

Gambling Legislation Changes Survey

Topline Highlights
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Methodology

This research was carried out by Ipsos UK on behalf of iGaming.com Limited (Online-Casinos.com). Ipsos UK interviewed a representative quota sample of 4,167 adults aged 18-75 in Great Britain using its online omnibus.

The sample achieved is representative of the population of this audience with interlocking quotas set on Age within Gender, Region and Working status.

The data has been weighted to the known offline population proportions for interlocking cells of gender within age and working status, as well as region, social grade and education to reflect the adult population (18-75) of Great Britain.

Fieldwork was carried out between the 30th August and 2nd September 2024.

Prior to answering all of the questions, participants were provided with an outline of online gambling/betting as follows:

In the next few questions, we will cover **online** “gambling/betting”, by gambling/betting we are talking about all of the activities mentioned below. Please keep this in mind when answering the questions that follow

- Online lottery games (e.g. National lottery, Thunderball, EuroMillions, Charity lottery, etc.)
- Online poker games
- Other online casino card games (e.g. blackjack, etc.)
- Online table games (e.g. craps, roulette, etc.)
- Online casino machine games (e.g. fruit machines, slot machines, etc.)
- Online betting on sports (e.g. football, cricket, horse, dog racing, etc.)
- Any other type of online gambling/betting activity

Q1 - Which of the following, if any, best describes your attitude towards online gambling/betting activities in Great Britain?

Over 1 in 10 (13%) adults aged 18-75 in Great Britain think that all forms of online gambling should be banned in Great Britain.

3 in 10 (32%) think that some forms of online gambling activities should be banned, with a similar proportion (30%) saying they are neutral on whether gambling activities should be banned or not.

Almost 2 in 10 (18%) don't think that any online gambling activities should be banned in Great Britain.

Q3 - To what extent do you agree or disagree with each of the following statements about gambling in Great Britain?

3 in 5 adults aged 18-75 (61%) agree that gambling in Great Britain should be more strictly regulated by the government.

Views of adults (18-75) in Great Britain are mixed with 26% agreeing that it has a positive impact on the GB economy, 35% disagreeing and 26% neither agreeing or disagreeing.

Almost half of adults (48%) agree that the gambling industry in Great Britain has taken steps to make the public aware of the harms of excessive gambling – twice the proportion disagreeing (23%).

More than half (55%) of adults aged 18-75 in Great Britain agree that the Government should provide more resources for gambling addiction (15% disagree).

Q4 - On balance, do you think there's too much, too little or just about the right amount of advertising relating to gambling on TV these days?

British adults (18 – 75) are more than seven times more likely to think there is too much (53%) than too little (7%) advertising relating to gambling on TV these days. A quarter (26%) believe it is about right.

Q5 - To what extent do you agree or disagree with the following statements?

More than six in ten adults aged 18-75 in Great Britain agree that gambling companies should not sponsor sporting events or sports teams that are popular with children (63%) or that exposure to gambling advertisements can influence children to start gambling at a younger age (64%). Two-fifths (42%) adults aged 18-75 in Great Britain agree that on balance, gambling sponsorship benefits sports teams and sporting events.

Q6 - On balance, would you say that gambling companies who run online gambling in Great Britain do too much, too little or about the right amount when it comes to promoting responsible gambling?

British adults (18-75) are significantly more likely to believe that gambling companies who run online gambling in Great Britain do too little (40%) than too much (15%) when it comes to promoting responsible gambling – for three in ten (29%), the current level of promotion is believed to be about right.

Q7 - Who, if anyone, do you think should have the most responsibility for providing support for the harmful effects of online gambling on individuals who gamble?

When asked, who, if anyone should have the most responsibility for providing support for the harmful effects of online gambling on individuals who gamble, 37% of adults aged 18-75 in Great Britain selected “Online gambling companies”. This was followed by “regulatory bodies” (17%), “the Government” (16%) and “individuals who gamble” (16%).

