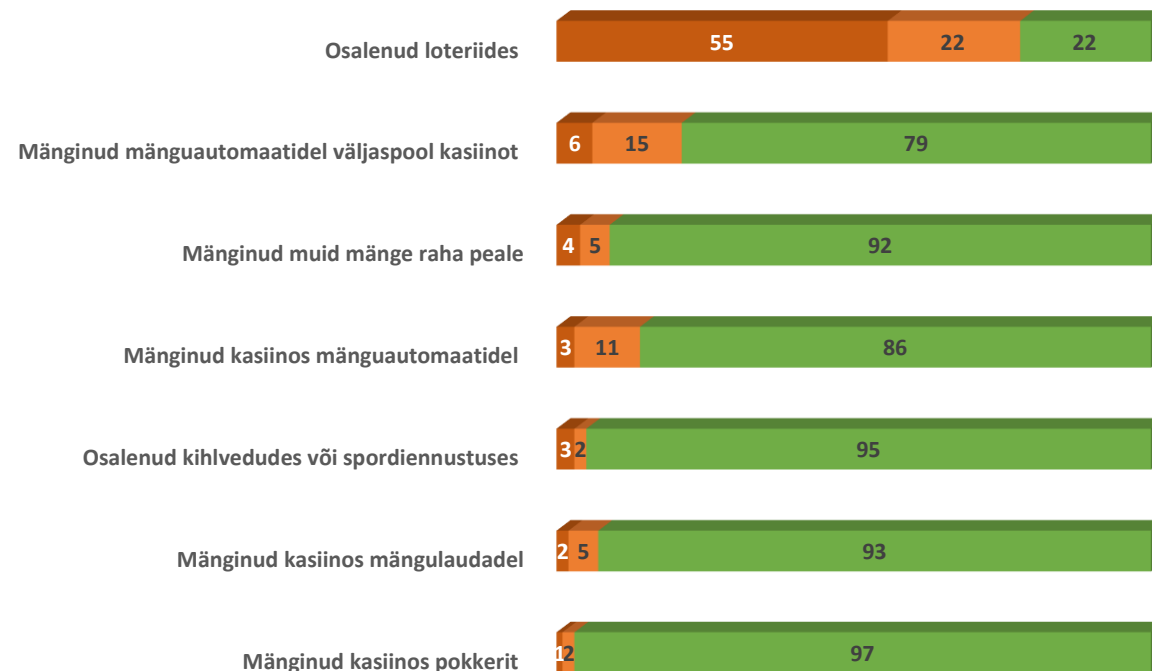
% of all inhabitants 15-74 years of age, N=2507

Online games



■ Jah, sh viimase kahe aasta jooksul ■ Jah, kuid mitte viimase kahe aasta jooksul ■ Mitte kunagi

Offline games

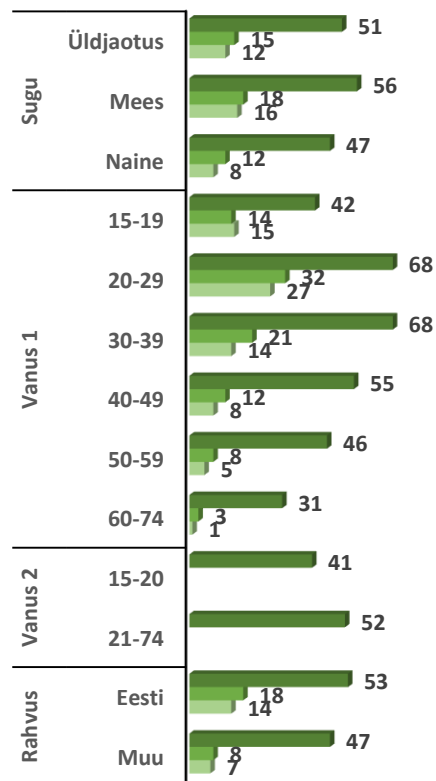


■ Jah, sh viimase kahe aasta jooksul ■ Jah, kuid mitte viimase kahe aasta jooksul ■ Mitte kunagi

Profile who have gambled online for money: in lifetime

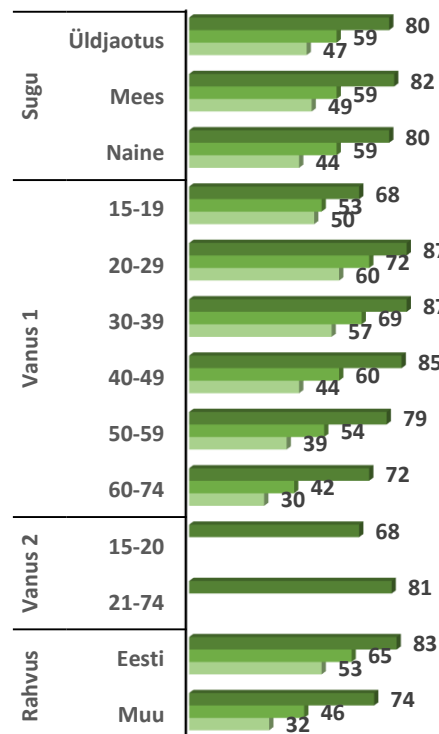
% of all inhabitants 15-74 years of age, N=2507

Gambled online for money



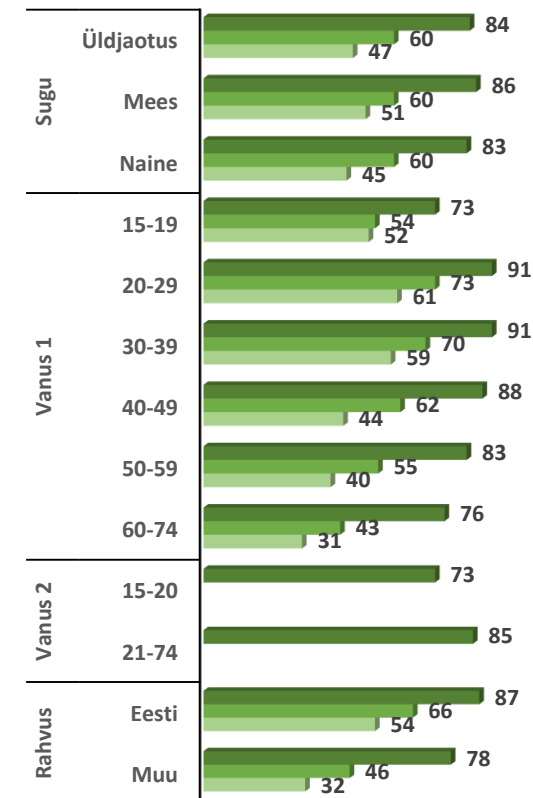
■ 2017 ■ 2014 ■ 2012

Gambled offline for money



■ 2017 ■ 2014 ■ 2012

Total gambling for money

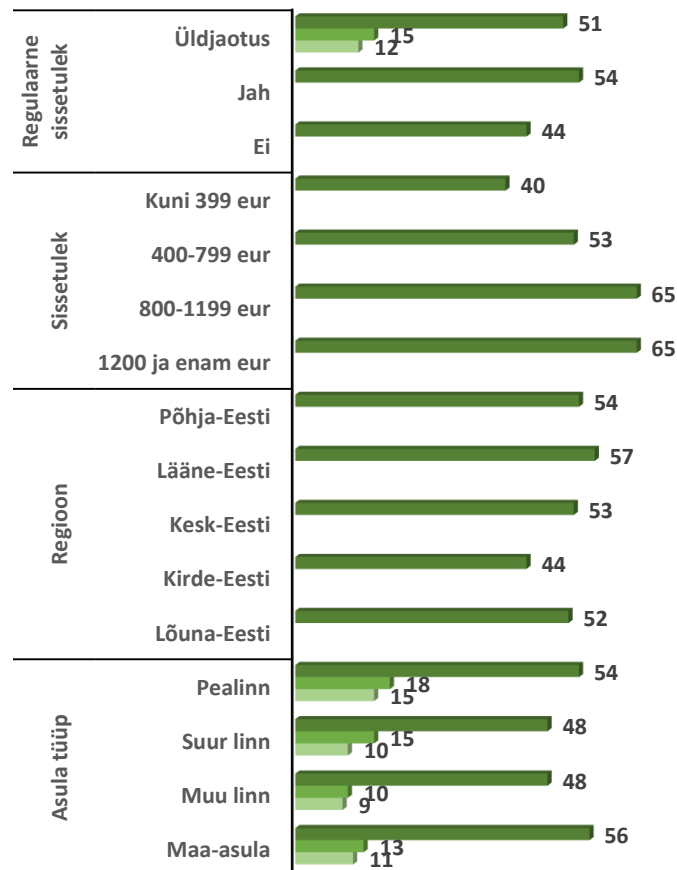


■ 2017 ■ 2014 ■ 2012

Profile who have gambled online for money: in lifetime

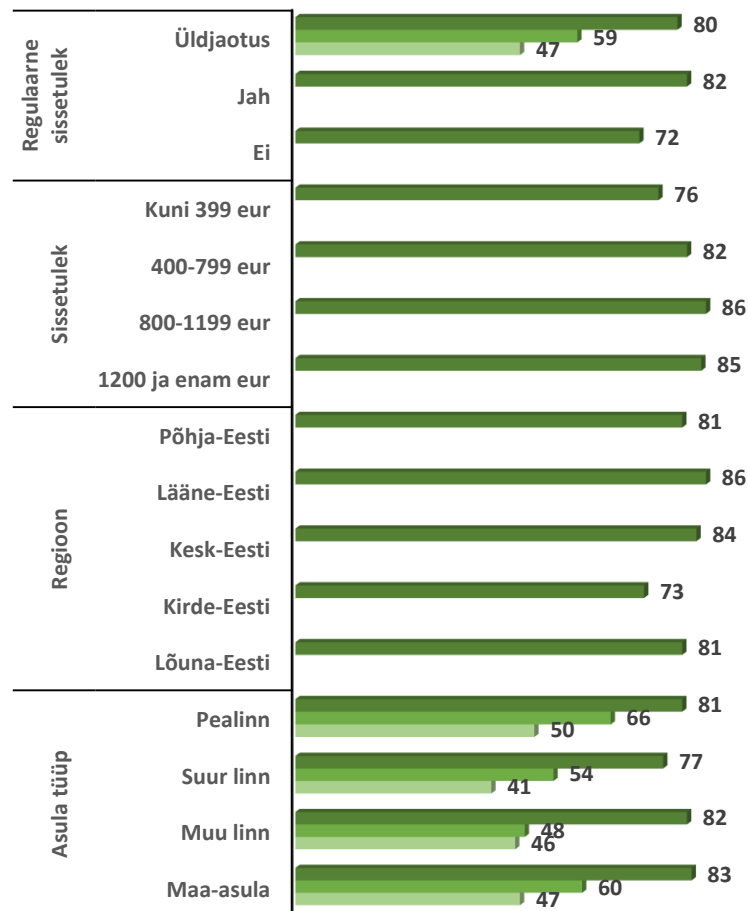
% of all inhabitants 15-74 years of age, N=2507

