

KANTAR

H N K HASARTMÄNGUSÖLTUVUSE
NÕUSTAMISKESKUS

Contacts of the Estonian residents with gambling

Study report

November 2021



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Introduction

Aim and methodology of the survey

The aim of the survey is to gain an overview of the gambling behaviour of the Estonian population by mapping the general exposure to gambling and the risk groups for gambling addiction. Both the current situation and, if possible, the changes in gambling behaviour compared to 2019, 2017 and 2014 are mapped.

The survey analyses:

- the distribution of the population according to the extent of exposure to gambling, including online and offline gambling, and the extent of different types of gambling games;
- the proportion and background of risk groups for gambling addiction, as well as the perception of gambling problems in risk groups;
- agreement with statements indicating problematic behaviour;
- reasons for gambling and awareness of blockers;
- noticing gambling advertising and its perceived impact.

The 2021 survey uses the PGSI methodology to calculate the size of risk groups for gambling addiction (see Chapters 3 and 7). Previously, the SOGS methodology was used for this purpose.

The comparisons and changes over time in the report represent a confidence level of at least 95%, and the differences from the mean for individual target groups are based on chi-square statistics.

Survey target group: Permanent residents of the Republic of Estonia aged 15–74 (982,904 inhabitants, data of Statistics Estonia as of 01.01.2021).

Method: the survey was conducted as a combination of an online and telephone questionnaire. The final sample size of the survey was **2,892 respondents**, including 2,376 respondents online and 516 respondents by telephone.

Survey period: 16.09–27.10.2021

The client of the survey is the Gambling Addiction Counselling Centre (Estonian: Hasartmängusõltuvuse Nõustamiskeskus). Ownership of the results of the survey belongs to the client of the survey.

Calculation of risk groups for gambling addiction based on the PGSI methodology

Gambling disorder or gambling addiction is repeated or continuous gambling (incl. online), which is characterised by:

- Deterioration of control over gambling (onset, frequency, intensity, duration, termination, context of gambling);
- The growing importance of gambling, with other activities being relegated to the background;
- Continuation or increase in gambling despite negative consequences (deterioration of relationships, financial loss, difficulties at work/studies, health problems).

Gambling can be continuous or episodic and occurs over a long period of time (at least 12 months).

Gambling causes significant distress and disturbances in many areas of functioning (personal, social, educational, professional, etc.).

The calculation of the gambling addiction rate in the present survey is based on the PGSI methodology (see the results in Chapter 3 and the description of the methodology in Chapter 7).

In the survey, gamblers are divided into three groups based on gambling and the problems that result from it:

- 1. Problem-free gambler** (test score 0) – the person is involved or has been involved in gambling, but gambling is unproblematic and has not caused any harm.
- 2. Gambler with some problems** (test score 1–7) – gambling has caused some problems for the person, continuing to gamble may lead to an increase in gambling and thus a risk of pathology.
- 3. Probable pathological gambler** (test score 8 or more) – the person experiences problems and disorders related to gambling in several areas of functioning (personal, economic, social, educational, professional, etc.) and has lost control of their gambling.

In the survey, the **risk group for gambling addiction** is made up of groups 2 and 3, i.e. gamblers with some problems and probable pathological gamblers.

