

Gambling Participation and Prevalence of Problem Gambling - Update

For Board approval	
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Prepared by:

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Executive summary

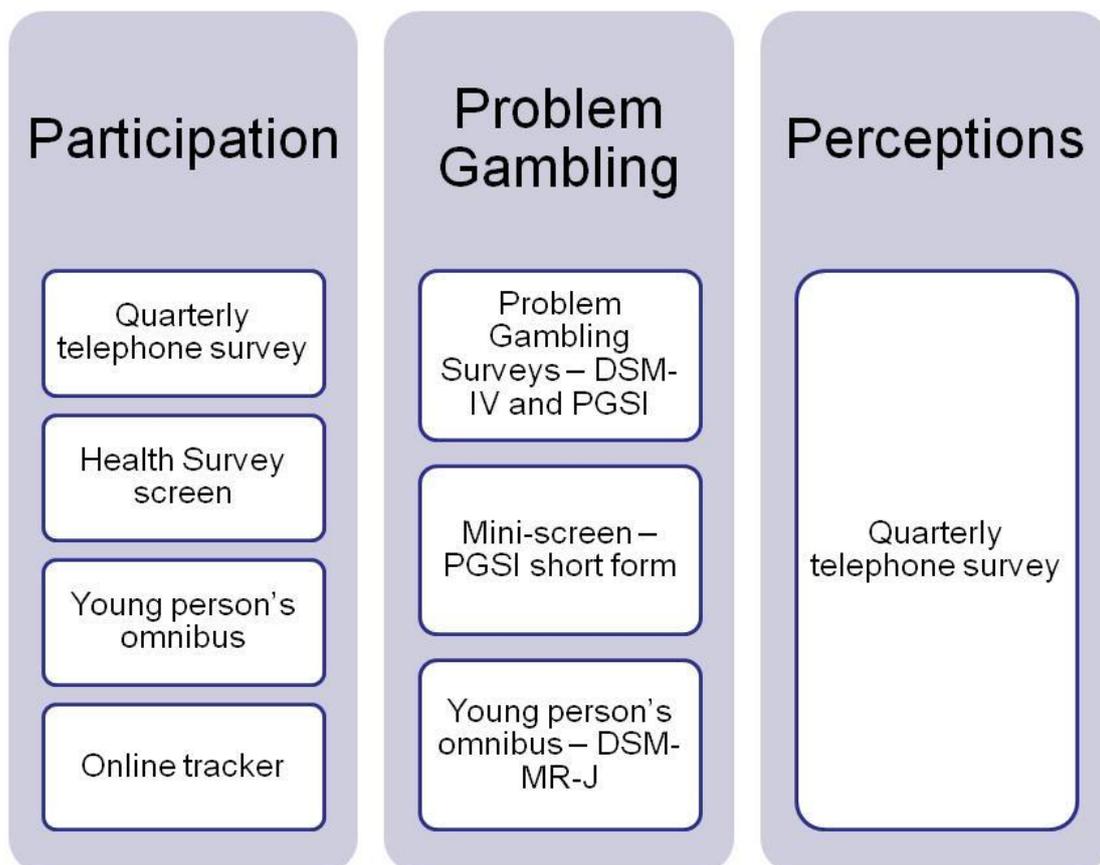
1. The aim of this paper is to provide an update on the participation and prevalence workstream. The key areas the paper focuses on are the commencement of an online survey, improvement of the methodology for the telephone participation survey and findings from secondary analysis of participation data for 2008-2014.
2. We introduced the online survey 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. The contractor has completed the first two waves of data collection, and we plan to publish the data early in 2016.
3. Improvements have also been made to the methodology of the telephone participation survey. The key change has been a shift from an omnibus approach (where our questions are included in a survey along with other clients' questions) to a stand-alone survey controlled by the Commission. This change has resulted in a higher response rate to the survey and greater security of survey delivery. First data from the new stand-alone telephone survey will also be published in early 2016.
4. The paper also provides key findings from secondary analysis of the telephone participation survey. The analysis was conducted by an external consultancy, Databuild. We published the report in May 2015 which explored trends in overall gambling participation, participation in individual activities, trends amongst demographic subgroups and co-fluctuation of trends in gambling participation with macro-economic indicators. The report found that overall participation in gambling is relatively static with a recent decline since the Lotto price rise. It also identified some interesting trends amongst sub-groups. In particular rates of participation in gambling have declined amongst those in DE¹ social grade but increased amongst those in AB² social grade. The analysis also showed that rates of participation in both fruit and slot machines and FOBTs have declined.
5. **[Exempt information under section 22 of the Freedom of Information Act]**

¹ DE social grade - semi-skilled & unskilled manual occupations, unemployed and lowest grade occupations

² AB social grade – higher and intermediate managerial, administrative and professional occupations

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. We deliver information gathering in this area through a combination of Commission-led surveys, mainly relating to gambling participation, and through inclusion of gambling related questions in larger scale surveys, such as the health surveys. The figure below summarises the surveys we currently use:



8. Since summer 2014 we have undertaken 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. We also commissioned external secondary analysis of the participation data relating to 2008-2014 which was conducted by the research consultancy, Databuild.
9. This paper provides an update on:
 - a. Commencement of an online survey to explore online gambling behaviour in-depth
 - b. Methodological changes to the telephone participation survey to improve robustness of approach
 - c. Headline findings of secondary analysis of the participation 2008-2014

Online survey

Background

10. To date the Commission's main measure of gambling participation has been the telephone participation survey carried out by ICM and more recently NatGen. 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.
11. Following a competitive tender exercise Populus Research was identified as the supplier for this new survey vehicle and they commenced data collection in March 2015.

