


# GAMBLING COMMISSION


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## Quarterly Research Briefing 03/15 (September 2015)

For Board approval	
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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 colleagues 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.
3. Following feedback from some Board the research briefing has a revised format. We intend for the revised structure to draw attention to limitations of the research and present the potential policy implications. We would like to receive feedback on the extent to which the new format achieves these aims.
4. We have:
  - introduced an assessment table to summarise the limitations around the research process used in each piece of research
  - considered using a scoring process for each article. However, we decided that this was not appropriate given the subjective nature of evaluating research. Instead we created an assessment table that draws upon a number of categories such as methodology, sample size and jurisdiction. The table can be found in Annex B
  - revised the layout of the research briefing to accommodate this change in approach. A number of headings sit underneath each title, such as: aims and methodology; key findings; limitations and potential policy implications. These headings aim to guide readers to the most significant findings of each study.
5. We considered introducing an annual research briefing in addition to the quarterly briefings to take a more strategic view of what we have learned over the preceding year and what it might imply for our regulatory policy. After a series of internal consultations, we concluded that it would make more sense to:
  - explicitly outline potential policy implications in the quarterly briefing
  - produce short thematic accounts of priority topics that emerge from reviewing the quarterly briefings, conversations with sector teams and those undertaking horizon scanning activity. The accounts will be live documents that we will update when new evidence becomes available. There is an example of a thematic review in Annex C. This has not been quality checked or signed off, but gives an idea of the type of content we propose to produce
  - ensure that when policy issues are taken to Board, the paper explicitly addresses the evidence base.
6. The Board is invited to note the revised format of the quarterly research briefing and provide feedback.

# Gambling Commission Research

## **Gambling participation: activities and mode of access, year to March 2015.**

Gambling Commission (2015)

### **Aims & methodology**

1. 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 June 2015.

### **Key findings**

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

2. An average of 49% of respondents had participated in at least one form of gambling in the previous four weeks. This compares with 55% in the year to June 2014 and 57% in the year to June 2013. This decrease has been predominantly driven by a decrease in participation in National Lottery draws.
3. A larger proportion of male than female respondents had participated in gambling in the previous four weeks (52% of males and 46% of females).
4. An average of 15% of respondents had participated in at least one form of online gambling in the previous four weeks.
5. A larger proportion of male than female respondents had participated in online gambling in the previous four weeks (17% of males and 12% of females).
6. 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 29%.
7. When respondents only playing National Lottery products online are excluded, the proportion of respondents who had participated in online gambling falls to 9%.
8. An average of 43% of 18-24 year olds had participated in at least one form of gambling in the previous four weeks. This compares with 48% in the year to June 2014 and 48% in the year to June 2013.

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

9. The most popular gambling activity was National Lottery tickets with 35% of respondents having participated in the past four weeks. This compares with 40% in the year to June 2012 and 46% in the year to June 2013.
10. This was followed by other lotteries (11%), scratchcards (10%) and betting on horse races (4%).
11. No other individual activity was participated in by more than 4% of respondents.

#### **Gambling involvement**

12. The most common frequency of participation when looking at an aggregate of all activities for past four week gamblers was 'once a week' (42% compared with 42% in the year to June 2014 and 44% in the year to June 2013). There has been a rise in the overall frequency of participation with 15% of respondents reporting to have participated 'less than once a month', compared with 14% in the year to June 2014 and 13% in the year to June 2013.
13. A similar trend is observed for participation on all aggregated betting activities, with the most common frequency being 'less than once a month' (37% compared with 50% in the year to June 2014 and 29% in the year to June 2013).

### **Limitations**

14. The original ICM omnibus was discontinued and we had to source a separate standalone survey for one of the quarters.
15. Data collection in April 2014 was conducted following the Grand National, and so results including those data are skewed.

### **Potential policy implications**

16. This forms part of our approach to collecting adult gambling prevalence data, allowing us to track participation in different modes and activities, as well as the frequency.

## **Responsible Gambling Trust Research**

**Developing a logic model for the ABB Code for Responsible Gambling and Player Protection.** NatCen Social Research funded by the Responsible Gambling Trust.

### **Aims & methodology**

1. The aims of the logic model were for those responsible for designing and implementing the Code to articulate its intended outcomes, and the mechanisms by which these outcomes would be achieved.
2. There were two workshops held with key stakeholders from the ABB and from the bookmakers' industry. The ten participants were made up of: two representatives from the ABB, representatives from two organisations that supply gambling machines to bookmakers and representatives from five major bookmakers who had implemented the code (Betfred, Coral, Ladbrokes, Paddy Power and William Hill).

### **Key findings**

3. The key stakeholders agreed that the ultimate goals of the Code were to reduce gambling-related harm and to increase business responsibility and sustainability.
4. The longer-term outcomes were agreed to be: achieve a sensible level of regulatory involvement from Government in a free, fair and transparent market place, gambling within betting shops is deemed to be a safe leisure activity, to achieve the longer-term outcomes betting shop staff should receive code specific training to supplement an existing training programme.
5. The shorter-term outcomes were agreed to be: increased awareness amongst staff of: a wider range of problem gambling indicators, the responsible gambling help and information that staff are expected to promote and machine tools.
6. The medium term outcomes were agreed to be: increase staff confidence to address potential signs of problem gambling, staff to effectively communicate responsible gambling messages and tools, increase opportunity for staff to spend time with customers and increase staff commitment to responsible gambling.
7. The following assumptions were noted in the workshop that staff-customer interactions have positive outcomes and that there are enough staff in betting shops to allow them to engage with customers.

