



Perceptions of the Gambling Industry (and its advertisements) Among Swedes

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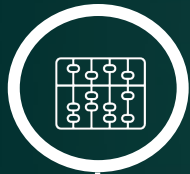
Contact at Novus: Lina Karlsson

Date: 2023-10-03

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Background



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Background & Implementation

BACKGROUND

The survey has been carried out by Novus on behalf of BOS. The purpose of the study is to get a measure of Swedes' attitude towards/knowledge of the Swedish gambling industry and its advertisements. The study also intended to investigate to what degree Swedes' opinions on these issues align with reality.

RESULTS

Results are delivered in a chart report. Any marked significant differences in the report (including gender, age, education, and region) are in comparison with the total. *A significant difference means that a value in a subgroup, e.g. gender, deviates from the total value to such an extent that it cannot be seen as random.*

The result is post-stratified—which is to say weighted against known population figures in order to correct for any distortions in the sample compared to the target population.

IMPLEMENTATION

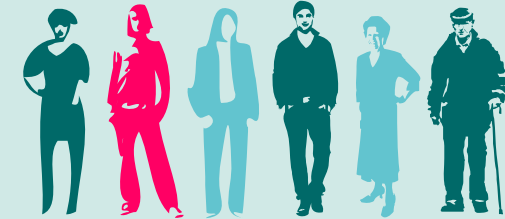
Number of conducted interviews: 1054

Field period: 15 – 20 September 2023

The survey was conducted via web interviews in Novus's randomly recruited Sweden panel, which guarantees representative results. This means that the results are generalizable to the target population.

TARGET GROUP

The general Swedish population



Age:
18-84
years

MARGIN OF ERROR

The margin of error is a measure of the uncertainty of the estimate of a parameter. The size of the margin of error depends on the proportion of responses and the number of interviews that are conducted. Below are examples of margins of error for different outcomes in the survey:

For 1000 interviews:

With turnout 20/80: +/- 2,5%

With turnout 50/50: +/- 3,1%

For 5000 interviews:

With turnout 20/80: +/- 1,1%

With turnout 50/50: +/- 1,4%

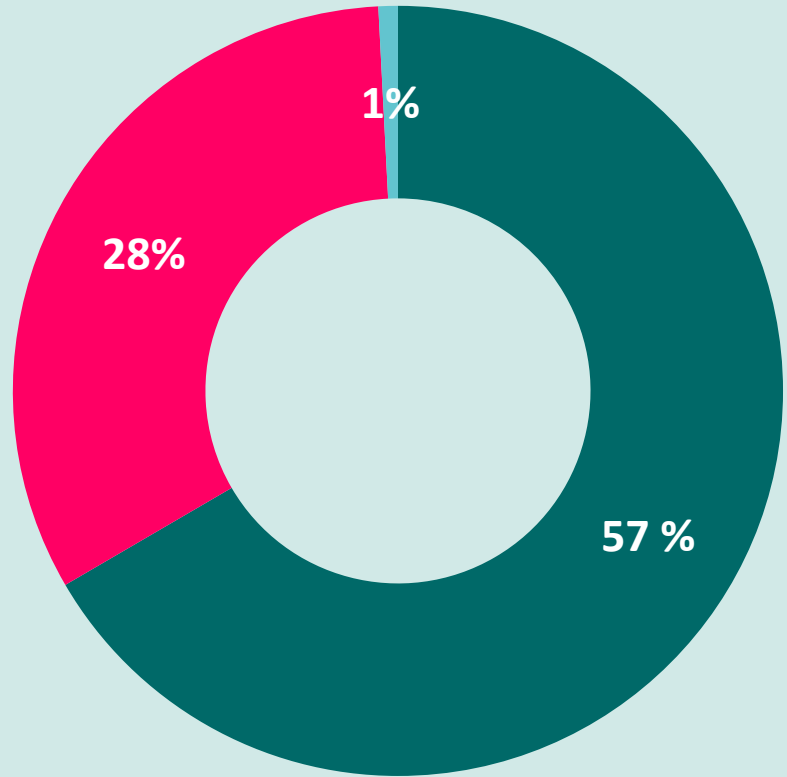




Results

The proportion of Swedes who gamble and gamble online

QUESTION: How often do you gamble?

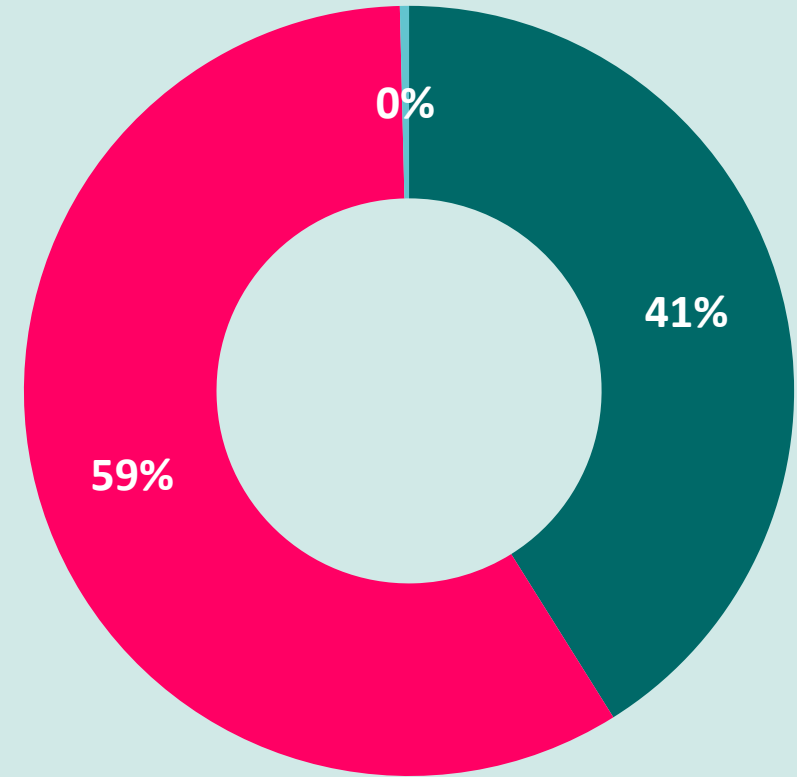


■ Gamblers ■ Never ■ Not sure

BASE: Total 2023 (n=1054)

Those who gamble:

QUESTION: Have you gambled online or via an app over the past year?



