



THE CASINO THERMOMETER

A survey study for the Swedish online casino market 2022

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About the survey



Method of data collection and analysis

The field work and analysis of this survey was done by Reflect Företagsutveckling AB - an independent research institute. The survey was answered by a nationally representative web panel at Norstat, where 4 382 persons chose to participate. Out of the 4 382 participants there were 501 active online casino players, 318 who could envision themselves playing in the future, as well as 233 ex-players. In total, then, 1052 persons answered the survey, while the remaining 3 330 did not belong to any target group and were screened out.

Out of the original 11 093 persons asked to participate in the Norstat web panel, the answering 4 382 accepted and had at that point the subject of the survey revealed to them. In order to ensure that the share of Swedish online casino players was estimated correctly, the shares were weighed with respect to sex and age to correct any discrepancies that might have arisen out of different tendencies to clicking the survey link (and by doing so, participating).

As an additional check, screening questions (regarding online casinos) were asked in a number of other surveys (on a wide range of different subjects), with the same result as the main survey. An additional 7 605 persons answered the screening questions in this way.

About the survey



Background

For the **CasinoFeber** team at Raketech, a need arose to get to know more about Swedish online casino players - who are they? What drives them? What do they play, and where? Increased knowledge about them (and a few other groups) was important to acquire, as there was a shortage of information on these specific target groups.

Target Population

The target population of this survey consists of three groups:

- 1) Individuals who play at online casinos (has played during the last 12 months).
- 2) Individuals who do not play at online casinos, but can envision themselves playing in the future.
- 3) Individuals who used to play at online casinos, but have not done so for 12 months and express no desire to play again.

Time Frame

The fieldwork was done 2022-10-14 – 2022-10-28.

The survey in short

- In total, 4 382 persons participated in the survey. Out of these, roughly 500 were online casino players. Another group of roughly 500 had either played previously or could envision themselves playing in the future.
- The survey was made by Reflect Företagsutveckling AB – an independent research institute.
- The survey was answered by a nationally representative web panel, and the online casino players (and the potential players as well as the ex-players) were subsequently weighed with respect to sex and age.
- The field work (the collection of data) was done during a two-week period: 2022-10-14 – 2022-10-28.

Alternative languages

- **Swedish Version**



ONLINE CASINO PLAYERS

Target Group 1: Individuals who play at online casinos (has played during the last 12 months)

Online casino players - overview



Target group 1: Individuals who play at online casinos (has played during the last 12 months).

12% Of the Swedish population play at online casinos

44% of these play every month



76% **LeoVegas** is the most well-known casino site

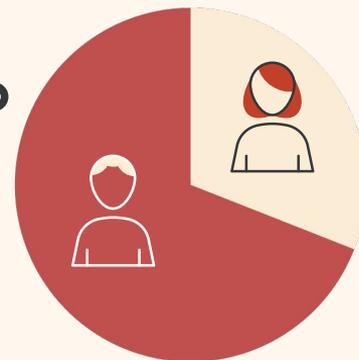


40% **Svenska Spel** has the greatest number of Swedish players



4.14 **Maria casino** has the highest user rating

69%
Of players are men



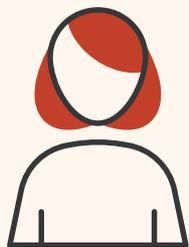
“easy and smooth”

The most important aspects when players choose casino

Slots is the favourite game of 52% of Swedish players



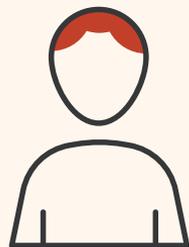
The online casino player



Characteristics



Average age: 43
Civil status: Married/partner (64%)
Education: College, less than 3 years (63%)
Employment: Full-time (52%)
Monthly income: ≈2700-3600€ (29%)



Characteristics



Average age: 42
Civil status: Married/partner (60%)
Education: College, less than 3 years (66%)
Employment: Full-time (64%)
Monthly income: ≈2700-3600€ (32%)

Online casino players



Sex	%	Quantity
Women	31%	155
Men	69%	346

Age	%	Quantity
18-35	41%	203
36-49	28%	142
50-75	31%	156

Education	%	Quantity
College, at least 3 years	29%	144
College, less than 3 years	65%	325
Elementary school (or equivalent) or lower	6%	32

Income (monthly salary)	%	Quantity
0 - 10 000 SEK	6%	29
10 001 - 20 000 SEK	12%	60
20 001 - 30 000 SEK	20%	98
30 001 - 40 000 SEK	27%	137
40 001 - 50 000 SEK	13%	67
50 001 - 70 000 SEK	6%	30
70 001 - 90 000 SEK	1%	5
90 001 +	2%	8
Doesn't want to disclose	13%	67

[100 SEK = 8,95 EUR]

Online casino players



Financial situation	%	Quantity
I'm financially stable and I can sometimes treat myself to some things	36%	182
My financial situation isn't bad, but it isn't good either	22%	108
I'm able to buy most of the things that I want and still have money to spare	21%	107
My financial situation is strained, but I get by if i plan ahead and think economically	10%	50
I often have more expenses than income and I'm in a constant struggle to make ends meet	4%	18
I don't know/I don't want to disclose this	7%	36

Occupation	%	Quantity
Full-time employee	61%	304
Retired / Disability Pensioner	13%	64
Student	9%	43
Part-time employee	6%	30
Self-employed	4%	21
On long-term sick leave	2%	11
Between jobs	2%	11
Housewife/house husband or equivalent	2%	8
Military service	0%	2
Other	0%	1
Doesn't want to disclose	1%	6

Online casino players



Extrovert <-> Introvert	%	Quantity
Extrovert	43%	214
Introvert	57%	287

Rationally <-> Emotionally driven	%	Quantity
Rationally	53%	267
Emotionally	47%	234

Social <-> Enjoys solitude	%	Quantity
Social	59%	297
Enjoys solitude	41%	204

Likes taking risks <-> Dislikes taking risks	%	Quantity
Likes taking risks	54%	272
Dislikes taking risks	46%	229

Online casino players



Civil status	%	Quantity
Married/cohabitant (with children)	35%	173
Married/cohabitant (no children)	25%	127
Single (no children) - private living	20%	98
Single (no children) - staying at parents or friends place	7%	33
Single (with children) - private living	4%	22
Partner (no children) - separate living	2%	12
Doesn't want to disclose	2%	11
Partner (with children) - separate living	2%	8
Other	2%	8
Single (with children) - staying at parents place	1%	5
Widow/widower	1%	4

Further details

Everyone that answered "Other" also mentioned that they were married. This means that out of the online casino players, **61.4% are married or in a relationship.**

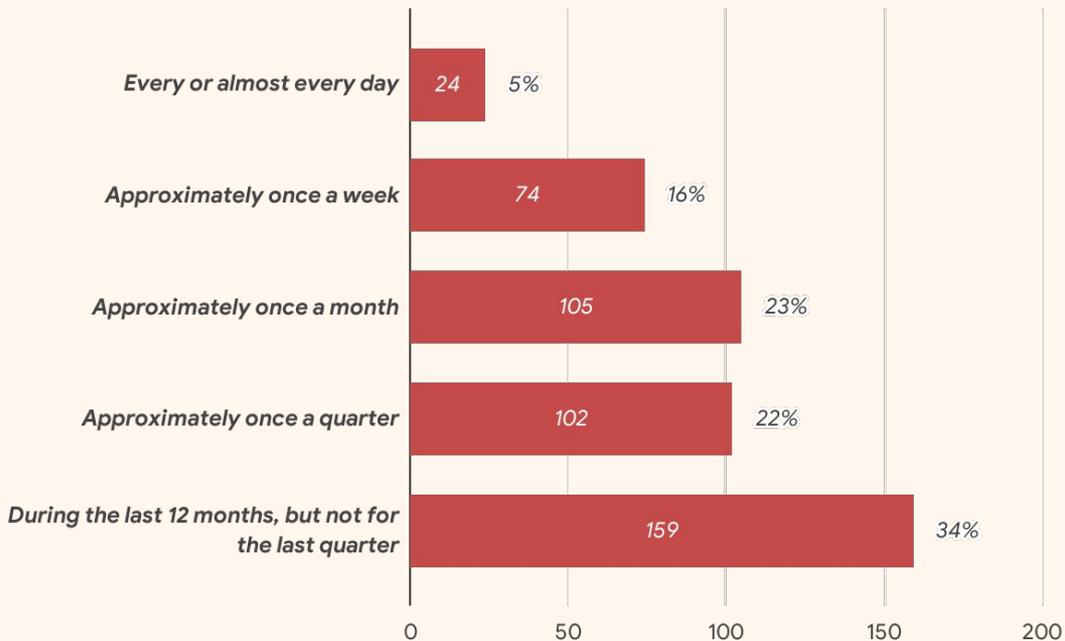
Type of question: Single choice

Answers given: 501

Target group: 1 - Online casino players

Playing frequency

How often, approximately, do you play at an online casino (for example Roulette, Blackjack or slots)?



Further details

21% of the online casino players in the survey play at least once a week, while 34% only play a couple of times per year.

Elders play significantly more often than the young – 9% of those older than 50 play every or almost every day, and 23% play once a week. Young people play less often – 10% do it once a week, and only 3% do it every day.

The average online casino player is male, but the women who play do it at least as often as the men.

Type of question: Single choice

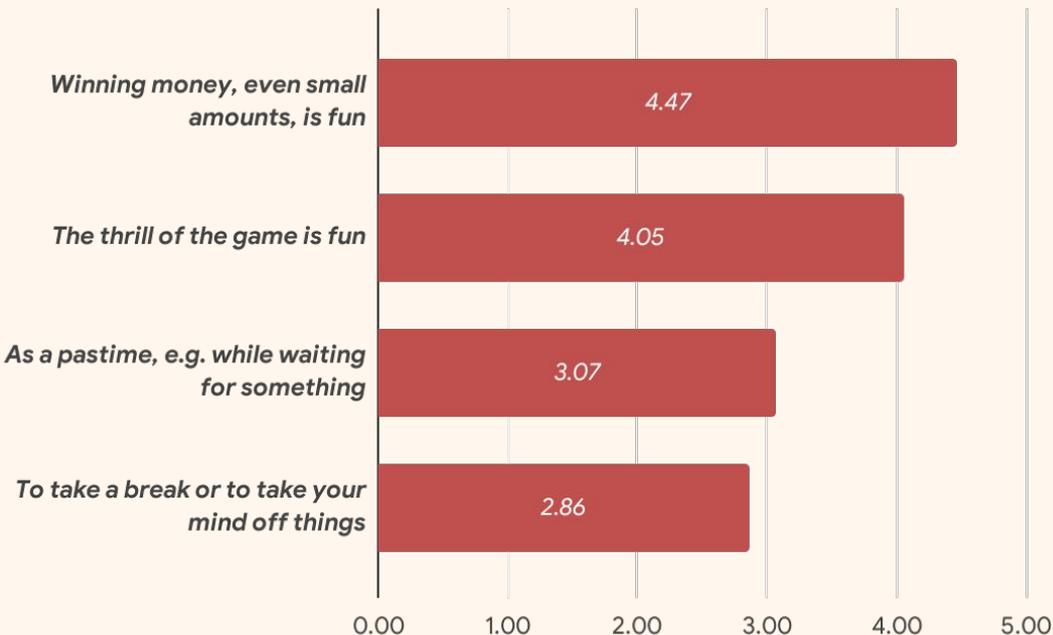
Answers given: 501

Target group: 1 - Online casino players

Playing incentive

On a scale of 1-6, how well do these statements match your reasoning for playing at online casinos?

(1 = no match at all och 6 = complete match).



Further details

On the question of why one likes to play at online casinos, the most common answer is that one enjoys winning money. The excitement aspect comes in at second place.

Women rate these statements higher than men, but the discrepancy is especially prominent for the "pause"-statement, which men only gave a 2.76 rating but women gave a 3.09.

The most common answer outside of the ones shown in the graph are those connected to the social aspect, often expressed as "Fun to place a bet with friends", "With workmates" and "Social to play with friends".

