

## Quarterly Research Briefing 01/15 (February 2015)

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**Prepared by:**

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## Quarterly research briefing 04/14

### 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. We will share this, and future, research briefings 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.

### Recent/current research

#### Gambling Commission research

3. **Gambling participation: activities and mode of access, year to December 2014**  
Gambling Commission (2014)

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 December 2014.

4. Key Findings

##### **Gambling participation in the past four weeks**

- An average of 53% of respondents had participated in at least one form of gambling in the previous four weeks. This compares with 55% in 2013 and 57% in 2012.
- A larger proportion of male than female respondents had participated in gambling in the previous four weeks (57% of males and 50% of females).
- An average of 16% of respondents had participated in at least one form of online gambling in the previous four weeks.
- A larger proportion of male than female respondents had participated in online gambling in the previous four weeks (18% of males and 13% of females).
- If those respondents only playing the National Lottery are excluded, the proportion of respondents who had participated in gambling in the previous four weeks falls to 33%.
- When respondents only playing National Lottery products online are excluded, the proportion of respondents who had participated in online gambling falls to 10%.

##### **Participation in each activity**

- Overall, 62% of past four week gamblers had gambled 'in person only'. A further 31% had gambled 'online only', and 7% had done so 'both online and in person'.

- 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.
- Participating 'online only' was the most popular method of gambling for spread betting and sports betting.
- The most popular gambling activity was National Lottery tickets (37% of respondents). This was followed by other lotteries (13%), scratchcards (9%) and betting on horse races (7%).
- No other individual activity was participated in by more than 4% of respondents.

### **How people gamble**

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- Participating 'online only' was the most popular method of gambling for spread betting and sports betting.

### **Gambling involvement**

- The most common frequency of participation when looking at an aggregate of all activities for past four week gamblers was 'once a week'. For participation on all aggregated betting activities the most common frequency was 'less than once a month'.

#### **5. Ipsos MORI Young People Omnibus, Gambling Commission (2014)**

This annual omnibus survey reports on young people's gambling behaviour amongst 11-15 year olds (n= 2,796). Further analysis of previous datasets are provided to show changing trends over time.

### **Key findings**

- There is no indication that the incidence of problem, at risk and social gamblers among 12 to 15 year olds is rising compared with the 2008/9 data. This is the first time since 2008/9 that a problem gambling screen has been used in the survey<sup>1</sup>.
- One in six children claims to have spent their own money on a gambling activity in the last week. This figure has been consistent since 2012.
- There is limited movement in play across most gambling activities over time. Fruit machines remain most commonly played, followed by private betting and playing cards for money. Other participation in activities such as betting in shops, using gambling websites and visiting casinos remain notably low.

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<sup>1</sup> As a result of the screen of the new being included, making direct comparisons with previous years should be treated with caution.

- National Lottery play (draw based games and scratchcards) has proven to be flat over time. However, broadening participation levels has seen Lotto play among 11 to 15 year olds decrease.
- Scratchcards are the most commonly used National Lottery product among this age group.
- Most National Lottery purchases are made when accompanied by a person aged 16 or over, usually with majority of parents handing money over at the till.
- Unaccompanied National Lottery purchases peak among 15 year-olds, who are nearing the legal age for participation.

## 6. RGT Machines Research

- The collection of reports summarised below provides an overview of the Responsible Gambling Trust's research programme into machines in bookmakers. The aim of the programme was to use industry-held data to investigate research questions around harmful and non-harmful play. More detailed summaries of each report can be found in the paper submitted to Board in November 2014.

### **Report 1: Theoretical markers of harm for machine play in a bookmaker's. A rapid scoping review. Wardle et al. (2014)**

- This report outlines the evidence scoping review that sets the scene for the research programme. Data from bookmakers such as Ladbrokes, William Hill, Paddy Power, Betfred and Coral informed the analysis. The records covered the period from 1st September 2013 to 30th June 2014.
- To guide the analysis, nineteen markers of harm were identified under the following categories: those where behaviour can be viewed over time (called 'between-session' markers), those where behaviour is viewed within a single session of play (called 'within-session' markers) and contextual markers of harm, relating to the person, their interactions, the venue, location and so on.
- A list of potential markers of harm was generated through a review of existing gambling research literature and from a consultation exercise with key stakeholders.
- Each potential maker of harm was then reviewed against existing literature and also against standard criteria (Bradford Hill) for identifying causal patterns in epidemiology.
- The paper concludes that there is a significant gap in existing knowledge of what patterns of play are most likely associated with a person experiencing harm. Therefore, further research on clarifying what constitutes certain behaviours by taking a more holistic approach which would help understand different variations of these. More generally, a commonly recognised definition of gambling-related harm and method to measure this is required.

