


GAMBLING COMMISSION

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Quarterly Research Briefing 02/14 (May 2014)

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For Board steer	
For Board information	

Prepared by:

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Executive summary

1. The purpose of this briefing note is to provide both the Board and all Gambling Commission (Commission) employees with a short summary of significant research that has either been published recently, or is due to be published in the near future. This, and future, research briefings will be shared with the Responsible Gambling Strategy Board (RGSB).
2. Copies of the full research documents featured in this briefing, or more detailed summaries, are available on request. Full citations of the studies featured in this briefing are provided in the annex.
3. Commissioners will be particularly interested in the Responsible Gambling Trust commissioned review of gambling advertising.

Recent/current research

Gambling Commission research

Gambling participation: activities and mode of access, year to March 2014 Gambling Commission (2014)

4. The following findings are based on a set of questions commissioned by the Gambling Commission in omnibus surveys conducted by ICM Research. These questions ask respondents about their gambling participation in the past four weeks. The data in this report is from the four quarterly surveys conducted in the year to March 2014.

Key findings

Gambling participation in the past four weeks

- An average of 56% of respondents had participated in at least one form of gambling in the previous four weeks. This compares to 55% in 2013.
- A larger proportion of male than female respondents had participated in gambling in the previous four weeks (61% of males and 51% of females).
- An average of 16% of respondents had participated in at least one form of online gambling in the previous four weeks. This compares to 15% in 2013.
- A larger proportion of male than female respondents had participated in online gambling in the previous four weeks (21% of males and 11% of females).
- If those respondents only playing National Lottery Draws online are excluded, the proportion of respondents who had participated in online gambling falls to 10%. This compares to 9% in 2013.

Participation in each activity

- The most popular gambling activity was National Lottery draws (41% of respondents). This was followed by other lotteries (13%), scratchcards (10%) and Horse races (7%).
- No other individual activity was participated in by more than 4% of respondents.

How people gamble

- Overall, 71% of past four week gamblers had gambled 'in person only'. A further 17% had done so both 'online' and 'in person', and 12% had gambled 'online only'.

- For participation in all individual activities, respondents were more likely to report that they gambled 'online only' than they were to report they did the activity both online and in person, with the exception of virtual dog and horse races.
- Participating 'online only' was the most popular method of gambling for spread betting, sports betting, betting on other events and casino games.
- Among past four week bettors, betting in person at a bookmakers was the most common option for all types of betting activity.

Gambling involvement

- The most common frequency of participation for past four week gamblers was 'once a month, less than once a week' with this being the most common frequency for nine activities, although for a significant number of activities respondents indicated that their participation was 'once a week'.

Advertising and marketing

Gambling advertising: a critical research review Binde (2013)

5. This report, commissioned by the Responsible Gambling Trust, provides a critical review of research on gambling advertising, with particular focus on studies that concern the impact of such advertising on participation in gambling and the prevalence of problem gambling. The report also discusses possible research approaches and makes recommendations about future studies.

Key findings

- It is very difficult, if not impossible, to assess how many people gamble excessively because of direct or indirect influence from advertising.
- Part of the difficulty of measuring the impact of advertising on problem gambling is that it is, in general, most probably relatively small.
- While *absolute* extent of impact is difficult to assess, it is possible to study the *relative* impact on various groups of people by different forms of advertising.
- Such research results are valuable for harm prevention and responsible marketing as they differentiate between relatively harmless and relatively risky advertising.
- Advertising is only one of a number of environmental factors that contribute to the prevalence of problem gambling.
- While the total environmental impact may be substantial, advertising in itself is only likely to make a significant contribution to problem gambling in particular conditions (extensive advertising for risky forms of gambling in an immature market with few player protection measures).
- High priority research topics/approaches
 - Surveying the volume and forms of advertising
 - Content analysis
 - Self-rated impact of gambling advertising
 - Self-report studies of perception of advertising
 - Advertising codes and risk factors for problem gambling
- Medium priority research topics/approaches
 - Eye-tracking: an experimental method for exploring exposure
 - Possible experimental methods from alcohol advertising studies
 - The professional production of gambling advertising
 - Deception in gambling advertising

- The ethics of gambling advertising
- Low priority research topics/approaches
 - The economic efficiency of advertising
 - Longitudinal youth studies
 - Econometric studies of advertising impact
 - Cross-sectional observations
- The authors conclude that although research on the impact of gambling advertising is methodologically challenging, it is possible to conduct studies that produce knowledge valuable for policy making, regulation and the responsible marketing of gambling.