Gambling online for money



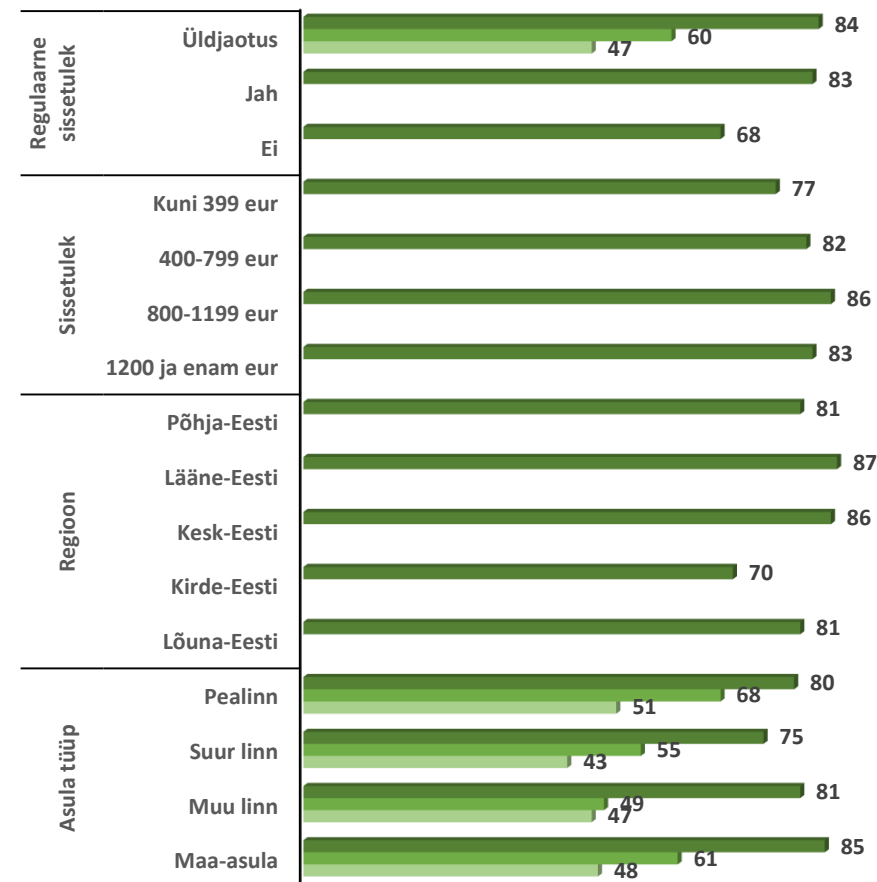
■ 2017 ■ 2014 ■ 2012

Gambling offline for money



■ 2017 ■ 2014 ■ 2012

Total gambling for money

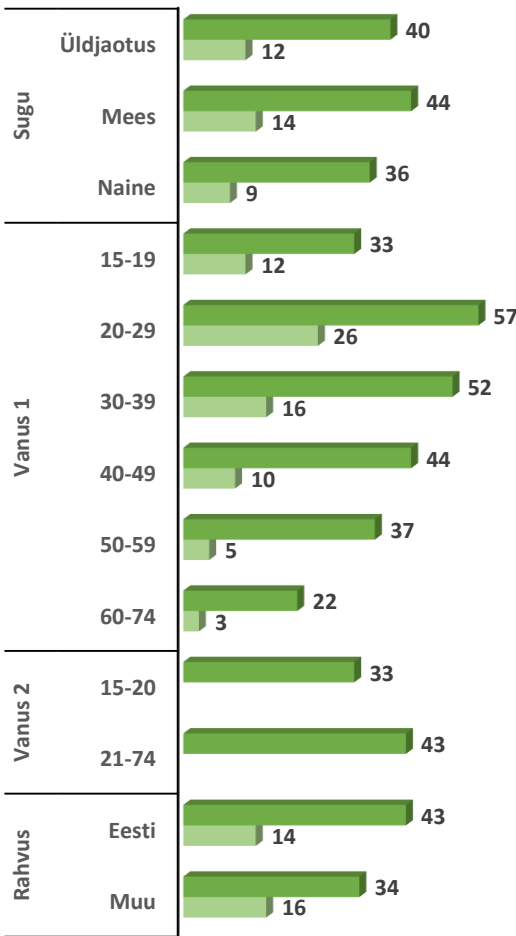


■ 2017 ■ 2014 ■ 2012

Profile who have gambled online for money: **past 2 years**

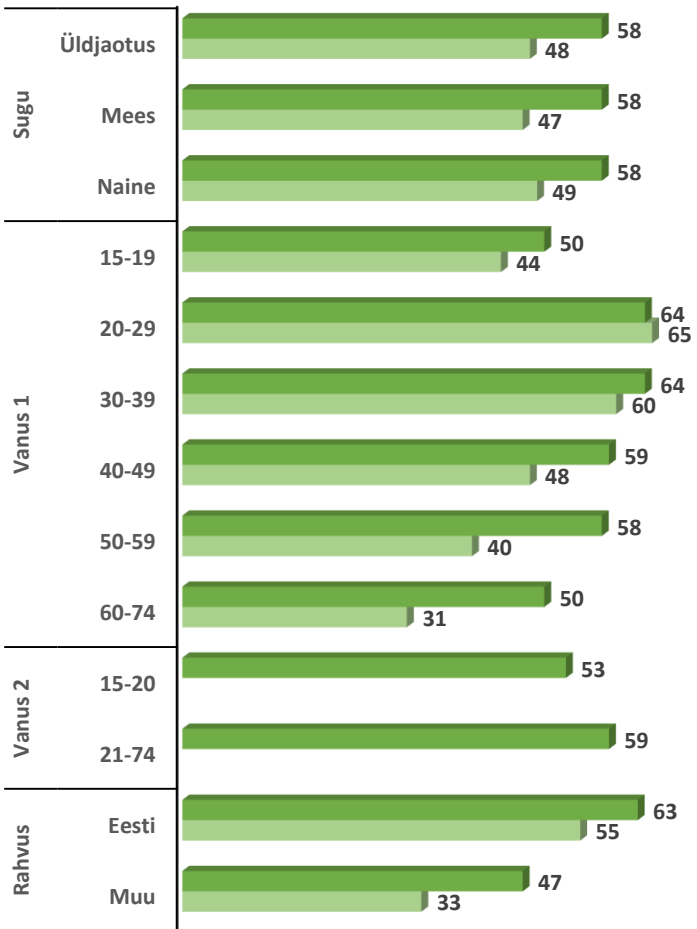
% of all inhabitants 15-74 years of age, N=2507

Gambling online for money



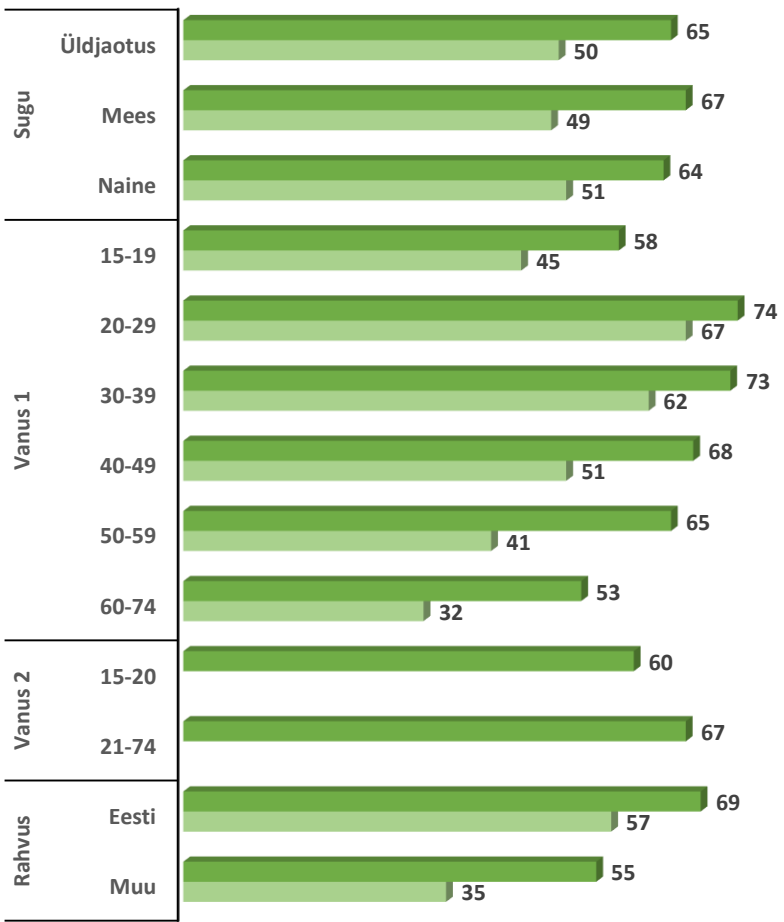
■ 2017 ■ 2014

Gambling offline for money



■ 2017 ■ 2014

Total gambling for money

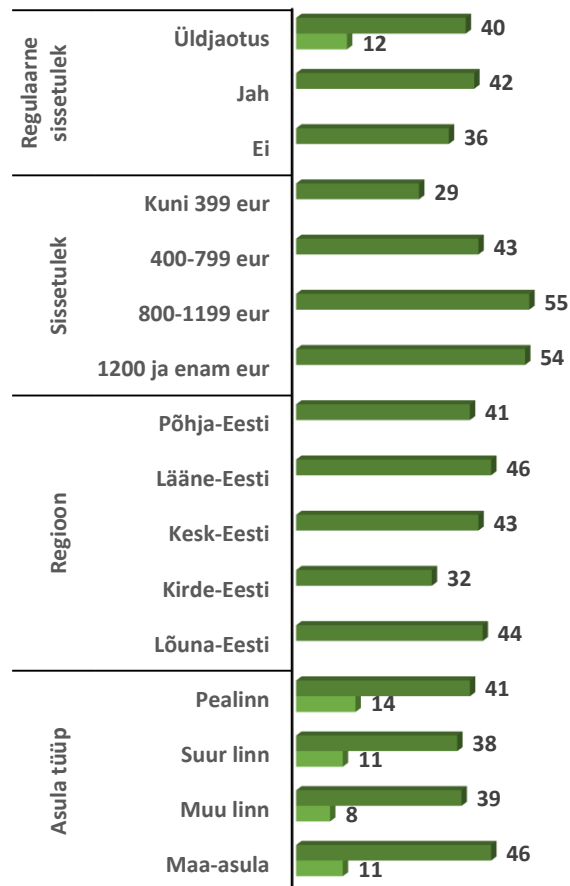


■ 2017 ■ 2014

Profile who have gambled online for money: **past 2 years**

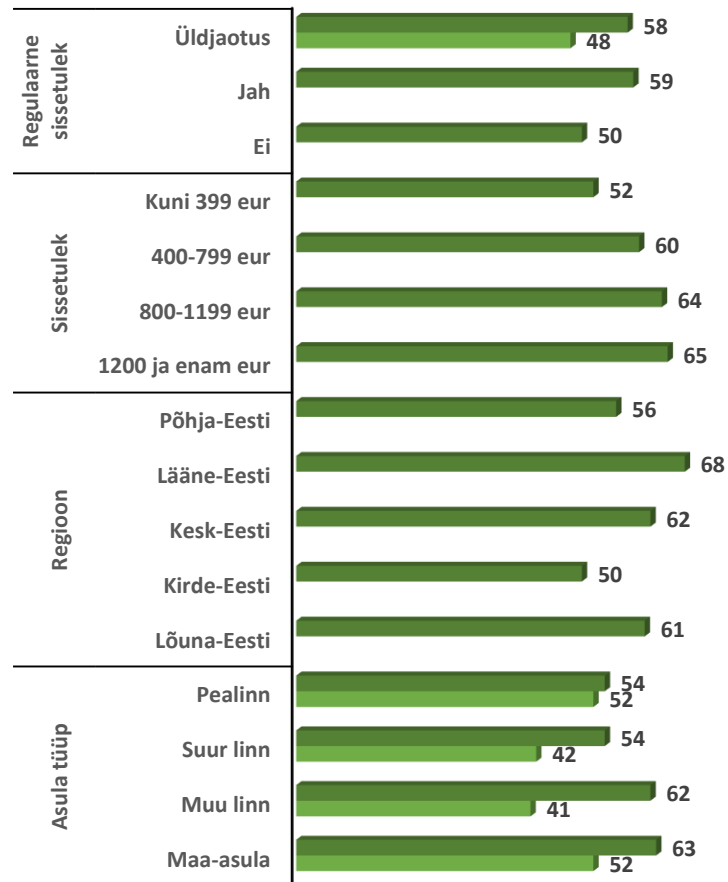
% of all inhabitants 15-74 years of age, N=2507

Gambling online for money



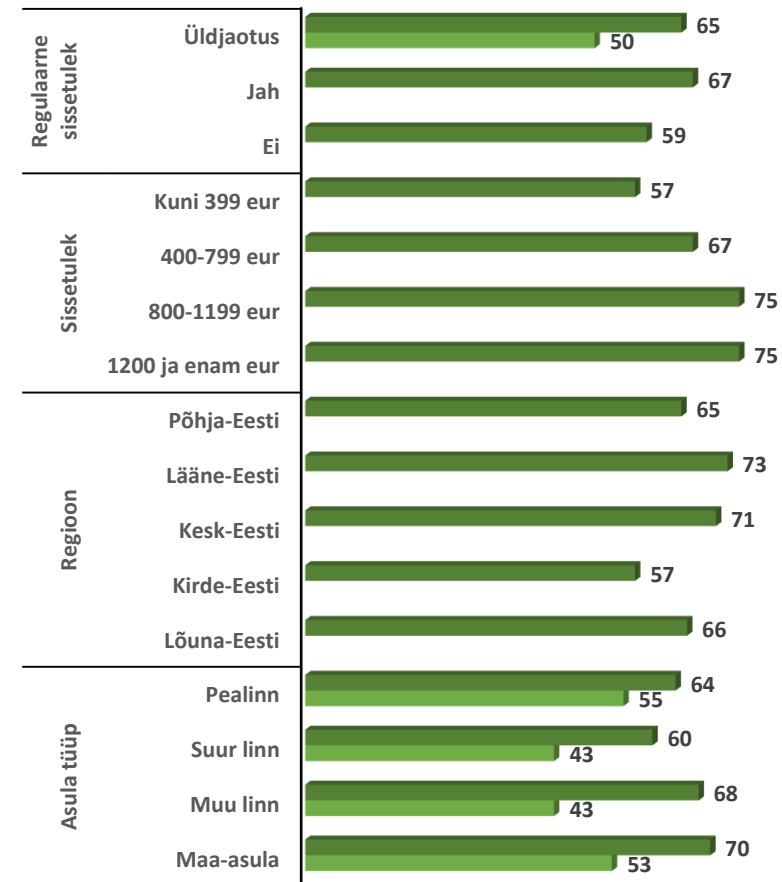
■ 2017 ■ 2014

Gambling offline for money



■ 2017 ■ 2014

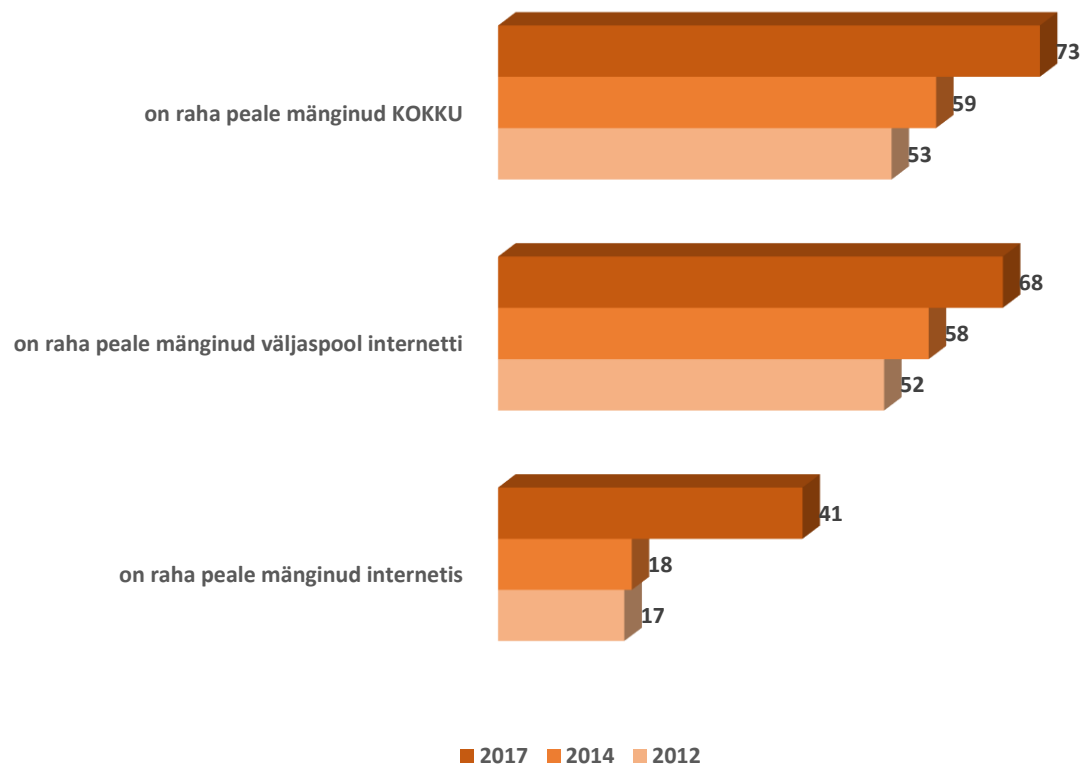
Total gambling for money



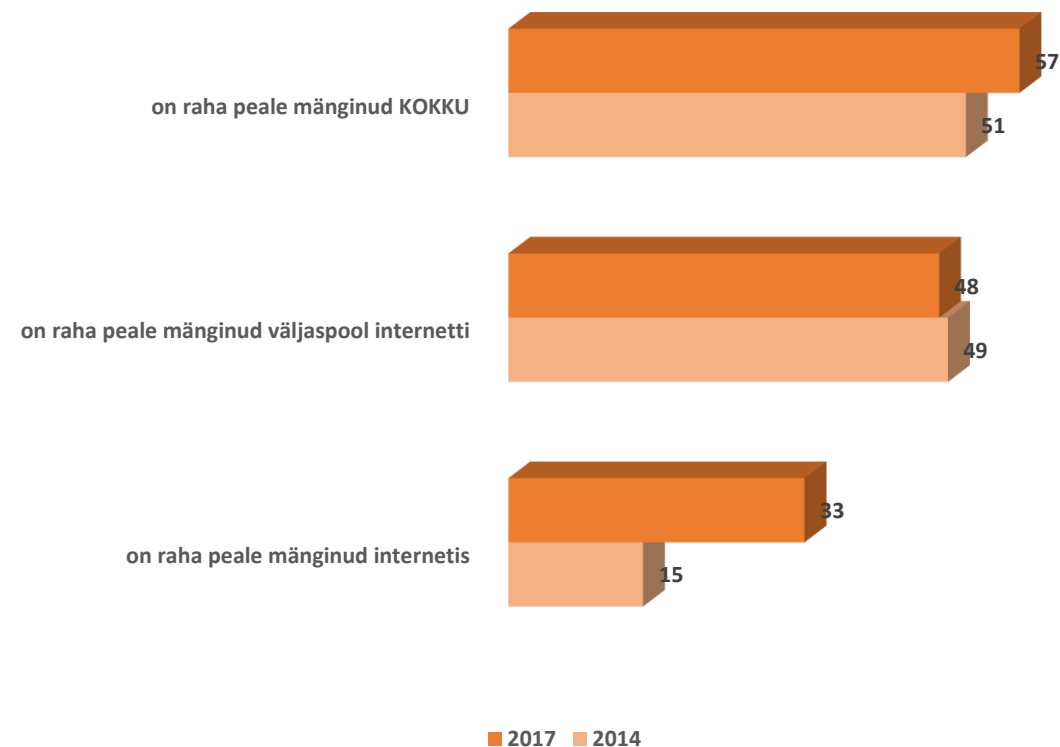
■ 2017 ■ 2014

Playing for money among those aged 15-20 (1)