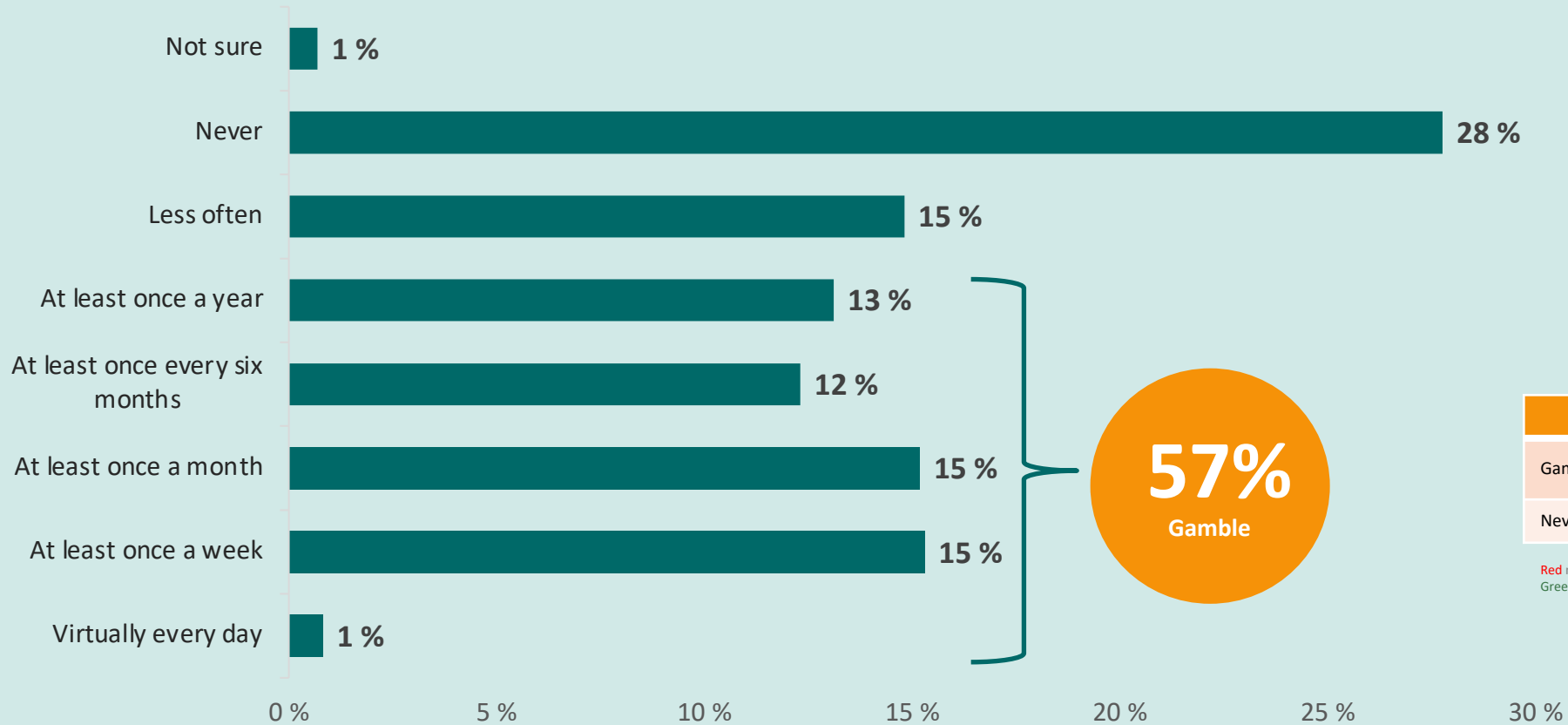
■ Yes ■ No ■ Not sure

BASE: Those who gamble (n=598)

The answer *Gamblers* includes all those who answered that they gamble every day, at least once every week, month, six months, year

Gamblers

QUESTION: How often do you gamble?



	18-34 years	35-49 years
Gamblers	42 %	60 %
Never	41 %	21 %

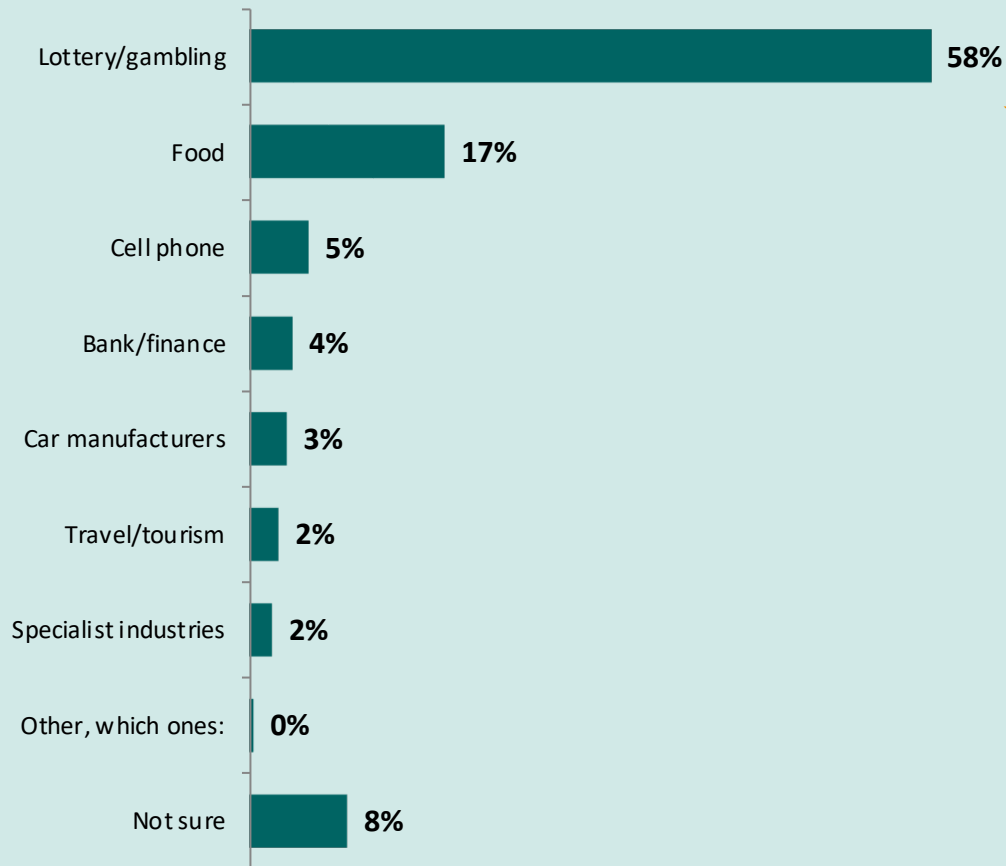
Red number=significantly lower than average
Green number=significantly higher than average