### **Limitations**

8. The authors suggest that further work is needed to define some of the concepts that feature in the code. This will help measure the outcomes and clearly outline the goals of the Code.
9. The evaluation was sometimes challenging due to the lack of consistency in practice across operators. This made the impact of the Code difficult to measure.
10. The workshops did not attempt to evaluate the impact of the Code upon machine gamblers in bookmakers who the Code is aimed to help.

### **Potential policy implications**

11. The authors recommend that the short, medium and long term outcomes must be monitored by the ABB going forward.
12. The authors emphasise the importance of effective staff training provided by betting operators to promote responsible gambling amongst at-risk and problem gamblers.
13. The authors suggest that the ABB should consider evaluating the impact of the Code such as researching players' views and reactions to the messages.

## **ABB Code for Responsible Gambling and Player Protection: evaluation of early impact among machine gamblers. NatCen Social Research funded by the Responsible Gambling Trust.**

### **Aims & methodology**

1. To use machine data to evaluate the impact of the Code in light of the following four outcomes: the length of time spent gambling on machines; the amount of money gambled on machines during the session; the proportion of machine gambling sessions which lasted 30 minutes or more and the proportion of machine gambling sessions in which individuals inserted £250 or more into the machine.
2. These outcomes were chosen as the ABB and other industry operators anticipated that the Code would result in players gambling in a more controlled way. Spending more time and/or money gambling than intended is generally accepted as a consequence of uncontrolled gambling. Therefore, it was hypothesised that if the Code was to demonstrate any early impact with regard to machines it would be a reduction in the amount of time and/or money spent gambling.
3. The analysis first assessed the impact of the Code on sessions played during the first day of its introduction (1st March 2014) to look at the immediate impact on outcomes. Then, the impact throughout March for the same groups of gamblers was explored to look at potential adaptation in behaviours over this month.

### **Key findings**

4. The results did not show any statistical evidence that the Code had an impact on the four outcomes considered.
5. Failure to find this statistical evidence can be explained as less than 10% of sessions included some kind of interaction with the machine-based messages and very few sessions included any kind of voluntary limit-setting.
6. It is clear that setting voluntary limits on machines is not a popular choice among machine players; less than 0.5% of machine play sessions included a voluntarily set time or money limit, and use of these tools declined throughout 2014.

### **Limitations**

7. It is premature to conclude that the findings of this evaluation provide final evidence that the Code is ineffective or effective. Because of funding constraints, this study only looked at a very narrow range of outcomes and was limited to analysing data from machines.
8. The study did not consider the broader impact of staff interventions specifically or of responsible gambling messaging, nor the impact of these elements of the Code on non-machine gamblers. Also, the study does not reflect improvements that operators have been working on since the ABB code was introduced.
9. Existing research findings show that machine players can experience harm from gambling at what might be viewed as comparatively low levels of expenditure. In terms of measuring harm, understanding the context of the individual and what harm means to them is of paramount importance.
10. There are a number of recommendations for further evaluation. This includes research to understand why people do not set voluntary limits on machines, what the right level is at which mandatory messages on machines are triggered, further evaluation of the impact of changes in staff training, and responsible gambling advertising across all gamblers in bookmakers.

### **Potential policy implications**

11. The authors recommend that the ABB should employ other evaluation methods and techniques to explore the impact of the Code further.
12. The authors suggest that further work is needed with the industry to encourage the use of responsible gambling tools on machines. This is a critical failing of the Code as the intended behaviour changes have not occurred.

## **Gambling- related Harm**

### **Exploring area-based vulnerability to gambling-related harm: who is vulnerable? Findings from a quick scoping review. Wardle (2015).**

#### **Aims & methodology**

1. To explore who may be vulnerable to gambling-related harm and to assess the evidence base on this topic. This paper reports on Phase 1 of a research project supported by Manchester City Council and Westminster City Council to advise local authorities on the issue of gambling-related harm and the location of gambling premises. Phases 2 to 4 are ongoing and these reports are to be published in September 2015.
2. A series of semi-structured interviews were held with a range of stakeholders (academics, policy makers, industry, treatment providers and legal professionals) to explore understanding of terms like gambling-related harm and who they believed may be vulnerable to harm. From these interviews, a list of those deemed more likely to be vulnerable to harm was created.
3. A brief scoping review of research literature then examined the evidence base for each group/characteristic mentioned.

### **Key findings**

4. There was a broad consensus among stakeholders that gambling-related harm meant adverse consequences arising from someone's gambling engagement that could affect the individual, their family, friends, broad social network or community. It was perceived that harm could be short or long term and that you did not have to be a "problem gambler" to experience harm.
5. The vulnerable groups who may experience gambling-related harm were considered to be: young people, students, those with mental health problems, substance use/misuse issues, learning difficulties, certain ethnic groups, migrants, homeless, those with constrained economic circumstances or living in deprived areas, prisoners, older people, problem gamblers, those with personality/cognitive impairments and women.

### **Limitations**

6. A solid evidence base looking at broader gambling-related harm has yet to be developed meaning that the above finding is a result of a probabilistic approach, i.e. trying to understand who is more likely to experience gambling-related harm. This meant that the literature used was largely made up of studies focusing on problem and at-risk gambling.