15-20-years TOTAL
Gambling lifetime (N=150)

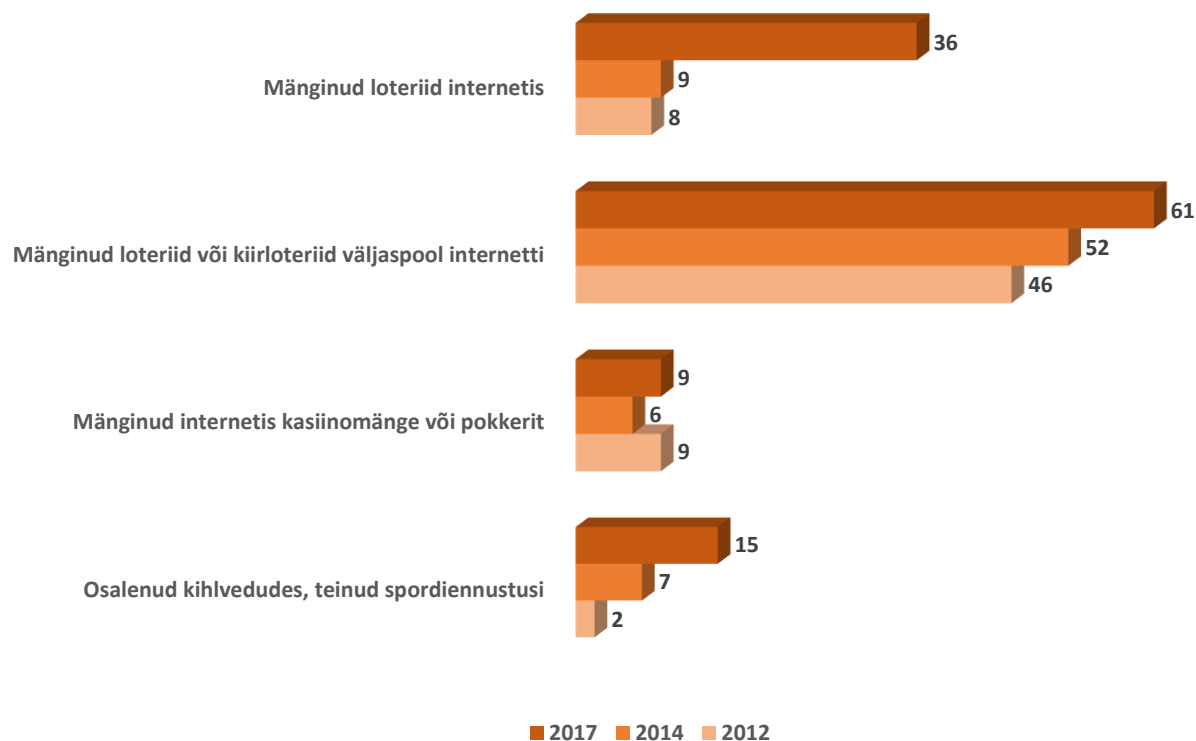


15-20-years TOTAL
Gambling past 2 years (N=150)

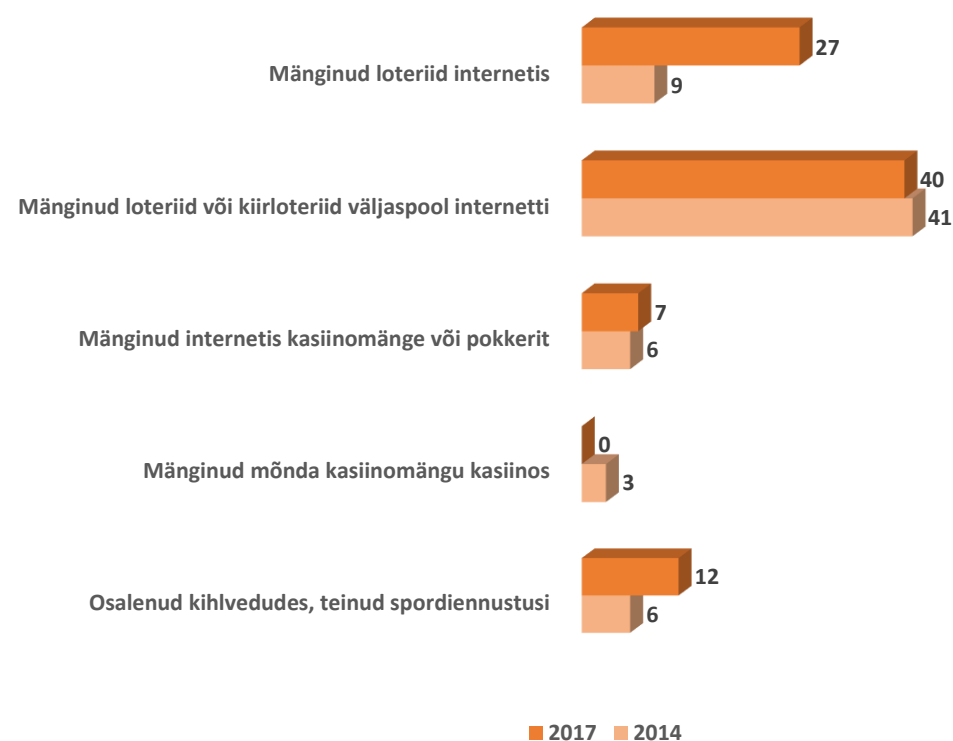


Playing for money among those aged 15-20 (2)

15-20-years TOTAL
Gambled in lifetime



15-20-years TOTAL
Gambled past 2 years



Summary of playing for money in different forms of gambling

- The results of this survey differ from the earlier general indicators of participation/experience in gambling.
- In comparison with 2014, the differences are as follows.

	2014	2017
Gambling for money (experience in lifetime)	60%	84%
Offline	59%	81%
Online	15%	51%
Gambling for money within the last 2 years	50%	66%
Offline	48%	58%
Online	12%	40%

Explanations to the conclusion about playing gambling games

On the previous slide we saw major changes in the significantly higher level of experience in playing gambling games in comparison with the earlier results. The main reasons for such changes highlighted can be as follows.

The questionnaire method was different from the previous ones (50% of the sample questions by web interviewing and 50% of the sample by phone interviewing method). Due to that some of the changes in the results showing higher level of gambling according to our estimation are caused by methodological changes (web interviewing enables a more private environment for responding). Here we are dealing with aspects proceeding from objective conditions of the questionnaire methods.

When comparing the results of the sample of the phone interviewing and the web interviewing we see that the results are higher in the phone interviewing than last year, but a littler lower than in the sub-sample of the web interviewing. For example:

- Gambling offline within the last 2 years in 2014 – 48%, 2017 total 58%, incl. CAWI 64%, CATI 52%.
- Gambling online within the 2 last years in 2014 – 12%, 2017 total 40%, incl. CAWI 58%, CATI 23%.


Reliable results about gambling are noticeable in age group 15-20, in which age limits are established to gambling pursuant to the legislation.

The fact that online gambling has increased more in comparison with offline gambling is evidently influenced by the impact of the intermediate period, during which the law established requirements to the identification of the offline player in lottery games. Identification of the person online may be perceived as more private by the person purchasing the ticket. It cannot be excluded that the identification of the person gambling has brought along honest admittance of one's gambling habits.

It is possible that playing gambling games has actually enlivened to some extent.

Conclusion of the gamblers' profile

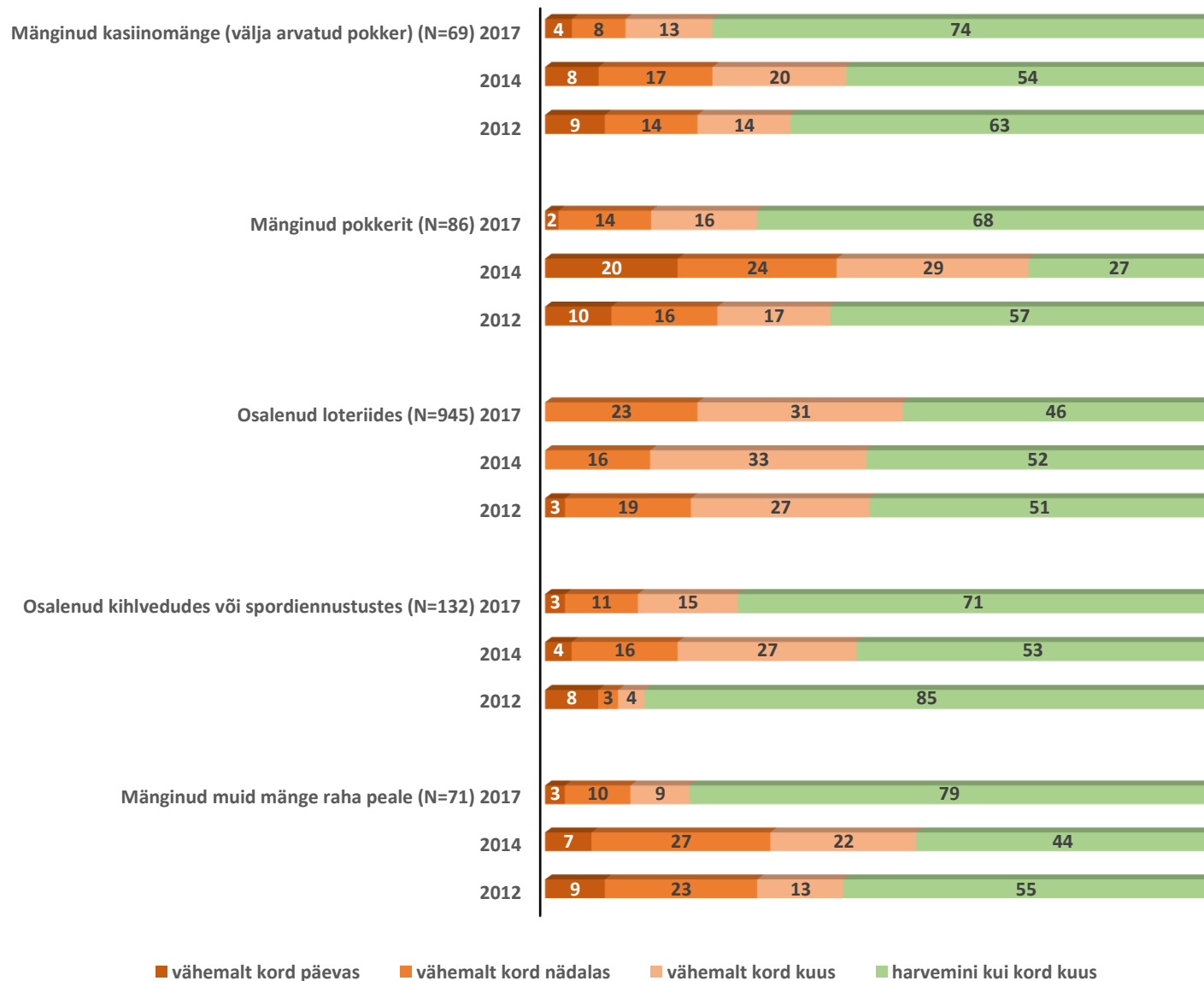
- **The general level of gambling** among men and women is approximately equal (86% and 83%).
- According to age the number of gamblers is highest in age group 20-29 (91%) and the lowest in age group 60-74 (74%) so - general differences are not significant.
- In age group 15-20 (age limit established to gambling games) 73% of people have gambled.
- Among Estonians 87% of people have gambled, among other nations the level is 78%.
- **Within the last two years** the number of men and women who have gambled is rather similar, 67% and 64% respectively. Offline gambling experience is equal among men and women, online gambling is more popular among men, 44% and 36% respectively.
- According to the age, the rate of gambling within the last two years has been the highest in age group 20-29, and the lowest in age group 60-74 (53%). The level of gamblers in age group 15-20 is 57 %.
- According to nationality, within the last two years, 69% of Estonians have gambled, the level among other nationalities is 55%.
- In the comparison of online and offline gambling it appears that people gamble more in environments other than the Internet. The highest level of gambling is among age group 20-29 (57%), and the lowest in age group 60-74 (22%). In this group the difference between online and offline gambling is also the biggest (-28% for offline).
- The smallest difference between online and offline gambling is in age group 20-29 (-7% for the Internet).
- It is interesting to observe age group 15-20 as it is subject to age restrictions established to gambling. In this group the level of offline gambling has not increased in comparison with 2014 (is 48%, was 49%) and online gambling is significantly higher than in 2014 (now 33%, 15% in 2014), The gambling experience in the group originates mainly from lotteries, but also 12% of the group has been engaged in betting and sports predictions.