■ Virtually every day ■ At least once a week ■ At least once a month ■ At least once every six months ■ At least once a year ■ Less often ■ Never ■ Not sure

BASE: Total 2023 (n=1054)

Close to six out of ten believe the lottery/gambling industry is the largest buyer of advertisements in Sweden

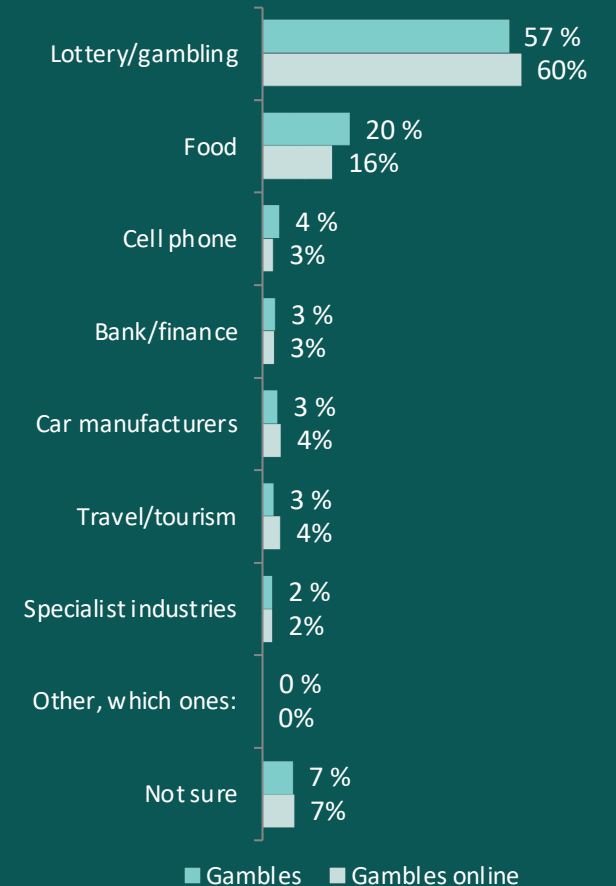
QUESTION: Which of these industries do you believe is the biggest buyer of advertisements in Sweden?



Significantly more men (64%) than women (52%) believe the lottery/gambling industry is the biggest buyer of advertisements. Among 18-34-year-olds, the number is also significantly higher than the average (67%)

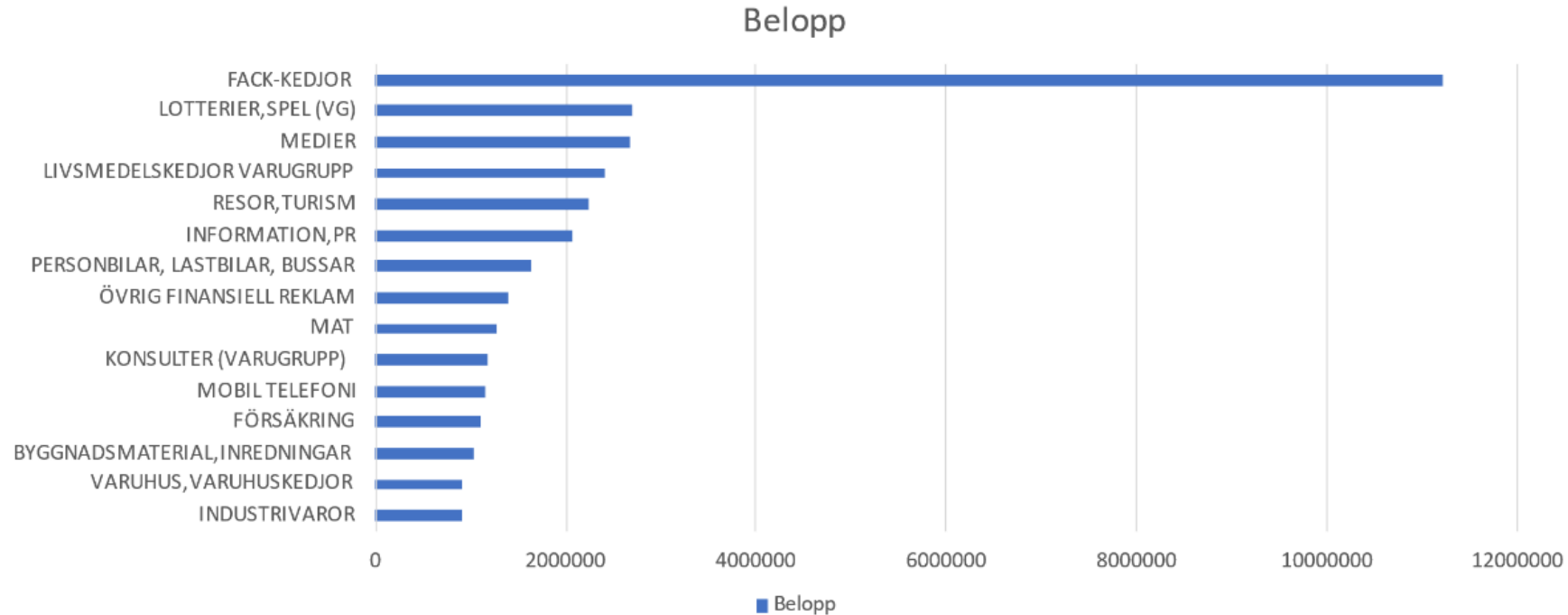
BASE: Total 2023 (n=1054)

Differences Gambles/Gambles online



BASE: Gambles (n=598), Gambles online (n=246)