**Do advertising and promotions for online gambling increase gambling consumption?
An exploratory study Hing et al (2014)**

6. This study aimed to explore ways in which advertising and promotion of internet gambling may contribute to increased consumption of gambling. Qualitative interviews were conducted with internet gamblers drawn from the general population (n=50), and treatment-seeking internet gamblers (n=31).

Key findings

- Analysis of interview transcripts revealed limited reported effectiveness of advertising and promotions in converting non-gamblers to internet gamblers.
- However, general population gamblers reported occasionally gambling more than intended (increased consumption) in response to free bet and deposit offers.
- Some treatment-seekers reported increased gambling, particularly associated with bonus offers that required matched deposits and gambling before any winnings could be collected.
- Advertisements and promotions invoked urges to gamble among treatment-seeking gamblers, and appeared to some participants to be designed to target individuals who had taken steps to limit or cease gambling.
- The authors suggest that these findings provide preliminary evidence of internet gambling promotional activities increasing overall consumption amongst a subgroup of gamblers.

Online and social games

**A taxonomy of gambling and casino games via social media and online technologies
Gainsbury et al (2014)**

7. This paper reviews the relevant literature to generate a proposed taxonomy framework to distinguish between the different types of online activities with gambling-themed content. The framework builds on the Gambling Commission’s scoping review into social gaming, and is intended to promote clear and consistent discussion and investigation of new and emerging online gambling and gaming technologies.

Key findings

- The authors propose the following taxonomy to be used with games that include some casino (or gambling) themed components:
 - *Social casino game* is defined as a game that does not require payment to play, is based on or has a substantial interaction with a

- social media platform, and the central theme of which is a simulation of a gambling activity (e.g. poker, slots, roulette, bingo, keno, betting).
 - *Social game or virtual world with casino features* games that are free to play and are based on a social media platform but only include optional casino-themed activities.
 - *Practice games* are also free to play, but these are not based on social media sites and are typically provided by gambling operators on a site related to an internet gambling site.
 - *Standalone console, online or mobile games* are similar to practice games, but they are not on a platform provided by a gambling operator.
 - *Subscription or paid console/mobile game* are games which require monetary payment to play but do not provide monetary prizes include console games and paid mobile apps with gambling themes.
 - *Skill-based tournaments or competitions* games which require payment to play and do award prizes but are not chance-based are classified as.
 - *Internet gambling* is classified as an online game in which payment is required, monetary prizes may be awarded and the outcome of the game is predominately determined by chance.
- Under the proposed taxonomy the principal features that differentiate online gambling games include:
 - requirement for payment
 - role of skill
 - type of platform
 - centrality of the gambling theme.

Apps Environment: research report. Prepared for Ofcom
Kantar Media (2014)

8. This qualitative research study explored the applications (apps) environment, by investigating the attitudes and behaviours of app users, the stated and observed impact of apps on their lives, and any stated concerns among users. The study focused on those using smartphones, tablet computers, MP3 players and Smart TVs, covering the Android, Apple iOS, Windows, and BlackBerry smart device operating systems (OS).

Key findings

- *Perceptions* – participants assume official app stores have an active role in monitoring content offered in their marketplace. Apps are viewed as a ‘ring-fenced’ area, limited and contained as opposed to the open expanse of the internet.
- *Permissions* – overall many app users said they paid very little attention to the permissions requested by apps.
- *Concerns*- very few participants raised spontaneous concerns about apps. When prompted, in-app purchasing and advertising were of greatest concern to parents, and at most, a frustration or annoyance to others.
- *Parental controls* - Influenced by the common perceptions surrounding the apps environment, parents were more likely to allow children to use apps than to access browser content as they were perceived as safer and more contained.

