


Collection of participation, mini-screen and perceptions data

For Board approval	
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Executive summary

1. Since 2000 questions have been included in the ICM telephone omnibus survey to measure gambling participation and public perceptions of gambling. The current survey is made up of:
 - Participation questions
 - Problem gambling mini-screen¹ for those who have gambled in the past year
 - Perceptions of gambling
2. There have been a number of emerging issues with the survey, notably:
 - Due to a reduced demand for telephone omnibus surveys the ICM omnibus has reduced in frequency from once a week in 2012 to once a month currently. This means the Commission has reduced control over when the omnibus runs
 - The response rate for the survey is low, increasing the potential for non-response bias in the data
3. As a result we plan to commission a stand-alone quarterly telephone survey to collect adult gambling prevalence data, problem gambling rates via the mini-screen and measure public perceptions of gambling. It is expected that the new survey will be comparable with the existing omnibus data as far as possible in order that trends can continue to be analysed.
4. **[Exempt information under section 43 of the Freedom of information Act]**

Background

5. The Commission has a responsibility under the Gambling Act 2005 to provide advice to the government on gambling issues. As part of this the Commission undertakes research to monitor participation in and perceptions of gambling in Great Britain.
6. Since 2000 questions have been included in the ICM telephone omnibus survey to measure gambling participation and public perceptions of gambling. In 2010 the Gambling Commission (the Commission) undertook a comprehensive review, including a public consultation, of the way in which gambling prevalence data was gathered and used. The review concluded it would be appropriate to move to a decoupled approach by separating data collection on the level of gambling from data collection on the level of problem gambling. As a result since 2011 participation data has been gathered through a comprehensive methodology which captures in-depth information about how gamblers participate in activities (in-person, online etc) and with what frequency they play. To-date this data has been reported in a brief quarterly report of the year to date.
7. The current survey is made up of:
 - Participation questions:
 - Past four week participation in individual activities
 - Mode of play

¹ The problem gambling mini-screen is a short-form of the Problem Gambling Severity Index (PGSI) main screen which was used in the BGPS series and the Health Surveys. The mini-screen allows assessment of gambling related harm through a three, rather than nine, item screen. It is the intention that the mini-screen will be used to track problem gambling rates between large-scale surveys. The first indication of whether the screen is tracking effectively will be available when the next wave of HSE data is published in late 2016.

- Frequency of play
 - Problem gambling mini-screen for those who have gambled in the past year
 - Perceptions of gambling
 - Is gambling conducted fairly and can be trusted
 - Is gambling associated with criminal activity
8. There have been a number of emerging issues with the survey, notably:
- Due to a reduced demand for telephone omnibus surveys the ICM omnibus has reduced in frequency from once a week in 2012 to once a month currently. This means the Commission has reduced control over when the omnibus runs
 - The response rate for the survey is low (less than 1%), increasing the potential for non-response bias in the data
 - There is a lack of suitable alternative omnibus surveys which have a sample frame similar to that of the ICM omnibus.
9. As a result we plan to commission a stand-alone quarterly telephone survey to collect adult gambling prevalence data, problem gambling rates via the mini-screen and measure public perceptions of gambling. The new survey will be comparable with the existing omnibus data as far as possible in order that trends can continue to be analysed.
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Approach

11. Surveys will continue to be conducted quarterly (in March, June, September and December). To ensure consistency and comparability, the participation and perceptions surveys will continue to be conducted separately at different times of the month. Problem gambling Mini-screens will continue to be included at the end of the participation survey.
12. As mentioned above comparability will be maintained as far as possible, as such the features of the survey which will be retained are:
- 1,000 telephone interviews per quarter for participation questions and mini-screen
 - 1,000 telephone interviews per quarter capturing perceptions of gambling
 - A nationally representative sample (in terms of age, gender, social classification and region) of adults (over 18-year-olds)
 - The same question set to be retained as the 'core' questions
 - The current weighting methodology will be maintained
 - Retaining the same split of mobile / landline sample

