Social Profiles and Social Behaviour and Attitudes towards Gaming and On-Line Gaming in Spain

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ABSTRACT

For the last two decades our world has experienced increasing globalization linked to the revolution in Information and Communication Technologies (ICT) leading to new business spheres escaping from the traditional Nation-State control. The gaming business is one of these areas and has recorded a notable increase in profits in the last decade: gambling, betting and network games constitute some of the main issues developed by ICT companies located beyond State control. The action of the States is focusing on the formulation of new public policies that allow them to control these activities. But first a deep social description of gaming is needed to know which actors are involved in this field of activities, which is the profile of the gamer and what kind of social attitudes are carried out by users and companies taking part of the business. This article focuses on the social profiles and the social behaviour and attitudes towards gaming in Spain, and specially in the transition from traditional gaming to on line gaming.

KEYWORDS: *gaming, internet, social profiles, social behaviour, social attitudes.*

JEL CLASSIFICATION: *Z13, Z18.*

INTRODUCTION

For the last two decades our world has experienced increasing globalization linked to the revolution in Information and Communication Technologies (ICT). This has led to a new profitable network of global business procedures that are escaping from the Nation-State spheres of control. The gaming business is one of these areas and has recorded a notable increase in profits in the last decade: gambling, betting and network games constitute some of the main issues developed by ICT companies located beyond State control. Therefore, the action of the State is focusing on the formulation of new public policies that allow them to control these activities while assuring a new source of revenue through taxation.

The online sale of leisure and entertainment imply the disappearance of the principle of territoriality and the emergence of a new principle, one of multi-position of users and suppliers. This raises new issues such as legal certainty for users, corporate responsibility, the advertising of public and private offers, the resulting tax revenues and the possibility of tax avoidance, prevention and control of money laundering, the protection of minors, and the monitoring and protection of possible addictions.

In order to face these new phenomena the EU member States need to be supplied with new data and information about the environment in which this business are is developing during

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the last years. In the present article we provide some new data and evidences about the social aspects of the matter in the case of Spain portraying which actors are involved in this field of activities and which is the profile of the gamers, and which kind of attitudes and behaviours are showing towards gaming.

The present study article has been undertaken within the framework of the activities of the research group in public policies on recreation and entertainment of the *Instituto de Política y Gobernanza* (IPOLGOB) of the University Carlos III Madrid. The target population in which this research was carried out is made up of residents in Spain (Spaniards and foreigners living in Spain) whose ages are between 18 and 75 years old and it was measured through several opinion polls launched between 2009 and 2010.

It is remarkable that this is one of the few occasions in which gambling games in Spain, most especially in their on line versions, are being studied from a sociological and political perspective (Cases, 2009; González Seara, 1998; Ruiz Martínez, 2010; Ruiz Martínez et al., 2011). It never ceases to surprise anyone that an activity that moves a considerable amount of money and that arouses mixed or conflicting feelings has received so little attention from the perspective of a social investigation.

The reader will be able to find in this article abundant sociological information on the profile and behavioural habits of Spanish gamblers, not only those *traditional* ones, but also those who are on line gamblers. One part of the research was focused precisely on analysing quite deeply the on line gambling phenomenon. It gives dimension to the number of practicing players, their sociological profiles and their expenses and eventually it estimates with certain approximation the volume of resources that are channelled into on line gambling games in our country. Therefore, we should understand that the data extracted and the conclusions reached simply describe the attitudes and behaviours of the residents in Spain with respect to all kinds of situations that have been derived from the practice of or the participation in activities that are part of *games of luck or fate, stakes or games of chance*. This should be constituted as the first of the studies of a provisional series that will allow scholars and public authorities to know, in a more detailed manner, the scope or boundaries of gambling in Spain.

Methodologically speaking (Moore et al., 1998; Tourangeau & Yan, 2007), we have tried to harmonise the information on gambling available through the estimates that were made by the Spanish Home Affairs Ministry from its annual reports on gaming in Spain and the data furnished every quarter by the Commission on the Telecommunications Market through their collective agreement with the Spanish entities on methods or means of payment, i.e., based on the data that were obtained from the use of bank cards. These data allow us to delve deeply and be precise about the data that have been available up to the present time.