Medieinvesteringar Brutto 2023 tom sept

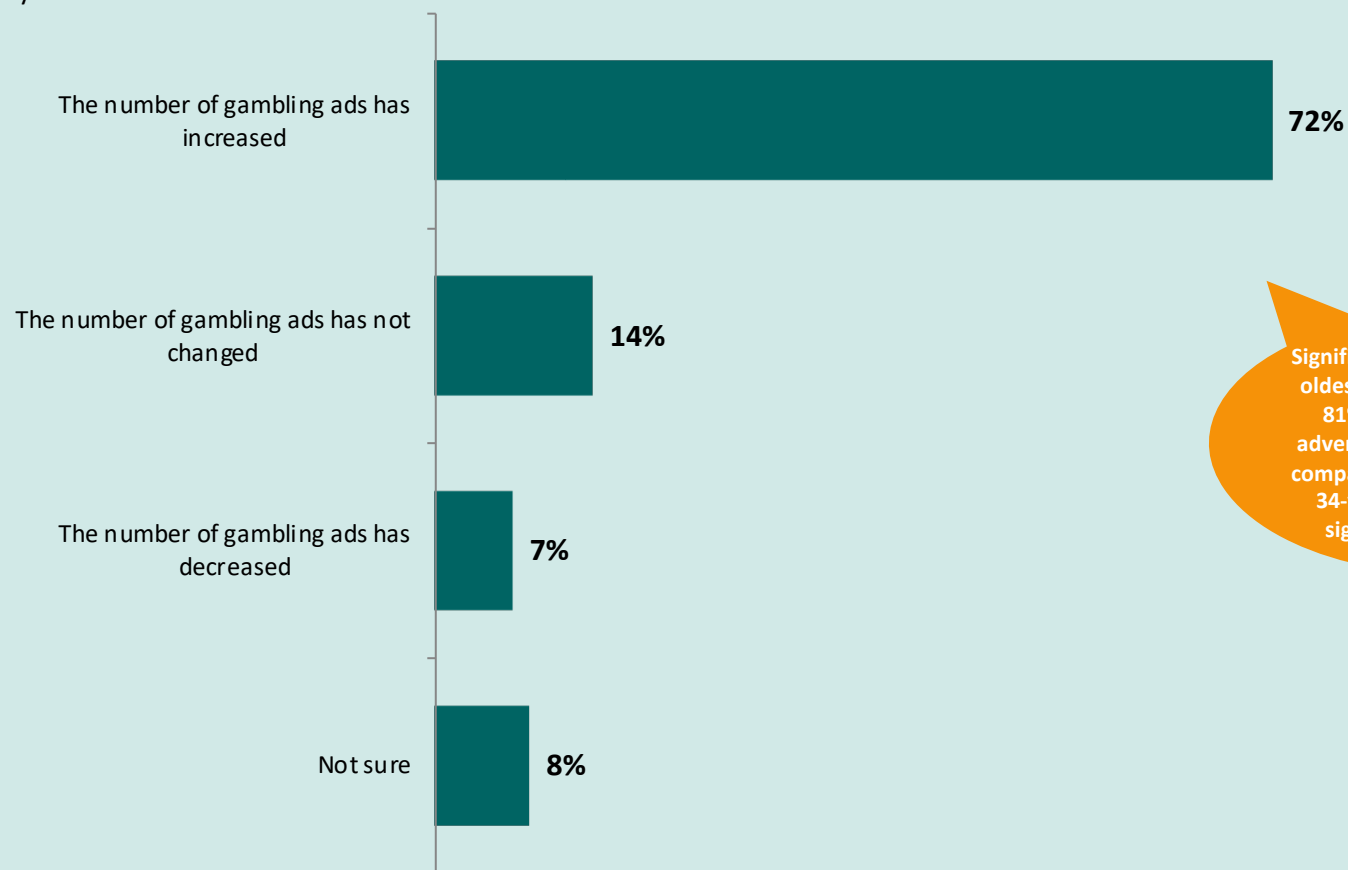


Källa: Kantar RM

The reality: Gambling advertisement is the second largest advertiser in Sweden

Over seven out of ten think the number of advertisements from gambling companies has increased over the past three years

QUESTION: Do you think that the number of advertisements from gambling companies has increased or decreased in Sweden over the past 3 years?



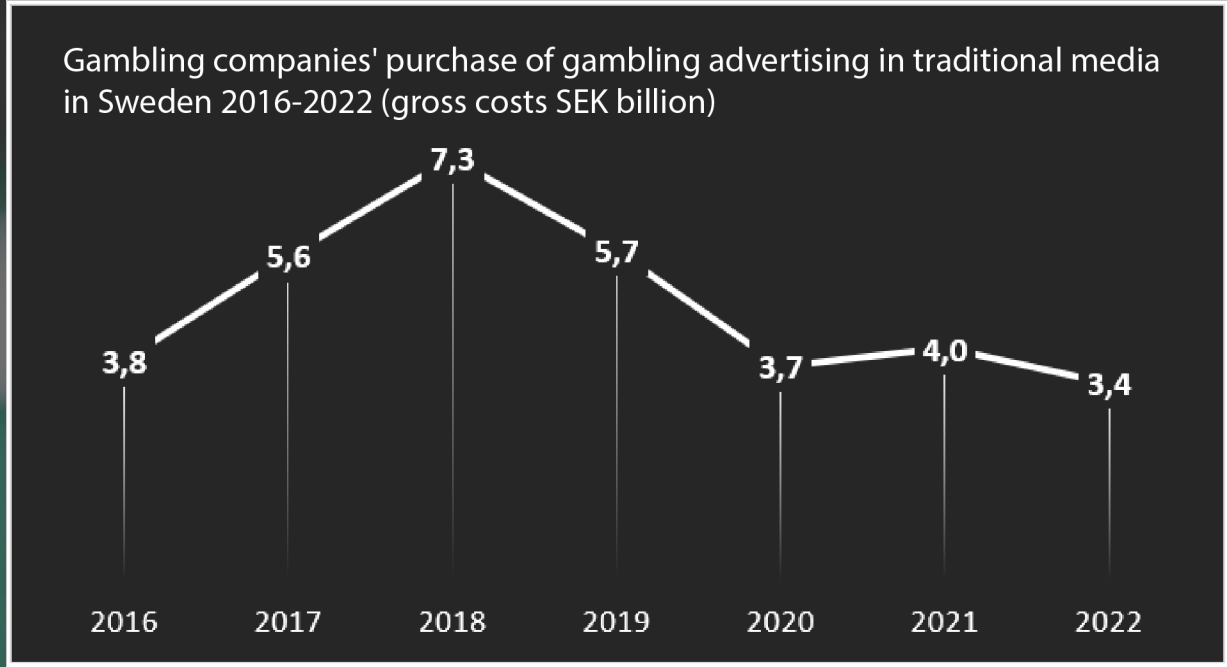
Significantly more people in the oldest age group (65-84 years; 81%) think the number of advertisements from gambling companies has increased. For 18-34-year-olds the number is significantly lower (59%).