### **Potential policy implications**

7. The licensing objectives set out in the Gambling Act (2005) are used as a reference point to challenge what groups need to be treated as vulnerable and how they can be protected. The author claims that the Act itself does not define what are considered to be vulnerable groups.
8. The author argues that vulnerable groups should not be perceived in silos. The focus instead should be on the multiple and complex risk factors for harm, with some people having multiple characteristics of potential vulnerability.
9. There is a call for public health specialists to advise local authorities on gambling issues and protection of the vulnerable.
10. Partnership working between the industry, local authorities and community safety teams seen in alcohol licensing and local partnerships should be used to address concerns around gambling-related harm in the community.
11. Due to the flexibility of Statement of Licensing Policy, local authorities should give special consideration to the proposed location of premises. The Statements of Licensing Policy is to be reviewed by local authorities this year and will take effect from January 2016.
12. More funding into the research of gambling-related harm is needed to draw supported conclusions on the groups affected and how they experience harm. From this, it will be possible to make further policy recommendations.

## **Playing Social Roulette: The Impact of Gambling on Individuals and Society in Ireland. Fulton (2015).**

### **Aims & methodology**

1. The main aim of the study was to explore gambling behaviour in Ireland and specifically the issue of problem gambling and its impact on the individual, the gambler's social connections and wider impacts of gambling behaviour on society.
2. The study took an ethnographic approach to allow an in-depth understanding of gambling behaviour. Qualitative interviews with 55 stakeholders were carried out with: addiction service providers (n = 10), gamblers (n = 22), gamblers' social connections (n = 22), the gambling industry (n = 7).

### **Key findings**

3. Four main categories of gambling emerged from the interviews: social gambling, problem gambling, compulsive or pathological gambling and professional gambling. It was noted that there was overlap in the definition of problem gambling and compulsive or pathological gambling.
4. All gamblers described a buzz associated with gambling. Problem gamblers described rationalising their behaviour to explain away losses. Participants who were socially connected to problem gamblers were aware of behaviours such as mood swings and acting secretively. These characteristics were supported by those working from Addiction Services who noted that problem gambling differed from other addictions in that it does not give rise to physical signs of problematic behaviour. On the other hand, some observations made by workers in Addiction Services have shown them to be visibility spaced out, pre-occupied and experience insomnia.
5. Participants expressed that problem gambling behaviour was difficult to detect until the gambler had reached a crisis point. Some potential indicators of developing problems were offered such as: increased isolation, chasing losses, increased spending on gambling, and high involvement (especially of young males) in e-gaming, where there is a need to win or break records achieved.
6. An event that sparked an upward or downward movement in emotions could precede gambling. On one hand, gambling was perceived as an activity that could help to 'fix' negative emotional experiences such as job losses, feelings of depression, suicidal thoughts or coping with the death of someone. On the other hand, some people celebrated happy events by participating in gambling.
7. The participants who worked for Addiction Service Providers attributed the ease of access to forms of gambling such as bookmakers and online accounts has significantly influenced gambling behaviour amongst men. This has allowed problem gamblers to keep their behaviour hidden from their social network.
8. Problem gamblers tend to seek help in their late thirties to early forties, however a significant amount of time and money has been spent by this time as many begin gambling at a young age.
9. The social impact of problem gambling is said to lie within a breach of trust that covert gambling creates. Examples that were provided by families and friends include: starting arguments so that problem gambler can leave to gamble, borrowing money that has not been paid back and lying about the frequency of gambling. As a result, many social ties have broken down and the problem gambler has become isolated further.

### **Limitations**

10. A key focus of this study is on the impact of recent legislation introduced to Ireland called the General Scheme for the Gambling Control Bill (2013), which makes this



piece specific to Ireland.

11. While the study provides rich data on the experience of problem gamblers' and their social connections, the social impact of gambling and problem gambling in Ireland cannot be accurately measured using this methodology alone.

#### **Potential policy implications**

12. The findings of this study could inform the approach being taken by RGSB/RGT in their work on measuring gambling-related harm. Jon Watkin (RGSB Secretariat) is meeting with the project lead on 12 August.
13. This study could help inform staff training measures to monitor problem gambling behaviour as it details characteristics that problem gamblers exhibit.
14. This information sheds light on the experience of social networks that surround gamblers, which could in turn shape how support could be given to problem gamblers' and people they are connected to socially. One recommendation made in the paper is to incorporate gambling into the curriculum at college age in order to raise awareness of responsible gambling.

## **Marketing & Advertising**

### **Marketing of Sports Betting and Racing (2015). Sproston et al.**

#### **Aims & methodology**

1. To explore the impact of betting and racing marketing on gambling behaviour and intention among Australians, particularly on specific population subgroups: regular bettors, non-regular bettors, problem gamblers and adolescents.
2. The study utilised a mixed methodology approach that is made up of: a review of literature derived from Australia and overseas, an environmental scan of the advertisements and marketing of 6 major betting companies, content analyses on 24 advertisements, 10 focus groups were held with ten participants in each (n = 100) and an online survey was conducted (n = 3,200).

#### **Key findings**

3. Television was the most popular advertising medium for all six betting brands featured in the research. Overall, for sporting events and racing, wagering advertising is more prolific in events viewed on subscription television.
4. Over a ten week period the six wagering providers collectively spent \$12 million (approx. £5.6 million) on a total of 13,000 advertisements.
5. All of the six main betting companies were actively engaging social media users. This was carried by regular updates on sporting or racing events details, their wagering products, deals and competitions.
6. The ease of access to products, at any time, and these mainly targeted at male bettors.
7. The data collected from the content analyses showed that advertisements were predominantly: fast-paced, upbeat, focused on success/monetary value and forming relationships through betting. Multi-channel or digital offerings were integrated into all brands' business strategies and there were references to leveraging CRM technologies to reach a wider, mass-market.
8. Responsible gambling messages were not commonly seen in televised or live sports

advertising according to participants. Data from the content analyses showed an absence of clear responsible gambling messages.