Q8 - To what extent are you confident, or not, in regulators in Great Britain's ability to enforce online and offline/ in-person gambling regulation (i.e., any form of gambling that takes place in a physical location, rather than online such as traditional casinos, racetracks, etc.) gambling regulation?

When asked to what extent are you confident, or not, in regulators in Great Britain's ability to enforce online gambling regulation and offline/in-person gambling regulation, adults in Great Britain had a similar opinion on both.

	Online gambling regulation	Offline/ in person gambling regulation
Very confident	8%	7%
Fairly confident	25%	25%
Not very confident	29%	31%
Not at all confident	17%	15%
Very/ fairly confident (NET)	32%	33%
Not very/ at all confident (NET)	47%	46%
Don't know	20%	21%
Prefer not to say	1%	1%

Base: n=4,167 adults aged 18-75 in Great Britain

Q9 - For each of the following, to what extent do you believe the current gambling initiatives in Great Britain are appropriate, or not?

Adults in Great Britain's beliefs on whether gambling initiatives are appropriate or not for both online and offline/in-person gambling are similar.

Adults in Great Britain (18-75) are twice as likely to believe that the current gambling initiatives in Great Britain are appropriate for Online (50%) or Offline / in person (48%) than not (25% respectively)

	Online gambling regulation	Offline/ in person gambling regulation
Very appropriate	17%	15%
Fairly appropriate	34%	33%
Not very appropriate	16%	17%
Not at all appropriate	9%	9%
Very/ fairly appropriate (NET)	50%	48%
Not very/ at all appropriate (NET)	25%	25%
Don't know	24%	26%
Prefer not to say	1%	1%

Base: n=4,167 adults aged 18-75 in Great Britain

Q10 - Before today, how much, if anything, would you say you know about the Gambling Commission?

Knowledge of the Gambling Commission is low with a slight majority (53%) of adults in Great Britain (18-75) having not heard of this organisation, or say they have heard of, but know nothing about this organisation. A quarter (28%) know just a little and 14% know a fair amount or a great deal.

Q11 - Before today, how much, if at all, have you heard about these stake limit changes for online slot games by the UK Government?

Prior to answering questions on online slot games, participants were provided the following information: Online slot games are digital versions of traditional slot machines that can be played over the internet. These games are typically hosted on online casino platforms and involve spinning reels with various symbols.

Stake limits for online slot games will be introduced by the government for the first time in Great Britain in September 2024, including lower limits for young adults, as the Government continues to roll out measures to protect people from gambling harms.

The stake limits that will be introduced in September 2024 are:

- Maximum £2 stake for 18 to 24-year-olds for online slot games to be introduced.
- £5 limit for adults aged 25 and over brings stakes in-line with physical casinos.

Over half of adults aged 18-75 in Great Britain (56%) have never heard of the stake limits for online slot games being introduced by the Government in September 2024. A quarter (25%) have heard a great deal, fair amount or just a little about these changes.

Q14 - What, if any, are your preferred payment method(s), for your online gambling?

Among those respondents who said that they had personally spent money on at least one gambling activity in the past 12 months (n=1,944), “debit card” was, by far, the most preferred payment method (62%). This was followed by “digital wallet” (21%) and “bank transfers” (21%).

Q15 - How much of each of the following gambling websites policies, terms or conditions do you typically read, or not?

The extent to which respondents who have spent money on at least one gambling activity in the past 12 months (n=1,944), read each of the seven itemised gambling website policies or terms and conditions monitored varies with only a quarter or a smaller proportion reading every detail or most parts thoroughly.

The least read (at around two-fifths or more) where respondents say they have “never read” or “typically don’t read” are “License information” (50%), “Privacy Policy” (46%), “General Terms and Conditions” (43%) and “Bonus Terms” (39%).

Q16 - Before today, to what extent do you know about each of the following?