BASE: Total 2023 (n=1054)

Differences Gambles/Gambles online



BASE: Gambles (n=598), Gambles online (n=246)

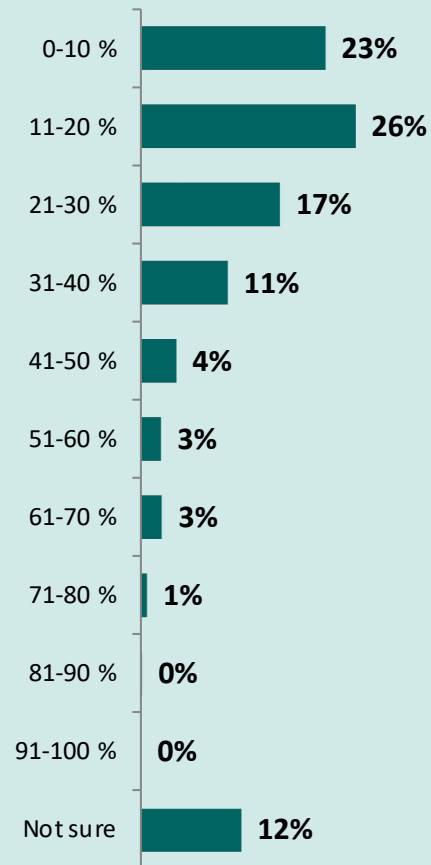


The reality: Gambling advertisement volume has decreased with more than 50%.

Gambling companies' purchase of gambling advertising in traditional media in Sweden 2016-2022 (gross costs SEK billion)

On average, Swedes believe that 23 percent of the Swedish population has a gambling addiction

QUESTION: How great a proportion of the Swedish population do you think has a gambling addiction? 0%=no one and 100%=everyone



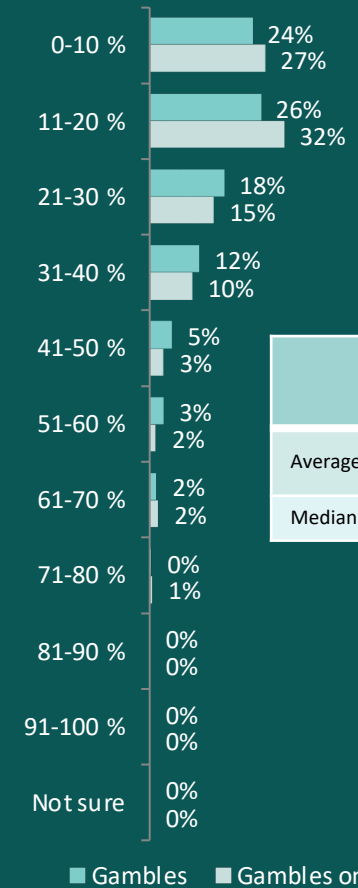
Average (0-100 where Not sure is excluded):
23%

Median:
17%

	Man	Woman	18-34 years	35-49 years
Average	19%	26%	23%	22%
Median	15%	20%	17%	15%

BASE: Total 2023 (n=1054), Man (n=533) Woman (n=522)

Differences Gambles/Gambles online



	Gambles	Gambles online
Average	22%	20%
Median	17%	15%

BASE: Gambles (n=598), Gambles online (n=246)



Folkhälsomyndigheten

The reality according to The Swedish Public Health Agency and Swelogs 2021

Just over 4 percent have some degree of gambling problem (352,000 people) in Sweden.
This percentage can be divided into different degrees of problem gambling:

0.5 percent (40,000 people) have gambling problems (PGSI 8+)

0.8 percent (65,000 people) have an increased risk of problem gambling (PGSI 3-7)

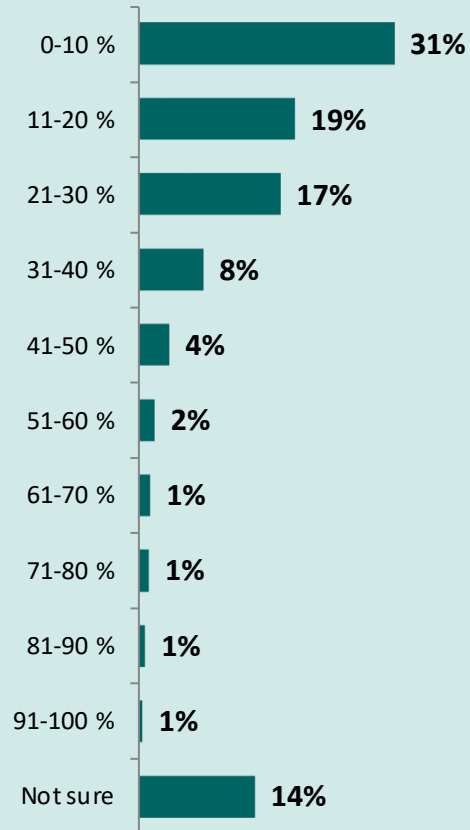
3.0 percent (247,000 people) have some risk of problem gambling (PGSI 1-2)

(The rate of problem gambling in the population was largely unchanged from 2018 to 2021)

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On average, Swedes believe that online casinos pay back 21 percent of every crown spent to the players

QUESTION: How much of every crown spent do you think online casinos pay back to the players? 0%=nothing and 100%=everything



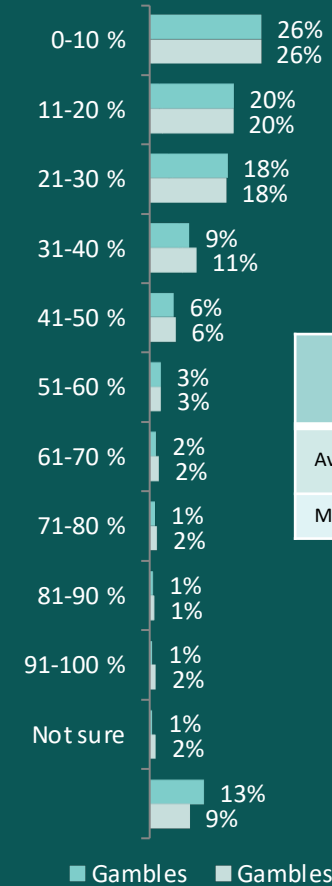
Average (0-100 where Not sure is excluded):
21%