### **Report 2: Identifying problem gambling - findings from a survey of loyalty card customers. Wardle et al (2014)**

- The second report from the research programme discusses the methodology used with data taken from loyalty card holders. The procedure of linking two datasets; one containing responses to a participant survey and the second

made up of loyalty card use is outlined. This moves towards building a picture of how the authors could predict who may be experiencing problems with their machine play.

- The results of the combined data are set out in Report 3: Predicting Problem Gambling, Excell et al. (2014) and are detailed below.

**Report 3: Predicting problem gamblers: analysis of industry data. Featurespace & RTI. Excell et al. (2014)**

- In this third report, the findings of the research design process outlined in the previous paper are presented. The initial stage of the research showed that industry data was of a standard that would enable reliable analysis from loyalty card records. This data was then combined with a participation survey with those who held the loyalty cards.
- The research concluded that it was possible to distinguish between potentially harmful play and non-harmful play. But efforts to do so were likely to be far more successful using information from linked sessions (for example, for loyalty card holders) than when using information from single sessions. Even with linked sessions, the algorithms that the researchers developed to identify potentially harmful play still mistakenly identified a significant proportion of non-harmful play as potentially harmful.
- Some testing demonstrated the poor performance of the ABB code's mandatory reminders in identifying problem gamblers. With the current mandatory ABB threshold of £250, only 1.3% of problem gamblers would receive the reminder message, indicating that the ABB limits are set too high.
- A recommendation is made to conduct further research that develops the variables used in this analysis.

**Patterns of play: analysis of data from machines in bookmakers. Wardle et al. (2014)**

- Transactional data recorded by machines major bookmaker within the time frame of September 2013 to June 2014 formed the analysis.
- The core research areas were as follows: where the bets were placed (region, local levels of deprivation and population density, when the bets were placed (time of day, days of the week and month) and what types of games were played. Descriptive statistics such as the mean and median were applied to the dataset.
- In the regional analysis, London was identified as a key area of activity for B2 play. This was in terms of the highest number of bets placed, values staked and money lost. Another conclusion drawn was that the later in the evening play occurred, usually after 8pm, stake size significantly increased. In addition, the time of year in accordance to major sporting events show an increase in machine usage.

**The role of stake size in loss of control in within-session gambling. Impact Of Stake Size on Reflection Impulsivity, Response Inhibition and Arousal when Gambling on a Simulated Virtual Roulette Gambling Task: Implications for Gambling Related Harm. Parke et al. (2014).**

- This study builds on the previous report by investigating the impact of stakes and prizes upon the decision making processes of machine players.
- Thirty two participants were asked to participate in five different gambling environments: £20 per spin winning condition, £20 per spin losing condition, £2 per spin winning condition, £2 per spin losing condition and a control condition whereby participants gambled at £0 per spin with no result provided.
- The findings show that gambling at higher stakes tends to impair decision making which can result in a reduction in self-control when gambling, lending support to a new stake-related risk factor, as opposed to a rate of loss.

**Understanding of Return to Player messages: Findings from user testing. Collins et al. (2014)**

- This report in the machines series is based on cognitive interviews that were carried out with twenty five players. The aim was to understand the perception and understanding of return to player (RTP) messages. It was reported that no participants from the sample had noticed RTP messages.
- Discussions held with participants showed that there was a split between those who held the perception that RTP messages were effective, and those who did not. In addition, responses highlighted that the consequences of unclear RTP messages could encourage machine play.

7. **Changes in machine gambling behaviour. Headline findings from a follow-up study of participants to the Health Survey for England 2012, Scottish Health Survey 2012 and the British Gambling Prevalence Survey 2010. Heather Wardle & Dan Philo (2014)**

- This paper assesses the change in machine player engagement over the previous year with thirty seven respondents taken from the HSE 2012 and the BGPS 2010.
- The report demonstrates that a 13% increase had occurred in machine play. In terms of gender, 85% of men and 89% of women remained at the same level of participation in machine gambling. Lower income households were identified as having the highest levels of machine play.
- Motivations for machine play centred on fun and excitement, whereas slot machine play was associated with holiday/day trips.