9. Sports and race betting marketing was perceived as increasingly pervasive and aimed to normalise gambling from the focus groups and online survey. Marketing techniques to create excitement and camaraderie were viewed as potentially harmful to vulnerable groups. Male adolescents, who did not self-report gambling participation, did show an awareness of how people are encouraged to gamble through easy access to digital gambling platforms portrayed in advertisements.
10. The online survey showed that adolescents were more likely to experience a high level of exposure to sports betting marketing through traditional media than the overall sample (48% compared with 32%). Similarly, adolescents were more likely than adults to have been exposed to marketing through digital media (14% compared with 6%) and through social media platforms such as Facebook (6% compared with 4%) and YouTube (5% compared with 3%).
11. Self-reported problem and at-risk gamblers had higher exposure to sports and race wagering marketing compared to the overall sample. This group was more likely to report positive responses to gambling advertising and were more likely to bet/gamble on other gambling forms as a result.

### **Limitations**

12. While the mixed methodology used to inform this study strengthened the findings that it produced, the authors were not able to identify a causal relationship between wagering marketing and betting behaviour.

### **Potential policy implications**

13. The authors recommend that the frequency and timings of betting advertisements should be reduced to ensure that vulnerable groups such as problem gamblers, at-risk gamblers and young people do not experience over exposure.
14. To make responsible gambling messages clear on both traditional and digital forms of advertising material.

## **The use of social media in gambling (2015). Gainsbury et al.**

### **Aims & Methodology**

1. To identify and describe the availability and promotion of gambling and social casino game opportunities via social media. To understand whether there has been a transition between social game play and gambling and whether there is the potential for social media to be used to promote responsible gambling.
2. A mixed methodology approach was taken that included a literature review, content analyses of social media pages (n = 101), qualitative interviews with gambling operators, adult social casino game players, policy makers and industry groups and an online survey (n = 1,554).

### **Key findings**

3. It was found that less than half of respondents had seen gambling advertisements on social media sites suggesting that the advertising presence on this platform is limited.
4. Online betting providers had the highest and most successful social media

presence, based on the number of followers analysed.

5. Social media posts by Australian licensed gambling providers appeared to abide by advertising codes of conduct. However this did not always extend to the required display of responsible gambling messages and warnings; these were rarely provided or were difficult to discern.
6. The majority (88%) of adult social media users surveyed had not actively engaged with gambling operators through social media. Less than half of those surveyed (41%) had seen advertisements for gambling operators on social media sites. However, two-thirds of respondents thought that there were too many promotions for gambling on social media, indicating that these were not welcomed by users generally.
7. The results showed that one-in-ten respondents (11%) indicated that promotions or content posted on social media by gambling operators had increased how much they gambled. Younger respondents, those with higher levels of gambling problems were significantly more likely to state that these promotions had increased their gambling.
8. The results showed that one-third of adults surveyed had played social casino games in the last 12 months. Compared with non-social casino gamers, these adults were slightly younger (43 years old on average v. 48 years for non-casino gamers), more likely to work full time (37% v. 30%) and more likely to be gamblers (91% v. 64%). No gender differences were reported. Half of social casino game players surveyed had paid money for these games, mostly to increase their enjoyment, take up promotions, to progress or as an impulse decision. Amongst those who had at least moderate gambling problems, a subgroup of social casino game players (27%) reported some negative consequences of their game use, and one-quarter thought that they might have a problem with these games.
9. There is a high level overlap between gamblers and social casino game players, showing that an underlying interest in gambling-themed activities can drive participation in both activities.

### **Limitations**

10. There is an absence of a strong evidence base to support that promotions found on social media or social casino games influence problem gambling behaviour.
11. The sample was not representative of the wider population and that was especially the case for young people.

### **Potential policy implications**

12. The author recommends that operators must clearly displaying responsible gambling messages on their social media pages.
13. The author recommends that social media should be monitored for the promotion of gambling, as well as gambling-themed games, to ensure that there are minimal potential negative consequences for users, particularly vulnerable groups.
14. A fuller summary of this paper is available on request.

## **The Leisure, Lifestyle & Lifecycle Project (LLLP): A longitudinal study of gambling in Alberta. el-Guebaly (2015).**

### **Aims & methodology**

1. To collect data on the factors influencing changes in gambling and problem gambling behaviour over time. Five critical age ranges were targeted: 13-15, 18-20, 23-25, 43-45 and 63-65 years old.
2. A longitudinal study spanning over a five year period that used surveys conducted over the telephone, face-to-face and computer self-completion interviews (n = 1,808). Data collected from a second longitudinal study, the Quinte Longitudinal Study (QLS) were also used in the study.
3. The authors assessed a range of psychosocial variables in order to identify: robust predictors of future problem gambling onset, the stability of gambling problems over time and the development of a multivariate model that illustrates the interaction of gambling behaviour and problem gambling over time.