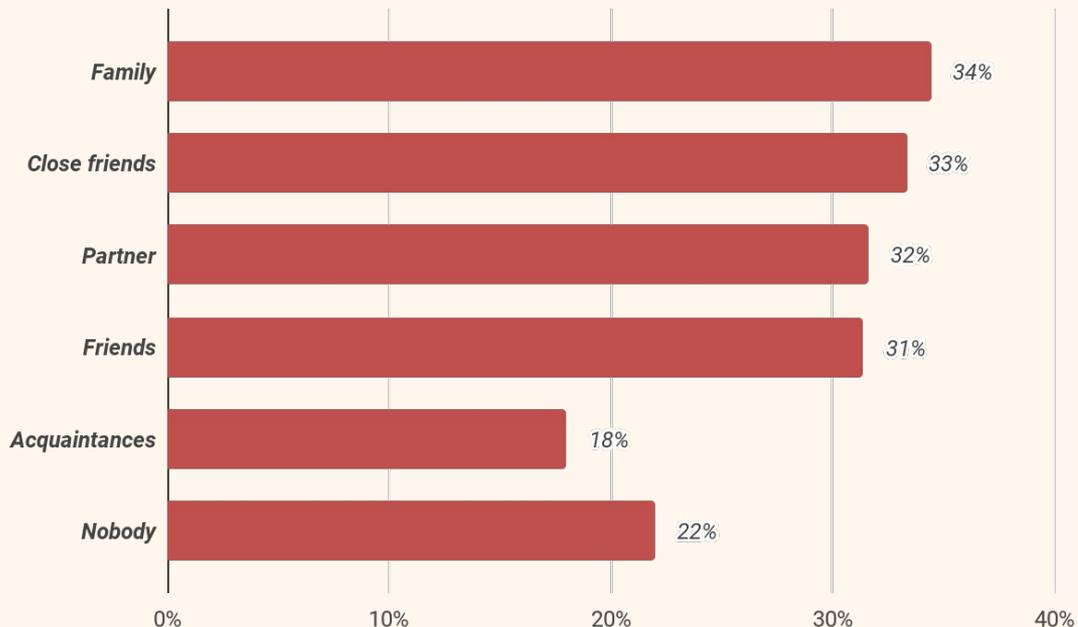
Type of question: Rating (1-6)

Answers given: 501

Target group: 1 - Online casino players

Openness about playing

Do you usually tell friends or family that you play at online casinos, or is this something you often keep to yourself? Please mark the ones you usually tell.



Further details

Only **one out of five** state that they **do not tell anyone** about their playing.

Moreover, **one out of three** do not tell their family nor their close friends.

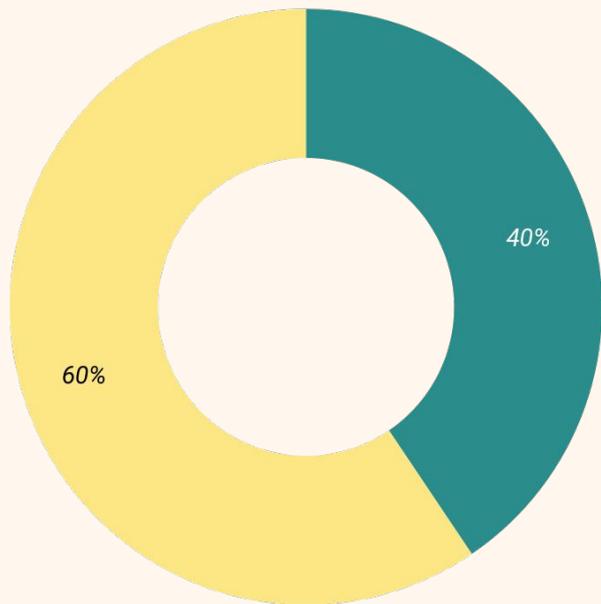
Type of question: Multiple choice

Answers given: 501

Target group: 1 - Online casino players

Openness about playing (partner)

- *Already told partner*
- *Not told partner*



Further details

On the openness question, 60% of those with a partner stated that they have not informed their significant other about their playing.

If we take a look at the more active players, those who play every day or at least once a week, 53% still decide not to tell their partner.

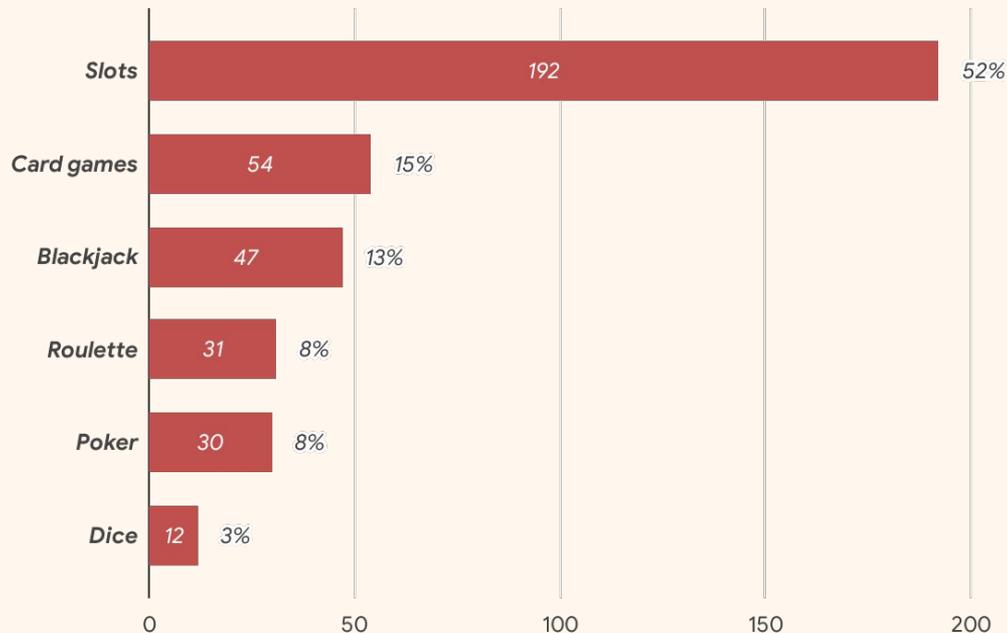
Answers given: 328 (everyone with a partner)

Target group: 1 - Online casino players

Favorite casino game

What casino game would you rather play?

(You could name a category, for example slots/cards/dice, or one specific game)



Further details

Standing out as a clear favorite of the gambling Swedes, **Slots** received a majority of the total vote (**52%**).

If we lump together Card games with Blackjack and Poker, the card-related category receives 36% of the vote.

Type of Question: Free writing (single choice)

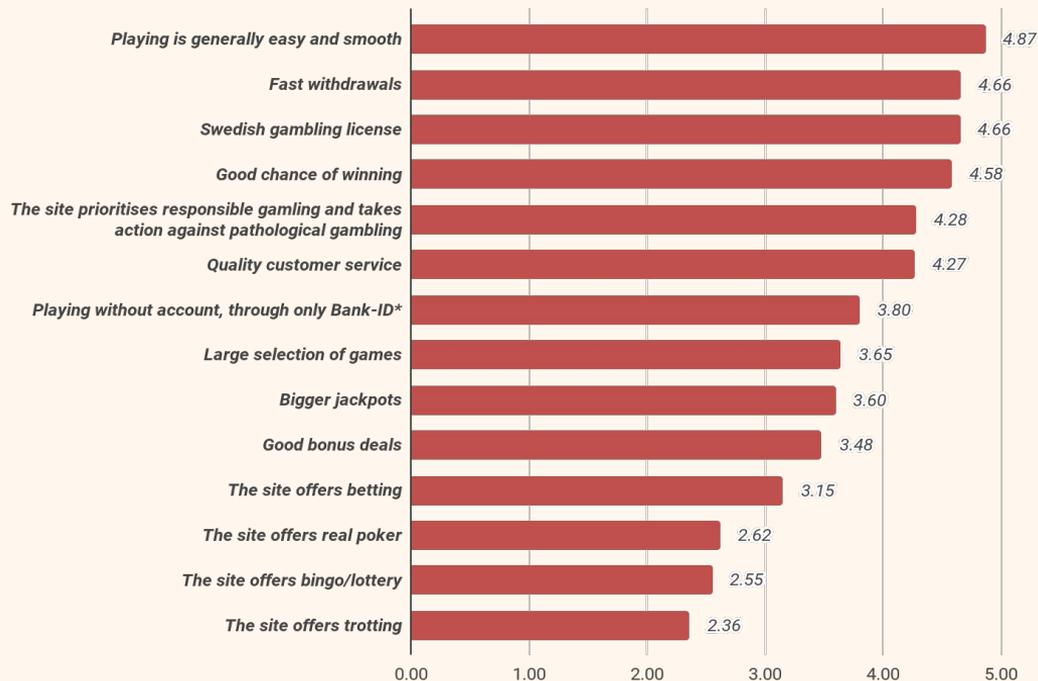
Answers given: 501

- 135 of the answers were unrelated to casino.

Target group: 1 - Online casino players

Why choose this casino?

What is most important to you when picking an online casino to play at? On a scale of 1-6, how well do these statements match your reasoning? (1 = no match at all och 6 = complete match).



Further details

When the online casino players take their pick, “Easy and no hassle” is considered the most important aspect.

Other important reasons include fast withdrawals, swedish gambling permits, and a good chance at winning.

**Bank-Id* is a Swedish electronic identification app, making possible fast transactions both on computers and mobile phones, through apps such as *Swish*. *Bank-Id* is widely used in Sweden.

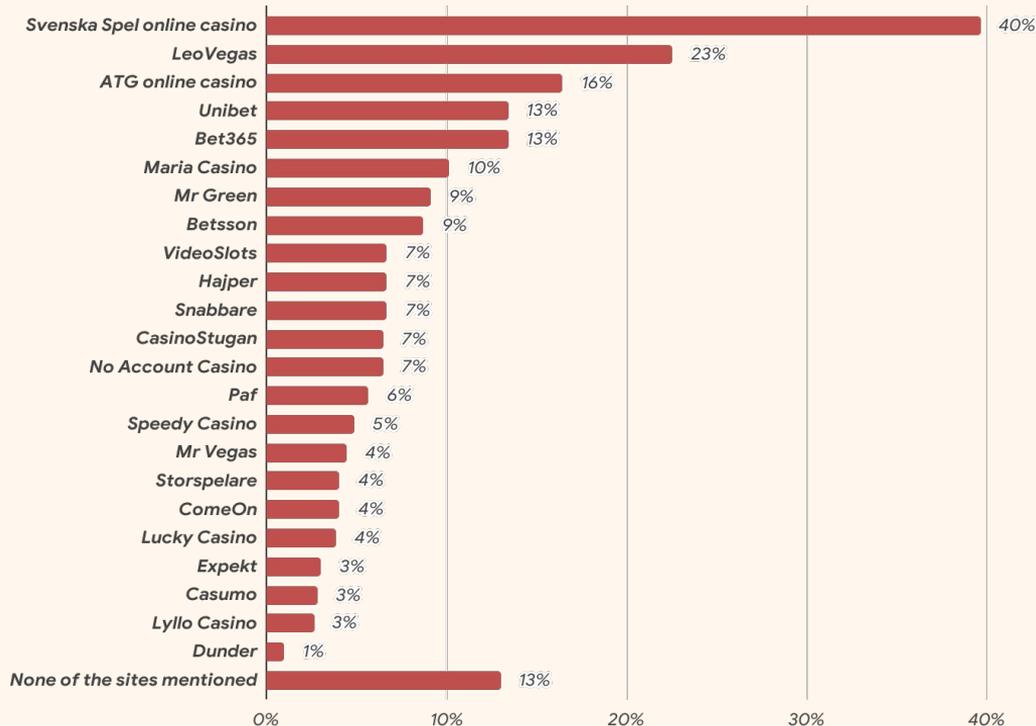
Type of question: Rating (1-6)

Answers given: 501

Target group: 1 - Online casino players

Gaming at different sites

On which of the following sites have you played online casino during the last 12 months?



Further details

Svenska Spel sits on top of the list with a massive 40% of the vote, likely because of their large base of customers as well as generally being perceived as trustworthy (see slide 33).