Median:
19%

	Man	Woman	18-34 years	35-49 years
Average	24%	18%	19%	21%
Median	20%	13%	15%	14%

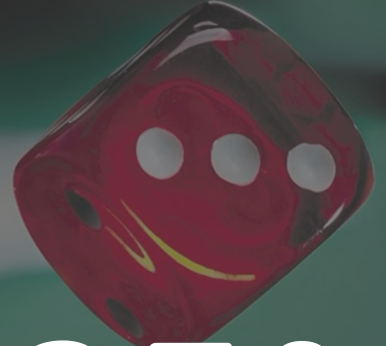
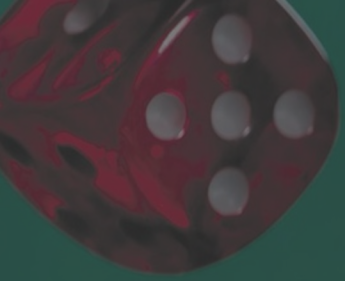
BASE: Total 2023 (n=1054), Man (n=533) Woman (n=522)

Differences Gambles/Gambles online



	Gambles	Gambles online
Average	24%	25%
Median	20%	20%

BASE: Gambles (n=598), Gambles online (n=246)



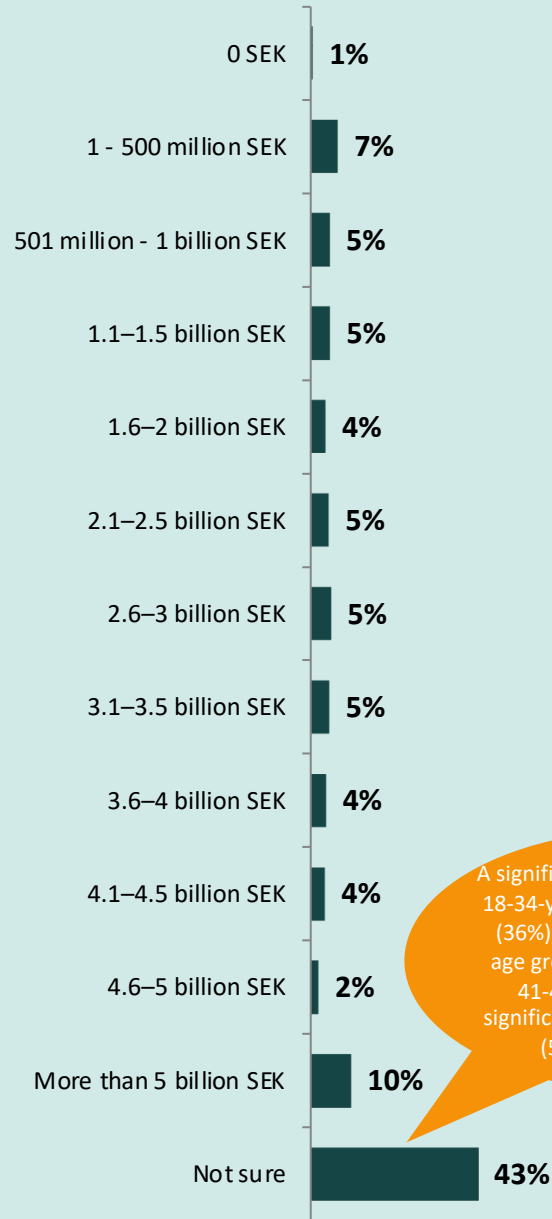
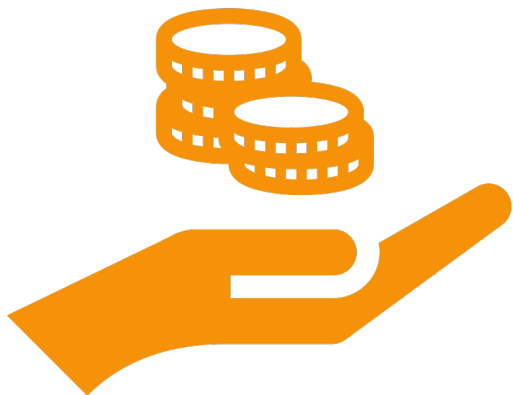
95%



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One out of every ten Swedes believes that the gambling industry generates more than 5 billion crowns in tax revenue every year

QUESTION: How much tax revenue, in SEK, do you think the government receives from the gambling industry every year? In other words, how much do you think the entire gambling industry pays every year in taxes?



A significantly smaller proportion of 18-34-year-olds answer "Not sure" (36%), compared with the other age groups, where the number is 41-49%. The number is also significantly higher among women (50%) than men (35%).

BASE: Total 2023 (n=1054)



BASE: Gambles (n=598), Gambles online (n=246)