Main results

Main results: scope and frequency of gambling

- 72% of the Estonian population aged 15–74 have been **exposed to gambling** (70–73% when taking into account the survey error limits); in the last two years, the share is 49% (48–51%), i.e. every second inhabitant. There has been more exposure offline than online.
- **Participating in the numbers lottery and/or instant lottery is the most popular**, both online and offline, with 43% of the population having been exposed to it in the last two years. Exposure to other types of gambling games is close to a tenth or less: 7% have played **casino games**, 7% have been involved in **betting and sports betting**, 4% have played **poker** and 10% have played other games not specified in the survey.
- Compared to 2019, the share of the population having been exposed to gambling and the exposure to different types of games have remained the same. Compared to 2014, the share of offline gambling has decreased (10 percentage points) and the share of online gambling has increased 2.5 times.
- **The profile of gamblers** has remained largely the same as in 2019: on average, there are more people involved in both online and offline gambling in the last two years among 20–39-year-olds, men, Estonians and people with higher incomes; for offline gambling, there are more than average inhabitants of rural settlements.
- **Exposure of 15–20-year-olds to gambling** overall and in the last two years compared to the Estonian average: 70% (63–76%) of young people have been involved in gambling, including 53% (46–60%) in the last two years. In the last two years, the share of young people who have gambled for money is slightly above average for offline gambling (47%): most often in lotteries, but also in other games and gaming machines outside the casino. Exposure to gambling overall and in the last two years is generally at the same level as in 2019, and the extent of exposure to individual game types has not changed.
- 25% of online gamblers and 16% of offline gamblers have done so **on a weekly basis** (out of those who have gambled in the last two years). However, most gambling games are played less often than once a month. Both lotteries and casino games are played online more often than offline. In the case of sports betting and betting, the share of both channels is practically equal, and gambling games other than those listed in the survey are more often played offline.
- On average, there are more **weekly gamblers** both online and offline among men, 50–59-year-olds, and those with a personal income.
- Compared to 2019, involvement in **different types of gambling games** has remained at the same level; only participation in betting and sports betting has increased both online and offline (33% and 35% of gamblers, respectively).

Main results: risk group and problems encountered

- **10% (9–11%) of the population and 20% (18–22%)** of those who have gambled in the last two years belong to the **risk group for gambling addiction** (gamblers with some problems and probable pathological gamblers). At the level of the population, the indicator is at the same level as in 2019, but has increased in the target group of those who have gambled in the last two years (2019: 13%). The proportion of gamblers with some problems has doubled, both in the population and among gamblers, and this may be due to a change in the methodology for calculating the size of the risk group.
- There are more people belonging to the risk group among **men** and **20–29-year-olds**. Unlike in 2019, ethnicity does not indicate belonging to a risk group.
- The population belonging to the risk group has had more exposure to different types of gambling games both online and offline (only gambling related to the offline lottery is at the level of the average gambler).
 - **Compared to 2019**, playing online lotteries, casino games and poker, as well as offline lotteries and playing on gaming machines in the casino and elsewhere have increased.
- **The frequency of gambling** is clearly **higher** in the risk group compared to problem-free gamblers, especially in the case of online and offline sports betting and betting, poker and other casino games, as well as offline gambling machines in casinos.
- In the gambling risk group, the **exposure to various problems** is above average: the most common problems include returning within the next few days to try to get back the money lost, betting larger amounts than they can afford, and feeling guilt about gambling or its consequences.
- 85% of those who have gambled in the last two years say they have no problems related to gambling for money. Of those who have had problems, 14% have used the assistance options. In most cases, it is the imposition of a gambling ban which has been used more than average by the risk group.

Main results: reasons for gambling, blockers, effect of advertising

- Among those who have been exposed to gambling in the last two years, the main **motives for gambling** are the desire to win a large sum of money (48%) and to have fun (43%). For the **risk group**, equally important are winning a large sum of money (54%) and having fun (53%), followed by the desire to win money to solve their financial problems (26%).
- **59% of the population** and **68% of those who have gambled in the last two years** are aware of the possibility of the **self-imposed gambling ban**.
- 13% of the population and 12% of those who have gambled in the last two years say they have experiences with **blockers** imposed on websites of **gambling organisers that do not have an activity licence in Estonia**, incl. 6% of the population and 7% of gamblers indicate it as the reason they have given up creating or using a user account.
- Compared to two years ago, awareness of the blockers has remained unchanged.
- **69% of the population** has noticed **gambling advertising** on at least one advertising channel: most often on the Internet or on social media, on television or as street advertising. The younger a person is, the more likely they are to have noticed the advertising.
- **6%** of those who noticed the gambling advertisement admit that it **affected them**: in particular, it created an interest in the game advertised or in gambling in general.

1

Extent of gambling and its
comparison in population
groups

Extent of gambling

EXTENT OF EXPOSURE TO GAMBLING AMONG THE POPULATION

72% of the Estonian population aged 15–74 have been exposed to gambling or playing for money (70–73% when taking into account the survey error limits), and 49% (48–51%) in the last two years, i.e. every second inhabitant.