Most online casino players (about 60%) play only on one site. Some have accounts at a number of sites:

2 sites - 18%

3 sites - 10%

5 or more - 7%

10 or more - 2%

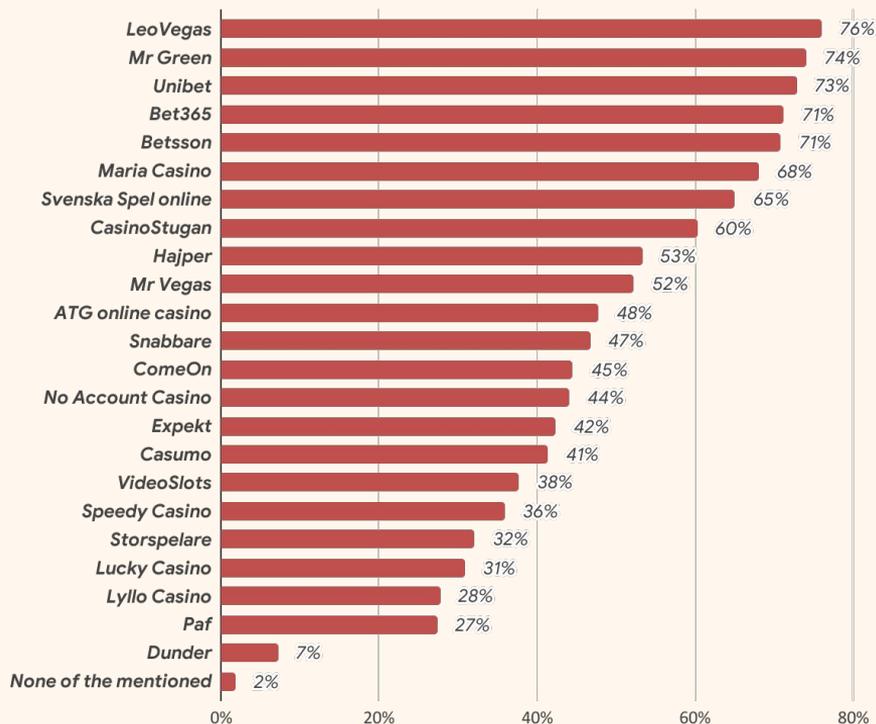
Type of question: Multiple Choice

Answers received: 501

Target group: 1 - Online casino players

Site knowledge

Which of the following casino websites do you know of?



Further details

Among online casino players, Leo Vegas is the most well-known site, followed closely by Mr Green, Unibet, Betsson, Bet365 and Maria Casino.

More than half of those answering say they know of more than 10 sites, and 12 individuals claim to know of all 23.

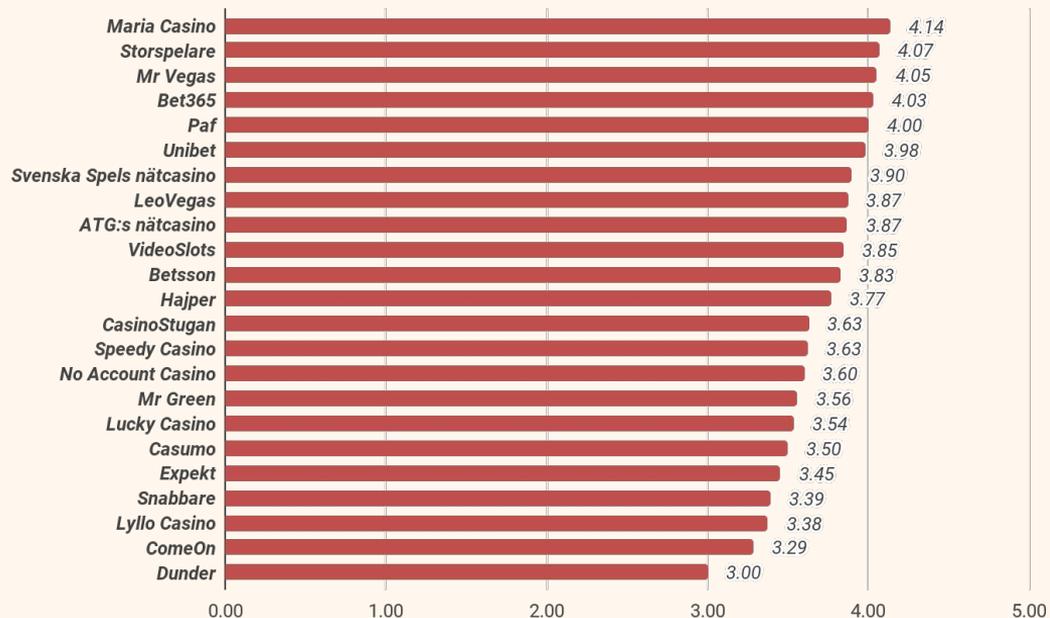
Type of question: Multiple choice

Answers received: 501

Target group: 1 - Online casino players

Site ranking

On a scale of 1-5, how would you rate these online casinos?
(1 = very bad and 5 = very good)



Further details

When the online casino players rate casinos, **Maria Casino sits on top** of the list with a **4.12** average rating. Next in line we have **Storspelare** with a **4.08** and **Bet365** with a **4.02**.

Should we isolate the top 6 of the list, then half of these would be comprised of three casinos run by **Kindred Group**: Maria Casino, Storspelare and Unibet.

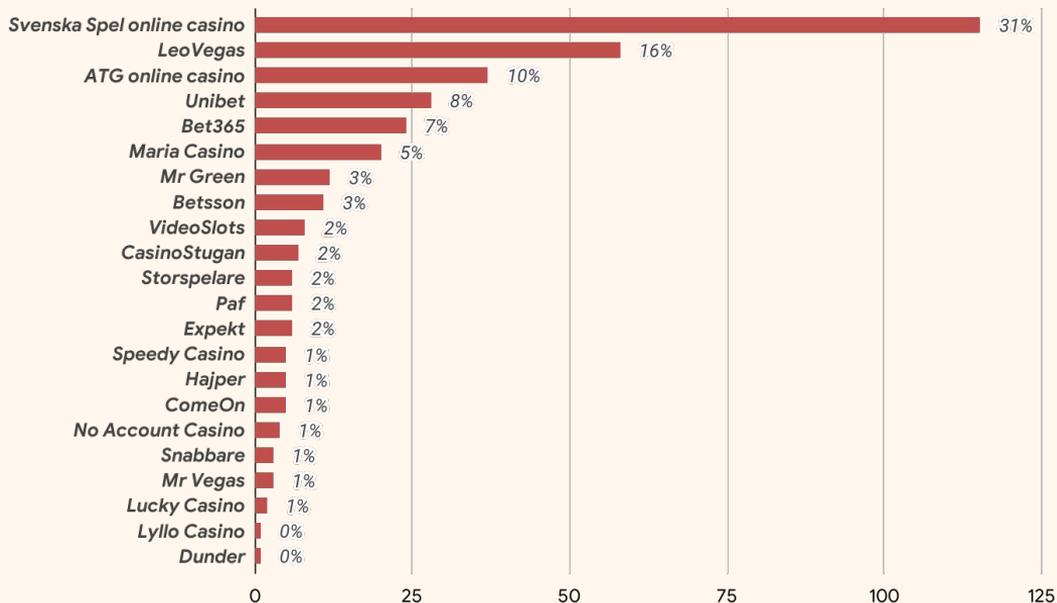
Type of question: Rating (1-5), and a "I don't know"

Answers received: 501

Target group: 1 - Online casino players

Favorite site

On which casino site of the following would you rather play?



Further details

Svenska Spel towers above the competition as the Swedish online casino players pick their favorite site. This can partially be explained by the fact that they have the largest customer base. In second place we find Leo Vegas, followed by ATG at third.

As to why people have Svenska Spel as their favorite site, security stands out as the most important reason:

- “[I]Trust the state more than any private actor”
- “Safe and the profit goes back into Sweden”
- “Feels secure”

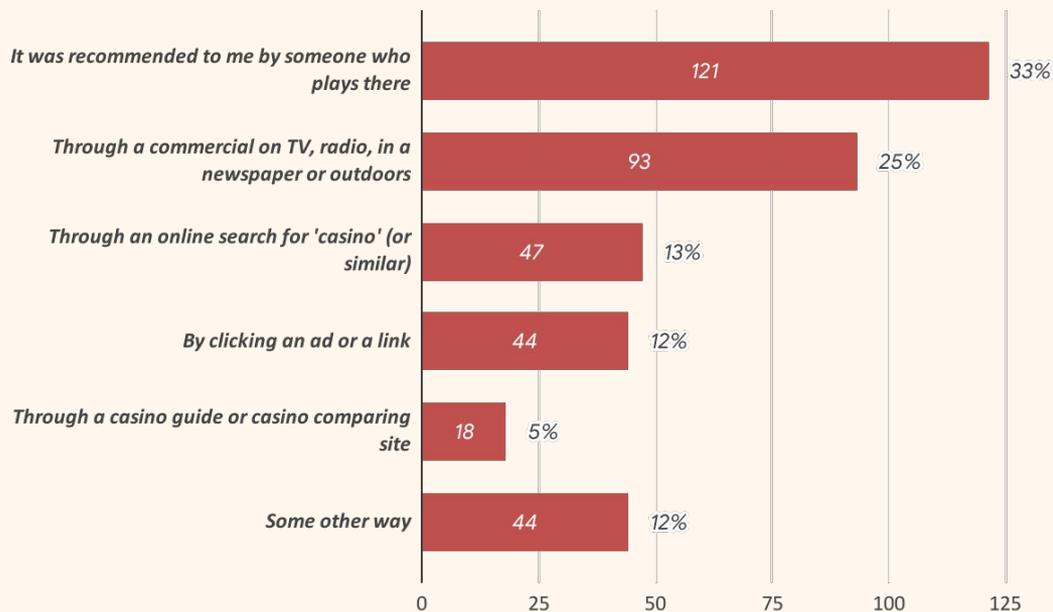
Type of question: Single choice

Answers received: 501

Target group: 1 - Online casino players

Finding the favorite site

Do you remember how you found your favorite site for the first time?



Further details

Usually, players find their favorite site from someone they know who already plays there, but it also common to find a favorite through a commercial.

Only 5% state that they found their favorite through a "casino guide website", but this number is twice as high for more frequent players.

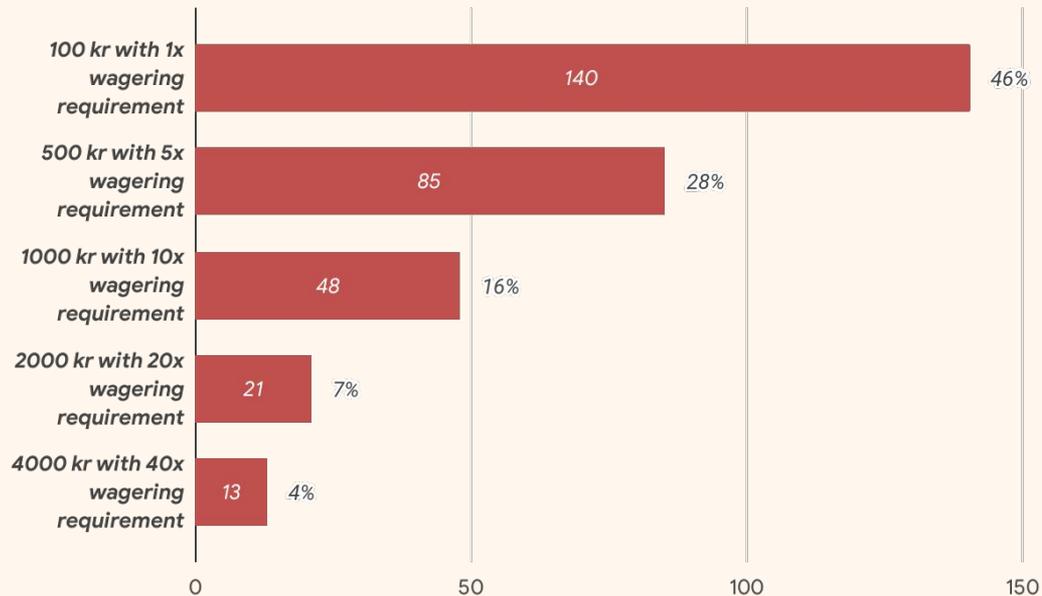
Type of question: Single choice

Answers received: 501

Target group: 1 - Online casino players

Bonus preferences

Given the choice of options below, which type of bonus do you usually prefer?



Further details

A majority of those answering prefer bonuses with a lower wagering requirement, even if the bonus itself is lower.

This preference is prominent across every metric, irrespective of age, sex or gaming frequency.

[100 SEK = 8.95 EUR]

Type of question: Single choice

Answers received: 501

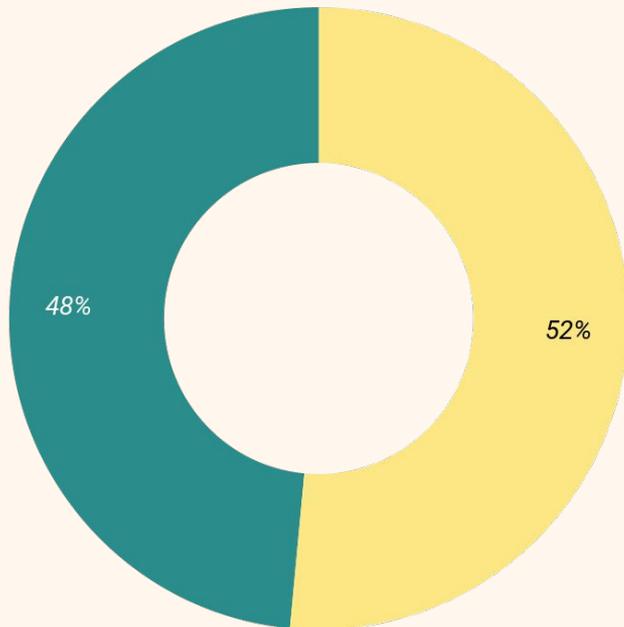
- 194 answered "Don't know/doesn't matter/no answer"

Target group: 1 - Online casino players

Freespin preferences

Freespins is a different kind of bonus. What type of freespin bonus would you rather receive?