We can allow ourselves to think that the article has a considerable importance from the point of view of the social information that it provides, as well as being accurate on the financial and economic magnitude of gaming. This kind of information might be very interesting for the public Authorities in order to design new policies on gaming. But we also believe that it offers a great amount of practical information in order to improve the marketing of gambling, always within the limits of entertainment. One of the most relevant conclusions reached is that Spanish gamblers maintain some moderate guidelines of behaviour. Their expenses in gambling do not exceed that which can be set aside for other types of entertainment. There still exists the added pleasure of defying fate and fortune and random. But more than this, the comparison between the different levels of expenditure per month that are set aside for individual or family recreation shows that this is a form of entertainment that does not result in being expensive in comparison with the prices of other similar activities.

1. TRADITIONAL GAMING

Gaming in Spain is a universal behaviour: the 92.4% of Spaniards who are between 18 and 75 years old have ever played or gambled. One half of this, the 49.4%, affirms playing or gambling habitually. With regards to the issue on gaming, the Spanish population is divided into two groups: the 48.9 % play at least once a month and the other 50.1% play only once in a while or not ever (indeed, almost never). The 1% gave a NS/ NC (Don't Know/Don’t Answer) response. There is a hard nucleus of 6. 7% of regular gamblers (they do play so every day or several times per week); while the 28.1% plays every week and the resting 14.1% plays less frequently than the previously mentioned ones but they do so at least once a month.

Table 1: What kind of game do you play?

	Sometimes	Regularly	On line	SMS
Lotería Nacional	83,0	16,1	0,2	0,4
Euromillón, Loterías Primitivas	61,3	28,5	0,4	0,1
ONCE	60,8	10,2	0,1	
Football pools	46,0	8,4	0,2	
Bingo	26,5	0,3	0,1	
Slot machines	15,6	0,2	0,1	
Casino games	11,2	0,5	0,1	
Other lotteries	11,0	2,4	0,2	0,2
SMS	7,5	0,2	0,2	3,6
poker on line	7,1	1,3	2,6	
Sport betting	5,7	0,1	0,3	
Poker rooms and poker tournaments	3,5	0,7	0,7	
I don’t play any of them	7,6	50,6	95,2	95,9
Do you play any of these games on line?			***4.8***	
(n)	*(1.000)*	*(1.000)*	*(1.000)*	*(1.000)*

Given the scale of the population that gambles, their profiles tend to be watered down when mixed with the whole population but the gamblers are quite more frequently men than women, and mainly amongst the regular ones, whose average ages are between 25 to 55 years old and whose social status is middle class and above. Therefore, gambling depends to a certain extent on the availability of the financial or economic resources to do so.

Table 2: Gamblers by gender and age and social status

	Every-day	More than once per week	Once per week	Once per month	Once every 3 months	Once per year or more	Never	(n)
Total	2,0	4,7	28,1	5,6	8,5	35,5	15,6	(1000)
Men	3,0	5,6	32,9	7,5	8,7	29,0	13,3	(496)
Women	1,0	3,8	23,4	3,8	8,3	41,9	17,9	(504)
16-25	0,0	6,6	20,6	3,7	9,6	28,7	30,9	(136)
25-34	0,0	6,8	31,5	6,4	7,8	32,4	15,1	(219)
35-44	2,9	5,8	35,4	5,3	11,2	29,1	10,2	(206)
45-54	3,5	2,3	30,2	6,4	8,1	39,0	10,5	(172)
55-64	1,5	3,8	24,2	5,3	7,6	43,9	13,6	(132)
65-75	4,4	1,5	20,0	5,9	5,9	44,4	17,8	(135)
High status	0,0	4,9	32,9	4,9	9,8	41,5	6,1	(82)
Med-High status	1,1	5,1	29,8	6,7	7,9	35,4	14,0	(178)
Medium status	2,2	4,9	27,7	6,0	8,9	35,5	14,7	(448)
Med-Low status	2,7	4,2	27,7	4,6	6,9	33,1	20,8	(260)
Low status	3,1	3,1	15,6	3,1	15,6	40,6	18,8	(32)

The National Lottery, the ordinary lottery, the coupons of the ONCE (a national private organisation for the blind people) and the football pools and the sports betting tickets (not too popular nowadays in Spain) are the universal gambling games that any resident in Spain can play at any moment. Each one has a nucleus of habitual gamblers with different sociological characteristics. The rest of the games are much more specialised and they have, as a way of saying it, their own public that is different from the rest, something like special niches in the market.