Respondents aged 18-75 in Great Britain who have spent money on at least one online gambling activity in the past 12 months (n=1,944) were presented with seven rules and rights that apply to gambling online in Great Britain as follows:

1. Online gambling websites need to publish their terms, rules and odds and abide by them
2. You can seek compensation in cases of an online gambling company's website not abiding by their own terms, rules and odds when gambling online
3. Online gambling websites are obligated to store and protect any personal information you provide them
4. You are allowed to withdraw your deposit balance at any time, including when a bonus is pending or active
5. Online gambling websites are obliged to provide you with responsible gambling tools and assistance (e.g. deposit limits, time limits, check in, etc.)
6. Online gambling websites are obliged to store your funds separately from their operational accounts
7. In case an online gambling website cannot resolve your complaint, you can seek ADR (Alternative Dispute Resolution)

	Online gambling websites need to publish their terms, rules and odds and abide by them	You can seek compensation in cases of an online gambling company's website not abiding by their own terms, rules and odds when gambling	Online gambling websites are obligated to store and protect any personal information you provide them
A great deal	15%	9%	15%
A fair amount	21%	16%	21%
Just a little	22%	19%	26%
Heard of, know nothing about	16%	15%	15%
Never heard of	16%	32%	15%
Great deal/ fair amount (NET)	36%	25%	36%
Great deal/ fair amount/ a little (NET)	58%	44%	62%
Don't know	9%	9%	8%
Prefer not to say	*	*	*

	You are allowed to withdraw your deposit balance at any time, including when a bonus is pending or active	Online gambling websites are obliged to provide you with responsible gambling tools and assistance	Online gambling websites are obliged to store your funds separately from their operational accounts	In case an online gambling website cannot resolve your complaint, you can seek ADR
A great deal	12%	13%	9%	9%
A fair amount	20%	23%	16%	16%
Just a little	22%	29%	19%	17%
Heard of, know nothing about	14%	14%	13%	14%
Never heard of	22%	14%	31%	34%
Great deal/ fair amount (NET)	31%	36%	26%	25%
Great deal/ fair amount/ a little (NET)	53%	65%	44%	41%
Don't know	10%	7%	11%	10%
Prefer not to say	1%	*	1%	1%

More than 3 in 5 (65%) have heard a great deal/fair amount/ a little that “Online gambling websites are obliged to provide you with responsible gambling tools and assistance”.

3 in 10 (32%) never heard that “You can seek compensation in cases of an online gambling company's website not abiding by their own terms, rules and odds when gambling online”.

More than 1 in 5 (22%) never heard that “You are allowed to withdraw your deposit balance at any time, including when a bonus is pending or active”.

3 in 10 (31%) never heard that “Online gambling websites are obliged to store your funds separately from their operational accounts”.

A third (34%) never heard that “In case an online gambling website cannot resolve your complaint, you can seek ADR”.

Q17 - Thinking about online gambling companies or websites, would you say you know where to check if an online gambling website company was licensed, or not?

Having been informed of the required licence to operate online gambling activities, respondents who said that they had spent money on at least one gambling activity in the past 12 months (n=1,944) are more likely not to know (53%) than know (45%) where to check if an online gambling website company is licensed

Prior to answering this question, participants were provided with the following information:

A licensed gambling company is an entity that has obtained a license from the Gambling Commission. This license allows the company to legally operate online gambling activities such as betting, gaming, and lotteries within Great Britain.

Q18 - And, on balance, to what extent do you typically check whether an online gambling company operating a gambling website is licensed or not?

Among adults who said that they had spent money on at least one gambling activity in the past 12 months (n=1,944), 11% “always”, 21% “sometimes”, 22% “hardly ever” and 37% “never” check whether an online gambling company operating a gambling website is licensed or not.

Q19A - Do you think that people like you ever knowingly gamble on unlicensed gambling websites, or not?

A larger proportion of participants who said that they had spent money on at least one gambling activity in the past 12 months (n=1,944), say that people like them never knowingly gamble on unlicensed gambling websites (52%) than do (17%) with a sizable proportion not knowing (30%).

Q19B - And why do you think that people like you might knowingly gamble on an unlicensed gambling website?