- 20 freespins - 5kr each
- 100 freespins - 1kr each



Further details

When it comes to freespins, the answers given are clearly divided, but a slight majority prefers a lower number of freespins with a higher individual value.

The young (18-35 yrs) prefer 20 freespins (56%).
The elder (50-75 år) are instead in slight favor of 100 freespins (53%).

[100 SEK = 8.95 EUR]

Type of question: Single choice

Answers received: 501

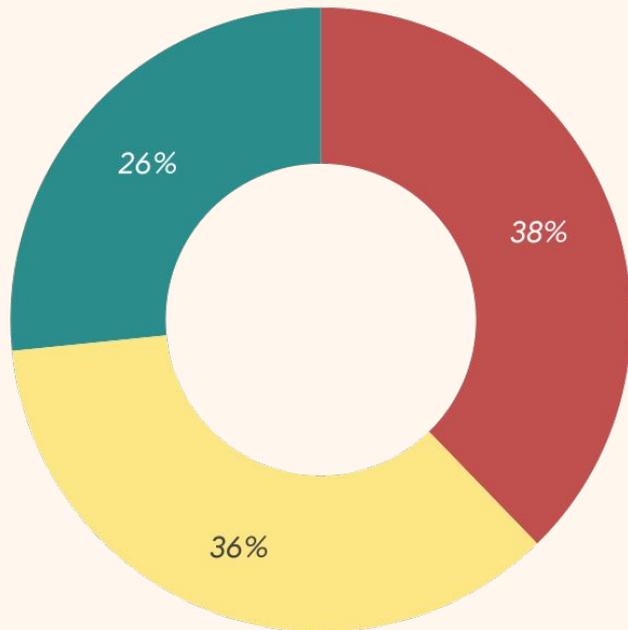
- 165 answered "Don't know/doesn't matter/no answer"

Target group: 1 - Online casino players

Bonus utilised

Recall the casinos you mentioned earlier – while playing there, did you utilise any casino bonus connected to terms and conditions?

- No
- Don't know/don't remember
- Yes



Further details

27% of the players in the survey state that they have at some point utilised a bonus connected to terms and conditions.

Surprisingly, the biggest group here consists of those who have not in fact utilised any bonus.

Type of question: Single choice

Answers received: 501

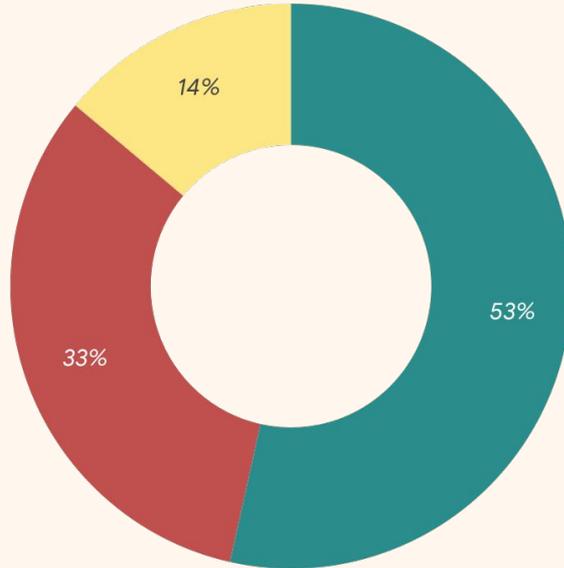
- 16 answered "no answer"

Target group: 1 - Online casino players

Issues regarding bonuses

Have you experienced any type of issues regarding the bonuses that you utilised, or has this process run along smoothly and without any issues?

- *No, the process was smooth*
- *Yes, I have experienced issues*
- *Don't know/don't remember*



Further details

One out of three players has experienced some kind of issues regarding their bonuses.

The majority has on the other hand not experienced any issues.

Type of question: Single choice

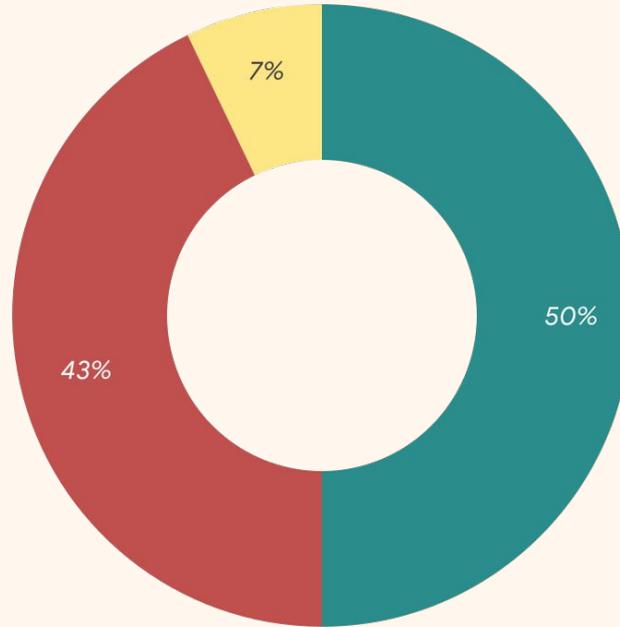
Answers received: 129

Target group: 1 - Online casino players

Types of bonus issues

What kind of issue did you foremost experience?

- Terms and conditions were unclear
- I faced issues withdrawing money
- Other



Further details

Half of those answering state that their issues regarding bonuses consisted of unclear terms and conditions.

43% stated that their biggest issue was withdrawing the money.

Type of question: Single choice

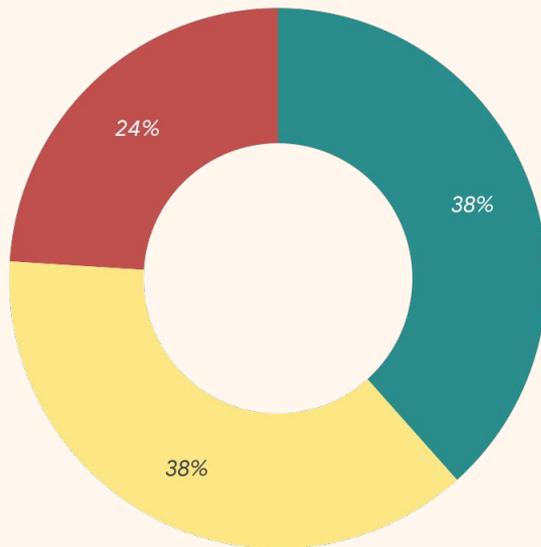
Answers received: 42

Target group: 1 - Online casino players

Reading terms and conditions

In general, how often do you read the terms and conditions regarding a specific bonus before you utilise it?

- I often read the terms and conditions very carefully
- I sometimes read the terms and conditions carefully, and sometimes I read them less carefully
- I rarely read the terms and conditions very carefully at all



Grafen baseras på 125 respondenter

Further details

Roughly 25% state that they rarely read the terms and conditions closely.

On the other hand, the numbers of players who read the terms and conditions closely and very closely speak of the fact that a majority of players actually read the terms and conditions – despite their often tiresome textual nature.

Type of question: Single choice

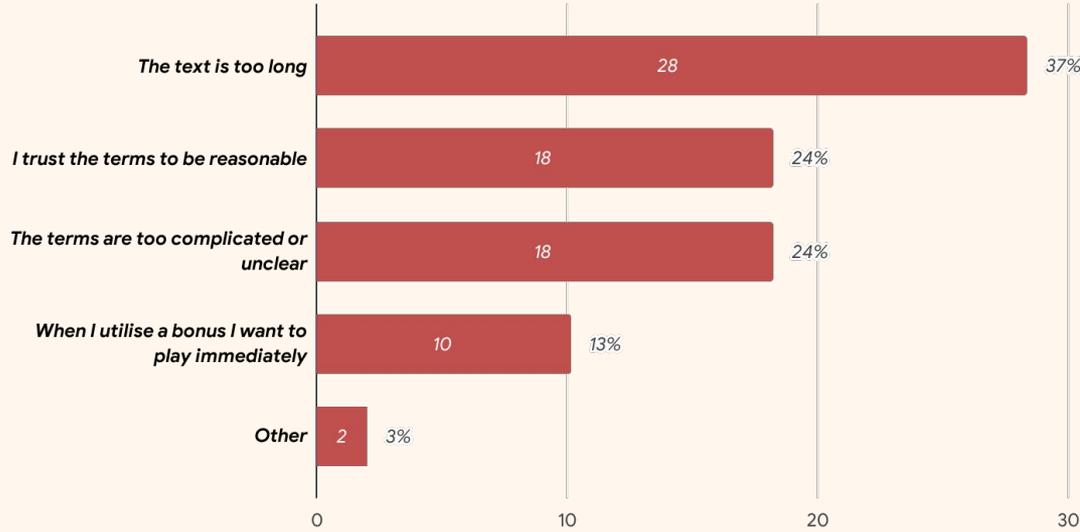
Answers received: 129

- 4 answered "don't know"

Target group: 1 - Online casino players

Unread terms and conditions

What do you think is the foremost reason for you not closely reading the terms and conditions?



Further details

The main reason for why players do not read the terms and conditions is that they are too long. At joint second place we find "I have trust in that the terms and conditions are reasonable" and "They are too complicated or unclear".

More than 60% of those who do not read the terms and conditions do so because the terms and conditions are too long, too complicated or too unclear.

Type of question: Single choice

Answers received: 77

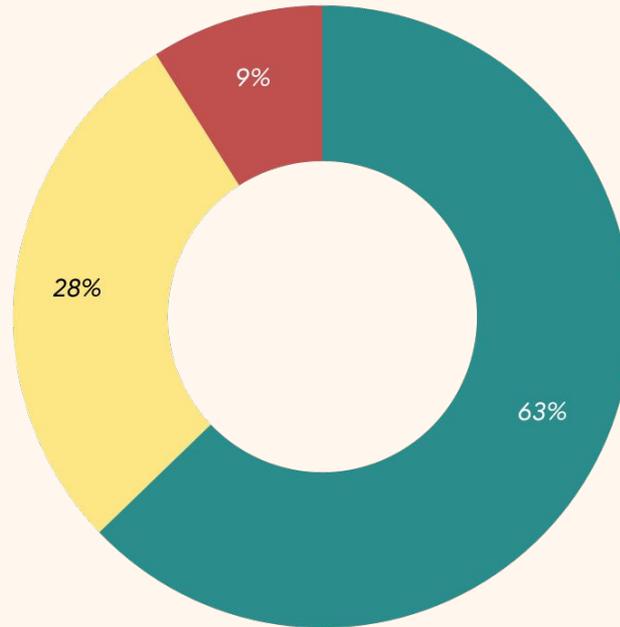
- 1 answered "don't know"

Target group: 1 - Online casino

Withdrawal issues

Recall the casinos you mentioned earlier – generally speaking, how easy or hard has it been to withdraw your earnings?

- **Most often it is easy and smooth**
- **Sometimes it is easy, and sometimes harder**
- **It is rarely easy and most often a hassle**



Further details

A majority (63%) of online casino players think that withdrawing earnings is often easy and smooth, while 9% often experience some kind of hassle.

In total, 37% of players state that they are met with some type of complications when trying to withdraw their earnings.