There has been **more offline exposure than online exposure**, both among those with gambling experience overall and those who have gambled in the last two years. **Among those who have gambled in the last two years**, the difference between online and offline gambling is smaller than for those who have gambling experience overall: 31% (29–33%) have gambled online and 38% (36–40%) have gambled offline (slide 1.1).

Participating in the numbers lottery and/or instant lottery is the most popular, both online and offline:

- regardless of the channel, 43% of the population have played them in the last two years, with 33% having gambled offline and 26% online (slide 1.3).

For the other **gambling game types mapped in the survey**, exposure in the last two years is close to one tenth or less (slide 1.3):

- 10% have gambled money in games not listed in the survey, including 7% offline and 4% online;
- 7% have played casino games, incl. 6% online and 1% at casino tables;
- 7% have participated in betting or sports betting, online being more popular than offline (6% vs. 3%);
- 4% have played poker (online poker being more popular than playing in casinos) and 4% have used gambling machines at casinos

CHANGES IN THE EXTENT OF EXPOSURE TO GAMBLING

Compared to the survey conducted in 2019, the proportions of the population who have been exposed to gambling overall and in the last two years have remained the same. Compared to 2014, online gambling has decreased among those who have gambled in the last two years (10 percentage points), while online gambling has increased 2.5 times (slide 1.1).

There are no differences in the extent of exposure to different types of online and offline gambling compared to two years ago (slide 1.2).

Comparison of the extent of gambling in population groups

SCOPE OF OVERALL GAMBLING IN POPULATION GROUPS

On average, there are more people with exposure to gambling overall and exposure in the last two years among the **age groups 30–39 and 20–29**: the share of exposure in the last two years is 64% and 59%, respectively, compared to the average share of 49%. In the 40–49 age group, the share of people who have exposure to gambling overall is above average (78%), but exposure in the last two years has remained at the same level as the population average.

The share of those who have been involved in gambling **in the last two years** is slightly above the average (49%) among **men** (52%), **Estonians** (53%), **residents of rural settlements** (53%) and **people with higher incomes** (55% of those whose income per household member exceeds 1300 euros).

The group **significantly less exposed to gambling** is residents aged 60–74, among those 53% having exposure to gambling overall and 30% have been exposed to it in the last two years.

SCOPE OF ONLINE AND OFFLINE GAMBLING IN POPULATION GROUPS

In terms of age groups, the above-mentioned groups dominate both online and offline gambling: **30–39-year-olds and 20–29-year-olds** have had the most exposure to gambling overall as well as in the last two years. People aged 40–49 also have more than average exposure, but in terms of the last two years, offline gambling is at the same level as the population average.

Men have been exposed to gambling more than women both online and offline; the exception is offline gambling in the last two years, which is equal among men and women (38%).

Estonians have been more exposed to gambling both online and offline than non-Estonians, both overall and in the last two years.

Residents of rural settlements have been involved in offline gambling more than average (42% in the last two years compared to the average 38%).

In the last two years, the share of people involved in offline gambling is slightly above average in Southern Estonia (41% vs the average 38%), while in Northern Estonia it is below the average (35%).

In conclusion, the profile of the population exposed to gambling has not changed compared to two years ago, both in terms of overall exposure and exposure channels.

Extent and frequency of gambling among 15–20-year-olds

The gambling experience of the target group of **15–20-year-olds** has been analysed separately, as they are subject to a legal restriction on gambling (slides 1.6–1.8).

Exposure to gambling in this age group is comparable to the Estonian average both overall and in the last two years. 70% (63–76%) of young people have had **exposure to gambling**, including 53% (46–60%) **in the last two years**. In the last two years, the share of young people who have been involved in **offline gambling** is slightly above the average, the respective figure being 47% (40–53%). The most popular form of **offline gambling** has been **numbers or the instant lottery** (38%), while the share is also above average for other games (15%) and for gaming machines outside the casino (6%).

In the last two years, 35% (28–41%) of young people have been involved in **online gambling**. Most often, they have played **numbers or instant lottery** online (22%), participated in **betting or sports betting** (13%) and **played casino games** (10%).

Comparing gambling overall and in the last two years both online or offline, there have been no statistically significant changes compared to 2019.

A comparison of the extent of gambling by individual game types with the 2019 survey shows that there have been no significant changes in the overall exposure or in the exposure over the last two years* (slide 1.8).