An Empirical Study of Gender Differences in Online Gambling

McCormack, Shorter & Griffiths (2014)

9. This survey aimed to develop a better profile of female online gamblers and to examine any gender differences between males and females in terms of how and why they gamble online, their frequency of online gambling, patterns of play, as well as attitudes to online gambling. The survey was placed on international gambling websites, and was completed by both male (n=800) and female (n=175) online gamblers.

Key findings

- Females had been gambling online for a shorter duration of time than males, had much shorter online gambling sessions
- Female respondents also had different motivations for gambling online (i.e., to practice for free, to spend less money and out of boredom), and experienced online gambling differently to males, with increased feelings of guilt and shame for gambling online.
- The authors suggest the results show there is still a stigma around gambling particularly evident among females in this study, and that treatment providers need to be aware of these potential gender differences in online gambling to develop appropriately tailored interventions.

Online gambling participation and problem gambling severity: is there a causal relationship? Philander and MacKay (2014)

10. This study analyses data from the BGPS 2010 to explore whether a causal argument can be made over the effects of online gambling participation on problem gambling. The most notable finding is that, once a correlation issue is corrected, past year online gambling is actually related to a *decrease* in problem gambling severity. [NB: although the title is different Commissioners were previously briefed on this study in February's Quarterly Research Briefing, when the study was in-press].

Other research

Gaming machine density is correlated with rates of help-seeking for problem gambling: a local area analysis in Victoria, Australia Barratt et al (2014)

11. This study uses help-seeking as an outcome measure for a local area analysis of problem gambling in Victoria, Australia. A cross-sectional ecological design was used to investigate the extent to which gaming industry and demographic, economic, and social factors are associated with rates of telephone and face-to-face counseling for problem gambling at the local government area level. Electronic gaming machine density was found to be independently correlated with both types of help-seeking, with a range of local factors controlled. The authors argue that this study supports previous research that has consistently found an association between gaming machine density and problem gambling, using gaming machine expenditure as a proxy measure of harm.

Are Psychology University Student Gamblers Representative of Non-university Students and General Gamblers? A Comparative Analysis Gainsbury, Russell and Blaszczynski (2014)

12. This study aimed to explore the differences between university-recruited psychology student gamblers (which is a population commonly used in psychology research) and a sample of gamblers from the general population. Participants completed online surveys

to assess their gambling behaviour, attitudes and knowledge about gambling, and problem gambling status. Results showed university-recruited students differed significantly from both adults and students recruited from the general population in respect to demographic variables and gambling behavior. When demographic variables were controlled, psychology undergraduate students were found to gamble less frequently, at different times, and to be at lower-risk for gambling-related problems, but had more irrational beliefs and more negative attitudes towards gambling than gamblers recruited from the general population. The authors argue these results indicate that caution is required when extrapolating findings from research using university-recruited student gamblers to community populations.

The Prevalence of Problem Gambling in Denmark in 2005 and 2010: A Sociodemographic and Socioeconomic Characterization Elkholtm et al (2014)

13. This study uses data derived from two nationally representative Danish health surveys to estimate the past year and lifetime prevalence of problem gambling¹, and to explore whether problem gamblers' sociodemographic and socioeconomic characteristics differ from those of non-problem gamblers. The past year prevalence of problem gamblers in Denmark remained stable from 2005 to 2010 (0.9 and 0.8 % respectively). The highest past year prevalence of problem gamblers was found among young men in both 2005 and 2010. Problem gamblers were more prevalent among men, disability pensioners, respondents with a lower level of education, and those not married or cohabiting.

Fair Game: Producing gambling research

Cassidy, Loussouarn & Pisac

14. This report focuses on the production and consumption of gambling research. The authors state the purpose is "to disrupt existing relationships between users and producers and to provide a set of recommendations around which discussions about the future of gambling research can take place". The report is based on qualitative data from semi-structured interviews with gambling research stakeholders (n=109) including researchers, policy makers and members of the industry in the UK², Europe, Australia, North, America and Hong Kong / Macau.

Key findings

- The idea of 'problem gambling' is politically useful. It focuses attention on individual gamblers, rather than relationships between the industry, the state, products and policies.
- Gambling research is heavily dependent on industry support.
- Funding programs prioritise banal questions: researchers are not free to devise critical alternatives unless they wish to remain unfunded.
- There is a lack of transparency about the influence of industry on research and no professional code of conduct governing these relationships.
- The industry has the most accurate and informative data but rarely shares this with researchers.