The gamblers consider gambling to be subject to fortune or random. The intelligence of the gambler does not play a part – except for a segment of practicing gamblers like poker. To defy chance or luck is part of its attraction. But Spanish gamblers consider themselves to have little luck. There is a social construction of fate and random: confidence in having it decreases with age, the social status and the frequency of the gambling, and it is more prevalent among men than among women.

Table 3: If you have ever played some game, which game was that one?

	Lotería Nacional	Euromillón Lotería Primitiva	ONCE	Football pools	Bingo	Slot machines	Casinos
Total	(83,0)	(61,3)	(60,8)	(46,0)	(26,5)	(15,6)	(11,2)
Men	49,9	53,4	48,4	63,3	47,9	74,5	50,9
Women	50,1	46,6	51,6	36,7	52,1	25,5	49,1

	Lotería Nacional	Euromillón Lotería Primitiva	ONCE	Football pools	Bingo	Slot machines	Casinos
16-25	8,1	9,8	7,2	12,8	13,2	16,1	15,2
25-34	22,5	24,0	21,5	24,3	25,7	25,0	28,6
35-44	22,4	24,3	22,7	22,6	20,0	25,6	17,8
45-54	19,4	18,9	20,1	17,6	17,7	18,0	12,4
55-64	14,3	11,1	14,3	11,3	13,2	5,8	15,2
65-75	13,3	11,9	14,1	11,3	10,2	9,6	10,7
High status	9,2	10,0	8,4	8,7	7,9	10,3	17,9
Med-High status	17,8	17,5	18,7	20,2	24,2	21,1	30,4
Medium status	45,7	47,2	46,0	45,9	43,4	48,9	38,4
Med-Low status	24,2	23,0	23,3	23,9	22,3	18,7	13,5
Low status	3,1	2,4	3,5	1,3	2,2	1,1	0,0

The image of gambling is dominated above all by fortune. In a complementary way, it is viewed as a way of raising taxes; as a way of squandering or wasting or even a vice or addition, an opinion adhered to by the non- gamblers, among whom there is a sector that is hostile to gaming; and as an industry or a form of entertainment. This last concept dominates among gamblers, nourished by the tension of defying fortune, as we can see, for a moderate price.

Gamblers do not have a clear idea of the amounts that they gamble or bet. Their calculations do not stick to the balance between what is being played and what is actually obtained, i. e., it is the case of their actual expenses. But even with this calculation, they underestimate the amounts that they actually gamble. While from the official estimates, it can be considered that around 40€ a month average is what a habitual gambler actually and really spends, these people remember that they only spent an average of 22.5€ per month, meaning to stay, somewhere around half of the amount.

Even then, from the answers of the gamblers, it can be deduced that among those who declared themselves to be regular users in gaming, the amounts that are gambled vary a lot. In accordance with their own statements, subjected, we insist, to high margins of error or forgetfulness, the centre of gravity is set between 6€ and 30€ per month: 55% of the gamblers affirm betting these amounts. Below this figure, there are 16.1%, who are above all sporadic or infrequent gamblers. Above this figure, there are 15.9% while 13.1% points out that they do not know how much they actually gamble or bet.

Table 4: How much do you bet?

	Games	Betting amounts Estimated (millions of €)	Reward amounts Estimated (millions of €)	Real expenditure Estimated (Betting-Rewards) (millions of €)
Privet companies games	*Casinos*	2.287	1.788	499
	Bingos	3.375	2.108	1.267
	Slot machines	14.499	10.874	3.625

	Games	Betting amounts Estimated (millions of €)	Reward amounts Estimated (millions of €)	Real expenditure Estimated (Betting-Rewards) (millions of €)
Spanish State-owned games	*Lotería Nacional (Saturday)*	5.369	3.951	1.694
	Lotería Nacional (Thursday)	276		
	Football pools	557	2.422	1.981
	Quinigol	11		
	Loería Primitiva	3.820		
	Lototurf	10		
	Quíntuple plus	5		
ONCE	*ONCE*	2.101	1.009	1.092
TOTAL		32.309	22.151	10.158
Estimated expenditure per capita in 18-75 years old people/year				***290,36 €***
Estimated expenditure per capita in 18-75 years old people/month				***24.20 €***

As a consequence of this system of calculation for the monthly expenses in gambling, the great majority of gamblers do not know the amount that they get from prizes or rewards throughout the month (69.2%). The smaller prizes or rewards appear to stay on a kind of a limbo, recycled into new bets. Those who do remember it account for an average of 18.2€. It has to be affirmed therefore that the gamblers do not have a clear idea of the profitability of their activity but that they end up with the idea that they do globally lose some amount of money. Nevertheless, these losses appear to be rationalised in the same way as it is being done with the cost of those activities that are connected with recreation and entertainment.