The extent of weekly gambling among young people aged 15–20 is comparable to the population average: 23% (13–32%) vs 25% (21–28%) online and 17% (10–24%) vs 16% (14–18%) offline (slide 2.1). Compared to 2019, this has also not changed. Looking at the long-term trend since 2014, there is an increase in the share of weekly gamblers among young people involved in offline gambling (slide 2.1).

** The sample of young people is 244 respondents, which means that the error limits in the results are wider.*

2

Frequency of gambling
and frequent gambling in
population groups

Frequency of gambling

FREQUENCY OF GAMBLING

A **quarter** (25%, within the error limit 21–28%) of those who have gambled **online** in the last two years have done so on a **weekly basis**. This figure has remained stable throughout the last four surveys. **Out of those who have been involved in offline gambling in the last two years**, 16% (14–18%) have done so on a weekly basis. This indicator has also remained at the same level since 2014 (small fluctuations remain within the error limit of the survey) (slide 2.1).

In terms of the **specific types of gambling games**, the vast majority of those who have been exposed to gambling in the last two years play them **less often than once a month**. The exception is the **online numbers lottery**, where the share of those that play **at least once a month** and those who play less frequently is equal (slides 2.2 and 2.3).

In the case of the lottery, i.e. the type of game with the largest range and frequency of play, the share of **online weekly players is 24%** of all online gamblers; the share of **offline players is 13%**.

In the case of **sports betting and betting**, the share of weekly gamblers in both channels is **just over a tenth** (12% online and 14% offline). In both of the channels, there is also a small segment (5–6%) of everyday gamblers.

Playing casino games is much more common online: there are 16% of weekly poker players and 19% players of other casino games. In a real casino environment, there are 4% of weekly players on gambling machines, and no one marked themselves as a weekly player of poker and other games; also in the view of monthly gambling, the real casino environment is less often used than the virtual one.

Other games (those not listed in the survey) are much more often subject to offline rather than online gambling: weekly share 13% online and 21% offline, while the respective monthly share is 29% and 43% for those who have been involved in the specific game in the last two years.

CHANGES IN THE FREQUENCY OF GAMBLING

Compared to the 2019 survey, the average frequency of playing online games has remained largely the same in terms of players that gamble at least once a month or more often. Only in the case of betting and sports betting has the share of monthly gamblers increased from 20% to 33%.

In terms of **offline gambling**, there is also an increase in the share of players involved in betting and sports betting: the share of gamblers who play at least once a month has risen from 21% to 35%

Frequency of gambling in population groups

WEEKLY GAMBLING IN THE VIEW OF POPULATION GROUPS

The rate of weekly online gambling is significantly higher for men than for women (31% vs 15%); in terms of age, the share of those who gamble **at least once a week** is higher than the average among 50–59-year-olds (34%) and lower than the average among 30–39-year-olds (20%). There are no significant differences by nationality and place of residence. There are more frequent gamblers among those who have a personal income.

The same target groups are more active in terms of offline gambling: 22% of men and 11% of women play weekly; among age groups, the share of frequent gamblers is higher than the average among 50–59-year-olds (21%).

The profile of frequent gamblers is comparable to that of two years ago.

Looking at the long-term trend since 2014, there is an increase in the share of weekly gamblers among young people involved in offline gambling.

3

Proportion and
description of the risk
group for gambling
addiction

Proportion and description of the risk group for gambling addiction and the extent of gambling

PROPORTION OF RISK GROUP

In order to identify the risk groups, the 2021 survey used the PGSI methodology, which includes nine statements referring to potential problems (for more details on the methodology, see the report introduction and Chapter 7). Previous surveys have used the SOGS methodology.

The proportion of the population belonging to the risk group for gambling addiction (gamblers with some problems and probable pathological gamblers) is comparable to the previous survey, despite a change in methodology: **10% (9–11%) vs 7%**. However, the proportion is higher for **those who have been involved in gambling in the last two years: 20% (18–22%) vs 13%**. The proportion of gamblers with some problems has doubled, both in the population and among the gamblers (slide 3.1).