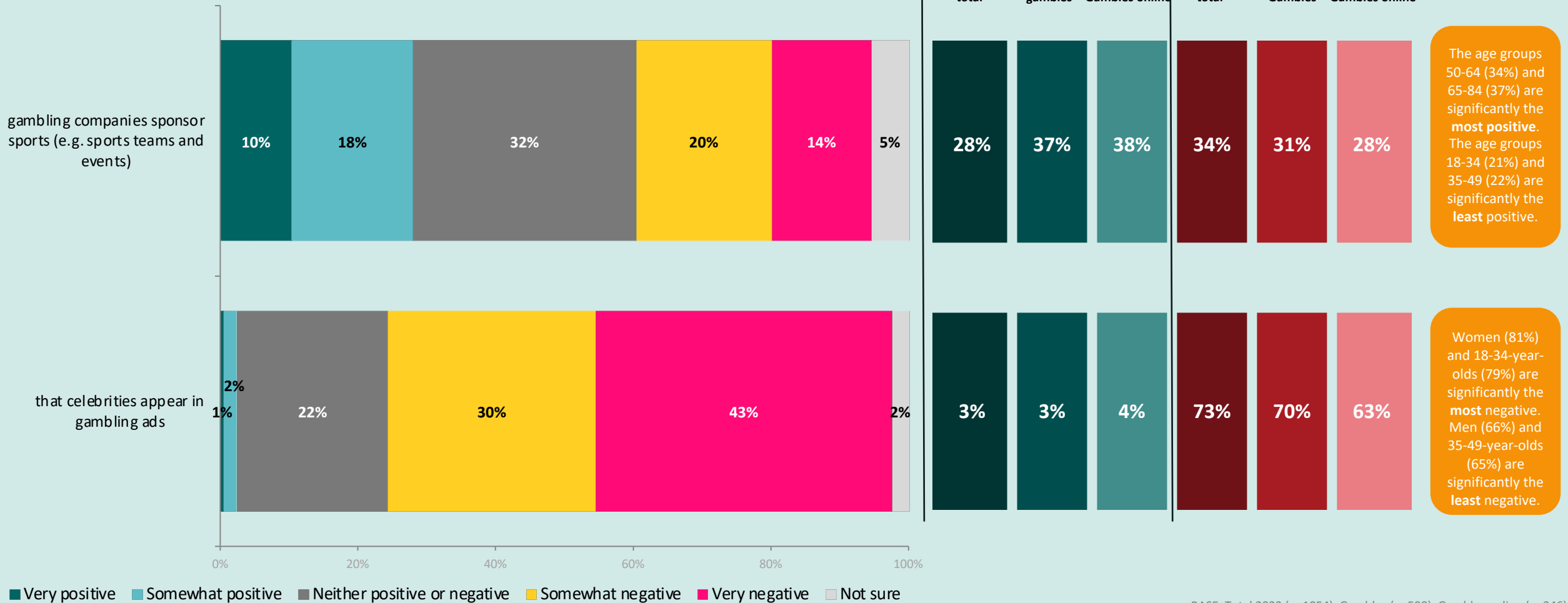
STATSKONTORET

Gambling tax more than 4 billion SEK 2021
+ 0,5 billion SEK corporate tax

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Every third Swede feels negatively towards the fact that gambling companies sponsor sports, and close to three out of every four Swedes feel negatively about the fact that celebrities appear in gambling ads

QUESTION: How do you feel about the fact that...



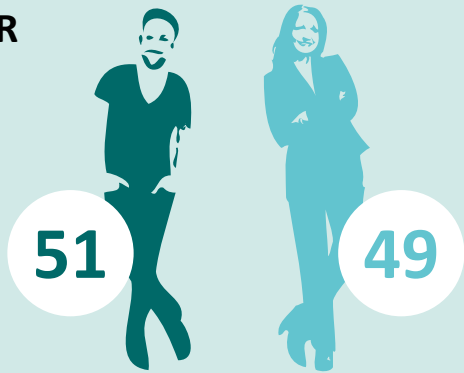
BASE: Total 2023 (n=1054), Gambles (n=598), Gambles online (n=246)



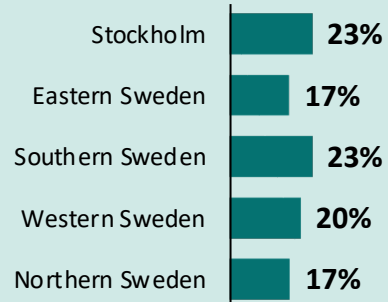
Background questions

BACKGROUND

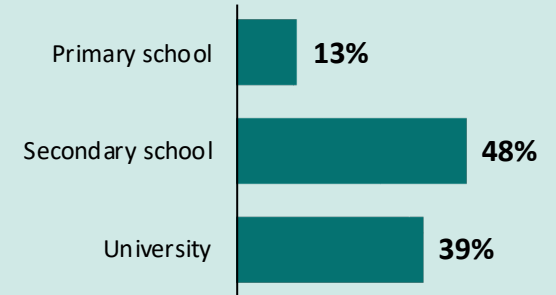
GENDER



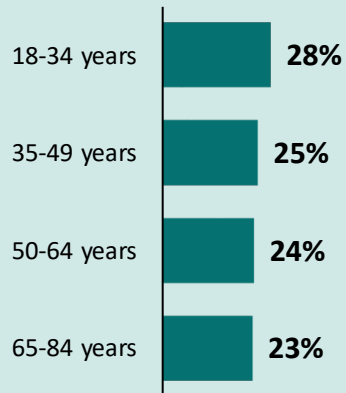
REGION



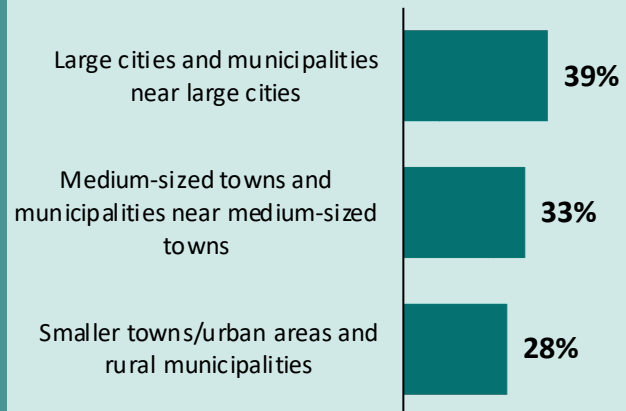
EDUCATION



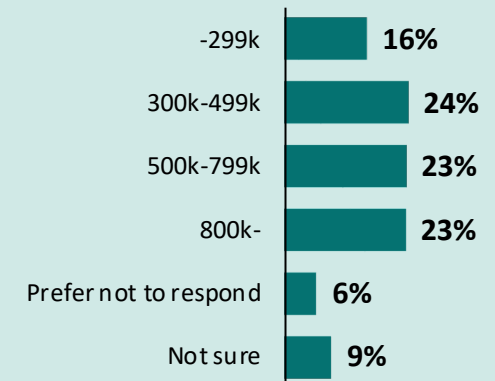
AGE



MUNICIPAL GROUP



HOUSEHOLD INCOME



BASE: Total (n=1054)

About Novus surveys

Definitions

In Novus reports, we often report differences between different values, something we call statistically significant differences, statistical significance or that something is "not within the margin of error".

Degree of confidence

Novus standard is 95% confidence level, which means that the true value for the population with 95% probability is within the range given by the sample value +/- margin of error. Using a 95% confidence level corresponds to a significance level of 5%.

What is a margin of error?

The margin of error is a measure of the uncertainty in an estimate of a parameter. For example, the margin of error in a sample of 1000 individuals, at a 5% significance level, will be for the following outcomes:

20/80: +/- 2.5%

50/50: +/- 3.1%

Is it statistically certain?

If a difference is greater than the margin of error, the difference is statistically significant. A statistically significant difference between two different values means that there is a difference that probably cannot be explained solely by chance. What is certain is thus that there is a difference, not the size itself.



In short - Novus' municipal group division

The report reports significant differences for three main groups of municipalities; large cities and municipalities close to cities, larger cities and municipalities near larger cities as well as smaller cities/urban areas and rural municipalities. Novus uses SKR's municipal group division from 2017.