## **Young People**

8. **Gambling and substance use: co-occurrence among adults in a recent general population study in the United States. Barnes et al. (2014)**

- This study examines the relationship between gambling behaviour and substance dependence in the United States. A national survey was conducted between 2011-2013 with 2,963 respondents aged 18 and over.

- Gambling dependence was considered alongside other dependences such as alcohol, tobacco and marijuana. The authors conclude that there was an overall link with problem behaviours, in particular substance abuse.
- Problem gamblers were identified in the sample using the 3+DIS screen and tended to be male and from a low socio-economic status.
- The authors conclude that from behaviours reported in the last year, gambling participation was the highest (77%), closely followed by alcohol use (68%).
- It is recommended that future screening of potential problem gamblers in clinical settings should include questions around co-occurring substance abuse.

## Problem Gambling

9. Gambling in the Mist of Economic Crisis: results from three National Prevalence Studies from Iceland. Olason et al. (2015)
  - This paper examines the impact of economic recession upon gambling participation and problem gambling in Iceland. The authors claim that there is little known about the potential effects of the national currency losing half of its value and the rise in household debts on gambling behaviour.
  - A traditional survey methodology was used across the three studies. This allowed for comparability over time as the interviews were carried out before and after the recession hit.
  - Key findings presented by the authors showed that gaming machine play was the only activity to experience decline over the period.
  - Past year prevalence of problem gambling had increased. However, upon further examination this was attributed to an increase in card and internet gambling among young men.
  - Those who had experienced financial difficulty were 52% more likely to have bought a lottery ticket compared with those who were not financially affected.
  - The authors conclude that economic recession can have differential effects on gambling behaviour across the population, notably changes in activity choice.
10. **Do the DSM-5 diagnostic revisions affect the psychometric properties of the Brief Biosocial Gambling Screen?** Brett et al. (2014)
  - This piece examines changes in the diagnostic criteria for gambling disorder in the newest revision of the Diagnostic and Statistical Manual of Mental Disorders (DSM-5). The adaptations aim to simplify the screen without compromising its validity.
  - The authors discuss the potential impacts of these changes before moving on to the psychometric properties of another commonly used screen, the Brief Biosocial Gambling Screen (BBGS).
  - The paper concludes that in light of the adaptations to the DSM-5, BBGS remains a psychometrically supported instrument for gambling disorder because of its ability to produce positive and negative predictive values.

11. **Characteristics and Help-Seeking Behaviors of Internet Gamblers Based on Most Problematic Mode of Gambling.** Blaszczynski et al. (2014)

- This paper explores the impact of gambling modes upon problem gambling behaviour. Two hypotheses informed the research process. The first hypothesis investigated whether internet gamblers are less likely to seek help, and the second asking whether problem internet gamblers are more likely to use online modes of help.
- To explore the hypotheses, respondents were recruited from an online advertisement asking to take part in an online survey. The sample number reached 4,594 people who used social media and gambling help websites. A second sample made up of 620 respondents was then created as they identified as problem gamblers.
- The authors concluded from the statistical significance tests that problem internet gamblers were even more likely than problem land-based gamblers to be male. The acceptance of help was less likely to occur amongst internet gamblers compared to land-based gamblers.
- There was a low usage of online help amongst both groups. However, problem land-based gamblers were more likely to seek formal help.
- Recommendations were made for an increase in targeted support for problem internet gamblers. A second recommendation was made for further research into why help-seeking rates are lower among internet problem gamblers.

## Other

12. **An Exploratory Study of Gambling Operators' Use of Social Media and the Latent Messages Conveyed.** Delfabbro et al. (2014).

- This paper is based on the analysis of latent messages extracted from social media posts. A sample of 101 websites and social media profiles of large gambling operators were used as the sources.
- The research questions focused on: the type of social media used, content of promotions and the prevalence of responsible gambling messages.
- A central finding in the paper shows that key messages on social media platforms tended to be framed positively, and rarely communicated responsible gambling messages. The authors hold a discussion around the impact of these findings upon vulnerable groups and communities more widely.
- The paper concludes that the impact of accessible and pervasive gambling promotions upon regular gamblers and vulnerable groups must be considered in future research.