### **Key findings**

4. Findings showed that problem gamblers were more likely to report an early big win in their gambling history, as well as family exposure to gambling and/or problem gambling while growing up.
5. Demographically, the only characteristic robustly associated with concurrent problem gambling was being non-Caucasian. Unlike previous research, male gender, younger age, and lower income were not consistent correlates.
6. Problem gambling was robustly associated with several personality traits, poorer physical health, and most mental health disorders.
7. Levels of gambling involvement and gambling-related problems were stable at the population level. However, at an individual level there is a considerable amount of transition.
8. Overall, variables indicating frequent and more intensive involvement in gambling were predictive of future problems in both the LLLP and QLS.
9. Approximately 80% of problem gamblers will have at least one year of remission (i.e., did not meet criteria for problem gambling) in a five-year period. Of those that do recover, only about one-third are observed to relapse, although the maximum time period to observe relapse was only the subsequent three years following a recovery year.
10. All gamblers who experienced both positive (improvements in relationship and family functioning and happiness) and negative changes (increase in illegal activities and stressful life events) in one time period increased their gambling in the subsequent period. This suggests that people gamble to enhance positive feelings as well as escape from negative ones.

### **Limitations**

11. All research findings are somewhat time (2005-2011) and geographically specific (Alberta).
12. It is expected that most, but not all, of the present results would apply to other jurisdictions in other time periods.
13. Although the research design included over sampling of individuals with greater gambling involvement, the number of individuals experiencing problems over the course of the study is small, and some results may be less reliable.

### **Potential policy implications**

14. This research sheds light on gambling/problem gambling at the population level

over time. The main recommendation in the report is to target interventions as gambling involvement begins to increase, and particularly with gamblers that have a family background of gambling/problem gambling.

### **Sports bettors' responses to sports-embedded gambling promotions: Implications for compulsive consumption. Hing et al. (2015).**

#### **Aim & Methodology**

1. To explore sport bettors' responses to the promotion of gambling during televised sport (n = 544).
2. Sports bettors with varying degrees of problem gambling severity completed surveys and the results were analysed.

#### **Key findings**

3. Compared to non-problem and at-risk gamblers, problem gamblers report most encouragement and influence to gamble from these promotions. Problem gamblers are also be more influenced to sports bet by contextual factors, particularly certain bet types and promotions.

#### **Limitations & potential policy implications**

4. A full copy of this paper was not available to complete this section.

### **Assessing the effectiveness of a responsible gambling behavioural feedback tool for reducing the gambling expenditure of at-risk players. Wood and Wohl (2015).**

#### **Aims & methodology**

1. To assess the utility of a responsible gambling tool by online gamblers (n = 694 male, n = 85 female) transacting with a Swedish online operator (Svenska Spel).
2. An online feedback form, supplied by PlayScan, containing a colour-coded risk rating (Green = no issues, Yellow = at-risk, Red = problematic) which was determined by a proprietary algorithm.

#### **Findings**

3. The results showed that yellow (i.e. at-risk) players who used the tool significantly reduced the amounts of money deposited and wagered compared with players who did not use the tool – an effect observed the week following enrolment as well as twenty-four weeks later.

### **Limitations**

4. This study does not address the extent to which players who use a behavioural feedback tool are more likely to self-monitor and/or be concerned about taking action if their gambling behaviour becomes risky. Further research is required to examine whether there are any differences in attitudes to gambling and self-control, between those who decide to use a behavioural feedback tool and those who choose not to.

### **Potential policy implications**

5. The development of online responsible gambling tools for at-risk gamblers and problem gamblers should continue.

## **Mental Health**

**Mental Health and Online, Land-Based and Mixed Gamblers.** Blaszczynski et al. (2015).

### **Aims & Methodology**

1. To investigate differences in mental health status in exclusive online, exclusive land-based and mixed Internet and land-based samples of gamblers (n = 4594).
2. The participants completed a survey to provide information on: demographic details, gambling participation, use of alcohol, tobacco and drugs, help-seeking, personal problems experienced due to gambling, as well as measures of problem gambling and psychological distress.

### **Key findings**

3. The group of mixed gamblers proved to have higher problem gambling scores, level of gambling involvement and consumption of alcohol during gambling than exclusive online gamblers.
4. Land-based gamblers experienced higher levels of psychological distress, self-acknowledged need for treatment and help-seeking behaviour.
5. Overall these findings suggest that exclusive online gamblers represent a different subpopulation who experience a lower risk of harm compared to gamblers engaging in multiple forms.

### **Limitations**

6. A full copy of the paper was not available to complete this section.

### **Potential policy implications**

7. The characteristics of different problem gambling subpopulations may inform the development of more effective targeted interventions.

## **Gambling problems in bipolar disorder in the UK: prevalence and distribution.**

Jones et al. (2015).

### **Aims & methodology**

1. To determine the prevalence and distribution of problem gambling in people with bipolar disorder in the UK.
2. The participants were screened using The Problem Gambling Severity Index (PGSI) to measure gambling problems with bipolar disorder (n = 635).

### **Key findings**

3. Moderate to severe gambling problems were four times higher in people with bipolar disorder than in the general population, and more specifically were associated with type 2 bipolar disorder.
4. Approximately 1 in 10 patients with bipolar disorder may be at moderate to severe risk of problem gambling, possibly associated with suicidal behaviour.
5. Elevated rates of gambling problems in type 2 disorder highlight the significance of modest but unstable mood disturbance in the development and maintenance of such problems.

### **Limitations & potential policy implications**

6. A full copy of this paper was not available to inform this section.

## **Co-morbidity Between Gambling Problems and Depressive Symptoms: A Longitudinal Perspective of Risk and Protective Factors.** Dussault et al. (2015).