¹ The surveys use the lie/bet questionnaire.

² Although the researchers spoke to a UK regulator, no-one at the Gambling Commission was approached to take part. It is assumed (from the quote provided) the UK regulator is someone from a Local Authority.

Rates of Problematic Gambling in a British Homeless Sample: A Preliminary Study Sharman et al

15. This study aimed to explore the prevalence of problematic gambling in the homeless. Participants (n=465) were recruited from homelessness services in London, and those that had gambled were administered the PGSI problem gambling screen. PGSI problem gambling was indicated in 11.6 % of the homeless population, compared to 0.7 % in the BGPS. Of participants endorsing any PGSI symptoms, a higher proportion of homeless participants were problem gamblers relative to the low and moderate risk groups, compared to the BGPS data.

Young people and student gambling

A prospective study of adolescent risk and protective factors for problem gambling among young adults Scholes-Balog et al (2014)

16. This study utilised a large longitudinal data set (n = 2,328) to examine a large range of adolescent risk and protective factors for problem gambling in young adulthood. In the full analyses, only two predictors were statistically significant. Gender (female) was associated with a reduced risk of young adult problem gambling, while family rewards for pro-social involvement moderated the risk relationship between adolescent alcohol use and young adult problem gambling.
17. The following studies also focused on young people/student gambling:
 - The Use of Protective Behaviors in Relation to Gambling Among College Students (Lostutter et al)
 - Predicting Gambling Problems from Gambling Outcome Expectancies in College Student-Athletes (St-Pierre et al)
 - Self-Identification as a Moderator of the Relationship Between Gambling-Related Perceived Norms and Gambling Behavior (Foster et al)

Treatment and interventions

18. The following studies focus on problem gambling treatment and interventions:
 - Abstinence versus Moderation Goals in Brief Motivational Treatment for Pathological Gambling (Stea, Hodgins, Fung)
 - Predictors of Treatment Outcome Among Asian Pathological Gamblers (PGs): Clinical, Behavioural, Demographic, and Treatment Process Factors (Guo et al)
 - Gambling-Related Problems as a Mediator Between Treatment and Mental Health with At-Risk College Student Gamblers (Geisner et al)

Psychology and neurobiology of gambling

19. The following studies focus on psychology and neurobiology of gambling:
 - Pathological Gambling and Alcohol Dependence: Neural Disturbances in Reward and Loss Avoidance Processing (Romanczuk-Seiferth et al)
 - Experiential Avoidance Mediates the Association Between Thought Suppression and Mindfulness with Problem Gambling (Riley)
 - Impaired Metacognitive Capacities in Individuals with Problem Gambling (Brevers et al)
 - Damage to insula abolishes cognitive distortions during simulated gambling (Clark et al)

- Gambling Increases Self-Control Strength in Problem Gamblers (Bergen, Newby-Clark and Brown)
- Nonhuman Gamblers: Lessons from Rodents, Primates, and Robots (Paglieri et al)
- Effect of Casino-Related Sound, Red Light and Pairs on Decision-Making During the Iowa Gambling Task (Brevers et al)

Co-morbidities and correlates of gambling

20. The following studies focus on co-morbidities and correlates relating to gambling:

- Correlates of Depressive Symptom Severity in Problem and Pathological Gamblers in Couple Relationships (Poirier-Arbour et al)
- Understanding the relationship between pathological gambling and gambling-related cognition scores: the role of alcohol use disorder and delusion proneness (Abdollahnejad, Delfabbro and Denson)
- Pathological Gambling, Co-occurring Disorders, Clinical Presentation, and Treatment Outcomes at a University-Based Counseling Clinic (Soberay et al)
- *DSM-5* gambling disorder: Prevalence and characteristics in a substance use disorder sample (Rennert et al)
- Health behavior and body mass index among problem gamblers: Results from a nationwide survey (Algren et al)

Forthcoming research

Operator-Based Approaches to Harm Minimisation: Summary, Review and Future Directions Blaszczyński, Parke, Rigbye & Parke

21. This Trust-commissioned report gives critical consideration to current knowledge and understanding regarding harm minimisation in gambling.

Annex A – full citations

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