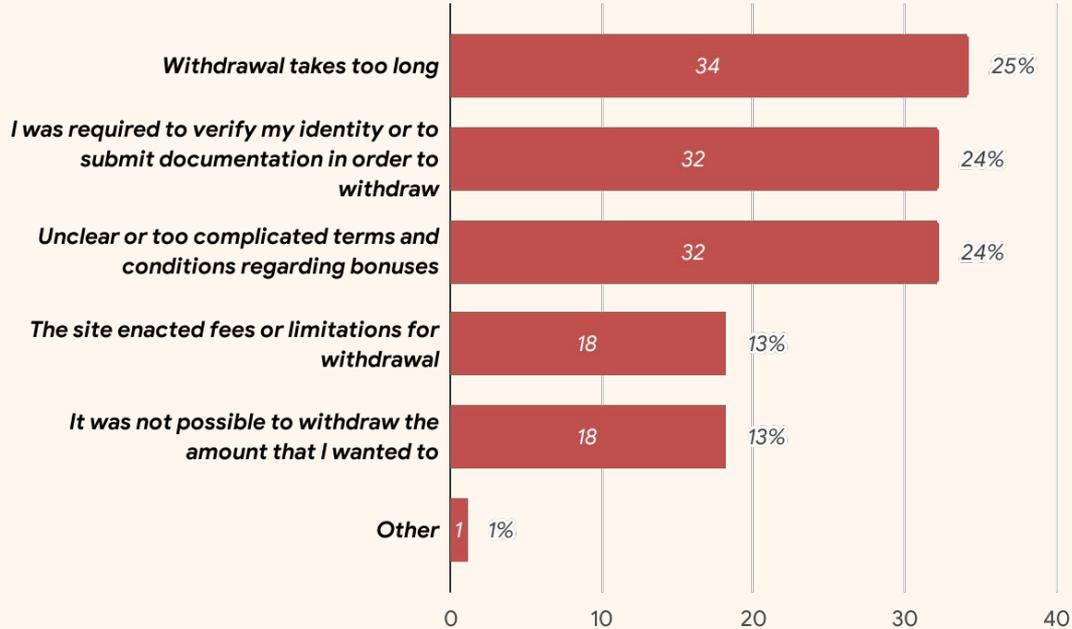
Type of question: Single choice

Answers received: 501 – 65 answered “Don’t know/remember” – 38 answered “I have never tried to withdraw funds from an online casino”.

Target group: 1 – Online casino players

Types of withdrawal issues

What has been the main issue?



Further details

The most common issue with withdrawal is that it takes too long (25%). Almost as common (24%) are both the complicated rules for bonuses and the need for verification.

Type of question: Single choice

Answers received: 148

- 13 answered "Don't know/remember"

Target group: 1 - Online casino players

Taking out loans to play

Have you needed to take out a loan in order to play during the last 12 months, and if so how often?



Further details

11% of players take out loans to play, more or less often. However, 89% has not done so during the last 12 months.

Type of question: Single choice

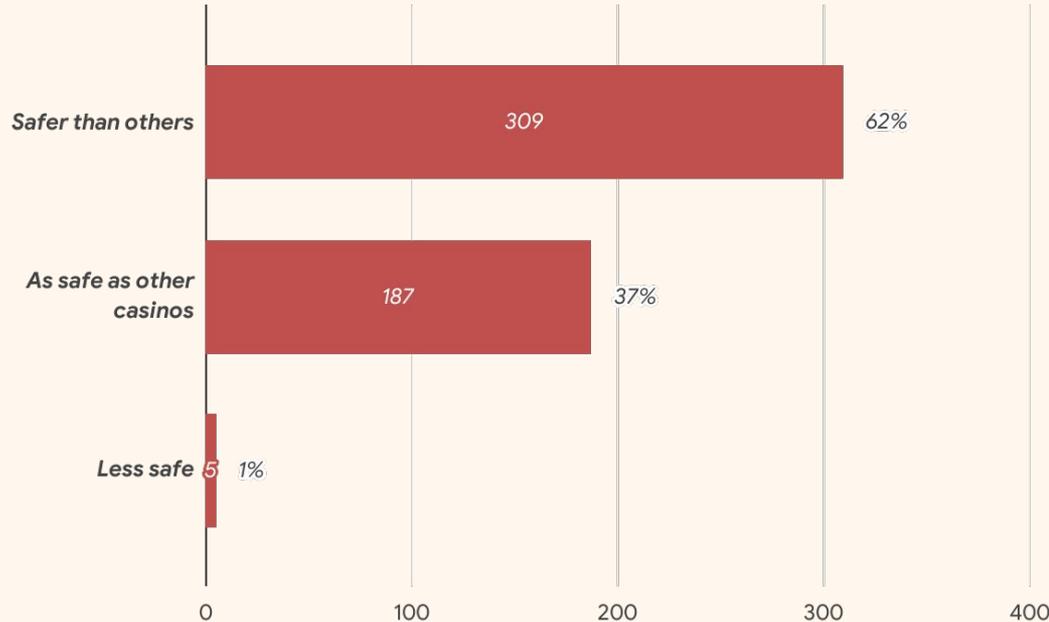
Answers received: 501

- 13 answered "don't want to state"

Target group: 1 - Online casino players

Svenska Spel

In Sweden there are many companies and websites with Swedish gambling licences that offer online casino gaming. One of these is Svenska Spel. Which of the following corresponds most closely with your opinion, belief or feeling towards Svenska Spel?



Further details

The majority of the players (62%) believe Svenska Spel to be more secure than other Swedish-licensed casinos.

Only about 1% believe Svenska Spel to be less secure than others.

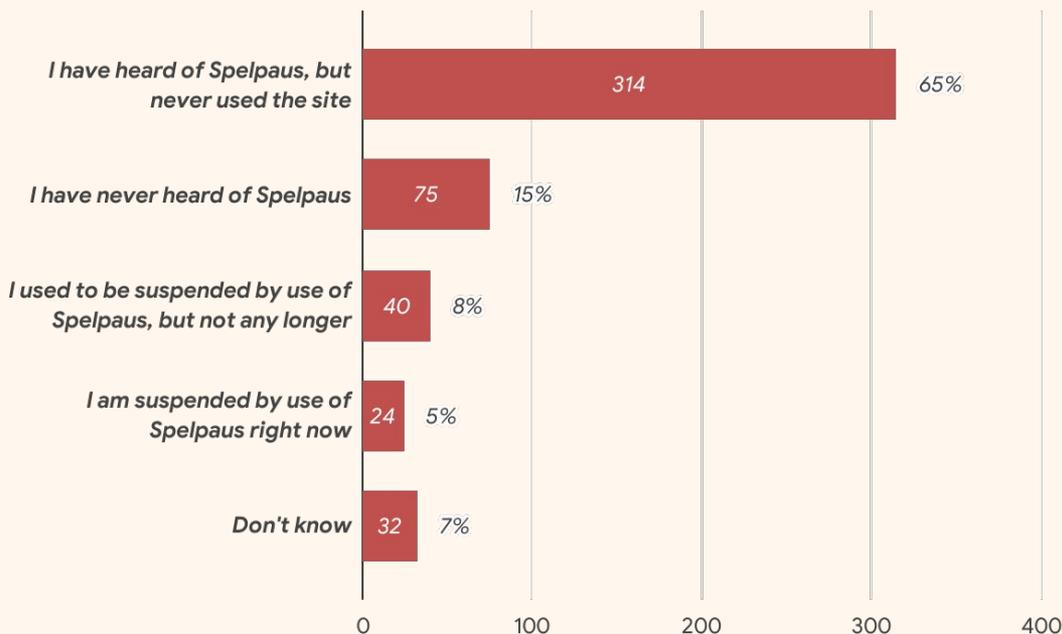
Type of question: Single choice

Answers given: 501

Target group: 1 - Online casino players

Spelpaus

In Sweden, the Swedish Gambling Authority (Spelinspektionen) presents the players with an opportunity to suspend themselves from all gambling licensed by the Swedish Gambling Authority. This service goes under the name Spelpaus. Which of the following corresponds most closely with your view on this service?



Further details

A majority of players (78%) does know of Spelpaus.

It's more common for women to have heard of Spelpaus (22%) than for men (14%).

13% of players are using or have in the past used Spelpaus to suspend themselves. (At the time of writing, 86 000 people in Sweden are using Spelpaus)

Type of questions: Single Choice

Answers received: 501

- 16 answered "Don't want to state"

Target group: 1 - Online casino players



POTENTIAL PLAYERS

Target Group 2: Individuals who do not play at online casinos, but who can envision themselves playing in the future

Potential players overview



Target Group 2: Persons who do not play at online casinos, but who can envision themselves as playing in the future.

5% Of the Swedish population do not play, but can imagine trying out online casinos

29% of these play alternative online games on a weekly basis on which they also gamble.



82% **LeoVegas** is the most well-known online casino

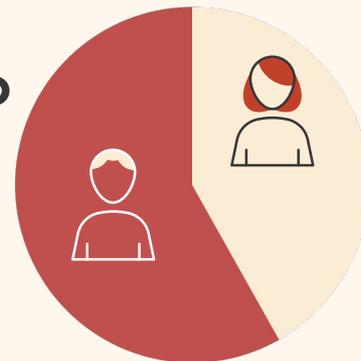


48% **Blackjack** spurs the most interest



35% **Scratchcards** is in general considered the most fun money game

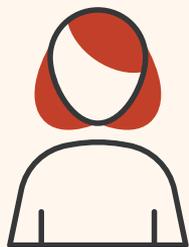
58%
Of potential players are men



“A higher chance to win than normal”

The most enticing argument to start playing at online casino.

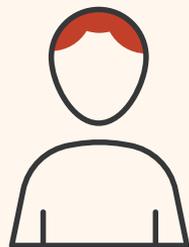
The potential player



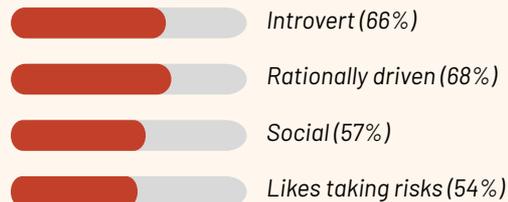
Characteristics



Average age: 39
Civil status: Married/partner (63%)
Education: College, less than 3 years (62%)
Employment: Full-time employee (55%)
Monthly income: ≈1800 - 2700£ (23%)



Characteristics



Average age: 48
Civil status: Married/partner (63%)
Education: College, less than 3 years (56%)
Employment: Full-time employee (63%)
Monthly income: ≈2700 - 3600£ (27%)

Potential players



Sex	%	Quantity
Women	42%	133
Men	58%	185

Age	%	Quantity
18-35	37%	117
36-49	27%	85
50-75	36%	116

Education	%	Quantity
College, at least 3 years	34%	109
College, less than 3 years	58%	185
Elementary school or lower	8%	24

Income (monthly salary)	%	Quantity
0 - 10 000 kr	6%	19
10 001 - 20 000 kr	14%	43
20 001 - 30 000 kr	17%	55
30 001 - 40 000 kr	24%	76
40 001 - 50 000 kr	16%	52
50 001 - 70 000 kr	7%	23
70 001 - 90 000 kr	3%	8
90 001 +	1%	2
Doesn't know /want to disclose	13%	40

[100 SEK = 8,95 EUR]

Potential players



Financial situation	%	Quantity
I'm financially stable and I can sometimes treat myself to some things	42%	135
I'm able to buy most of the things that I want and still have money to spare	22%	71
My financial situation isn't bad, but it isn't good either	18%	56
My financial situation is strained, but I get by if I plan ahead and think economically	11%	34
I often have more expenses than income and I'm in a constant struggle to make ends meet	4%	13
I don't want to disclose/I don't know	3%	9

Occupation	%	Quantity
Full-time employee	60%	190
Retired / Disability pensioner	14%	43
Part-time employee	10%	32
Student	6%	20
Self-employed	4%	12
Between jobs	3%	9
On long-term sick leave	3%	8
Housewife/house husband or equivalent	1%	3
Doesn't want to disclose	0%	1

Potential players



Extrovert <-> Introvert	%	Quantity
Extrovert	34%	109
Introvert	66%	209

Rationally <-> Emotionally driven	%	Quantity
Rationally	63%	199
Emotionally	37%	119

Social <-> Enjoys solitude	%	Quantity
Social	57%	182
Trivs bäst själv	43%	136

Likes taking risks <-> Dislikes taking risks	%	Quantity
Likes taking risks	57%	181
Dislikes taking risks	43%	137

Potential players

Civil status	%	Quantity
Married/cohabitant (with children)	38%	120
Married/cohabitant (no children)	24%	76
Single (no children) - private living	19%	59
Single (no children) - staying at parents or friends	6%	19
Single (with children) - private living	6%	19
Partner (no children) - separate living	3%	11
Partner (with children) - separate living	1%	2
Widow/widower	1%	2
Single (with children) - staying at parents	0%	1
Other	2%	5
Doesn't want to disclose	1%	4

Further details

4 of those who answered "other" also mentioned that they are married. This means that **63% of potential players are married or living with a partner**. And 67% are currently in a relationship.