The 73.1% of gamblers put a top on the amounts that they gamble. The amounts that are gambled are facing the impact of the crisis: the 6.2% of the gamblers affirms that they gamble more than they did last year; the 71.2% says that their betting is the same but a 22.3% answer that they are gambling less.

Gamblers set aside an average of 10.1 minutes per day for their activity or hobby but there are considerable differences between the habitual gamblers (15.9 minutes) and the resting 1% declares dedicating more than one hour a day to gambling. This obviously refers to those who gamble with slot machines, cards, etc.

Gaming is a pleasure carried out alone in the majority of occasions, although it can take place in the company of other people, because there are some kinds of gambling that require this. It has been observed that for some infrequent gamblers and for those who are not gamblers, gambling is a way of socialisation, of spending some time with friends or acquaintances and a way of playing with other people.

2. ON LINE GAMING

The Online Gaming Activity has been measured from different perspectives. The 7.1% of the population living in Spain between 18 and 75 years old have gambled at one time on the Internet, as they remember it in a generic manner; a 4.8 % remember having played a specific game of chance on the Internet; and a 1.3 % gambles on the Internet in a regular manner. This is equivalent to argue that 2,484 million of people living in Spain declaring that they have usually gambled or bet on Internet at least sometimes in the last six months, and that 1,679 million remember having played some specific game in this period of time. This elasticity in the memories is not nothing but a reflection of the everydayness in which Internet has become a part of the practices of the people living in Spain.

Table 5: Do you gamble on line? If so, which kind of game do you play to?

	Percentage of on line gamblers (% of the whole population)		Sociological distribution of on line gamblers (% vertical)	
	Declare playing poker, lotteries, etc.	**Remember gambling**	**Declare playing poker, lotteries, etc.**	**Remember gambling**
Total	7,1	4,8	(100)	(100)
Men	7,5	6,5	52,1	66,7
Women	6,7	3,2	47,9	33,3
16-25	25,0	14,0	47,9	39,6
25-34	11,9	8,7	36,6	39,6
35-44	3,9	1,9	11,3	8,3
45-54	1,2	1,7	2,8	6,3
55-64	0,8	1,5	1,4	4,2
65-75	0,0	0,7	0,0	2,1
High status	6,1	3,7	7,0	6,3
Med-High status	9,0	6,7	22,5	25,0
Medium status	8,5	6,0	53,5	56,3
Med-Low status	4,6	2,3	16,9	12,5
Low status	0,0	0,0	0,0	0,0

The gamblers on Internet show a very compact profile: they are less than 35 years old in most of the cases; two thirds are men and as far as social status is concerned, they are in the upper, upper-middle or intermediate-middle classes. This means to say that their profile is more dominated by their being internet users than their being gamblers. Their sociological characterisation reproduces that of Internet surfing in Spain, i.e., they are internet users that gamble and not gamblers that have become internet users.

Table 6: Which game do you play on line?

	Total	Men	Women	Under 25	25–34	35-44	Over 45
Euromillón, Loterías Primitivas	28,0	31,1	24,0	10,2	28.6	47.8	31,1
poker on line	21,2	22,6	19,3	26,5	22,6	14,5	22,6
Lotería Nacional	14,0	18.4	9,4	11,2	15,5	20,3	18.4
Quiz games	9,2	14,2	13,8	9,2	13,7	14,5	14,2
Poker rooms and poker tournaments	12,4	14,4	9,6	12,2	17.3	7,2	14,4
Football pools	14,5	7,1	12,0	9,2	8,9	7,2	7,1
Sport betting	6,9	6,2	11,1	4,1	8,9	13.0	6,2
Bingo	5,1	10.9	1,5	5,1	8,9	7,2	10.9
ONCE	8,3	6,3	3,8	4,1	6,5	5,8	6,3
Casino games	5,3	4,2	6,4	7,1	4,8	4,3	4,2
Slot machines	4,2	4,2	5,3	5,1	3,6	7,2	4,2
Other lotteries	4,6	3,5	5,0	5,1	4,2	1,4	3,5
None	22,4	19,3	26,4	27.6	21,4	14,5	19,3