13. **Review of the Association of British Bookmakers' Code for Responsible Gambling and Player Protection in Licensed Betting Offices in Great Britain, and of M. Griffiths (2014) Responsible Gambling Initiatives and Preliminary Evaluation of the ABB Code of Conduct.** Livingstone (2014).

- This paper, commissioned by the Campaign for Fairer Gambling, is split into two themes. The author provides a critical review of the ABB code for Responsible Gambling and Player Protection, before moving onto a critique of

Mark Griffith's own ABB review titled Responsible Gambling Initiatives and Preliminary Evaluation of the ABB Code of Conduct (2014).

- The author claims that while 'responsible gambling' is a widely term, is it an ill-defined concept which places the individual at the centre of gambling related harm. As a result of this focus on the individual, the impact of social, economic and financial factors, as well as the marketing of products, is sidelined.
- The ABB code of conduct is considered in the context of multiple jurisdictions by the author. The code is critiqued for not explicitly addressing harm minimisation and instead reflecting industry self-regulation. However, it is argued that if the measures were to be properly enforced, effectiveness would be strengthened.
- The second half of the paper unpicks the paper published by Mark Griffiths (2014) around the same issue of the ABB Code of Conduct. The author claims that Griffiths presents a highly positive evaluation of the code and attributes this to his involvement in producing the policy. Additionally, the data discussed by Griffiths is not provided in the form of tables or an appendix. Livingstone claims that this weakens the points argued for by Griffiths.

## **Forthcoming Research**

- Contextualising machine gambling characteristics by location - final report A spatial investigation of machines in bookmakers using industry data (Geofutures – funded by RGT)
- ABB Code of Responsible Gambling and Player Protection: Evaluation of early impact (NatCen – funded by RGT)

## Annex

Barnes et al. (2014). Gambling and substance use: co-occurrence among adults in a recent general population study in the United States. *International Gambling Studies*.

Blaszczynski et al. (2014). Characteristics and Help-Seeking Behaviors of Internet Gamblers Based on Most Problematic Mode of Gambling. *Journal of Medical Internet Research*.

Brett et al. (2014). Do the DSM-5 diagnostic revisions affect the psychometric properties of the Brief Biosocial Gambling Screen? *International Gambling Studies*.

Brosowski et al. (2015). Gambling in the Mist of Economic Crisis: results from three National Prevalence Studies from Iceland. *Journal of Gambling Studies*, [epub ahead of print].

Collins et al. (2014). Understanding of Return to Player messages: Findings from user testing. Machines Research funded by the Responsible Gambling Trust.

Delfabbro et al. (2014). An Exploratory Study of Gambling Operators' Use of Social Media and the Latent Messages Conveyed. *Journal of Gambling Studies*.

Derevensky et al. (2014). Do Social Casino Gamers Migrate to Online Gambling? An Assessment of Migration Rate and Potential Predictors. *Journal of Gambling Studies*.

Excell et al. (2014) Predicting problem gamblers: analysis of industry data. Featurespace & RTI. Machines Research funded by the Responsible Gambling Trust.

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

Ipsos MORI & Gambling Commission (2014). Young People Omnibus.

Livingstone, C. (2014). Review of the Association of British Bookmakers' Code for Responsible Gambling and Player Protection in Licensed Betting Offices in Great Britain, and of M. Griffiths (2014) Responsible Gambling Initiatives and Preliminary Evaluation of the ABB Code of Conduct.

Parke et al. (2014). The role of stake size in loss of control in within-session gambling. Impact of stake size on reflection impulsivity, response inhibition and arousal when gambling on a simulated virtual roulette gambling task: implications from gambling related harm. Machines Research funded by the Responsible Gambling Trust.

Wardle et al. (2014) Identifying problem gambling - findings from a survey of loyalty card customers. Machines Research funded by the Responsible Gambling Trust.

Wardle et al. (2014). Patterns of play: analysis of data from machines in bookmakers. Machines Research funded by the Responsible Gambling Trust.

Wardle et al. (2014). Theoretical markers of harm for machine play in a bookmaker's. A rapid scoping review. Machines Research funded by the Responsible Gambling Trust.