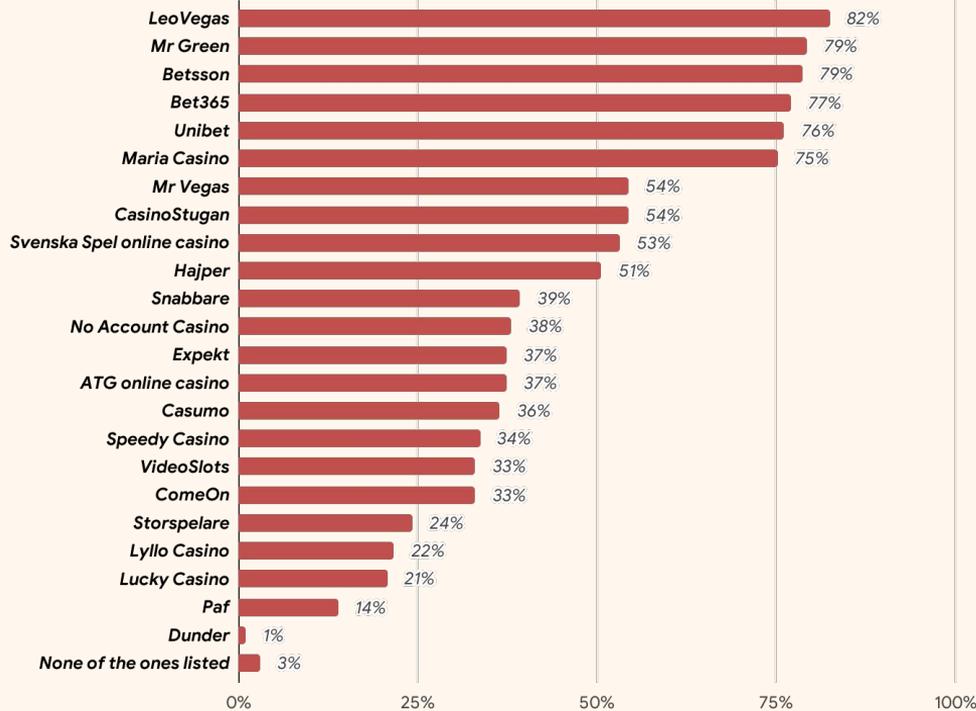
Type of question: Single choice

Answers received: 318

Target group: 2 - Potential players

Site knowledge

Which of the following casino websites do you know of?



Further details

LeoVegas, who received the greatest number of votes from target group 1, does so here as well, with 82%.

3 out of 4 potential players know of LeoVegas, Mrgreen, Betsson, Bet365, Unibet and Maria Casino.

There is a surprisingly large gap between sixth placed Maria Casino (75%) and the joint seven of MrVegas and Casinostugan (54%).

Type of question: Multiple choice

Answers received: 318

Target group: 2 - Potential players

Reasons for trying it out

Which of the following could make you try out playing at an online casino? Please rate each statement on a scale of 1-6 (1 = would not affect your decision 6 = would affect a lot).



Further details

A greater chance of winning is the highest rated reason for trying out an online casino. Other high-ranking answers include bonuses without deposit, huge bonuses, and that the site feels safe and that it takes its responsibility in acting against pathological gambling.

No spam or newsletters is rated relatively high (3.83), and surprisingly beats a record-level jackpot (3.44).

Fast registration was the lowest rated (3.03), suggesting that recognisable phrases like "casino without account" and "bankid casino" are aimed towards active players.

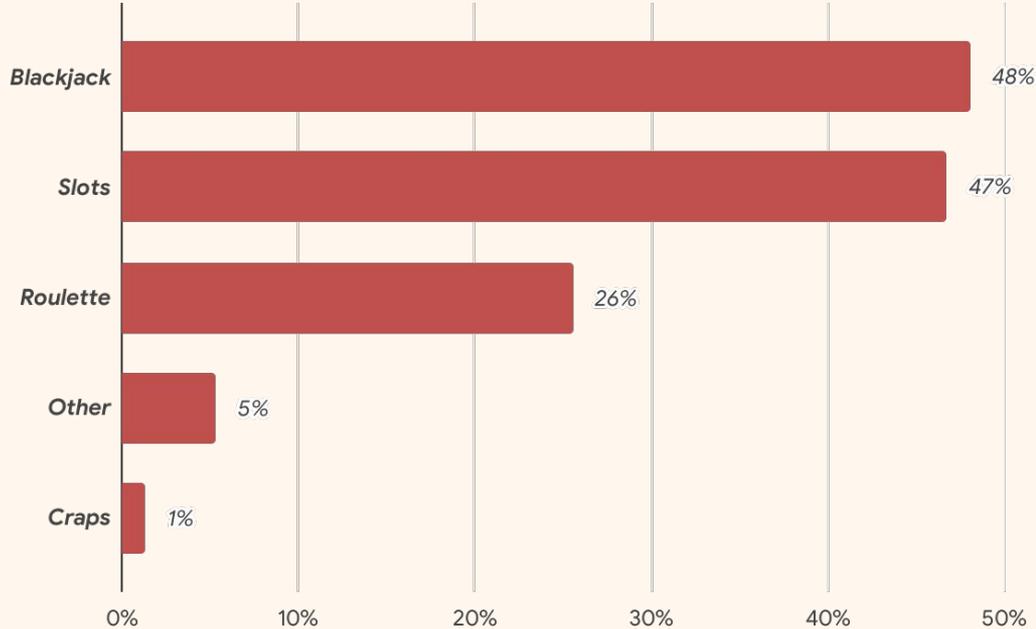
Type of question: Rating (1-6)

Answers received: 318

Target group: 2 - Potential players

Games that spark interest

What game, or kind of game, seems more fun or more interesting to you?



Further details

Blackjack sits on top of the list with 109 votes. Slots comes in at a close second at 106.

Among target group 1 (online casino players), only 13% voted Blackjack as their favorite game, while Slots received 52% of the vote.

Thus, potential players are way more interested in playing Blackjack than active players seem to be, as the favorite game of active players is Slots..

Type of question: Multiple choice

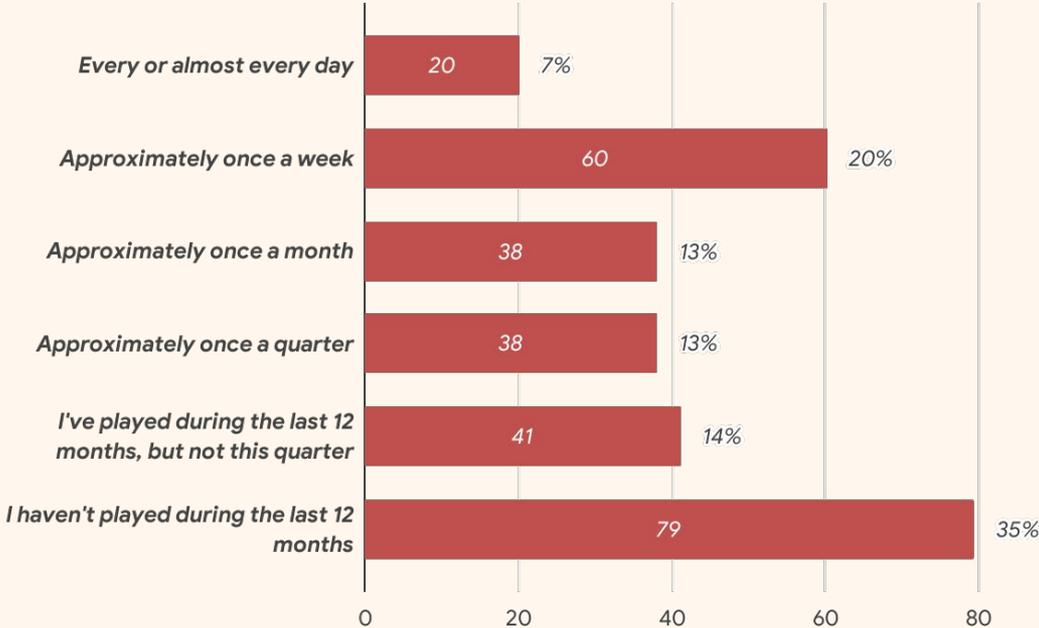
Answers received: 318

- 91 answered "don't know/no one"

Target group: 2 - Potential players

Online gambling frequency

How often do you approximately play an online game where you gamble with your own money?



Further details

35% have gambled with their own money on an online game during the last year.

Interestingly, 20% play as often as once a week.

If we lump together the daily, weekly and monthly gamblers, we find that 40% gamble with their own money at least once a month.

Type of question: Single choice

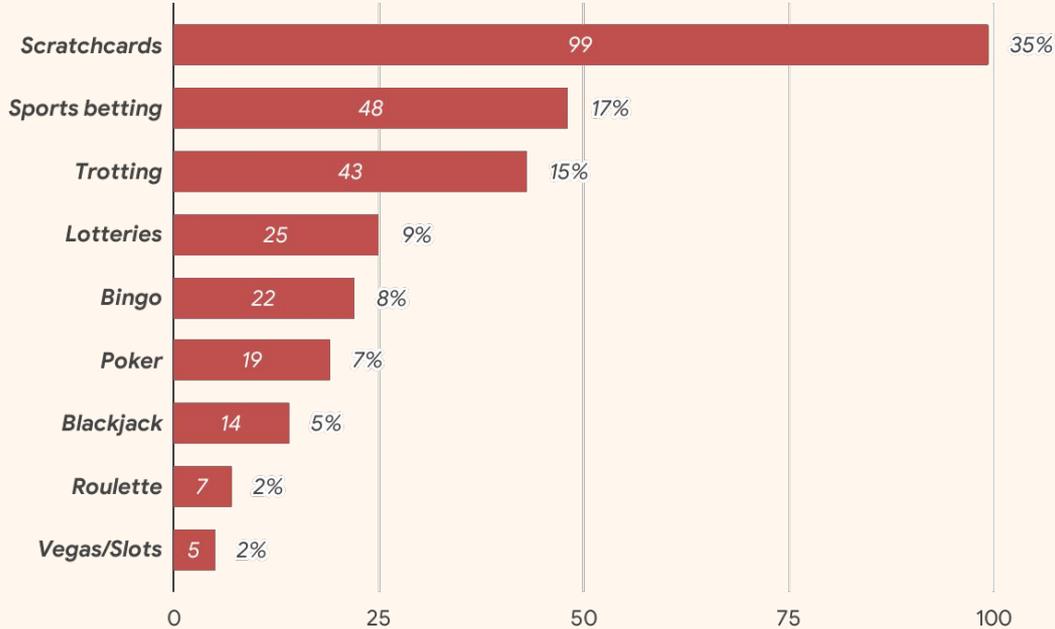
Answers received: 290 - 12 answered "don't know"

- 2 answer "don't want to disclose"

Target group: 2 - Potential players

Favorite money game

Which is the most fun money game?



Further details

At 35%, **Scratchcards** is the most popular game among potential players, followed by sports betting and trotting.

Among women, as many as 49% state that scratchcards is their favorite, followed by bingo (16%) and lottery (11%). The men are more evenly distributed, with 26% stating that sports betting is their favorite, followed by scratchcards (25%) and trotting (19%).

Type of question: Single choice

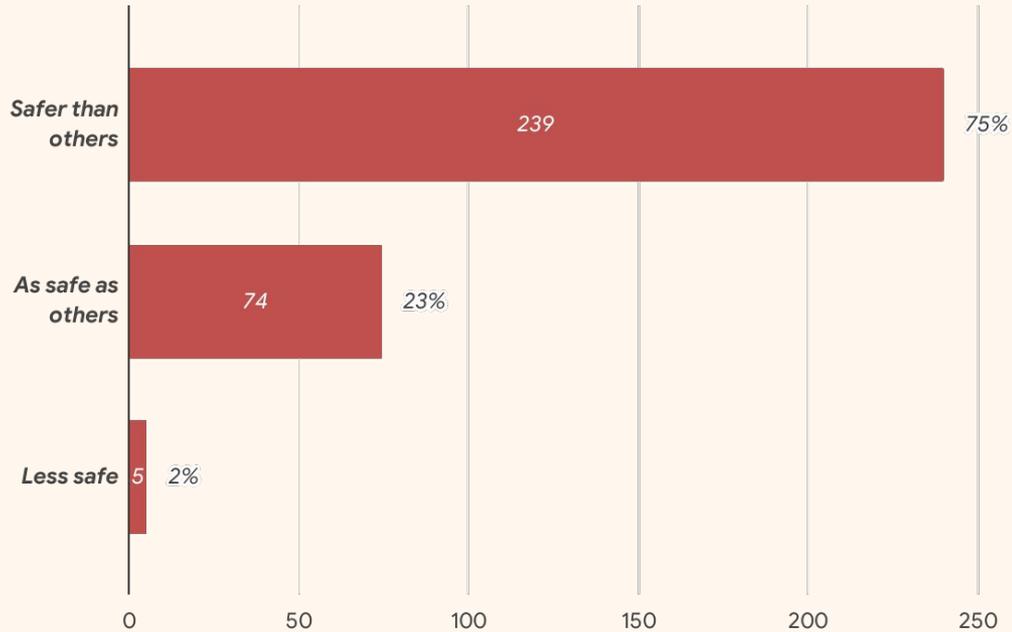
Answers received: 290

- 8 answered "don't know"

Target group: 2 - Potential players

Svenska Spel

In Sweden there are many companies and websites with Swedish gambling licences offering online casino gaming. One of these is Svenska Spel. Which of the following corresponds most closely with your opinion, belief or feeling towards Svenska Spel?