Among participants who said that they had spent money on at least one gambling activity in the past 12 months and believe people like them knowingly gamble on an unlicensed gambling website (n=339), are most likely to say this is because there “Less Know Your Customer (KYC) checks” (31%), they “can access games that are not available in the UK” (28%), have better odds and returns” (27%) or “offer larger bonuses than licenced casino sites” (26%) ,

Less Know Your Customer (KYC) checks	31%
Able to access games that are not available in the UK	28%
Better odds and returns	27%
Offered larger bonuses than licensed casino	26%
To work around account restrictions	24%
Limited by UK sites (e.g. for consistent winning)	23%
A wider variety of games available	21%
Less source of funds checks	19%
Offered more privacy and anonymity	17%
Other reason	1%
No reason	4%
Don't know	8%

Base: n=339 adults aged 18-75 in Great Britain who have spent money on online gambling activities in the past 12 months and think that people like them knowingly gambling on unlicensed gambling websites

Q20 - To what extent have each of the following legal requirements impacted your experience positively or negatively or not at all when you personally gamble online?

When asked to what extent have legal requirements impacted the respondents experience positive or negatively or not at all, adults aged 18-75 in Great Britain who have spent money on at least one online gambling activity in the past 12 months had similar views for each legal requirement.

	Source of Funds requirements	Anti-money laundering (AML) checks	Age verification	Know Your Customer verification (KYC)	Delays between spins	Affordability checks
Great deal - positive	7%	8%	13%	8%	6%	7%
Fair amount - positive	10%	10%	12%	11%	9%	11%
Just a little - positive	12%	11%	11%	11%	11%	13%
Made no difference	29%	28%	32%	27%	26%	29%
Just a little - negative	5%	5%	4%	5%	7%	6%
Fair amount - negative	2%	2%	2%	3%	3%	2%
Great deal - negative	2%	2%	1%	3%	1%	2%
Positive (NET)	29%	29%	36%	30%	26%	31%
Made no difference	29%	28%	32%	27%	26%	29%
Negative (NET)	9%	9%	7%	11%	11%	10%
Not applicable	19%	18%	15%	16%	24%	18%
Don't know	13%	15%	10%	16%	12%	12%
Prefer not to say	1%	1%	1%	1%	*	1%

Base: n=1,944 adults aged 18-75 in Great Britain who have spent money on online gambling activities in the past 12 months

Our standards and accreditations

Ipsos' standards and accreditations provide our clients with the peace of mind that they can always depend on us to deliver reliable, sustainable findings. Our focus on quality and continuous improvement means we have embedded a "right first time" approach throughout our organisation.



ISO 20252

This is the international specific standard for market, opinion and social research, including insights and data analytics. Ipsos UK was the first company in the world to gain this accreditation.



Market Research Society (MRS) Company Partnership

By being an MRS Company Partner, Ipsos UK endorse and support the core MRS brand values of professionalism, research excellence and business effectiveness, and commit to comply with the MRS Code of Conduct throughout the organisation & we were the first company to sign our organisation up to the requirements & self-regulation of the MRS Code; more than 350 companies have followed our lead.



ISO 9001

International general company standard with a focus on continual improvement through quality management systems. In 1994 we became one of the early adopters of the ISO 9001 business standard.



ISO 27001

International standard for information security designed to ensure the selection of adequate and proportionate security controls. Ipsos UK was the first research company in the UK to be awarded this in August 2008.



The UK General Data Protection Regulation (UK GDPR) and the UK Data Protection Act 2018 (DPA)

Ipsos UK is required to comply with the UK General Data Protection Regulation (GDPR) and the UK Data Protection Act (DPA). These cover the processing of personal data and the protection of privacy.



HMG Cyber Essentials

Cyber Essentials defines a set of controls which, when properly implemented, provide organisations with basic protection the most prevalent forms of threat coming from the internet. This is a government-backed, key deliverable of the UK's National Cyber Security Programme. Ipsos UK was assessed and validated for certification in 2016.



Fair Data

Ipsos UK is signed up as a "Fair Data" company by agreeing to adhere to twelve core principles. The principles support and complement other standards such as ISOs, and the requirements of data protection legislation.