13. We would, however suggest making the following changes to the approach:
- **Ceasing the use of Random Digit Dialling² (RDD)** to reach contacts. RDD pulls phone numbers from a pool of all registered GB phone numbers. If the contact is not available at the time of the first call they will not be contacted again unless they happen to come back out of the RDD pool. This results in a response rate of less than 1%³.
 - **Extending the fieldwork period;** fieldwork currently runs from Friday evening to Sunday afternoon. We suggest that the fieldwork is extended to a full week. This has a number of benefits; namely:
 - Extending fieldwork allows each database contact to be tried multiple times, maximising response rates and minimising non-response bias
 - The fieldwork would cover both weekends and weekdays, minimising non-response bias from certain types of people being out at these times and bias generated by people being out for large sports events which are typically held at weekends.
14. In addition to the core questions which will be retained we will also explore with the new supplier the potential for gathering more data through the surveys including:
- **A sample boost of 16-17 year olds;** this group are not currently covered by the Ipsos Mori young person's omnibus or the adult omnibus. We also know from the Health Surveys that those aged 16-24 are at particular risk of experiencing harm as a result of gambling behaviour
 - **In-depth data on online play;** the current telephone survey captures some data about online play but does not go into detail about how products are accessed (desktop, mobile, tablet etc) or how many accounts each individual has. It is likely that this data will be best captured via an online methodology. The Commission currently runs an online tracker with Populus which collects data on participation in and attitudes to, the National Lottery. This survey is run online so would not be appropriate for capture of the core participation and perceptions questions but could be used as a vehicle for some of the questions regarding online play. The use of Populus for this element would be explored further when these questions are developed.
 - **Capture of social gaming play;** as it is not classed as gambling the omnibus has not traditionally captured play on social games which look like gambling. There is, however, increased focus on how play on these games can transition to gambling. Questions in these surveys could capture rates of social gaming by demographic, providing more data on the sector.
 - **Perceptions of gambling;** the current approach to capture of perceptions data only explores two indicators; is gambling conducted fairly and can be trusted and is gambling associated with criminal activity. There is potential to expand these perceptions questions to further understand if the Commission is adequately fulfilling its licensing objectives and changes required. The current questions are very sensitive to media coverage of gambling. Whilst this will always be an issue some more in-depth questioning about the reasons for responses given will likely provide further insight than the current methodology.

² Random digit dialing is a method for selecting people for involvement in telephone statistical surveys by generating telephone numbers at random. Random digit dialing has the advantage that it includes unlisted numbers that would be missed if the numbers were selected from a phone book.

³ Response rate refers to the proportion of usable sample who responded to the survey.

Procurement

15. It is planned that the new survey will be commissioned through an open tender process with the specification being advertised through:
 - Government opportunities
 - Contracts finder
 - UK Shared Business Services Market Research Framework
16. As well as a general advertisement we have identified a number of potential suppliers who will be sent the specification directly. These suppliers are:
 - ICM Research Ltd
 - NatCen Social Research
 - Ipsos Mori
 - Databuild Research and Solutions Ltd
 - MRUK
 - Populus
 - Step Beyond
 - Vector Research Ltd
17. Responses will be assessed through a set of scoring criteria and interviews, if required. The contract will be awarded for three years with a break clause included after year one. We plan that the contract will be in place by late August to allow the first wave of the new survey to run in September.

Considerations

18. The core consideration with changing the approach to collecting participation and perceptions data will be how far it is possible to maintain comparability with the current approach. A number of the suggestions given above (e.g. changing the database source, extending fieldwork) will likely impact on comparability. We do, however feel that these changes bring sufficient benefits in terms of robustness of data to warrant them being made.
19. The new approach will also result in elevated cost. The cost of the new approach would be increased for two reasons:
 - The surveys report on a rolling year average, this means that the current and new approaches would need to be run concurrently for at least three quarters
 - A stand-alone survey will incur an increase cost compared to an omnibus survey where other contractors also run questions. The estimated cost for a standalone survey is likely to be around £50,000 per annum compared to around £30,000 for the current approach. As mentioned above the option of procuring space in another omnibus survey is not viable given that:
 - There are no other GB omnibus surveys which match the sample frame of ICM. Adjusting the sample frame would impact significantly on comparability
 - If another telephone omnibus with a differing sample frame were procured there is the risk that frequency would again decrease leaving the Commission in the position of needing to change the approach again.

Recommendations

20. This paper invites Board to note the initial, high level plans for the participation survey.