2. Frequency of gambling for money within the last 2 years among the gamblers

Frequency of gambling **online** for money

% of those playing a respective game past 2 years



Frequency of gambling **offline** for money

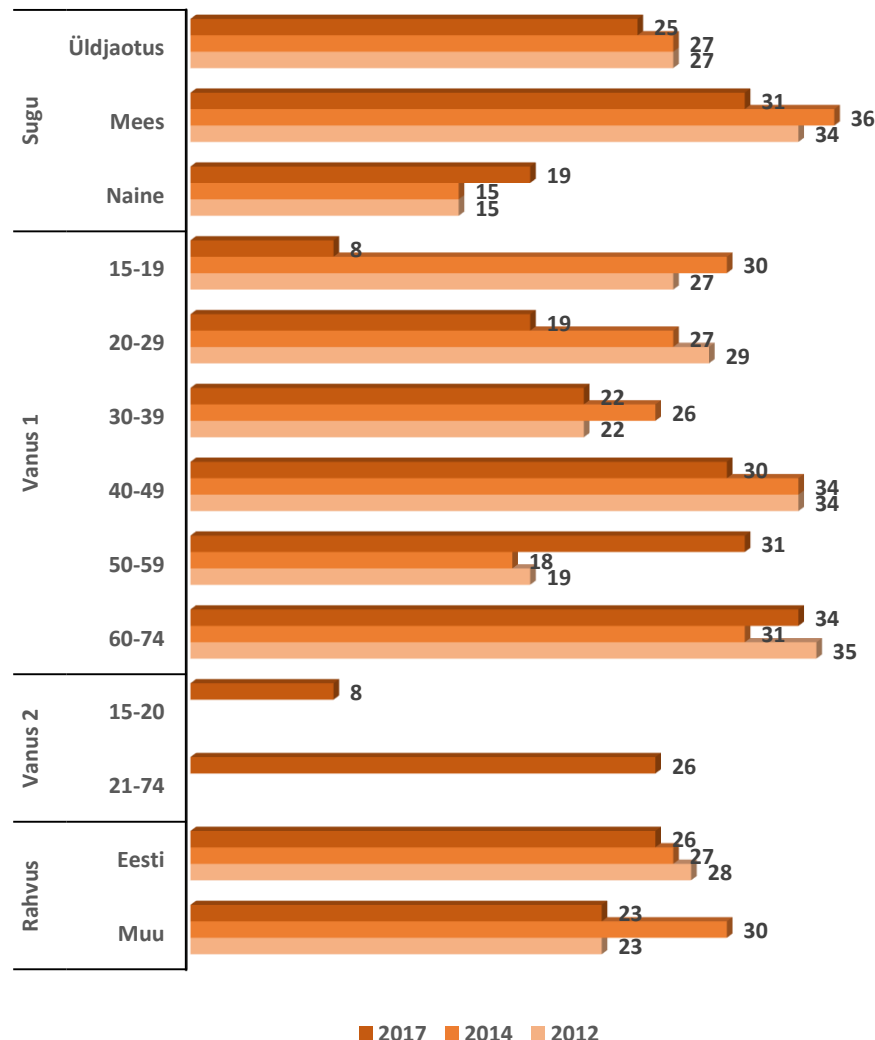
% of those playing a respective game past 2 years



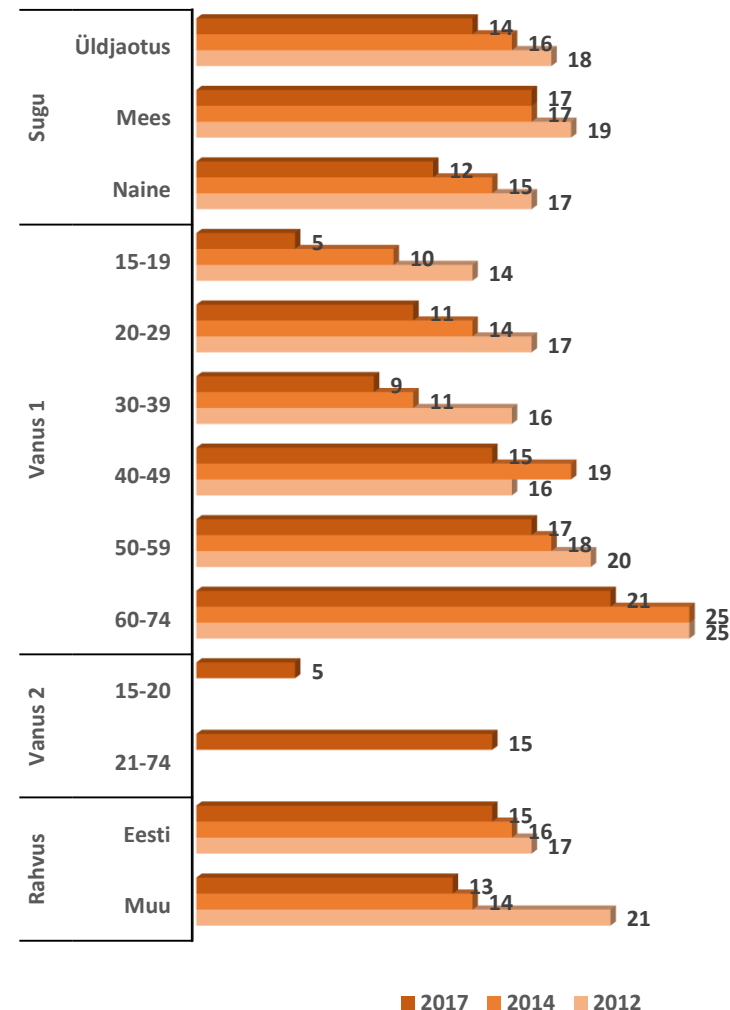
Weekly gamblers

% of those who played either online or offline past 2 years

Played **online** at least one game every week
(incl. daily gamblers)



Played **offline** at least one game every week (incl. daily gamblers)



Conclusion of frequency of playing for money in various forms of gambling among gamblers within the last two years

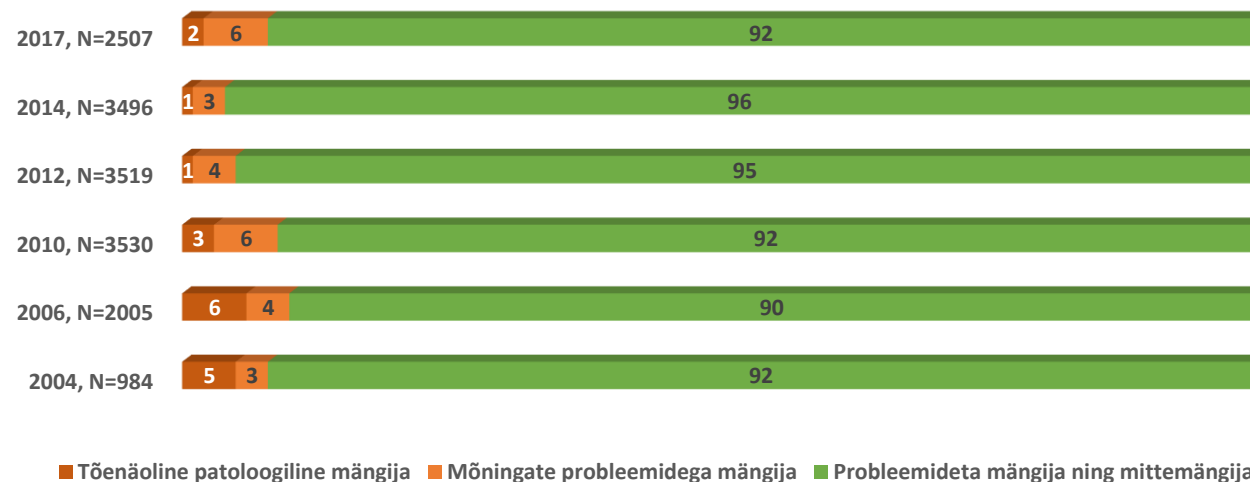
- Although the number of gamblers is higher in the earlier surveys, the frequency of gambling among gamblers has decreased. When the frequency of offline gambling has decreased a little, gambling online has increased significantly if we view the proportion of responses less than once a month.
- The decrease of frequency of **offline** gambling is clearly seen in the number of players who gamble in casinos, which number of players gambling at least once a month has decreased 7%-points in the sector of gambling tables and in the sector of slot machines 4%-points and 13%-points in poker.
- The decrease of frequency of gambling **online** among players is expressed in all types of games except lottery games in which it has remained of the previous level (see slide 22).
- The proportion of weekly players has also decreased in both – online and offline gambling. In comparison with 2014 the number of weekly gamblers decreased in both groups by 2%-points.
- The proportion of weekly online gamblers has increased in two groups – the women and 50-59 year-old players.
- As far as the youngest group (15-19) is concerned, it may be said that even though the number of players has increased, the proportion of weekly gamblers in this age group has decreased and forms only 8% of the players (see slide 24).
- **In conclusion it may be said that although the number of players is bigger than in previous surveys, the number of frequent players has decreased a little and especially among the young people.**

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3. Risk groups of gambling addiction and their background

Risk of gambling addiction in the population and among gamblers *

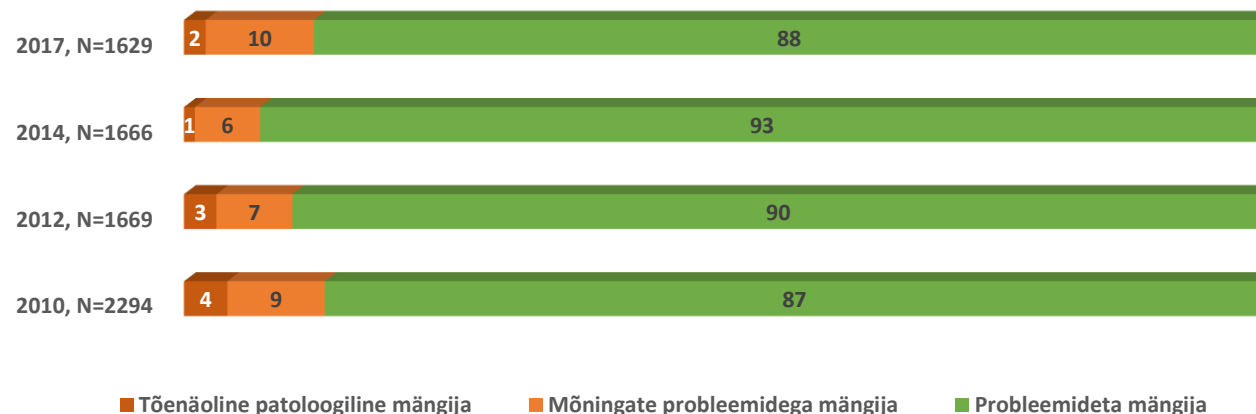
In the total population



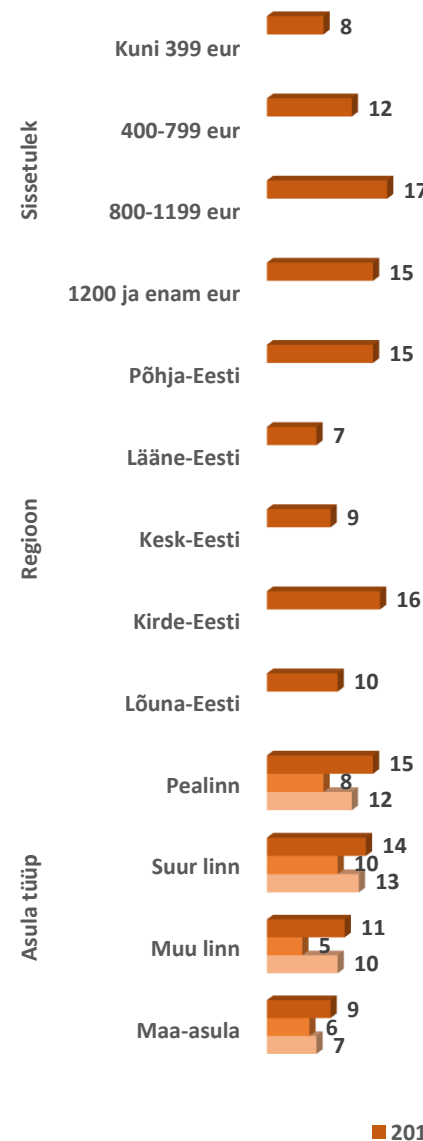
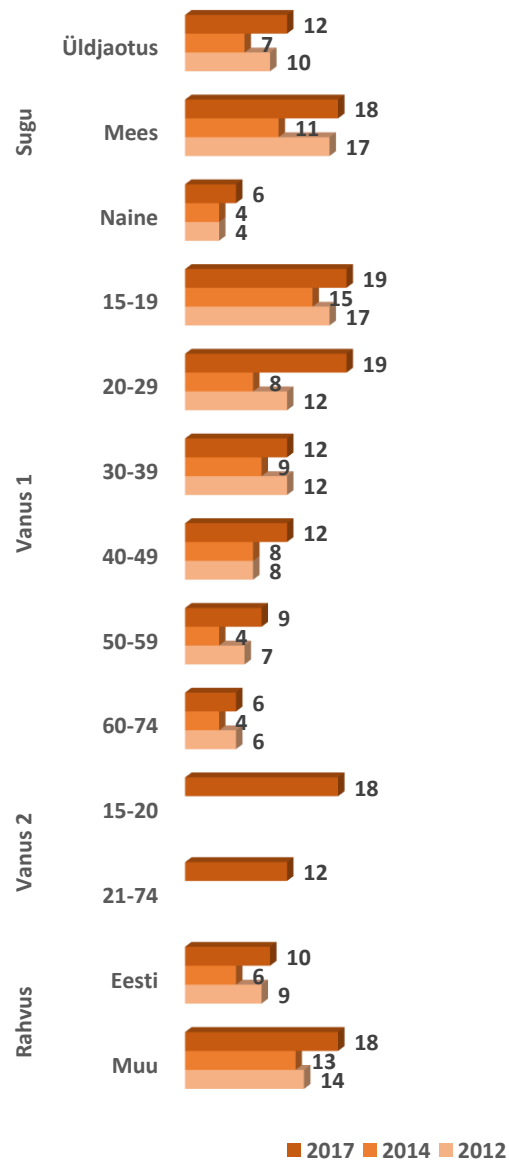
* Methodology for scoring gambling addiction is SOGS (see ch. 5, s. 45).

Risk group of gambling addiction or gambler with problems = probable pathological gambler + gambler with some problems.

