GAMBLING
COMMISSION

Item 6
GCP(16)24

Gambling Participation and Prevalence of Problem Gambling - Update

For Board approval	
For Board briefing	✔
For Board steer	
For Board information	

Date: **31 March 2016**

Executive summary

1. The aim of this paper is to provide the annual results of the participation and prevalence workstream. This paper supports a presentation of compiled findings of quarterly surveys conducted in March, June, September and December 2015 and, where possible, draw comparisons from previous years. One thousand telephone surveys and two thousand online surveys were conducted in each quarter. The sample is nationally representative of the GB population and weighted in terms of demographic and socio-economic indicators.

2. The survey results are reported on a rolling year basis to counteract seasonal trends in gambling participation.

3. The online survey has been introduced to better understand behaviour of those that gamble online including the technology they use for gambling, location of gambling and number of operators registered with. This is the first publication of online participation findings.

4. To improve communication of findings, infographics have been included in the annual publication. This has raised queries from Camelot who have not noted the same decline in National Lottery play and we will be seeking to identify methodological differences in survey approach to account for this difference.

5. The paper is also accompanied by presentation slides in annex 1.

Background

6. The Participation and Prevalence workstream is responsible for delivering information to internal and external stakeholders on rates of participation in gambling and the prevalence of problem gambling.

7. Since summer 2014 there has been activity on the workstream to more effectively deliver data required to inform policy decisions and to improve the methodological robustness of the existing participation survey.

8. The telephone survey data included in this presentation covers 2012 – 2015 with the qualifying year running from January to December. The problem gambling data was collected from 2013. Online survey data covers January to December 2015 and is our first full year of data.

Telephone participation survey

9. Overall participation has been affected by a decline in National Lottery participation and other lottery play year on year from 2012-2015, a pattern that is reflected across gender and age groups.

10. The notable drop in reported participation for 18-24 year olds between 2014 and 2015 is a reflection of artificially inflated participation in 2014 caused by the Grand National within the survey time parameters (4 weeks prior to survey).

11. The telephone survey indicates greater male online participation to be a continuing trend with male participation averaging 18% compared to 12% of females.

12. When discounting the artificial inflation of reported online gambling for 18-24 year olds, the 35-54 age group is shown to be more likely to gamble online than the 18-34 year old age group.

Problem Gambling

13. The Problem Gambling Severity Index (PGSI) was used as a short version of the 9 item PGSI screening tool. It includes the following three questions:

    - Have you bet more than you could really afford to lose?
    - Have people criticised your betting or told you that you have a gambling problem?
    - Have you felt guilty about the way you gamble or what happens when you gamble?

14. For each question respondents select on a range from ‘never, ‘sometimes’, ‘most of the time’ or ‘almost always’. Responses are then scored from 0-3 meaning the total possible score is 9. The table below illustrates this:

Score	Categorisation
0	Non- problem gambler
1	Low-risk gambler
2-3	Moderate risk gambler
4+	Problem gambler

15. The survey indicates that problem gambling percentage rates remain stable at 0.5%, however there are minor fluctuations between genders. Due to the very low number of problem gamblers responding to the survey these figures should be treated with caution, for example the representation of 0% of female gamblers does not provide evidence that there are no female problem gamblers. It does demonstrate, however that this is reported more often by men in each of the three years, with figures gravitating closer to 1% for men and close to 0% for women. The highest percentage of female problem gamblers reported in this study is 0.2% in 2014.

16. Trends are also precarious when studying age ranges, however general observations indicate that 18-24 year olds are most likely to be screened as problem gamblers and a possible increasing trend in the 55-64 year old category may indicate a requirement for further research and validation. Although also at a low level based on sample size, the 65+ category appears to be reporting a downward trend of problem gambling.

Online survey

Background

17. To date, the Commission’s main measure of gambling participation has been the telephone participation survey carried out by ICM and more recently NatCen. Whilst this survey provides in-depth data on participation in gambling as a whole it does not focus in detail on online play. As such a decision was taken to procure a new survey which could explore online behaviour specifically.

18. Following a competitive tender exercise Populus Research were identified as the supplier for this new survey vehicle and data collection commenced in March 2015.

Methodology

19. The methodology for the survey has been designed to provide in-depth data on those who have gambled online. Given the mode of survey delivery (online) we know that responses will be skewed towards those that have gambled online and therefore results are not representative of the population as a whole. Key methodological features of the survey include:

    a. A nationally representative sample of 2,000 interviews per quarter

    b. 1,000 responses are from Populus’ panel[1] members with 1,000 responses from ‘fresh’ sample recruited through various generic websites (i.e. not websites with an association with online gambling)

    c. Each fieldwork wave is conducted from Friday afternoon – Sunday night

    d. Interviews conducted quarterly in March, June, September and December in-line with the telephone omnibus survey

    e. Data published based on a rolling year average

20. The content of the survey was developed with input from the sector and thematic team to ensure the results are relevant to policy decision making. Core survey content includes:

    a. Past four week participation in gambling activities

    b. Mode of participation (online / in-person)

    c. Frequency of participation

    d. Method of participation (PC / mobile / tablet / laptop / SmartTV)

    e. Location of participation (home / work / whilst commuting / in pubs / clubs)

    f. Betting in-play

    g. Number of accounts registered for and number of accounts used frequently (at least once / month)

    h. Trajectory of online gambling spend

    i. Problem Gambling Severity Index mini-screen

    j. Social Gaming participation

[1] Panel members are individuals who have opted to receive information on surveys Populus is conducting on an ongoing basis. As such we know they may be atypical and hence only form half of the sample

Headline findings

21. More detailed findings are included in slides in annex 1, headline findings were:

    a. Those aged 25-34 are the most engaged age group, having more accounts, betting more in-play and gambling most on mobile and SmartTV.

    b. Laptop is the most popular mode of play for all age groups. Desktop play tends to be positively correlated with age, whereas SmartTV becomes less reported as age increases from 25 onwards.

    c. Overall, participants reported an average 3.5 registered accounts. The accounts with which they have spent money averages 3.2, and a monthly expenditure reported with an average of 2.6 accounts.

    d. Home continues to be the most popular location of play, positively correlated to age group. Of those surveyed, 96% of 18-24 year olds engage in online gambling at home through to 99% of those aged 65+. Those aged 25-34 are the most engaged whilst commuting (21% of this group), at work (18%) and in pubs/clubs (14%) whilst 18-24 year olds are the most engaged at sports venues and tracks (12%).

    e. Overall, 25% of online gamblers have bet in-play in the past four weeks, with the 25-34 year old age group being most engaged (41%) compared with 38% 18-24 year olds and 31% 35-44 year olds. The trend decreases with age, no other age group reports in-play engagement in the time parameters above 20%.

Publication

22. Publication of results will continue to occur on a quarterly basis but will be based on rolling year data from four quarters in order to correct for seasonal variation in gambling behaviour.

23. Enhancements will be made to the telephone survey for 2016:

    - Additional machines categories to ascertain location of play
    - Addition of football and tennis betting categories
    - Expansion of perceptions questions to gather further detail on attitudes to gambling

24. PGSI mini-screen data will be published quarterly

25. Testing of increased % of mobile sample to better reflect the population with commencement of higher proportion in 2017.

26. Future publication dates are as follows:

Publication	Date
Quarterly participation data and PGSI mini-screen data	April 2016
	July 2016
	October 2016
Problem gambling rates in Wales 2015	September 2016
Industry Statistics to September 2015	June 2016
Scottish Health Survey 2015	September 2016
Health Survey England 2015	December 2016
Industry Statistics to March 2016	November 2016