

Market overview for August 2020 - consumer research

We are continuing to publish consumer research collected to understand potential risks to consumers as a result of the Covid-19 period. This month we are publishing further consumer research data collected via the Yonder online omnibus^[1]. We used this survey to explore how people's gambling behaviour (rather than participation) changed as a result of the initial lockdown period, including shifts to online gambling and whether changes have been maintained post-lockdown.^[2]

The Yonder survey^[3] asked respondents about their gambling behaviour in three distinct periods:

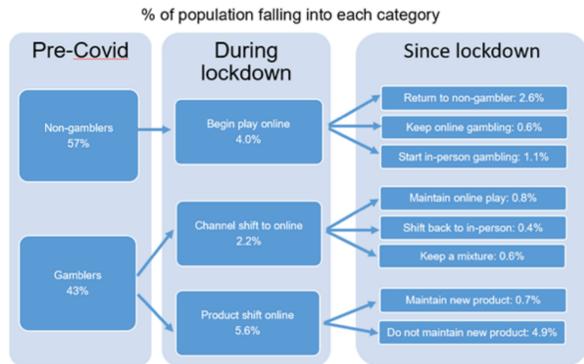
- pre-lockdown (January to mid-March)
- during lockdown (mid-March to mid-June)
- post-lockdown (mid-June up to the date the survey took place^[4]).

The gambling activities included in the survey were: scratchcards (in person), fruit/slot machines or machines in bookmakers (in person), bingo (in person or online), pre-event betting (in person or online), in-play betting (in person or online), casino games (in person or online) and instant win games or slots (online).

The Yonder data allows us to measure the impact of the Covid-19 period on both those who gambled before the initial lockdown and those who did not, including channel and product shifts and whether these have been maintained. It also indicates changes in levels of consumer gambling spend during the Covid-19 period and the factors which have influenced some people to increase their spend.

Behaviour change during and post lockdown

The diagram below summarises behaviour change during and post lockdown and provides population level percentages for where behaviour has changed and an increase in risk of harms.

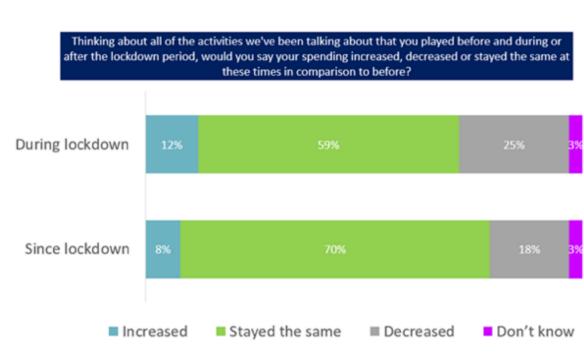


Looking back at the impact of the initial lockdown, the survey shows that at a population level, relatively few people changed their gambling participation during this period, although there were elements of shifting to online products in the absence of land-based opportunities, with some of these new behaviours being maintained post-lockdown.

- 4.0% of the population did not gamble before lockdown but then went on to gamble online during lockdown. Between lockdown easing and when fieldwork took place, the majority of this cohort returned to non-gambler status, but smaller proportions retained online gambling behaviours or started in-person gambling.
- 2.2% of the population gambled in-person before lockdown and shifted channel to online during lockdown, with more than half this number continuing to gamble online (sometimes alongside a return to in-person participation) post-lockdown.
- 5.6% of the population gambled before lockdown and shifted one or more products online (e.g. from football betting to online slots) during lockdown, however only a minority of this group (0.7% of the total population) maintained the new products since lockdown.

Changes in spend

The Yonder data shows that those who gambled pre-lockdown were more likely to decrease their spend during the initial lockdown than increase it, with 12% reporting an increase in spend and 25% a reduction. Since lockdown has eased, the proportion changing their spend has reduced, with seven in ten (70%) reporting no change compared to before.



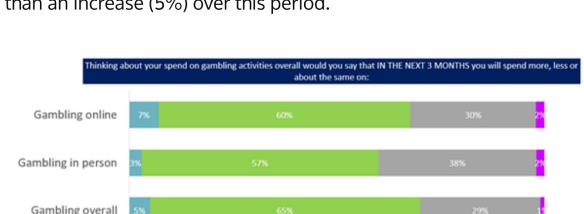
Reasons for increased time spend during or since the initial lockdown centred around wanting to alleviate boredom/need for some excitement, having more time to spend on leisure activities, and wanting to try and bring in additional money. While clearly a range of factors have influenced people who have increased their gambling spend, those involving a desire to bring in additional money or cover lost income are concerning. Consumer comments such as these, while qualitative, illustrate the need for operators to be vigilant.

Those who said their spend INCREASED during or since lockdown

Theme #1	Theme #2	Theme #3
Boredom/need for some excitement (19%)	More time to spend on leisure activities (24%)	Bring in additional money/cover lost income (18%)
"Boredom, nothing to do, wanted excitement. Had much more spare time on my hands. No live sports to bet on was annoying." "I've been bored at times so my gambling has increased. Plus with work hours being less I've had more time on my hands. This has included calling at my local store and buying scratchcards." "There has been little to do so I've bet for excitement."	"Lockdown presented the opportunity to focus more on leisure activities such as gambling, and most events were virtual which was concerning for me." "Not been working as much so have been playing online a lot more than usual." "When my partner was furloughed he encouraged me to put more money in when I ran out as he enjoys watching me play. Now he has gone back to work I play on before and keep to my budget."	"Because I've had hardly any money, so I've gambled to try to get some to feed my family and pay bills." "I was trying to supplement my income but ended up losing and self-banning." "I lost £1k after trying to win enough money to cover bills because furlough was too low."

Source: Yonder monthly online omnibus - September 2020
Sample size: All who have increased spend on gambling during lockdown or since lockdown ended at Q4 or Q6 (52)

The survey also provides an indication of how and why consumer spend may be impacted over the next 3 months. Respondents were more likely to anticipate a decrease in their gambling spend (29%) than an increase (5%) over this period.



^[1] In previous releases we reported this as a Populus survey. Populus changed their name to Yonder on 1 October 2020. This survey is separate from the Commission's quarterly online survey, which is also run by Yonder.

^[2] Our [latest official statistics on gambling participation](#) from our quarterly telephone survey.

^[3] A UK nationally representative sample of 3,389 adults aged 16 and over participated in the Yonder online omnibus survey and fieldwork took place between 17-19 July, 15-16 August and 19-20 September.

^[4] The post-lockdown period covered in the consumer survey does not exactly align with the monthly operator data. It is also important to note that the post-lockdown period respondents answered about varies in length depending on whether they participated in the July, August or September wave of the survey.