A. LARGE CITIES AND MUNICIPALITIES CLOSE TO LARGE CITIES

- A1. Large cities - municipalities with at least 200,000 inhabitants in the largest urban area.
- A2. Commuting municipality near a metropolitan area - municipalities with at least 40% commuting to work in a metropolitan or metropolitan municipality.




B. LARGER CITIES AND MUNICIPALITIES NEAR LARGER CITIES

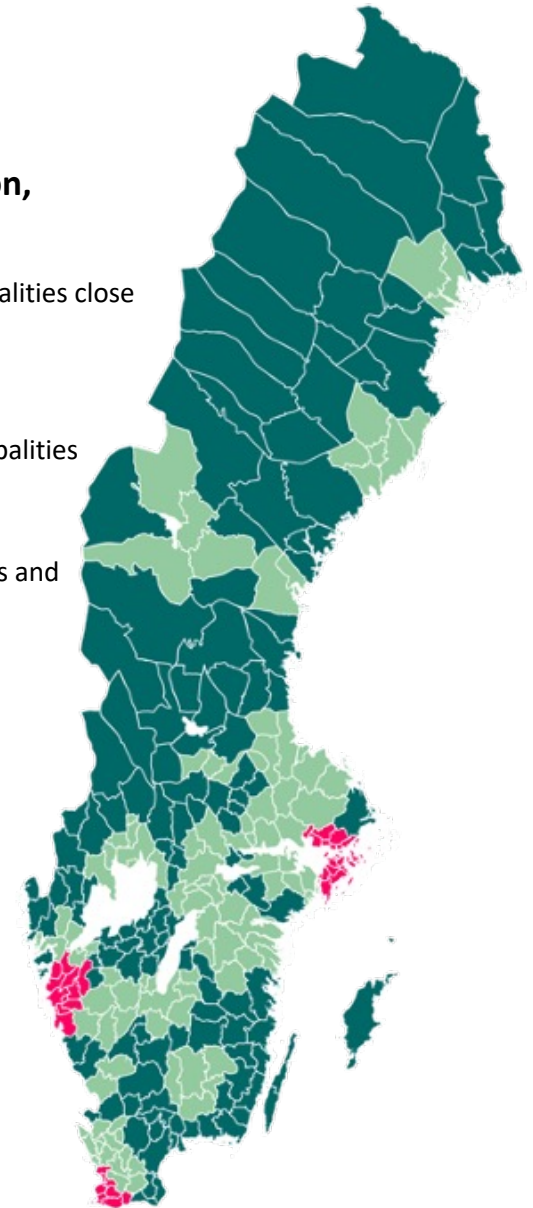
- B3. Larger city - municipalities with at least 50,000 inhabitants, of which at least 40,000 inhabitants in the largest urban area.
- B4. Commuting municipality near a larger city - municipalities with at least 40% commuting to work in a larger city.
- B5. Low commuting municipality near a larger city - municipalities with less than 40% commuting to work in a larger city.

C. SMALL TOWNS/URBAN AREAS AND RURAL MUNICIPALITIES

- C6. Smaller town/urban area - municipalities with at least 15,000 but less than 40,000 inhabitants in the largest urban area.
- C7. Commuting municipality near a smaller town/urban area - municipalities with at least 30% outbound or inbound commuting to a smaller town.
- C8. Rural municipality - municipalities with less than 15,000 inhabitants in the largest urban area, low commuting pattern (less than 30%).
- C9. Rural municipality with hospitality industry - rural municipality with at least two criteria for hospitality industry, i.e. number of guest nights, turnover in retail / hotel / restaurant in relation to the number of inhabitants.

Municipal group division, main groups

-  Large cities and municipalities close to large cities
-  Larger cities and municipalities near larger cities
-  Small towns/urban areas and rural municipalities



Info about Novus "Sverigepanel"

Novus Sweden panel consists of approx. 50,000 panelists. The panel is randomly recruited (you can not register yourself to make money or because you want to influence public opinion) and is nationally representative regarding age, gender and region in the age range 18-79 years. Any distortions in the panel structure are remedied by subtracting a nationally representative sample from the panel and by weighting the result.

We take good care of our panel through so-called panel management. This means that we make sure that you can not participate in too many surveys during a short period of time, nor in several similar surveys. We also have a system for rewards for the panel.



Survey implementation

A sample from the panel is drawn. The panelists in the sample receive an invitation to the survey via e-mail. The invitation contains information about how long the survey takes to answer, the last response date and a link that you click on to get to the questionnaire. You can answer all questions at once or take a break and return to the questionnaire at a later time.

When the data collection is complete, the data processing begins. Then tables are produced and a report is compiled.

**Feel free to ask for more
information about our
panel management!**



In short - about quality in web panels

Novus Sweden panel is of high quality. We continuously carry out quality checks and validations of both the panel and the answers given by the panel participants.

In comparative studies (with other web panels) we have found that the panel members in Novus' panel take longer to answer questions than panelists from other panels, and that there is a logic in the answers (example: if you like ice cream and chocolate, then you also like chocolate ice cream). In self-recruited panels, we do not see this logic to the same extent.

We also see that our panel members have a more "average Swedish behavior" than self-recruited panels, where you are, among other things, very internet active.

Novus panel members answer an average of 12 surveys per year, which is significantly fewer surveys than in many other panels, and provides a higher quality of implementation. Another very important quality aspect is to state the frequency of participants (response frequency), which is a requirement according to all industry organizations.

Some important checkpoints when conducting web surveys in web panels:

- The panel must be randomly recruited to be able to reflect reality.
- The survey company must always be able to report the frequency of participants for each individual survey.
- The panel members should not be professionals, ie. get too many surveys. If you get more than two per month, there is a risk that you become a professional respondent and respond to the survey for the wrong reasons.
- The panel must be managed with a good panel management regarding rewards, validation of answers, etc.
- Field work (conducting interviews) must always be reported and preferably include both weekdays and public holidays.



Publishing standards

The Novus trademark is a guarantee that a survey has been conducted correctly, and that the conclusions drawn are correct, given the purpose of the survey.



Following international professional standards (ESOMAR), Novus has a responsibility to ensure that our surveys are interpreted correctly when they are first published.



In order to ensure that our surveys are presented correctly, we always ask to read in advance any text, intended for publication, that mentions our surveys.

Novus reserves the right to correct any false or misleading interpretations that have been published.

At Novus we love questions

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