Among gamblers (gambled in the past 2 years)



Profile of gamblers belonging to a gambling addiction risk group, % of those who gambled in the past 2 years



Playing various games in risk groups Erinevate mängude mängimine riskirühmades: **online** gambling

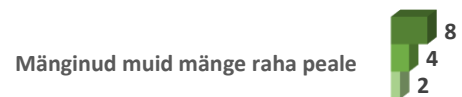
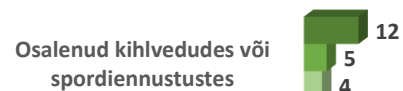
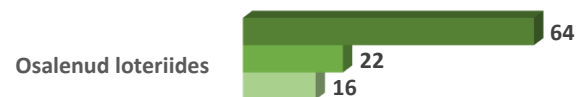
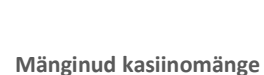
% of those who gambled in the past 2 years

Probable pathological gambler and gambler with some problems (N=196)

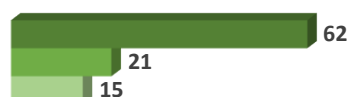
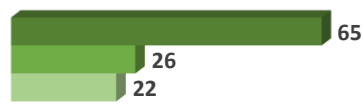
All gamblers (N=1629)

Gambler without problems (N=1433)

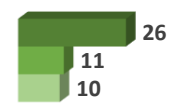
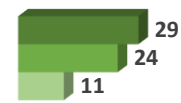
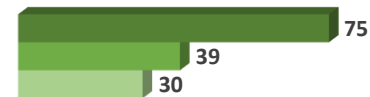
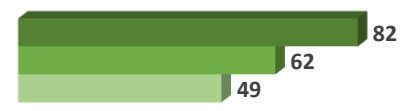
Gambler with some problems (N=160)



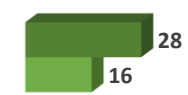
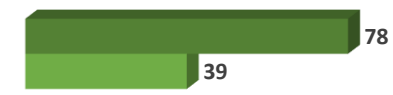
■ 2017 ■ 2014 ■ 2012



■ 2017 ■ 2014 ■ 2012



■ 2017 ■ 2014 ■ 2012



■ 2017 ■ 2014

Playing various games in risk groups: **offline** gambling

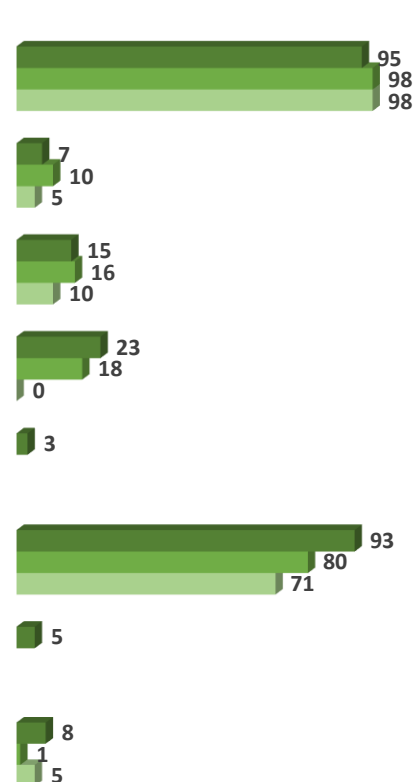
% of those who gambled in the past 2 years

All gamblers
(N=1629)



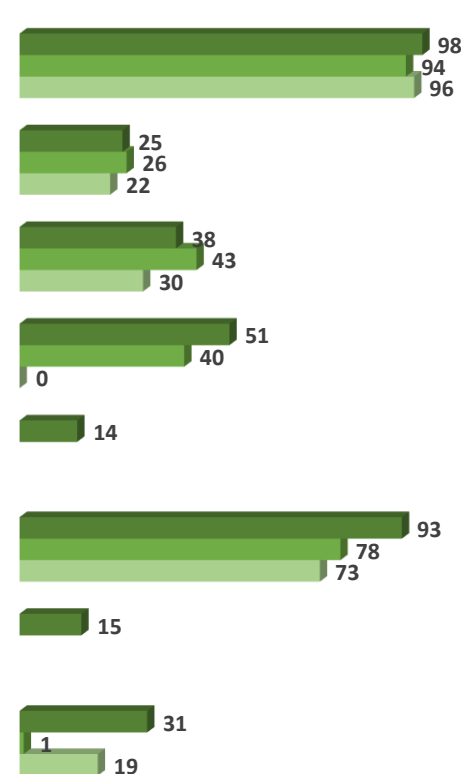
■ 2017 ■ 2014 ■ 2012

Gamblers without
problem
(N=1433)



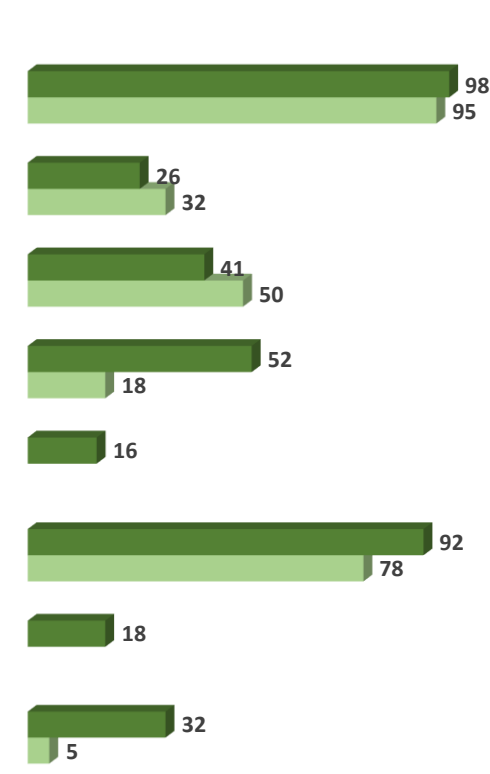
■ 2017 ■ 2014 ■ 2012

Gamblers with some
problems
(N=160)



■ 2017 ■ 2014 ■ 2012

Probable pathological
gambler and gambler
with some problems
(N=196)

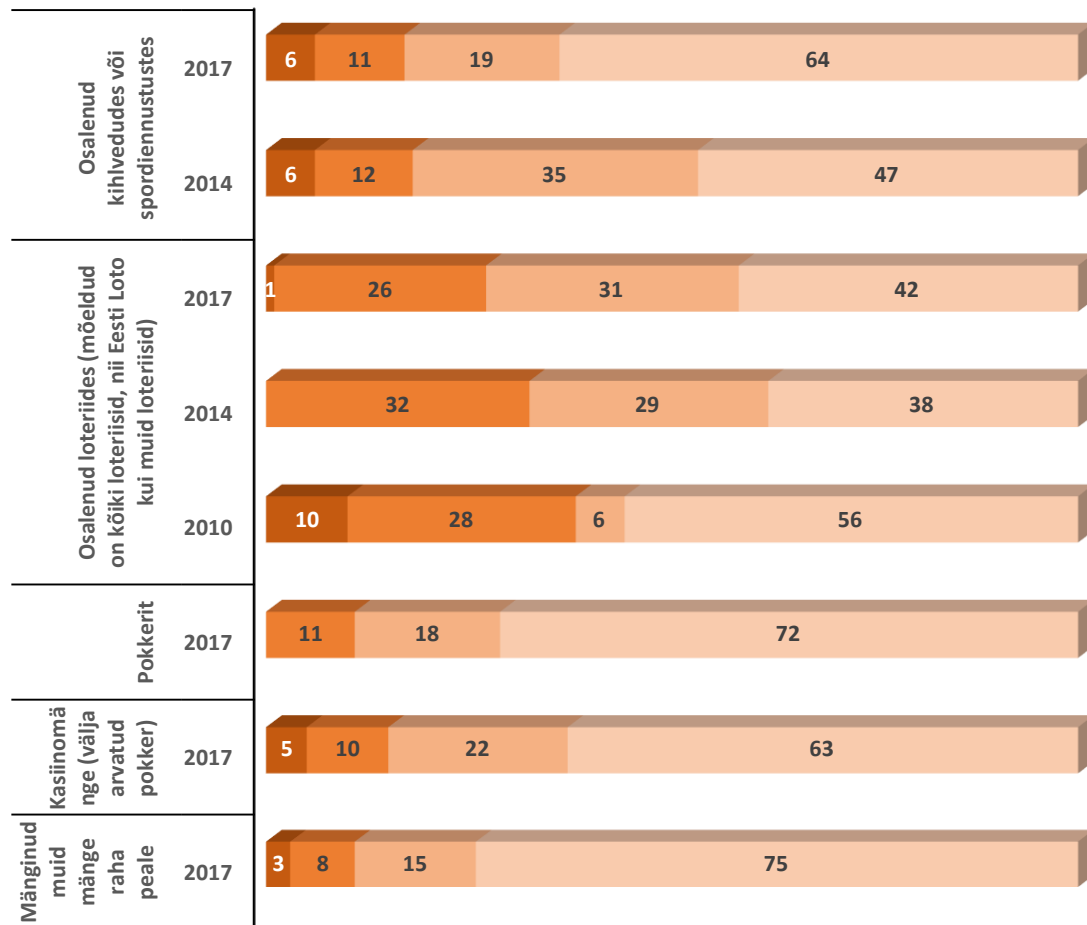


■ 2017 ■ 2014

Frequency of gambling **online** for money

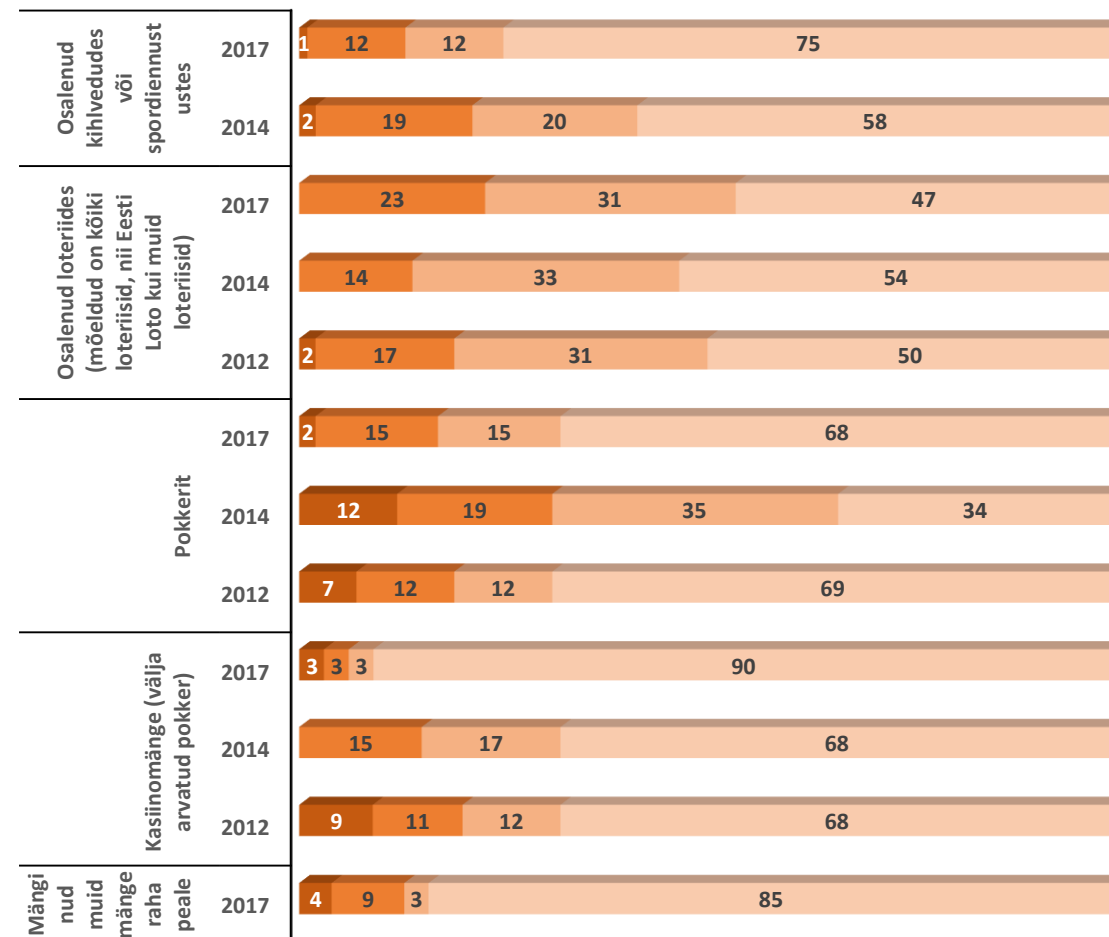
% of those who gambled in the past 2 years

Gamblers with problems



■ vähemalt kord päevas ■ vähemalt kord nädalas ■ vähemalt kord kuus ■ harvemini kui kord kuus