Further details

Three out of every four potential players believe Svenska Spel to be safer than alternative online casinos with a swedish gambling license.

Of all the target groups, potential players has the highest percentage of people answering "more safe", a number 8% higher than that of target group 1.

Only 2% of potential players believe Svenska Spel to be less safe.

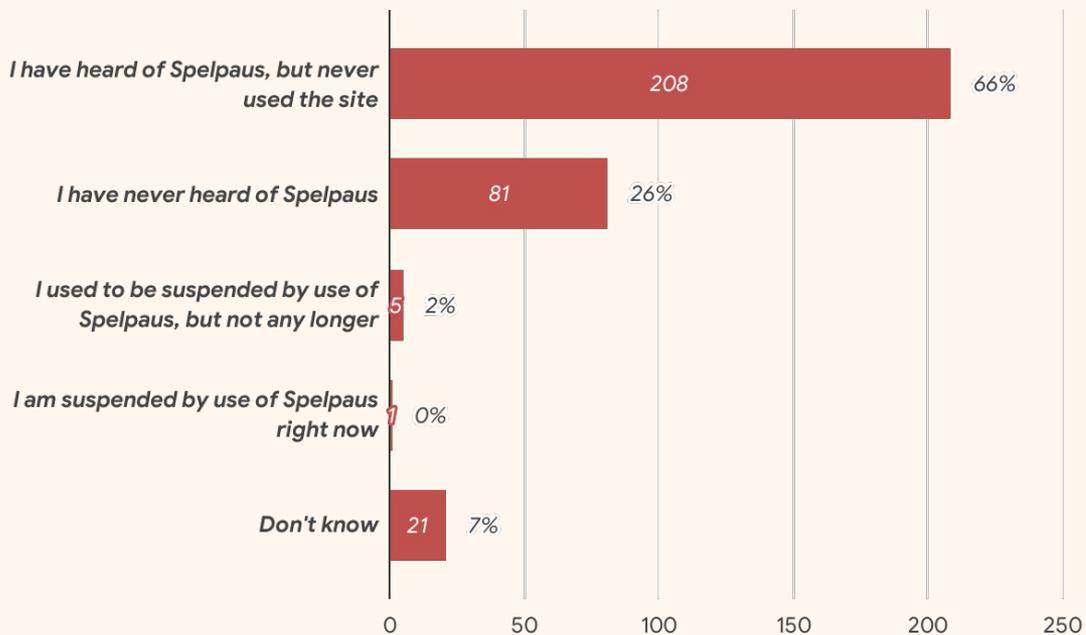
Type of question: Single choice

Answers given: 318

Target group: 2 – Potential players

Spelpaus

In Sweden, the Swedish Gambling Authority (Spelinspektionen) presents the players with an opportunity to suspend themselves from all gambling licensed by the Swedish Gambling Authority. This service goes under the name Spelpaus. Which of the following corresponds most closely with your view on this service?



Further details

A majority of the potential players (68%) know of Spelpaus.

26%, however, do not.

Type of question: Single choice

Answers received: 318

- 2 answered "don't want to disclose"

Target group: 2 - Potential players



EX-PLAYERS

Target group 3: Individuals who used to play at online casinos, but have not done so for 12 months and express no desire to play again

Ex-players overview

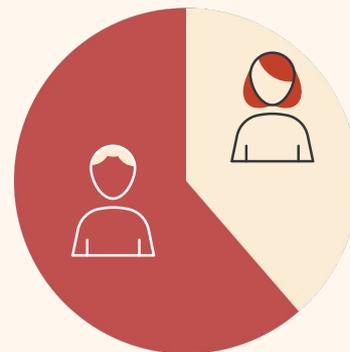


Target Group 3: Individuals who used to play at online casinos, but have not done so for 12 months and express no desire to play again.

7% *Of the Swedish population used to play at online casinos*

23% *of these play other online games where they gamble with their own money*

61%
Of ex-players are men



81% *LeoVegas is the most well-known online casino*

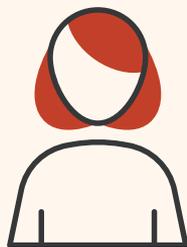


28% *Scratchcards is in general taken to be the most fun money game*

“[I] lost my interest”

The most common reason to stop playing

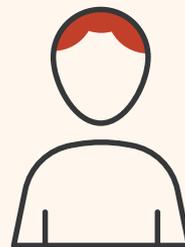
The ex-player



Characteristics



Average age: 43
Civil status: Married/partner (63%)
Education: College, less than 3 years (52%)
Employment: Full-time employee (52%)
Monthly income: ≈2700 - 3600£ (23%)



Characteristics



Average age: 48
Civil status: Married/partner (60%)
Education: College, less than 3 years (64%)
Employment: Full-time employee (64%)
Monthly income: ≈1800 - 2700£ (20%)

Ex-players



Sex	%	Quantity
Women	39%	90
Men	61%	143

Age	%	Quantity
18-35	32%	74
36-49	30%	69
50-75	39%	90

Education	%	Quantity
College, at least 3 years	37%	85
College, less than 3 years	59%	138
Elementary school or lower	4%	10

Income (monthly salary)	%	Quantity
0 - 10 000 kr	2%	4
10 001 - 20 000 kr	14%	32
20 001 - 30 000 kr	20%	47
30 001 - 40 000 kr	21%	50
40 001 - 50 000 kr	17%	39
50 001 - 70 000 kr	9%	21
70 001 - 90 000 kr	2%	5
90 001 +	0%	1
Doesn't know/doesn't want to disclose	15%	34

[100 SEK = 8,95 EUR]

Ex-players



Financial situation	%	Quantity
I'm financially stable and can sometimes treat myself to some things	40%	93
I'm able to buy most of the things that I want and still have money to spare	28%	66
My financial situation isn't bad, but it isn't good either	15%	34
My financial situation is strained, but I get by if I plan ahead and think economically	12%	29
I don't want to disclose/I don't know	4%	8
I often have more expenses than income and I'm in a constant struggle to make ends meet	1%	3

Occupation	%	Quantity
Full-time employee	59%	138
Retired / Disability pensioner	20%	46
Student	6%	14
Part-time employee	6%	13
Self-employed	3%	6
On long term sick leave	2%	5
Between jobs	2%	4
Housewife/house husband or equivalent	1%	3
Military service	0%	1
Doesn't want to disclose	1%	3

Ex-players



Extrovert <-> Introvert	%	Quantity
Extrovert	39%	91
Introvert	61%	142

Rationally <-> Emotionally driven	%	Quantity
Rationally	58%	134
Emotionally	42%	99

Social <-> Enjoys solitude	%	Quantity
Social	61%	142
Enjoys solitude	39%	91

Likes taking risks <-> Dislikes taking risks	%	Quantity
Likes taking risks	55%	129
Dislikes taking risks	45%	104

Ex-players

Civil status	%	Quantity
Married/cohabitant (with children)	38%	88
Married/cohabitant (no children)	24%	57
Single (no children) - private living	20%	46
Single (with children) - private living	8%	18
Partner (no children) - separate living	3%	6
Widow/widower	3%	6
Partner (with children) - separate living	1%	3
Single (with children) - staying at parents	0%	1
Other	2%	5
Doesn't want to disclose	1%	3

Further details

4 out of 5 answering "Other" also stated that they are married. This means that **64% of ex-players are married or living with a partner**. 68% are living in relationship (though perhaps with separate living).

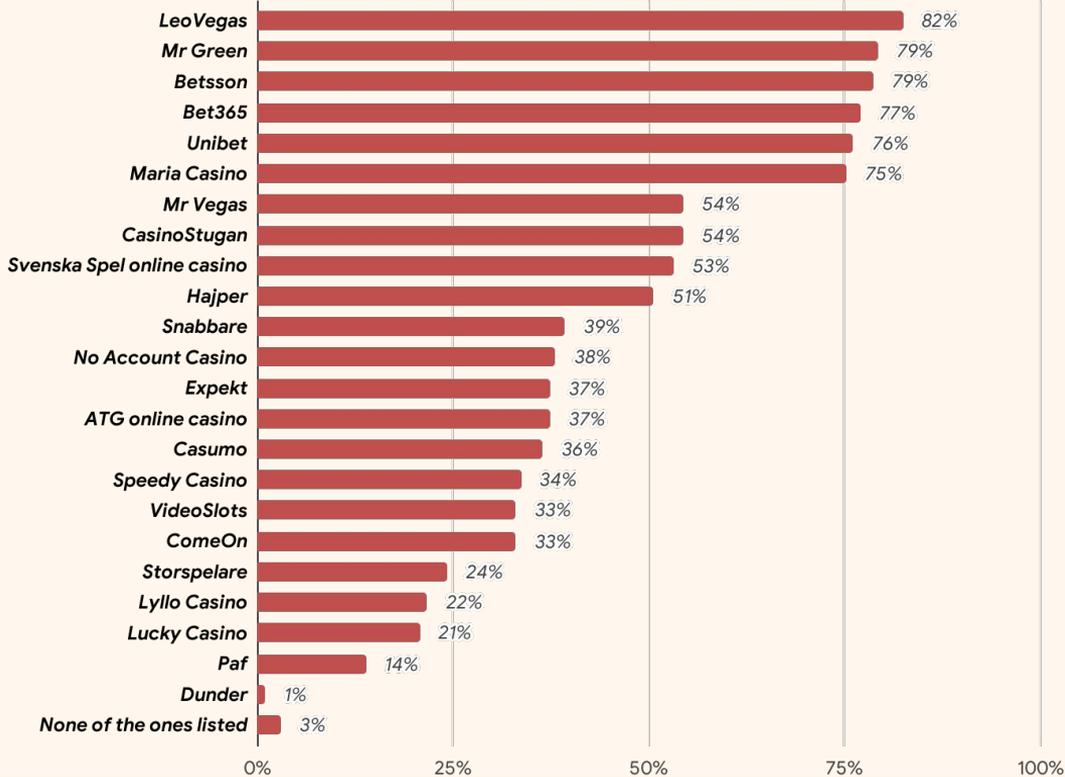
Type of question: Single choice

Answers received: 233

Target group: 3 - Ex-players

Site knowledge

Which of the following casino websites do you know of?



Further details

LeoVegas is the most well-known online casino among ex-players, at 81%. This is not too surprising, as LeoVegas sits on top of the lists for target group 1 and 2 as well.

Interestingly, the gap between the top-6 and nr. 7 is similar to the target group 2 results.

Type of question: Multiple choice

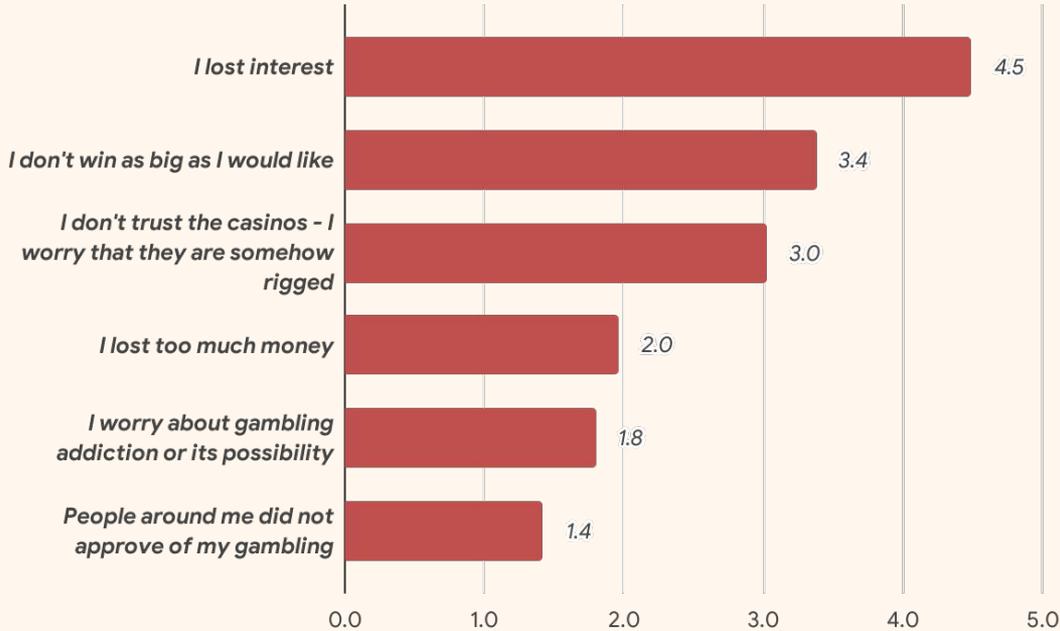
Answers given: 233

Target group: 3 - Ex-players

Reasons to stop playing

You previously stated that you've played at an online casino. Why haven't you played lately? Please rate every statement on scale from 1 to 6.