Methodology

12. We developed the methodology of the survey 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' panel³ 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
13. We developed the content of the survey 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

³ 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

14. In quarter one 2015 we also included questions on social media, marketing and advertising on a thematic basis. The aim of this thematic section was to further understand how engaged online gamblers are with gambling companies on social media and what impact both social media and advertising have on gambling behaviour. Specific questions included:
 - a. Whether respondents followed any gambling companies on social media
 - b. Whether posts on social media or advertising have prompted online gamblers to spend money on gambling activities
 - c. What impact the social media posts / advertising had on gambling spend (prompted to start gambling / increase amount gambled etc)
15. In quarter two 2015 we altered the focus of the survey with thematic questions included on self-exclusion. These questions covered:
 - a. Awareness of self-exclusion and gambling management tools
 - b. Lifetime uptake of self-exclusion
 - c. Reasons for self-exclusion
 - d. Self-exclusion from multiple operators
16. In subsequent quarters the two thematic sections will be alternated unless new priorities arise which we need to include.
17. **[Exempt information under section 22 of the Freedom of information Act 2000]**

Publication

18. We will publish results on a quarterly basis the results will, however, be based on rolling year data from four quarters in order to correct for seasonal variation in gambling behaviour. We will therefore publish the first results in early 2016. Following discussions with DCMS it has been agreed that core survey content will be published as experimental official statistics⁴.

Telephone participation survey

19. Since 2000 the Commission has captured data on participation in gambling and perceptions of gambling via a telephone survey conducted as part of an omnibus survey. There have been a number of emerging issues with the survey, including:
 - a. Due to a reduced demand for telephone omnibus surveys the ICM omnibus reduced in frequency from once a week in 2012 to once a month in 2014. This means the Commission had reduced control over when the omnibus ran
 - b. The response rate for the survey was low, increasing the potential for non-response bias in the data

⁴ Experimental official statistics are statistics that have been produced and released in line with the Official Statistics Code of Practice but are subject to change in terms of methodology in the future. Publication of this type allows review of the questionnaire post-publication based on feedback from internal and external stakeholders.

20. As a result we have commissioned a stand-alone quarterly telephone survey to collect adult gambling prevalence data, problem gambling rates via the PGSI mini-screen⁵ and measure public perceptions of gambling. We commissioned the stand-alone survey in late 2014 through an open tender process. Following this tender process NatCen were identified as the new supplier for the survey.
21. In order to continue reporting on a rolling year average and to ensure that comparability of the surveys can be assessed, for quarters one, two and three of 2015 we have run the new stand-alone approach in parallel with the previous omnibus approach. In addition to maintain methodological comparability as far as possible we have continued with the same questionnaire and a similar weighting strategy.
22. NatCen has now completed data collection for quarters one and two of the new stand-alone survey, with the results showing good tracking against the previous approach. They have also achieved a greatly improved response rate of 15%, compared with 0.8% with the previous approach.
23. We will publish data from the new survey as part of an annual report under official statistics in early 2016. The report will contain information on participation, perceptions and the PGSI mini-screen.

Secondary analysis of participation data

24. In 2014 we commissioned Databuild, a research consultancy, to carry out secondary analysis of the telephone participation data for 2008-2014. The aim of the analysis was to explore trends in gambling behaviour over time and to set these in the context of macro-economic indicators.
25. We published the full report in May 2015 which can accessed here: <http://www.gamblingcommission.gov.uk/pdf/Trends-in-gambling-participation-2008-2014.pdf>
26. Key findings from the report were:
 - a. Overall gambling participation has remained relatively static across the period. Since the Lotto price increase there has been a fall in National Lottery draw-based games participation which has led to a slight fall in overall gambling participation
 - b. Trends in gambling participation have differed between social grade; participation has decreased amongst those in DE⁶ social grade but increased amongst those in AB social grade⁷
 - c. Participation in online gambling has increased 50% across the period. The biggest increases have been observed amongst those aged 35-54 and those in the AB social grade
 - d. Participation in National Lottery draw-based games has decreased amongst both genders and all age groups except those aged 18-34. Participation in

⁵ The PGSI mini-screen is a short form version of the PGSI problem gambling screen. The full PGSI screen contains nine survey items relating to issues associated with gambling behaviour. The PGSI mini-screen was developed to provide a shorter survey instrument and contains three survey items.

⁶ DE social grade - semi-skilled & unskilled manual occupations, unemployed and lowest grade occupations

⁷ AB social grade – higher and intermediate managerial, administrative and professional occupations

other lotteries has increased amongst women and those aged 35+, showing some evidence for substitution between the products.

- e. Participation in online betting increased across the period. The most notable increases were amongst those aged 18-34 (3.4% to 7%), those in employment (2.2% to 4.4%) and those in the AB social grade category (1.6% to 4.3%)
- f. Participation in both fruit and slot machines and FOBTs decreased across the period with past four week participation rates for 2014 at 2.4% and 1.4% respectively.

27. More detailed findings are included in presentation slides in annex 1.

Upcoming publications

28. We publish data from participation surveys on a regular basis. Publication of data on problem gambling from the health surveys is dependent on the timetables of the Department of Health and Scottish Government. Upcoming publications include:

- Quarterly telephone participation data in July 2015 and October 2015
- Scottish Health Survey 2014 results in September 2015
- Annual report on telephone participation data, online survey, mini-screen data and perceptions data in early 2016
- Data on problem gambling in Wales in early 2016
- Scottish Health Survey 2015 results in September 2016
- Health Survey England 2015 results in December 2016.