Gamblers without problems

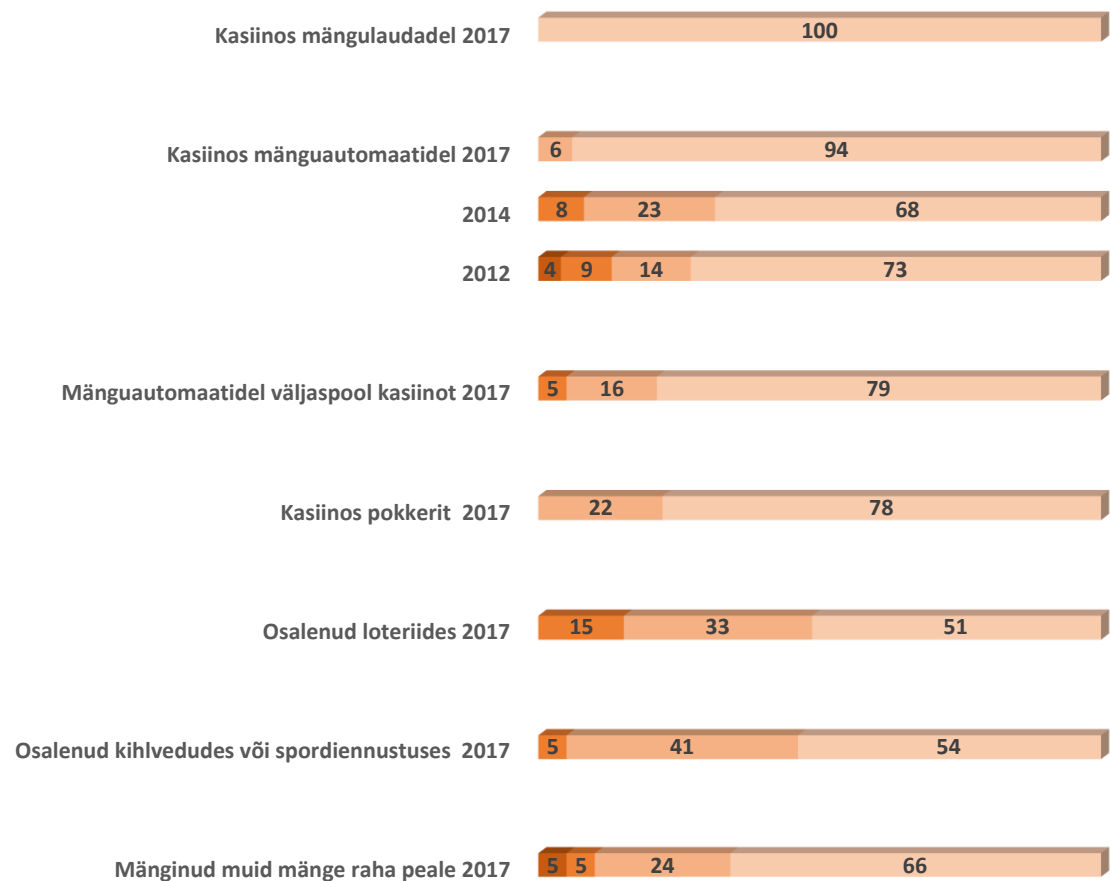


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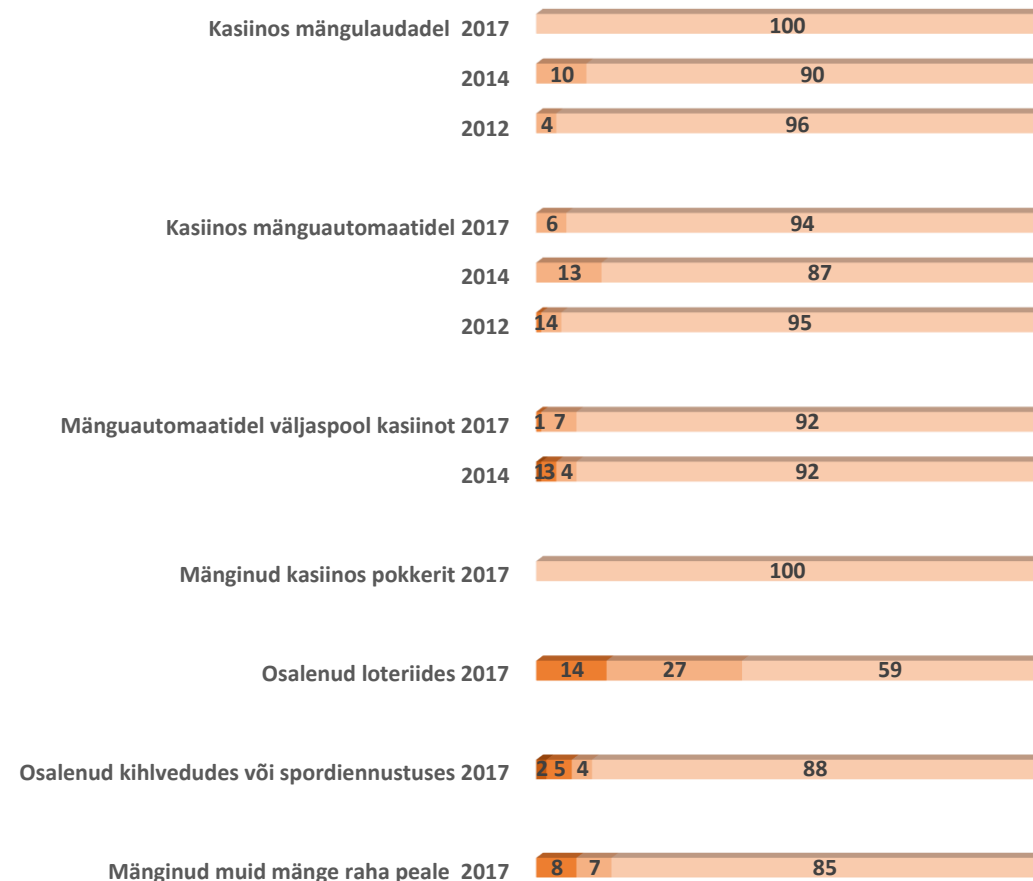
Frequency of gambling **offline** for money

% of those who gambled in the past 2 years

Gamblers with problems



Gamblers without problems



■ vähemalt kord päevas ■ vähemalt kord nädalas ■ vähemalt kord kuus ■ harvemini kui kord kuus

■ vähemalt kord päevas ■ vähemalt kord nädalas ■ vähemalt kord kuus ■ harvemini kui kord kuus

People in the gambling addiction risk group are mostly young

- The proportion of people who have played gambling games within the last two years is 66% of the population. The gambling addiction risk group comprises 8% of Estonian population at the age of 15-74 (about 78 578 people). These people admit that have experienced various problems in connection with gambling (assessment based on SOGS methodology, see chapter 5).
 - The proportion of probable pathological gamblers and gamblers with some problems (hereinafter referred to as problem gamblers) or other words the proportion of players in the gambling addiction risk group is 8% of the population, which in comparison with 2014 has risen from 4%. Hereby, also the methodology of data collection has to be considered.
 - Among all players, who have gambled within the last two years problem gamblers make up 12%.
 - The proportion of evidently pathological gamblers among the population, in comparison with 2014, has risen from 1% to 2%. The proportion of gamblers with some problems has increased from 3% to 6% in comparison with 2014.
- Among people who have gambled within the last two years, we find on average more men (18%), age group 15-29 (36%), age group 15-19 (19%), age group 20-29 (19%), from among other nationalities (18%) and people (17%) with average income (800-1199 EUR).

Problem gamblers play more different gambling games

- 68% of players, who have gambled within the last two years, have played for money online and 96% offline. The proportion of people who have played gambling games online has increased from 28% to 68%.
 - In comparison with 2014, the number of online gamblers playing lottery games has increase three times (from 22% to 64%) and among both – the problem gamblers and gamblers with some problems.
 - When observing offline gambling, it should be brought out that within the two last years, in comparison with the survey of 2014, playing on sot machines outside casinos, has increased from 21% to 27%.
- **Gambling addiction risk group or problem gamblers** (evident pathological gamblers and gamblers with some problems), in comparison with gamblers without problems, have played all games in the **Internet** more than on average, the most preferred is the lottery (78%), betting and sports predictions(33%), poker (28%) and casino games (29%).
 - In comparison with the survey of 2014, online playing of all the above-mentioned gambling games has increased in all risk groups.
- **In the environment other than the Internet** the number of problem gamblers, who have played different games, has increased, except not in lottery, which is equally played by problem gamblers and gamblers without problems. Problem gamblers, in comparison with gamblers with no problems, play more on slot machines in casinos (41%) and outside (52%), play on gambling tables in casinos (26%), play poker in the casino (16%) and take part in betting and sports prediction lotteries (18%).
 - Playing casino games in the risk group has decreased in comparison with the survey of 2014: playing on slot machines in the casino from 50% to 41% and playing on gambling tables in the casino from 32% to 26%.
 - In comparison with the survey of 2014, playing on slot machines outside casinos has increased among gamblers with no problems from 18% to 23% and among problem gamblers from 18% to 52%.

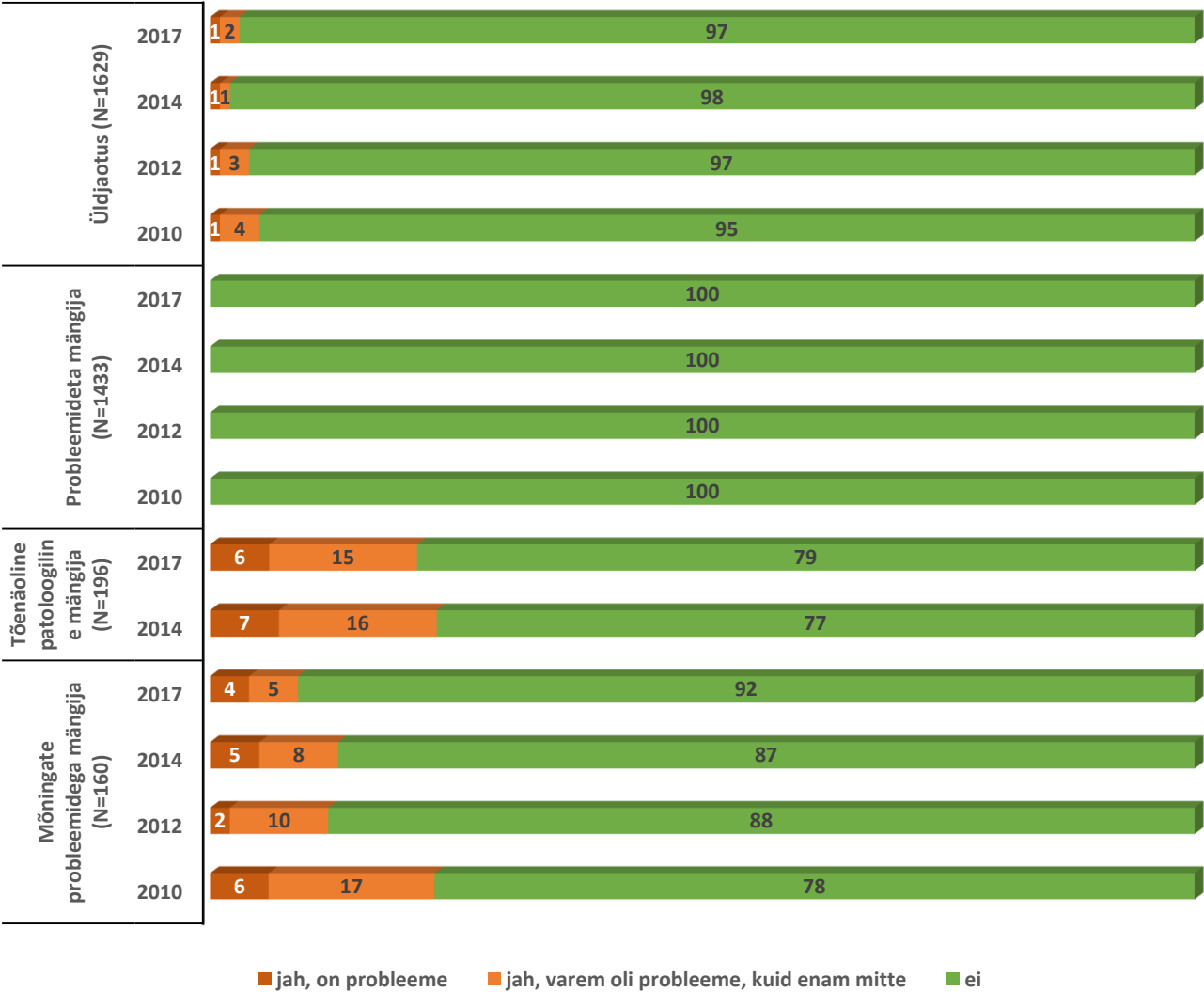
A background image featuring a pair of black-rimmed glasses and a black pen resting on a document. The document contains a bar chart with several blue bars of varying heights. The entire image has a dark blue overlay.

4. Experience of problems due to gambling for money

Experience of problems due to gambling for money

% of those who gambled in the past 2 years

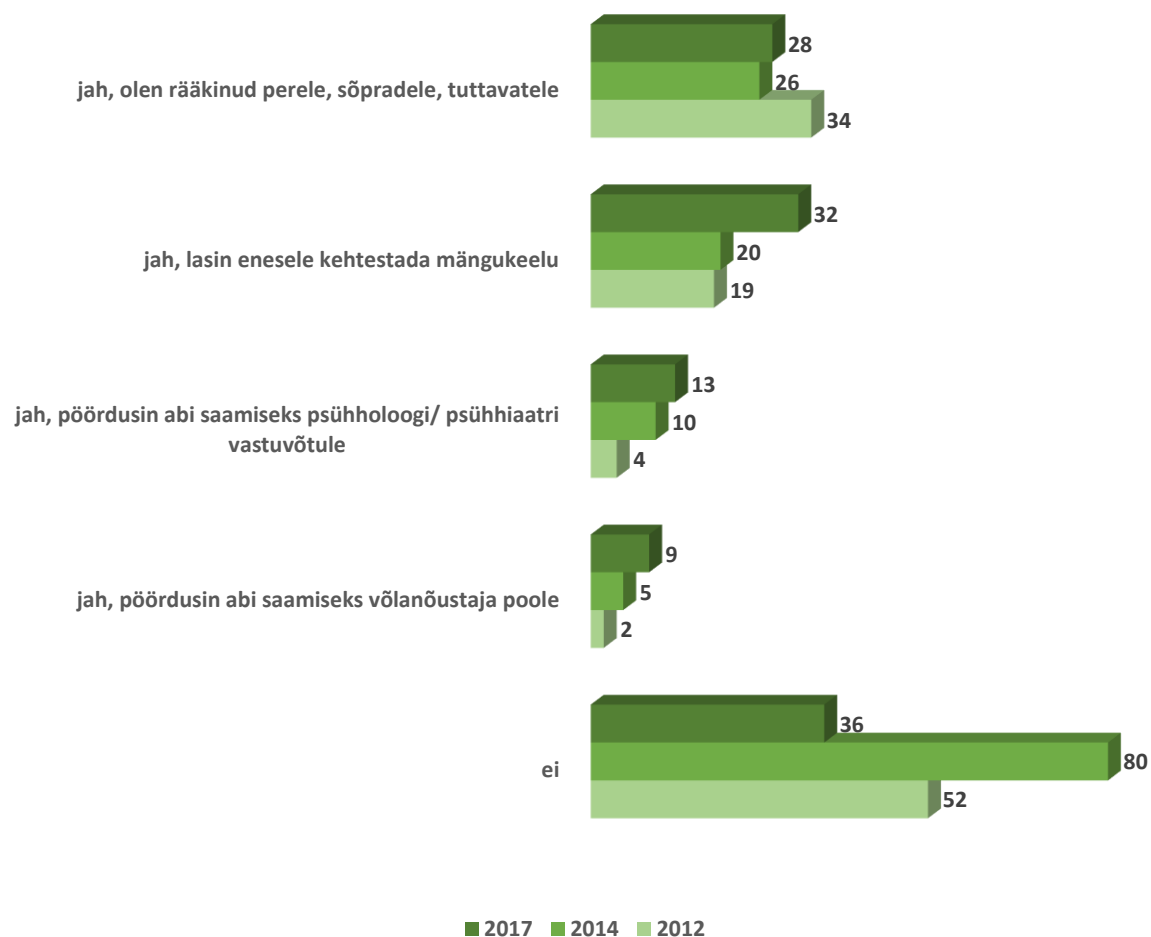
Do you feel you have ever had a problem with betting money or gambling?