### **Aims & methodology**

1. To examine whether long term factors can explain the concurrent links between depressive symptoms and gambling problems and whether possible transactional links between depressive symptoms and gambling problems exist from late adolescence to early adulthood.

### **Key findings**

2. Pre-existing factors may explain the initial emergence of an association between depressive symptoms and gambling problems in adolescence. However, once merged, their escalation is better explained by a mutual direct influence between the two sets of disorders.

### **Limitations & policy implications**

3. The full copy of the study was not available to complete this section.

## Young People

### **Compliance check of gambler and youth protection in German amusement arcades: a pilot study. Meyer et al. (2015).**

#### **Aims & Methodology**

1. To investigate the compliance of staff in Bremen's amusement arcades.
2. Researchers visited twenty nine arcades to observe the procedures carried out by staff members and their reaction to problematic gambling behaviour.
3. Field notes were made and a list of self-excluded customers was monitored.

#### **Key Findings**

4. Results showed that 26% of the 20- to 25-year-old mystery gamblers had their ID checked.
5. The chance of initiating a self-exclusion or similar agreement was significantly lower in amusement arcades holding several licences than in amusement arcades holding just one licence. Staff mentioned the possibility of self-exclusion to women significantly less frequently than to men.

#### **Limitations**

6. This research was a small pilot study to gain initial insight into compliance in respect of protection for problem gamblers and young people in amusement arcades.

#### **Potential policy implications**

7. The results indicate that regular external evaluations are critical to identify any shortcomings of measures to minimize gambling-related harm.
8. In addition, the level of staff compliance may be increased by amending current legislation (e.g. by introducing a nationwide self-exclusion programme).

### **Unhealthy Gambling Amongst New Zealand Secondary School Students: An Exploration of Risk and Protective Factors. Rossen et al.**

#### **Aims & Methodology**

1. To determine the prevalence of gambling and unhealthy gambling behaviour in a sample of New Zealand secondary school students (n=8500)
2. Survey questions on gambling were added to a national survey.
3. The age ranges were categorised as '15 or less' and '16 or older'. Odds ratios and logistic regression models were calculated and the raw data is presented in the report.

#### **Key findings**

4. One in ten students had gambled in the last 4 weeks and almost one quarter had gambled



in the last year. greater proportions of males than females had gambled in the last 4 weeks and in the last year.

5. The results showed that 4.8 % of the sample had two or more indicators of unhealthy gambling.
6. The multivariate analyses carried out showed that unhealthy gambling was associated with four main factors: more accepting attitudes towards gambling, gambling via gambling machines/casinos/track betting, being worried about and/or trying to cut down on gambling and having attempted suicide.

### **Limitations**

7. The age category does not define the legal gambling age, meaning that the analysis cannot compare underage gambling with young people over the legal gambling age.

### **Potential policy implications**

8. The authors recommend that targeted interventions for young people should centre on ethnic and social inequalities where prevalence of unhealthy gambling is highest.

## **Other**

### **Consumer spending in the gaming industry: evidence of complementary demand in casino and online venues. Philander et al. (2015).**

#### **Aims & methodology**

1. To understand the impact of the expansion of the remote gambling sector upon economic welfare.
2. A secondary data analysis of the British Gambling Prevalence Survey (BGPS) 2010 was carried out to estimate the net effect of Internet-based gambling activity on land-based demand.

#### **Key findings**

3. A robust complementary (positive) relationship between online and offline gambling is found using statistical tests.
4. The results suggest that economic concerns around the cannibalization of traditional gambling industries should be reconsidered, and provide support for prior research showing that Internet based firms can be complementary to brick and mortar businesses.

#### **Limitations**

5. While a positive relationship was discovered, this may not directly translate to revenue, since average spend figures may differ.

#### **Potential policy implications**

6. The authors demonstrate that land-based gambling venues are not under threat by the expansion of the remote sector.
7. The rapid expansion of the remote sector is said to be a novelty effect to new customers, and as a result a focus on responsible gambling tools should be applied.

**Broadening an understanding of problem gambling: The lifestyle consumption community of sports betting.** Gordon et al. (2015).

**Aims & methodology**

1. To provide a socio-cultural perspective of gambling that moves away from a focus on problem/pathological gambling.
2. Focus group interviews with peers aged between 18-30 who participated in sports betting.

**Key findings**

3. This paper provides insight into the social position of lifestyle consumption communities and how it is understood by gamblers.

**Limitations & potential policy implications**

4. A full copy of the study was not available to complete this section.

## Annex A

### Full Citations

Blaszczynski et al. (2015). Mental Health and Online, Land-Based and Mixed Gamblers. *Journal of Gambling Studies*.

Dussault et al. (2015). Co-morbidity Between Gambling Problems and Depressive Symptoms: A Longitudinal Perspective of Risk and Protective Factors. *Journal of Gambling Studies*. DOI: 10.1007/s10899-015-9546-x.

El-Guebaly (2015). The Leisure, Lifestyle & Lifecycle Project (LLLP): A longitudinal study of gambling in Alberta. Alberta Gambling Research Institute.

Fulton (2015). *Playing Social Roulette: The Impact of Gambling on Individuals and Society in Ireland*. The Irish Research Council.

Gambling Commission (2015). *Gambling participation: activities and mode of access, year to 2015*.

Gainsbury et al. (2014). *The use of social media in gambling*. Australasian Gaming Council.