(1 = does not affect my decision 6 = strongly affects my decision)



Further details

The foremost reason to stop playing is simply losing interest. Other common reasons include winning too little as well as not trusting the site.

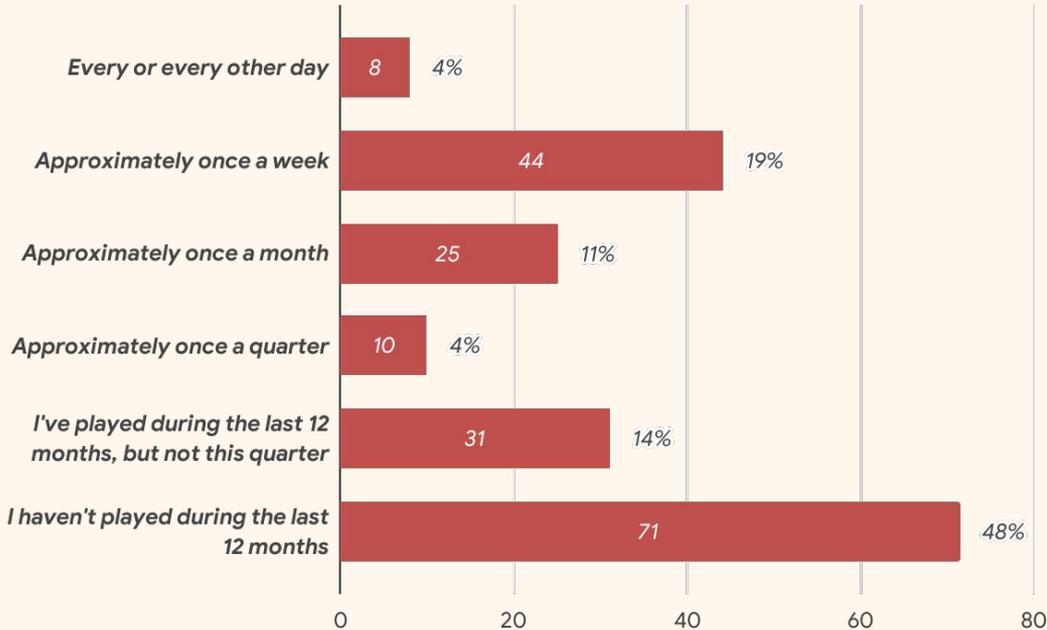
Type of question: Rating (1-6)

Answers given: 233

Target group: 3 - Ex-players

Online gaming frequency

How often do you approximately play an online game where you gamble with your own money?



Further details

38% did not gamble with their own money on an online game during the last year.

23% gamble about once a week.

If we lump together the daily, weekly and monthly gamblers, we find that 40% gamble with their own money at least once a month.

Type of question: Single choice

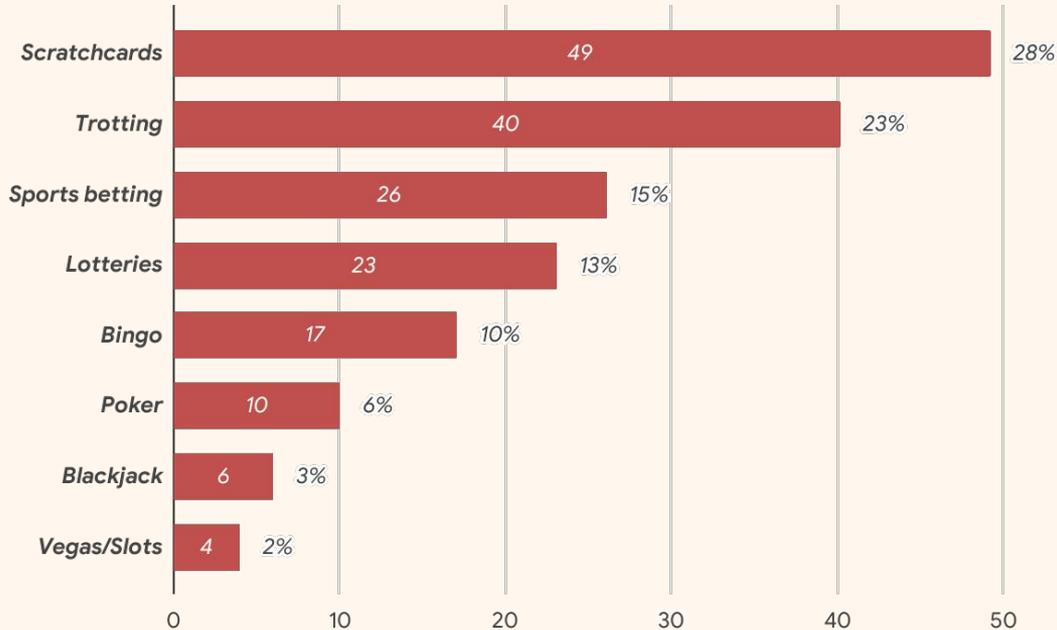
Answers received: 194 - 3 answered "don't know"

- 2 answered "don't want to disclose"

Target group: 3 - Ex-players

Favorite money game

Which is the most fun money game?



Further details

Scratchcards is the most popular (28%) money game among ex-players, with trotting (23%) and sports betting (15%) coming in at second and third.

Scratchcards sit on top of the list in spite of its modest revenue. This can partly be explained by that most scratch players play seldomly, and for small amounts. In addition, people who play scratchcards often only play scratchcards.

Surprisingly, 45%(!) of women state that their favorite game is scratchcards. Bingo comes in at second place (16%). Men instead prefer trotting (28%) and sports betting (21%).

Type of question: Single choice

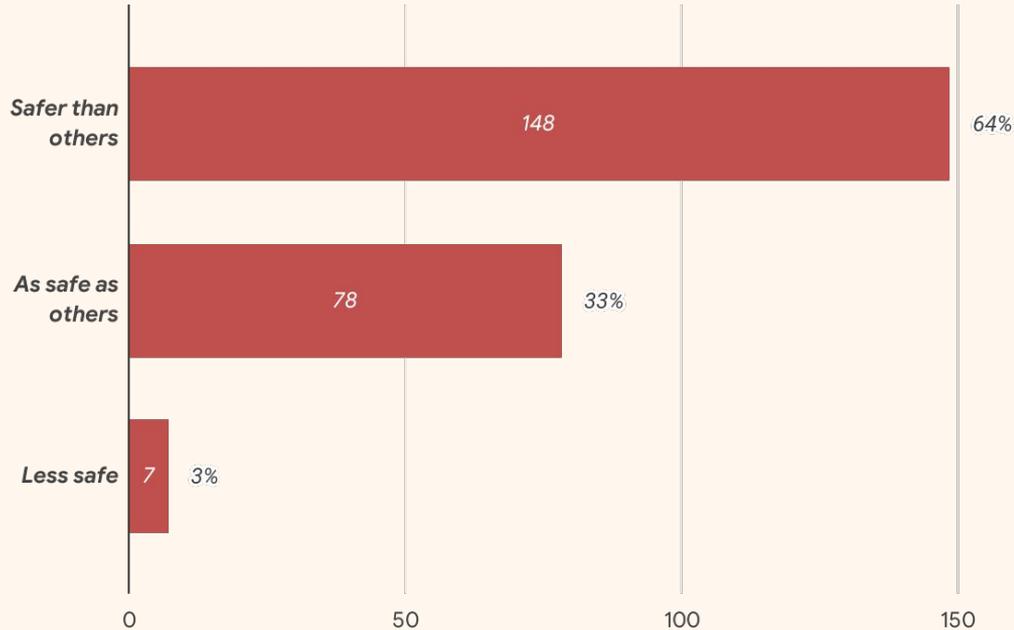
Answers received: 194

- 19 answered "don't know"

Target group: 3 - Ex-players

Svenska Spel

In Sweden there are many companies and websites with Swedish gambling licences offering online casino gaming. One of these is Svenska Spel. Which of the following corresponds most closely with your opinion, belief or feeling towards Svenska Spel?



Further details

A majority of ex-players (64%) believe that Svenska Spel is safer than alternative online casinos with Swedish gambling license.

3% believe that Svenska Spel is less safe, and this number is the highest observed among all the target groups. Nevertheless, the number is still very small.

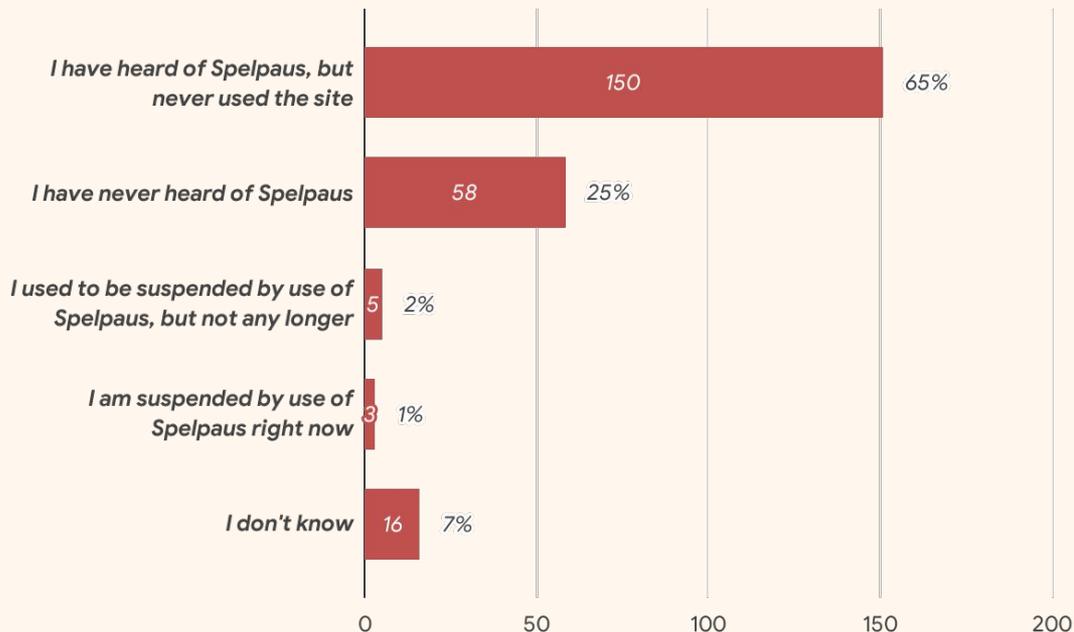
Type of question: Single choice

Answers received: 233

Target group: 3 - Ex-players

Spelpaus

In Sweden, the Swedish Gambling Authority (Spelinspektionen) presents the players with an opportunity to suspend themselves from all gambling licensed by the Swedish Gambling Authority. This service goes under the name Spelpaus. Which of the following corresponds most closely with your view on this service?



Further details

A majority of ex-players (68%) does know of Spelpaus.

25% has, on the other hand, never heard of it.

Only 3% of the ex-players have been or are currently suspended through Spelpaus.

Type of question: Single choice

Answers received: 233

- 1 answered "don't want to disclose"

Target group: 3 - Ex-players

Teamet



Martin Johansson
VD / CEO
Reflect Företagsutveckling AB

Martin Johansson is a statistician with 25 years of experience in market research both as client and contractor. He has 20 years of experience in the gaming industry - including Research Director at Svenska Spel AB.

Martin leads the analysis and research company Reflect Företagsutveckling AB that is responsible for the methodology and fieldwork for this study.



Jesper Ekström
Technical Product Director
Rakotech Group / CasinoFeber



Natalie Heljestränd
SEO Manager
Rakotech Group / CasinoFeber