Use of help resources when problems arise

% of gamblers who have experienced problems with betting money or gambling

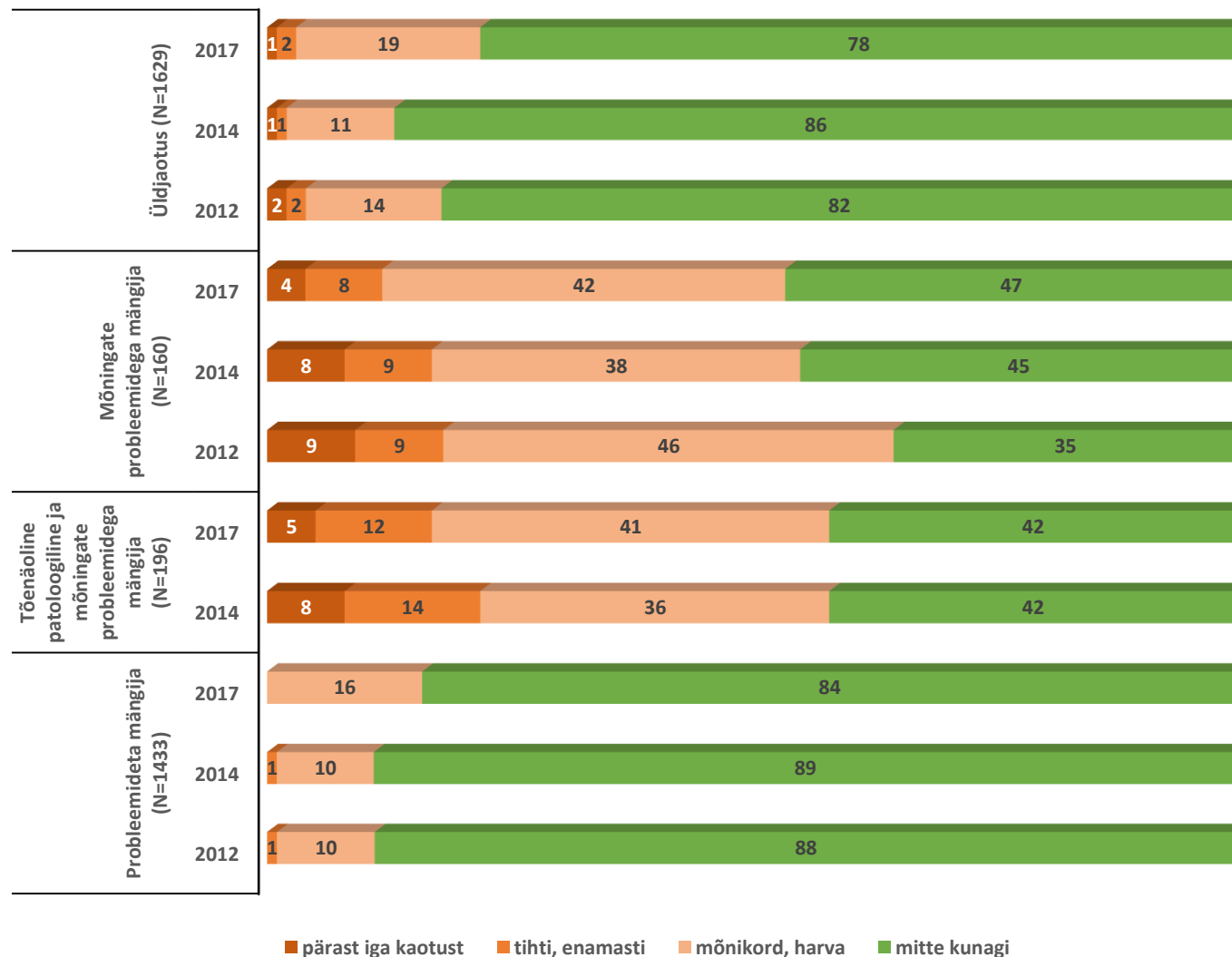
Have you used help resources and which ones, if you have had problems with gambling for money or staking bets?
(Problem gamblers, N=47)



Trying to win money back

% of those who gambled in the past 2 years

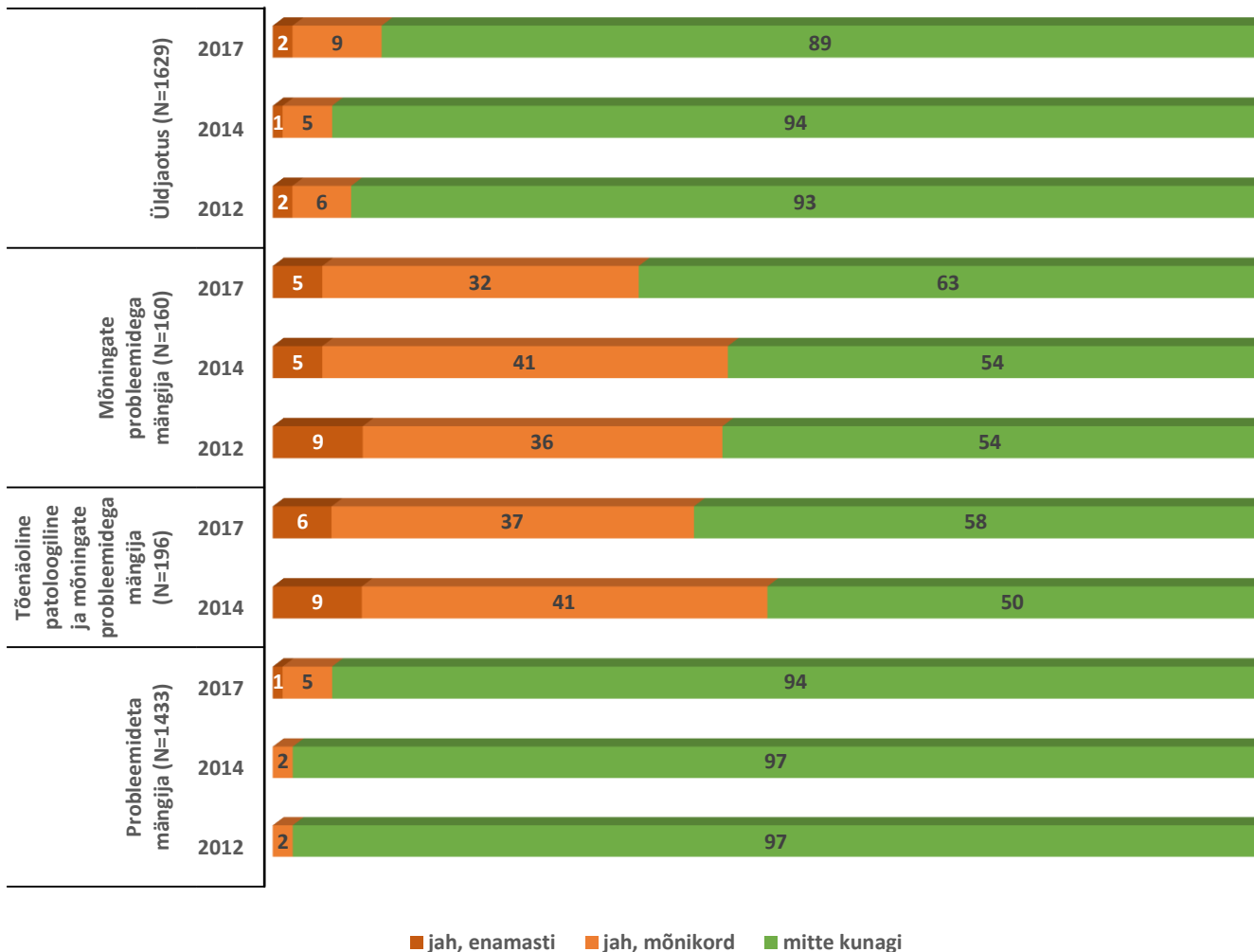
When you gamble, how often do you go back another day to win back money you lost?



Denial about losing money

% of those who gambled in the past 2 years

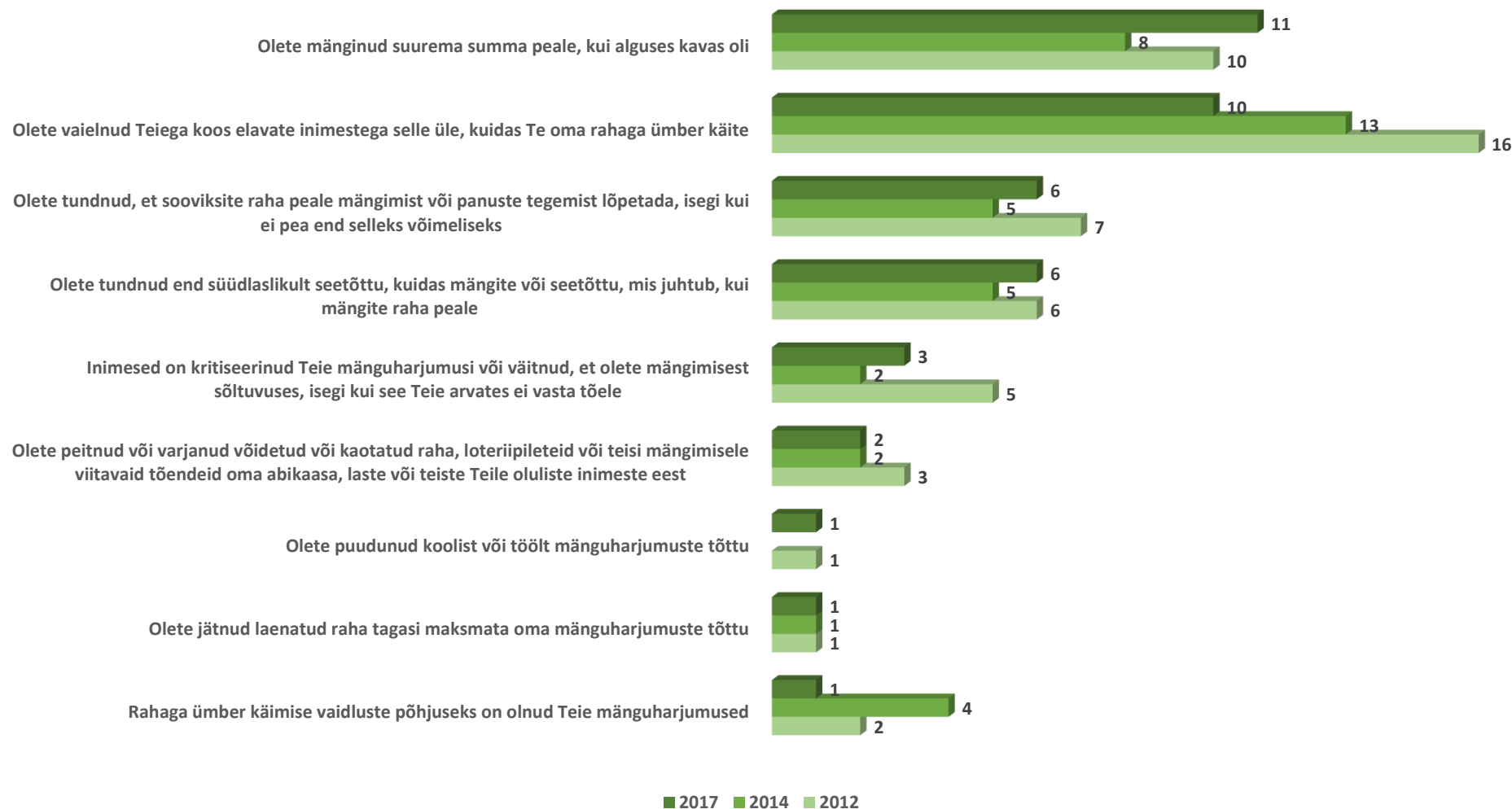
Have you ever claimed to be winning money gambling but weren't really? In fact, you lost?



Answering “yes” to the question related to gambling for money

% of those who gambled in the past 2 years

Answering “yes” to the question related to gambling for money
N=1636

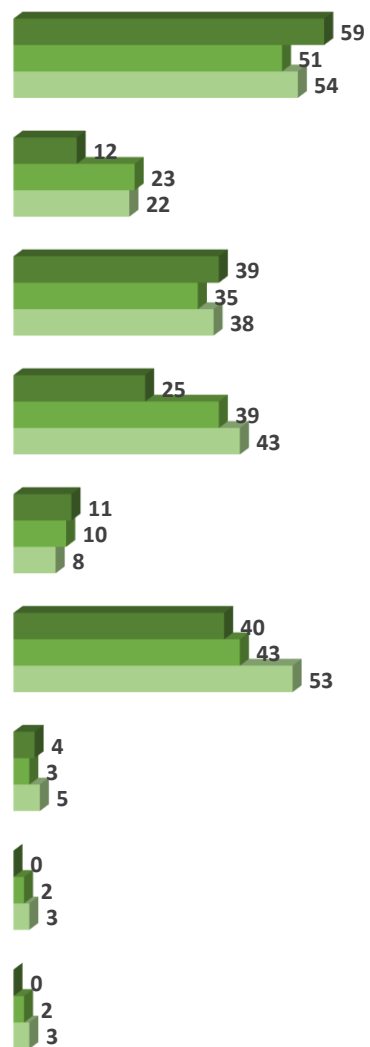


Gambler without problem (N=1433)



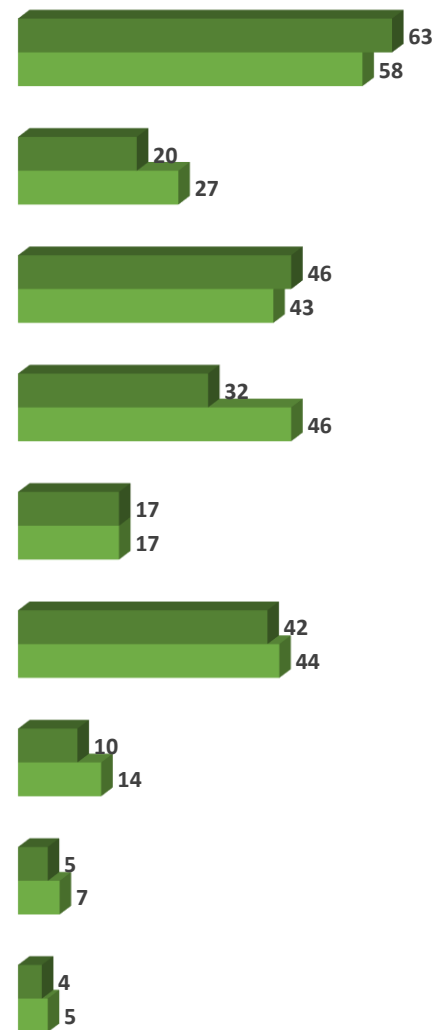
■ 2017 ■ 2014 ■ 2012

Gambler with some problems (N=160)