Among those who have gambled in the last two years, **the share of people belonging to the risk group** is higher than the average among **men** (24%) compared to women (15%). In the comparison of age groups, the share of those belonging to the risk group is higher than the average among **20–29-year-olds** with 26% (20–32%). Similarly to the survey from a few years ago, the share of people belonging to the risk group is above average among 15–20-year-olds (29% or 20–37%), probably due to the proportion of 20-year-olds in this age group (slide 3.2).

While a few years ago the survey showed a higher proportion of people belonging to the risk group among people of other nationalities, there is no nationality distinguishing feature in this survey.

The share of those belonging to the risk group is lower among people with a higher income level (15% of those who receive more than 1,300 euros per month per family member) and among residents of rural settlements (17%).

SCOPE OF GAMBLING IN RISK GROUPS

Compared to the average for those involved in gambling in the last two years, gamblers at risk of gambling addiction **have played more both online and offline** (slide 3.3 1 and 2). Online, they have played all games more than average; offline, they have only played lotteries at a level comparable to the average (83% vs the average 81%). However, the ranking of different types of games in terms of the share played follows the average gambler: lotteries are played online and offline most often (68% and 83%) and poker the least often (26% online and 13% offline).

Compared to the previous survey, playing online lotteries, casino games and poker, as well as offline lotteries and gambling in casinos and on gambling machines elsewhere, **has increased in the risk group**. The level of playing different games is rather at the same level as in 2017.

The frequency of gambling is clearly **higher** in the risk group compared to problem-free gamblers, especially in the case of online and offline **sports betting and betting, poker and other casino games, as well as for offline gambling machines in casinos** (slides 3.4 and 3.5).

4

Experiencing problems
related to gambling

Experiencing problems related to gambling

AGREEMENT WITH STATEMENTS RELATING TO THE RISK OF GAMBLING ADDICTION

Among those who have gambled in the last two years, the **rate of agreement with most statements remains relatively low**: the share of those who have experienced at least some problems is between 2% and 8%, depending on the problem (slide 4.1). The problem most often encountered has been betting in an amount which is larger than the person can actually afford to lose.

In the risk group for gambling addiction, the proportion of those who have experienced any of the problems is higher in the case of all the problems for probable pathological gamblers than it is among the group of gamblers with some problems. The following problems have been experienced most often:

- returning within the next few days to try to compensate for the lost money (40%);
- betting a larger amount of money than they can actually afford to lose (39%);
- feeling guilt over gambling or its consequences (37%);
- feeling that gambling has become problematic (31%);

In the risk group, 11–26% agree with all the other statements as well. For all the statements, the most frequently chosen answer is “sometimes”; experiencing the problems at the level of “often” or “almost always” ranges from 1% to 7% in the risk group. This is almost twice less than in 2019 with the SOGS methodology.

Use of assistance options and gambling ban

USE OF ASSISTANCE OPTIONS

85% of those who have gambled in the last two years say **they have no problems related to betting and gambling for money**. Out of the remainder, **2% have used some form of assistance** and **13% have not**.

Out of those who have **experienced problems** with gambling or betting, **14% have used some form of assistance** and **86% have not**. The most commonly used form of assistance has been a self-imposed gambling ban (9%) or talking to family, friends, acquaintances (5%). The help of a psychologist/psychiatrist or debt counsellor has been used by 1% or less (slide 4.2).

The risk group has used the ban on gambling more often than the average gambler (21%), and there are also fewer of those who have not used any form of assistance (69%).

Compared to 2019, the share of those who have not used any assistance opportunities is higher. This may be due to a change in the way the question is asked.

GAMBLING BAN

Out of those with a **self-imposed gambling ban**, 83% (62–100%) acknowledge its positive effects, i.e. they have stopped gambling, and 18% (0–40%) consider a self-imposed gambling ban necessary in another (neighbouring) country as well, if possible (slide 4.3). The sample of those with a gambling ban is small (22 respondents), so the error limit is wide and care must be taken when extending the results to the entire target group.

Out of the four respondents who continued to gamble despite the ban, two did so in a neighbouring country, one used another person's ID card or account, and one used other means.