Gordon et al. (2015). Broadening an understanding of problem gambling: The lifestyle consumption community of sports betting. *Journal of Business Research*. DOI:10.1016/j.jbusres.2015.03.016.

Hing et al. (2015). Sports bettors' responses to sports-embedded gambling promotions: Implications for compulsive consumption. *Journal of Business Research*. DOI:10.1016/j.jbusres.2015.03.003.

Jones et al. (2015). Gambling problems in bipolar disorder in the UK: prevalence and distribution. *British Journal of Psychiatry*. [epub ahead of print].

Meyer et al. (2015). Compliance check of gambler and youth protection in German amusement arcades: a pilot study. *International Gambling Studies*. DOI: 10.1080/14459795.2015.1053822.

NatCen Social Research (2015). *ABB Code for Responsible Gambling and Player Protection Evaluation of early impact among machine gamblers*.

NatCen Social Research (2015). *Developing a logic model for the ABB Code for Responsible Gambling and Player Protection*.

Philander et al. (2015). Consumer spending in the gaming industry: evidence of complementary demand in casino and online venues. *International Gambling Studies*. DOI:10.1080/14459795.2015.1042002.

Rossen et al. (2015). Unhealthy Gambling Amongst New Zealand Secondary School Students: An Exploration of Risk and Protective Factors. *International Journal of Mental Health and Addiction*. DOI: 10.1007/s11469-015-9562-1.

Sproston (2015). *Marketing of Sports Betting and Racing Report*. ORC International. Funded by Gambling Research Australia.

Volberg et al. (2015). Gambling and Problem Gambling In Massachusetts. Social and Economic Impacts of Gambling in Massachusetts (SEIGMA) Study. Massachusetts Gaming Commission (MGC).

Wood & Wohl (2015). Assessing the effectiveness of a responsible gambling behavioural feedback tool for reducing the gambling expenditure of at-risk players. *International Gambling Studies*. Volume 15 (2). DOI: 10.1080/14459795.2015.1049191.

## **Annex B**

**Exempt information under section 36 of the Freedom of Information Act 2000**

## Annex C

**Topic/Issue:** Speed of play

### Key messages:

There is limited empirical evidence clarifying the impact of game speed, and a reduction in speed could have an unavoidable negative impact on the enjoyment of all types of players<sup>1</sup>.

Structural features (such as speed of play) affect in session play, but their contribution to the development of gambling disorders is presumed rather than confirmed<sup>2</sup>.

It is very unlikely that risk can be attributed to one structural characteristic, the riskiness of a product is likely to be a complex combination of a number of structural characteristics in interaction with situational and personal factors.

### Secondary messages:

There is an argument that we should move away from our current model of regulation, based on controls built into a product (such as limits on game speed), to one that is built round the player and which, in return, gives much greater freedom to the industry to innovate to improve the player experience<sup>3</sup>.

Faster games may pose risks as they allow less time for reflection and lead to a higher level of spending per hour.

It has been argued that, as a general rule, the higher the event frequency, the more likely it is that a gambling activity will cause problems for the individual, particularly if the individual is susceptible and vulnerable.

### Evidence base:

#### Key research

- GC machines research programme, particularly: *A medium to long-term programme of research for investigating gaming machines in Great Britain: Recommendations from international and British expert panels*. [Jump to summary](#) [the hyperlink will navigate colleagues to relevant information when used electronically. See further information below if you are reading from a hard copy].
- Research on the development of a tool to assess riskiness of gambling products - ASTERiG. In this tool, 'event frequency' is the parameter (i.e. product characteristic) with the highest weighting. [Jump to summary](#) [the hyperlink will navigate colleagues to relevant information when used electronically. See further information below if you are reading from a hard copy].
- Map the Gap: a critical review of the literature on gambling-related harm. [Jump to extract](#) [the hyperlink will navigate colleagues to relevant information when used electronically. See further information below if you are reading from a hard copy].

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<sup>1</sup> GC Expert Panels study

<sup>2</sup> Source: Blaszczyński JGBE, 2013 7(3)

<sup>3</sup> Adapted from MH speech to BACTA, Nov 2010.

## Other GC evidence

- Problem gambling rates by product. There are several important caveats when using this information, so caution should be exercised when interpreting. However, there does not appear to be a linear relationship between a product's speed and the proportion of players who are problem gamblers. [Jump to extract](#) [this is a hyperlink that will navigate users to relevant information when used electronically. See Table on page 31 below if you are reading from a hard copy].

**Industry evidence:** N/A

## Forthcoming research/evidence:

- The Responsible Gambling Trust is considering commissioning a review into what we know about structural characteristics.

**Emerging directions:** N/A

## Common research weaknesses:

- There is a lack of empirical evidence on this issue.
- Correlation does not imply causality - just because a faster product displays an association with harm, does not mean it is causing or exacerbating that harm.
- Similarly, direction of any causality is also important – did machines lead to someone being a problem gambler, or did their problem gambling lead them to machines?
- Extremely difficult to isolate the effect of a single structural characteristic, especially in a normal gambling environment.
- Studies to date have tended to be lab-based and examined effect of event frequency on in-session behaviour, not problem gambling.