Internet has offered the possibility of gambling in a great variety of games of fortune; therefore, there are no games dominating in this environment as it is happening in the *real world*. The Euromillion game and the ordinary lotteries and the games that we are able to call typical on the Internet (poker, card games, the casino, the lottery, etc.) are those that dominate in this environment. On the secondary level are games such as the national lottery, question and answer contests and football pools or sports betting. And on the third level, there are the betting, the coupons of the ONCE, the casino gambling games and the gambling machines. The favourite ones are the Euromillion game and the ordinary lotteries, the *on line games* and the *poker rooms* or the casino games as it happens in other Western societies (Bernhard, 2007). In each case, public gambling games are more widely disseminated on the Internet, i. e., they are the ones that most gamblers play.

The 92.4% of the Internet gamblers get on line from their own homes although a 10.4% do it from their work posts. A minority, 4.6%, is connecting from public places. The declared frequency in gambling is lower than that in the real world but the length of the playing session is considerably higher: 30.1 minutes per day, with huge fluctuations between the gamblers and between the games. The session in the gambling machines are similar to those that are found in the bars. Bingo, table games or casino games and poker are played in or around one hour, according with the subjective appreciation of the gamblers.

Table 7: How much time do you use to gamble on line?

	(minutes)
Slot machines	63.2
Bingo	60.4
Casino games	54.1
Poker	50.3
Bets	45.2
On line games	42.3
Quiz games	38.6
Lotería Nacional	37.6
ONCE	37.6
Football pools	31.6
Average	*30.1*
Euromillón	25.6
Other lotteries	21.7

The 59.6% of the gamblers play the national and primitive lotteries, football pools or sports betting or the coupons of the ONCE *on line* through the official website of these games. The number of immigrants that play by accessing through these websites is a lot inferior to the average.

Table 8: Amounts expended in gaming in Spain (in €)

Date	From Spain to abroad	From abroad to Spain	Inside Spain	Total
1st Quar. 2009	72.241.218	271.875	14.836.390	87.349.483
2nd Quar. 2009	68.921.680	299.246	17.384.390	86.605.316
3rd Quar. 2009	69.233.764	485.957	16.026.638	85.746.358
4th Quar. 2009	75.236.398	945.427	19.685.673	95.876.499
2009 TOTAL	285.633.060	2.002.505	67.933.091	355.577.656

Source: Comisión del Mercado de las Telecomunicaciones, Informes trimestrales sobre el comercio electrónico en España, 2009-2010.

The reliability of the data that have been gathered through self-administered questionnaires on the web on the amounts gambled and amounts earned appears to be weak. The contrast between the data that were obtained through a survey and the data that were furnished by the Commission on the Telecommunications Market through the Spanish systems or modes of payment (*Servired*, *4B* and *Euro 6000*) allows us to estimate that the amounts played every year on the Internet vary between 350 and 487,5 million of Euros. On an average scale then, each Spanish gambler on the Internet states betting 24.2€ per month, which is to be interpreted as the difference between what is gambled and what is earned, i. e., the actual or real expenses.

The organisational aspects of the game on the Internet are not known by the users. 71.2% affirm that the server of the games that they play is in Spain. The majority do not know whom to complain in case the prizes or rewards are not paid and the ignorance about the taxes that are collected from this economic activity is generalised.

Table 9: How much do you pay as taxes?

% of rewards paid as taxes	(% of responders)
To 5%	16,7
From 6% to 10%	7,0
From 11% to 15%	7,0
From 16% to 20%	32,0
From 21% to 25%	1,3
From 26% to 30%	2,7
From 31% to 35%	4,2
From 36% to 40%	13,9
From 41% to 45%	1,3
From 46% to 50%	4,2
From 50% to 60%	4,2
From 60% to 70%	1,3
From 70% to 90%	4,2

Finally, the 4.1% of the people living in Spain who are between 18 and 75 years old play through the SMS (text messages) but this manner is restricted to quiz games and jigsaw programs on television that are enlivened by the TV conductors. Those who gamble in other games through text messages or SMS represent a fraction that is almost no appreciable. As a channel for distributing games, the SMS is still something that needs to be explored. In total, gamblers that use the SMS can be estimated to be around 1,435 million of individuals.

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