5

Reasons for gambling,
awareness of blockers,
buying loot boxes

Reasons for gambling, awareness of blockers

MOTIVES FOR GAMBLING

Among those who have been exposed to gambling in the last two years, the main motives for gambling are the **desire to win a large sum of money** (48%) and **to have fun** (43%). The desire to win money to solve their financial problems is a significantly less frequent motive for gambling (15%), and a tenth or less of the gamblers cited other reasons. 8% did not consider themselves as gamblers; in most cases, these were people who had only rarely played the numbers and/or the instant lottery.

For gamblers with some problems, the **desire to win a large amount of money** is important, but so is the **desire to have fun** (it is mentioned more often than average). 10% of them also cite a recommendation/example from a friend or family member (average figure 5%). **For probable pathological gamblers**, in addition to the **desire to win a large sum of money** (54%), the **desire to win money to solve their financial problems** is in second place (45%). A quarter of them mention an established habit (average 8%, 7% for problem-free gamblers, 10% for gamblers with some problems). For the **risk group** as a whole, equally important are winning a large sum of money (54%) and having fun (53%), followed by winning money to solve their financial problems (26%). All other reasons are also mentioned more often than average.

The motivations for gambling have not changed significantly compared to a few years ago.

AWARENESS OF BLOCKERS IN THE GAMBLING SECTOR

59% of the population and **68% of those who have gambled in the last two years** are aware of the possibility of a **self-imposed gambling ban**. **Awareness is higher** in target groups with a higher exposure to gambling: **men**, **Estonians**, and **the age group 30–59** (slide 5.2). The level of awareness is below average in the younger target groups, including those aged 20–29, where there are also more players than average, and at an average level among the oldest (65–74-years-old).

The level of awareness is above average for both problem-free gamblers and the risk group (including gamblers with some problems when viewed separately).

13% of the population and 12% of those who have gambled in the last two years say they have experiences with **blockers** imposed on websites of **gambling organisers that do not have an activity licence in Estonia**, incl. 6% of the population and 7% of gamblers indicate it as the reason they have given up creating or using a user account. The remaining people who have encountered blockers have ignored them.

In the **risk group for gambling addiction**, the exposure is **above average**: 19% of them have encountered blockers (including 17% among gamblers with some problems and 40% among probable pathological gamblers). In most cases, the blocker led the person to stop gambling (14%); however, 6% admit to ignoring the blocker.

Compared to 2019, awareness has remained largely unchanged for both observed indicators.

Exposure to buying loot boxes

11% of the population and **16% of those who have gambled in the last two years** have used real money to buy loot boxes in computer games. In the last two years, 6% of the population and 9% of gamblers have experience of buying loot boxes (slide 5.5).

The **risk group** has **more** exposure to loot boxes: **26% have bought them**, including 17% in the last two years. For the group of gamblers with some problems, these figures are 26% and 17%, and 24% and 14% for probable pathological gamblers. Thus, loot boxes have primarily been bought by gamblers with some problems, and the experience of probable pathological gamblers is no different from that of the average gambler.

Compared to 2019, the exposure to loot boxes has not changed, except for the fact that a few years ago probable pathological gamblers were most likely to have been exposed to loot boxes.

Loot boxes are mostly bought by **men** (16%) and the age group of **15–39-year-olds** (21%). A **quarter** (25%) of 15–20-year-olds have bought loot boxes.

Gamblers who have bought a loot box in the last two years **have mostly done so less than once a month**, the share of monthly buyers being 21%. The behaviour of the risk group is no different from the average: 25% have bought loot boxes. The samples of gamblers who have been exposed to loot boxes are very small and care must be taken when extending the results to the target group.

6

The effect of gambling advertising

Noticing gambling advertising and its effects

NOTICING ADVERTISING

69% of the population has noticed gambling advertising in at least one advertising channel. Half of the population has noticed it **on the Internet or on social media** (52%), more than a third **on television** (39%) and about a fifth **as street advertising** (22%). The share of other channels is less than one-fifth (slide 6.1).

The younger a person is, the more likely they are to have noticed gambling advertising: it is above average among 15–19-year-olds (90%), 20–29-year-olds (84%) and 30–39-year-olds (77%). The share of those aged 50 and over to have noticed the advertising is below the average. Compared to women, men have noticed advertising more (75% vs 64%) and Estonians more than representatives of other nationalities (73% vs 63%). Those who have gambled in the last two years have noticed the advertising more often than average (77%), including 87% of the probable pathological gamblers.