■ 2017 ■ 2014 ■ 2012

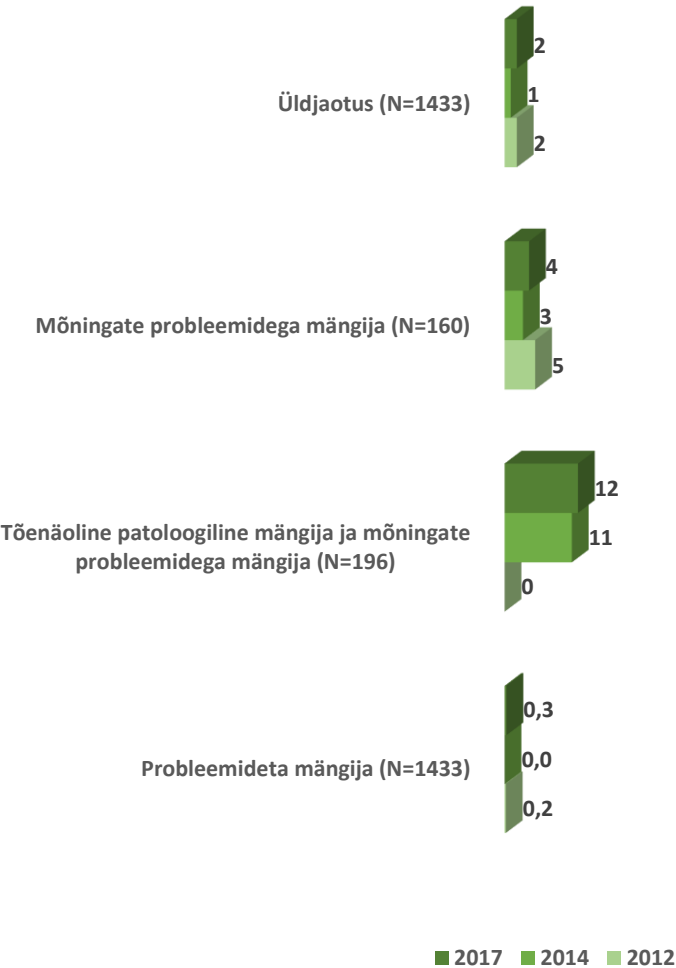
Probable pathological gambler and gambler with some problems (N=196)



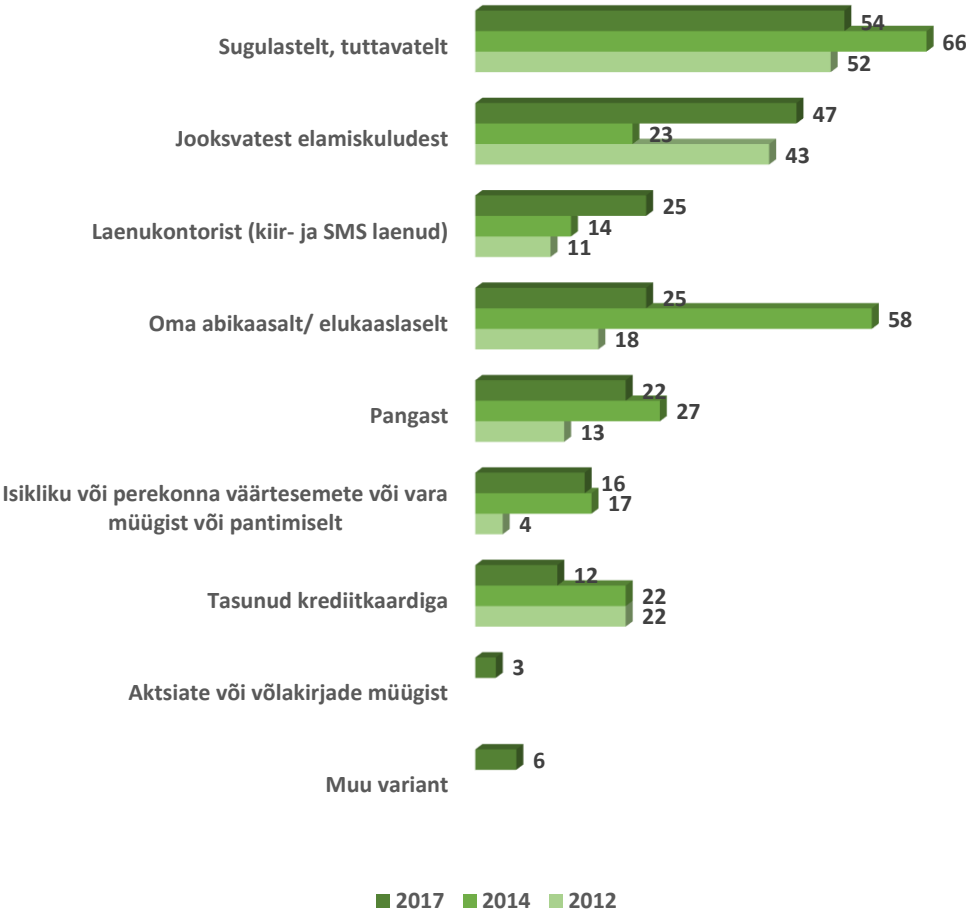
■ 2017 ■ 2014

Borrowing money to gamble or to pay a gambling debt, % of those who gambled in the past 2 years

Have you ever borrowed money to gamble?

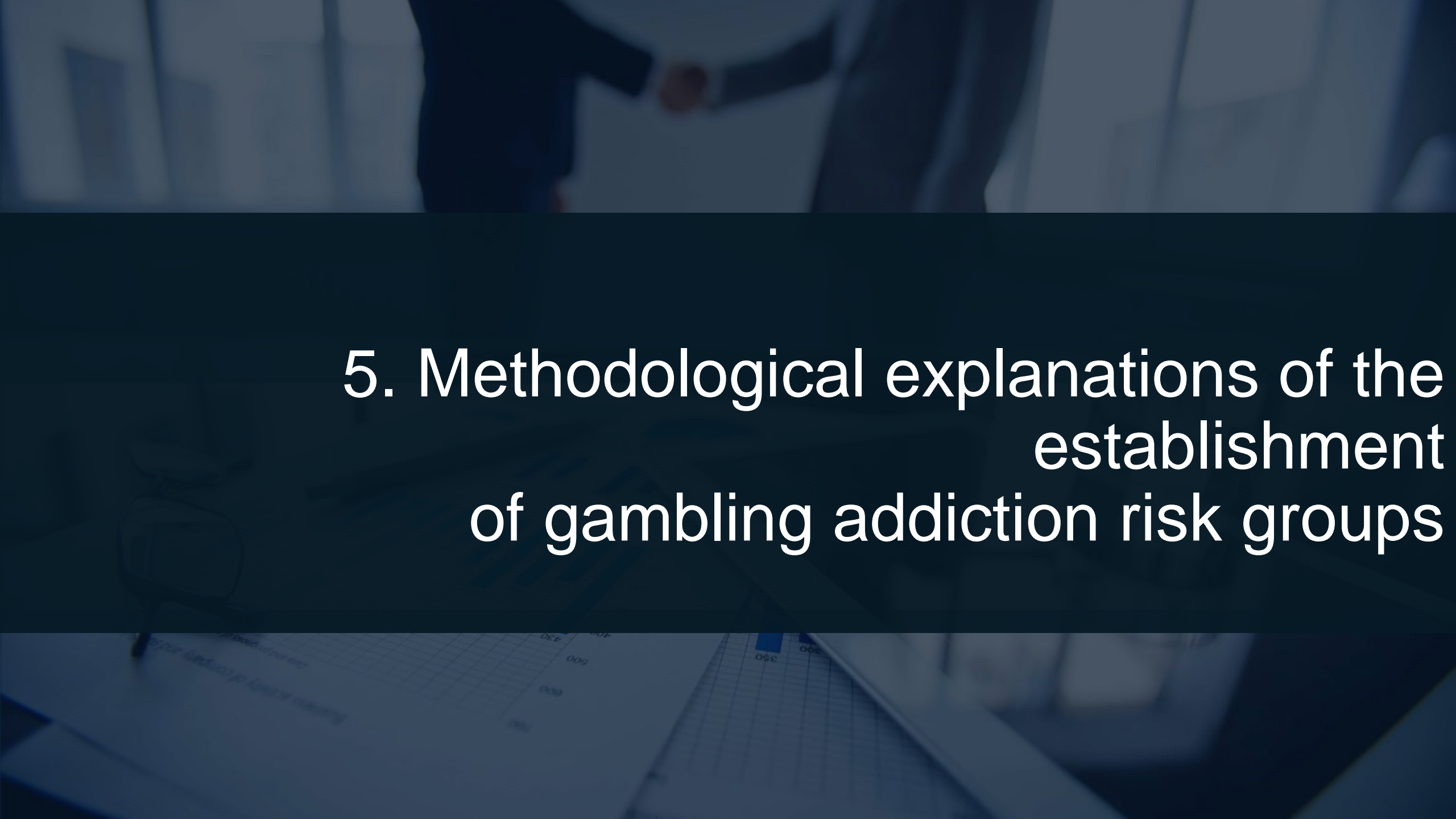


Who or where did you borrow from? % from gamblers who are borrowed money to gamble (N=29)



Problem gamblers play for bigger sums of money than before

- 22% of all gamblers has tried to win back their money on the following days. Their proportion has risen in comparison with the 2014 survey (+8%). Among problem gamblers 58% has tried to win back the money, which in comparison with the indicator from 2014, has remained on the same level; however, a positive trend is observed in the group of problem gamblers constituted in the fact that the attempt to win back lost money after each loss has decreased (-3%).
- 11% of all gamblers has stated that they win money but actually the situation is visa versa. In 2014, the factor was 6%. Among problem gamblers it has been stated by 43% of the group (including gamblers with some problems 37%). In comparison with 2014, it is noticed that in the group of problem gamblers the denial of loss has decreased from 50% to 43%, but in the group of gamblers without problems the corresponding indicator has risen from 11% to 16%.
- Among problem gamblers 63% has played for a bigger sum of money than intended prior; 32% has felt that they want to quit playing or betting for money even if they consider themselves unable to do it; 42% has argued with their co-habitants about the issue how they handle their money and 46% have felt guilty for the gambling habits.
- In comparison with 2014, the number of problem gamblers, who have played for bigger sums of money than planned initially, has risen from 58% to 63%, less gamblers without problems want to stop playing for money or betting (from 46% to 32%). Among all gamblers and problem gamblers the agreement to other statements referring to the gambling risk has not changed in comparison with the survey of 2014.
- 12% of problem gamblers (including 4% of gamblers with some problems) has taken loans for playing or paying back gambling debts. When money is usually borrowed from relatives and acquaintances, then in comparison with the survey of 2014, the indicators have been decreasing, but the proportion of taking money from current living costs and quick cash and SMS loans have increased.



5. Methodological explanations of the establishment of gambling addiction risk groups

5. Methodological explanations of the establishment of gambling addiction risk groups

- South Oaks Gambling Screen (SOGS; Lesieur & Blume, 1987, Laansoo, 2005*) is a valid and highly reliable screening test measuring the general behaviour related to gambling and distinguishing players with problems caused by gambling and players without problems. Questions comprise pathological gambling markers, such as regaining the loss, playing longer than planned, guilt accompanying gambling, negative reactions by other people in relation to gambling of an individual, claiming of having won instead of losing, borrowing money for gambling, etc.
- Respondents are grouped according to their gambling habits and points gathered for questions. Possible amount of points is 0-20. 5 or more points refers to pathological gambling; 2-4 points refer to a player belonging to the gambling addiction risk group with some problems, which may lead to the formation of pathology if deepened.
 - 0–1 points: no problem;
 - 2–4 points: some problem;
 - 5 or more points: probable pathological gambler.

* Lesieur, H. R., & Blume, S.B. (1987). The South Oaks Gambling Screen (The SOGS): A new instrument for the identification of pathological gamblers. *American Journal of Psychiatry*, 144, 1184-1188.
(Laansoo, S. (2005). *Pathological gambling: scope in Estonia and relations with behavioural and individual risk factors*. Master's Thesis. Tallinn University

Questions for scooring:

- Question (Q) „When you gamble, how often do you go back another day to win back money you lost?“, answers 1 or 2 („every time I lost“, „most of the time I lost “) – 1 point.
- Q „Have you ever claimed to be winning money gambling but weren't really? In fact, you lost?“, answers 1 or 2 („yes, most of the time“, „yes, less than half the time I lost“) – 1 point.
- Q „Do you feel you have ever had a problem with betting money or gambling?“, answers 1 or 2 („yes“, „yes, in the past but not now“) – 1 point.
- “Yes,, = 1 point:
 - Did you ever gamble more than you intend to?
 - Have people criticized your betting or told you that you had a gambling problem, regardless of whether or not you thought it was true?
 - Have you ever felt guilty about the way you gamble or what happens when you gamble?
 - Have you ever felt like you would like to stop betting money or gambling but didn't think you could?
 - Have you ever hidden betting slips, lottery tickets, gambling money or other signs of betting or gambling from your spouse, children or other important people in your life?
 - Have you ever argued with people you live with over how you handle money?
 - (If you answered yes to previous question):Have money arguments ever centered on your gambling?
 - Have you ever borrowed from someone and not paid them back as a result of your gambling?
 - Have you ever lost time from work (or school) due to betting money or gambling?
- Q „If you borrowed money to gamble or to pay gambling debts, who or where did you borrow from?“ , every answer gives 1 point (from household money; from spouse; from relatives, from bank; from credit card; from loan-office (quick- and SMS loans); sold personal or family property, other).



Summary

Summary

Gambling generally

84% of the population of Estonian aged 15-74 has been engaged in gambling:

• 81% has gambled offline,

• 51% has gambled online.

Within the last two years 66% of Estonians in the age group 15-74 has been engaged in gambling:

• 58% has gambled offline

• 40% has gambled online.

The most popular type of gambling is lottery either online or offline, among gambling games played within the last two years the next is betting and sports predictions online, and playing on slot machines offline outside the casino.

Gamblers' profile

- **Within the last two years** the gambling experience is almost similar among men and women. Offline gambling experience is similar among men and women, online gambling experience is higher among men.
- Continuously, within the two last years, the gambling experience is highest among young people – age group 20-29, however, online and offline gambling has increased in the age group 15-19 and is the lowest in the age group 60-74.

Summary

Frequency of gambling for money among gamblers who have gambled within the last 2 years

- ⑩ Although the number of people who have gambled is considerably higher than in previous surveys, the frequency of gambling has decreased. When the frequency of offline gambling has decreased a little, the frequency of online gambling has increased significantly.
- ⑩ The decrease of the frequency of **offline** gambling among players is clearly visible in casino gamblers, and less in other gambling games.
- ⑩ The decrease of the frequency of gambling **online** among players is expressed in all types of games, except lottery games, which have remained on the same level.
- ⑩ The number of weekly internet gamblers has increased in two groups – among women and age group 50-59.
- ⑩ As far as the youngest age group (15-19) is concerned, it may be said that the number of gamblers has significantly increased, but the number of weekly players has decreased and makes up only 8% of the gamblers in the corresponding age group.

Summary

Gambling addiction risk groups

- ⑩ 8% of the age group 15-74 of the population belongs to gambling addiction risk group. Among gamblers who have gambled within the last two years there are more problem gamblers on average from another nationalities, young men and people with average income.
- ⑩ Problem gamblers play different gambling games online and offline, whereby in risk groups the level of online gambling games has increased in all gambling games played in the Internet. Among offline gambling games playing on slot machines outside casino has increased.
- ⑩ Problem gamblers have gambled more for bigger sums of money than planned in comparison with the earlier period and express their wish to end gambling or betting for money. These statements are very sensitive from the aspect of the formation of gambling addiction in general.
- ⑩ Problem gamblers have started to take more quick cash and SMS loans for gambling or for paying gambling debts than before.

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