## Challenging the assumptions:

- *We should reduce speed on gaming machines on the precautionary principle...* while there is some academic consensus that this would be an effective harm-minimisation measure it does not have significant empirical support. Such a change would also reduce enjoyment for all players, and could potentially have negative unintended consequences (delays could increase players' cravings and lead to them spending more time on a game/product). We are also unclear on any substitution effects if such changes were made – i.e. whether at-risk/problem players would just be displaced to other forms of gambling.
- *This means certain products are inherently unsafe...* it should be noted that a seemingly diverse range of games (e.g. slots and lotteries) can be designed to have identical event frequencies.
- *The faster a game is, the more problematic it is....* Evidence from the BGPS and Health Surveys does not suggest that this is a simply linear relationship, e.g. some slower games (such as poker) have higher rates of problem gambling than much faster activities.

## Related issues:

- Other structural characteristics (e.g. stake size).
- Inter-relationship of structural, personal and situational variables.

- Gaming machines – because; (i) they are one of the faster forms of gambling (ii) any research on event frequency tends to be gaming machine-based, and (iii) only product where event frequency is explicitly regulated.

**Industry activity:** N/A



## Annex – further information

### **Assessment Tool to Measure and Evaluate the Risk Potential of Gambling Products: AsTERiG Peren (2011)**

This study aims to develop a globally applicable assessment tool to measure and evaluate the risk potential of gambling products. The assessment tool was developed after consultation with experts (via a Delphi study) and empirically validated and theoretically tested via the collection of data from ordinary, problematic and morbid gamblers. Based on the results of these two modules, the assessment tool's 'parameters' (essentially product characteristics felt to be indicative of risk potential) and 'scales' (essentially a scoring scale based on the particular specifications of each parameter) were drawn up. These parameters were then weighted based on a merging of the estimations of experts and gamblers.

#### **Main findings**

The assessment tool that was generated consists of ten parameters, modified by their different weights. These parameters, from the highest to lowest weighting, are:

- *Event frequency*
- *Multiple playing and stake opportunity*
- *Chance of winning*
- *Sensory product design*
- *Variable stake amount*
- *Availability*
- *Jackpot*
- *Interval of payback*
- *Almost profits (near miss)*
- *Continuity of playing.*

An analysis of the validity of these parameters showed a strong positive correlation between the assessment tool and external empirical parameters (e.g. prevalence ratios of problematic gambling behaviour corresponding to various forms of gambling, and other estimations of risk potential of gambling products).

### **A medium to long-term programme of research for investigating gaming machines in Great Britain: Recommendations from international and British expert panels**

Parke, J (publication due summer 2009)

1. This exercise consisted of three stages of consultation with eleven academic experts across different jurisdictions. Stage one focused primarily on collecting views on the relationship between certain structural factors of gaming machines and their association with harm. The second stage was primarily concerned with assessing the level of consensus among panellists regarding the associations of structural factors and harm, and how they relate to harm mitigation approaches. Stage three was used to collate themes from stages one and two, while seeking to refine and prioritise ideas for future research. An additional panel of academic experts in Britain was then consulted to ensure that that all information and ideas were considered in the context of gaming machines in Great Britain.

#### **Main findings**

- There was a degree of consensus among panel members on a number of measures which they felt worth further exploration. These include (with respective identified harm factors in brackets):

- *use of card based technology giving players opportunities for pre-commitment and information about how much they are spending (impact of stake)*
- *large prizes not paid out in cash (impact of prize)*
- *changes to access to additional funds through both the availability and positioning of on-site ATMs (opportunities for continuous play)*
- *restrictions on highly volatile machines (volatility)*
- *limits on the number of play lines (impact of stake).*
- In order to facilitate research into gaming machine related harm, it is important for the gambling industry and other stakeholders to develop a relationship which promotes openness and information sharing.
- Whilst the feasibility to using offline player tracking data is being considered, there may be some advantages, in the meantime, to using online player tracking data to help answer key questions regarding the structural factors of gaming machines.

### **Map the Gap: a critical review of the literature on gambling-related harm**

Of five studies that looked at the effect of **speed of play**, only one (Sharpe *et al.*, 2005) found no effect at all from quicker speed of play. The other four studies found that faster play was associated with some changes, but outcome variables differed across the studies – desire to play, satisfaction with play, length of play and number of games played – and none of the studies was able to examine relationships between speed of play and problem gambling.

**Table 6.8****Problem gambling prevalence (according to either DSM-IV or PGSI),  
by activity***All aged 16 and over*

2012

Gambling activity	Problem gambler			
		Problem gambler according to either DSM-IV or PGSI	Bases (unweighted)	Bases (weighted)
<b>All</b>				
<b>Lotteries and related products</b>				
National Lottery Draw	%	0.9	5911	5646
Scratchcards	%	1.7	2007	2128
Other lotteries	%	1.8	1622	1564
<b>Machines/games</b>				
Football pools	%	4.0	319	308
Bingo (not online)	%	3.4	669	606
Slot machines	%	2.6	677	799
Machines in a bookmakers	%	7.2	264	333
Casino table games (not online)	%	6.0	302	366
Poker played in pubs or clubs	%	13.2	109	148
Online gambling on slots, casino or bingo games	%	6.3	297	352
<b>Betting activities</b>				
Online betting with a bookmaker	%	3.8	497	560
Betting exchange	%	10.6	78	104
Horse races (not online)	%	2.3	1106	1141
Dog races (not online)	%	4.2	264	316
Sports events (not online)	%	5.8	484	532
Other events (not online)	%	12.9	121	124
Spread-betting	%	20.9	52	61
Private betting	%	2.2	437	595
<b>Other gambling activity</b>				
Any other gambling	%	9.8	150	173
Any gambling (excluding National Lottery Draw only)	%	1.3	4576	4657
Any online gambling (excluding National Lottery)	%	4.2	710	800