People who have gambled in the last two years have noticed advertisements on all channels more often than average. On average, probable pathological gamblers have noticed advertising in the same sources as those who have gambled in the last two years, but also more than average at public events (39%) (slide 6.2).

PERCEIVED IMPACT OF ADVERTISING

Out of those who have noticed gambling advertising, **6% admit that it affected them**. Among them, 4% say that they became interested in the game advertised and 2% became interested in gambling in general. Less than 1% of those who notice the advertisement acknowledge other effects. According to the respondents themselves, advertising has affected 15–29-year-olds (12%) and Estonians (7%) more than average (slide 6.3).

Gamblers with some problems and probable pathological gamblers acknowledge the effects of advertising more often than average. In comparison with those who have gambled in the last two years, **gamblers with some problems** cite more often than average to have developed an interest in the game advertised (10%), to have started gambling (2%), or to have started gambling more often than usual (2%). In comparison with those who have gambled in the last two years, **probable pathological gamblers** cite more often than average to have developed an increased interest in gambling in general (31%), to have started gambling more often than usual (7%), and to make larger bets while gambling (5%).

In conclusion, the risk group recognises being affected by all the effects of advertising more than problem-free gamblers, except for the effect of advertising on the size of bets.

7

Sample group
description.

Project team

Survey methodology: CAWI (Computer Aided Web Interviewing) survey

- The data collection of the survey was conducted in a combined form of telephone and online survey (the so-called omni method) with the aim of conducting at least 2,500 interviews, incl. 500 by telephone. Due to the larger than planned number of completed questionnaires in the online survey, the actual proportion of the survey method was 18% CATI and 82% CAWI.
- In the form of an online survey, 2,376 interviews were conducted. The survey was conducted as part of Kantar Emor's monthly online omnibus and could be answered in both Estonian and Russian.
- The sample of the online interviews was formed as a random extract from the database of pre-recruits of AS Emor, using a proportional population model. The random extract was based on the expected response rate of socio-demographic groups. The database of pre-recruits of AS Emor contains 30,000 contacts of respondents, which have been randomly collected by telephone or during a home visit. The database is validated and suitable for sampling of representative surveys.
- The questionnaire was programmed using NIPO Software's NIPO Nfield Online software application. The volume of interviews was monitored through the special software nField Web Manager.
- In order to invite the respondent to participate in the survey, a link to the questionnaire on Kantar Emor's online survey server was sent to them by e-mail. An SSL secure connection (for confidentiality) was provided when completing the form. The program also does not allow the same respondent to fill in the questionnaire repeatedly. One reminder letter was sent to non-respondents, given the occupancy of specific socio-demographic groups.
- Within the framework of the survey, 12,069 e-mail addresses were contacted.
- The average length of an online interview was 5.7 minutes.

Survey methodology: CATI (Computer Aided Telephone Interviewing) survey

- In the form of a telephone interview, 516 interviews were conducted. It was possible to complete the survey in both Estonian and Russian.
- CATI method (computer aided telephone interviewing) – the questions of the questionnaire are on the computer screen and the answers are immediately entered into the computer by the interviewer. Filters and rotations are programmed to reduce errors during the interview. The survey was conducted at the Kantar Emor survey centre with 40 employment. The course of the interview and the proportions of the sample were verified by the special software program NIPO.
- For the telephone survey, randomly generated mobile phone numbers and the Kantar Emor pre-recruit database were used.
- All of our interviewers have completed a training programme.
- 26 interviewers of AS Emor who received the respective training participated in the survey.
- A total of 7,163 contacts were made by the interviewers.
- The average length of a telephone interview was 5.5 minutes.

Project team

The following were involved in and responsible for the different phases of the survey:

Contact person of the client:	Pille-Riin Indermitte
Compiler of the survey report:	Jaanika Hämmal
Compiler of the questionnaire program	Olga Kosolapova, Kalev Mitt
Russian translation of the questionnaire:	Anastasia Lesment
Survey coordinator:	Kaja Ruuben, Kaja Nebel
Data processing:	Olga Kosolapova, Kalev Mitt
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