

PATTERNS OF PLAY AND CONSUMER VULNERABILITY

Briefing Workshop

4 June 2018

De Morgan House, London



Questions?

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using #POP18

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Agenda

- Introduction
- Objectives of the briefing workshop
- Goals and objectives of the project, budget and timeframes
- Process to date
- Overview of available datasets
- Next steps- including commissioning process
- Q & A
- Networking opportunity

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Objectives of the workshop

- To share goal and objectives of the project
- To present outputs of a data mapping exercise conducted by the Gambling Commission
- To provide a networking opportunity
- To begin to identify possible partnerships

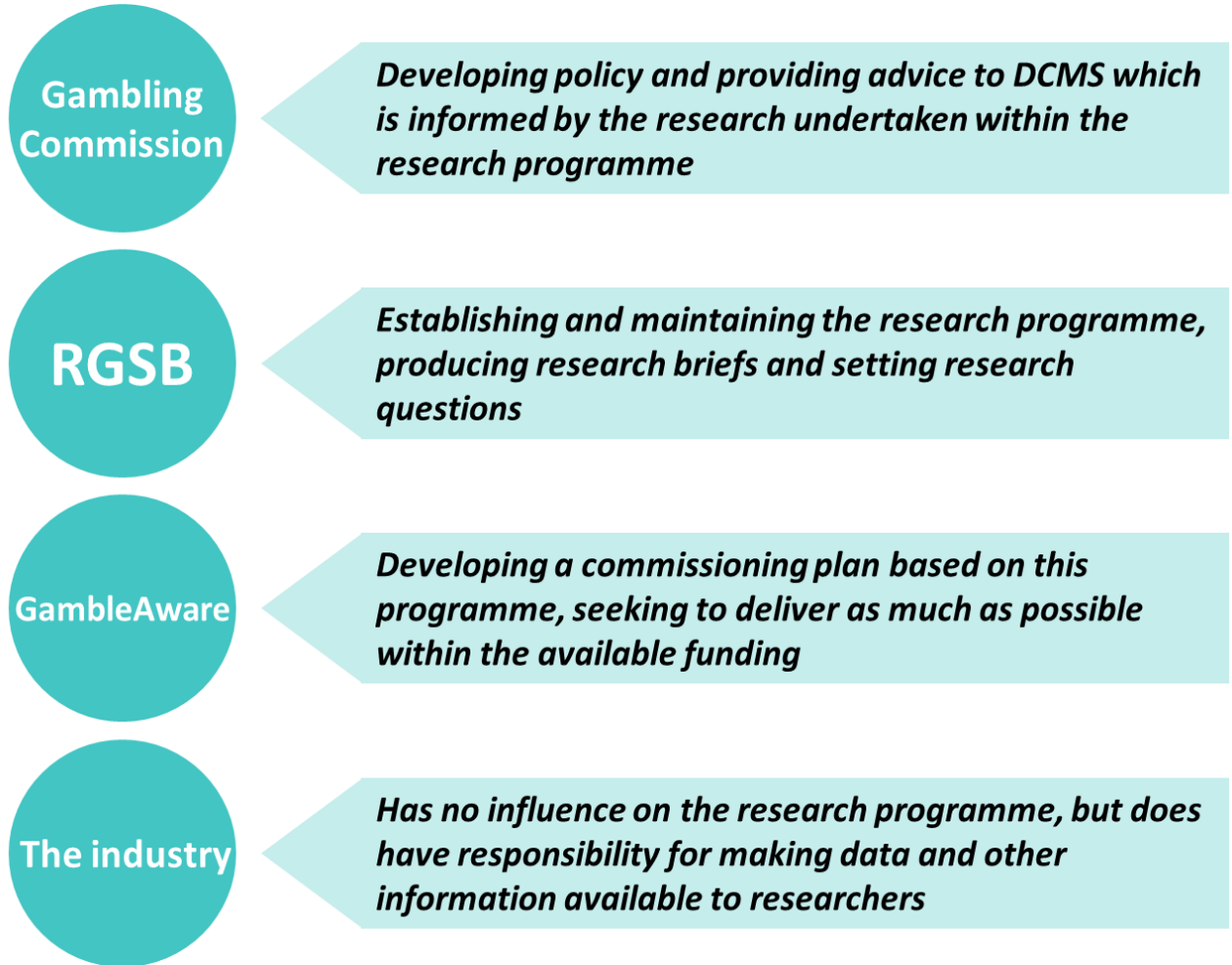
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Research strategy and commissioning – roles and responsibilities





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How this fits with our wider research programme?

Theme 1
Gambling-related harms

"We need to develop a way to comprehensively understand and measure the harms caused by gambling"

Theme 2
Patterns of play

"We need to understand how gambling behaviour varies across different products and environments, and which characteristics are most strongly associated with harm"

Theme 3
Treatment

"We need to understand what works in gambling treatment and build the evidence base to help formulate an effective and inclusive approach to treating gambling related harms"

Theme 4
Longitudinal study

"We need to understand how gambling behaviour changes over time and why people move in and out of harmful play"

Theme 5
Industry-based interventions

"We need to use evaluations to assess the effectiveness of interventions, and identify best practice in industry-based harm minimisation"

Theme 6
Education and prevention

"We need to understand what works in preventative education through insights provided by research and evaluation"

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Purpose of the research



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What do we
already know?

- Improved understanding of how people gamble on machines in bookmakers, adult gaming centres and bingo premises
- High-level data on how people play online slot and casino games

What do we
need to find
out?

- Better understanding of how people gamble
- How gambling behaviour varies – by environment, products, and characteristics
- Where are the strongest associations with harm

Why?

- Inform proportionate regulatory policy
- Design of harm-prevention interventions
- Inform longer-term data collection plans

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Research objectives

- How gambling behaviour varies – by environment, product and characteristic
- Which features are most strongly associated with harm
- More about the risk of harm by combining real play data with corresponding demographic and socio-economic data from consumers
- If, how and why some gambling products are more harmful than others.

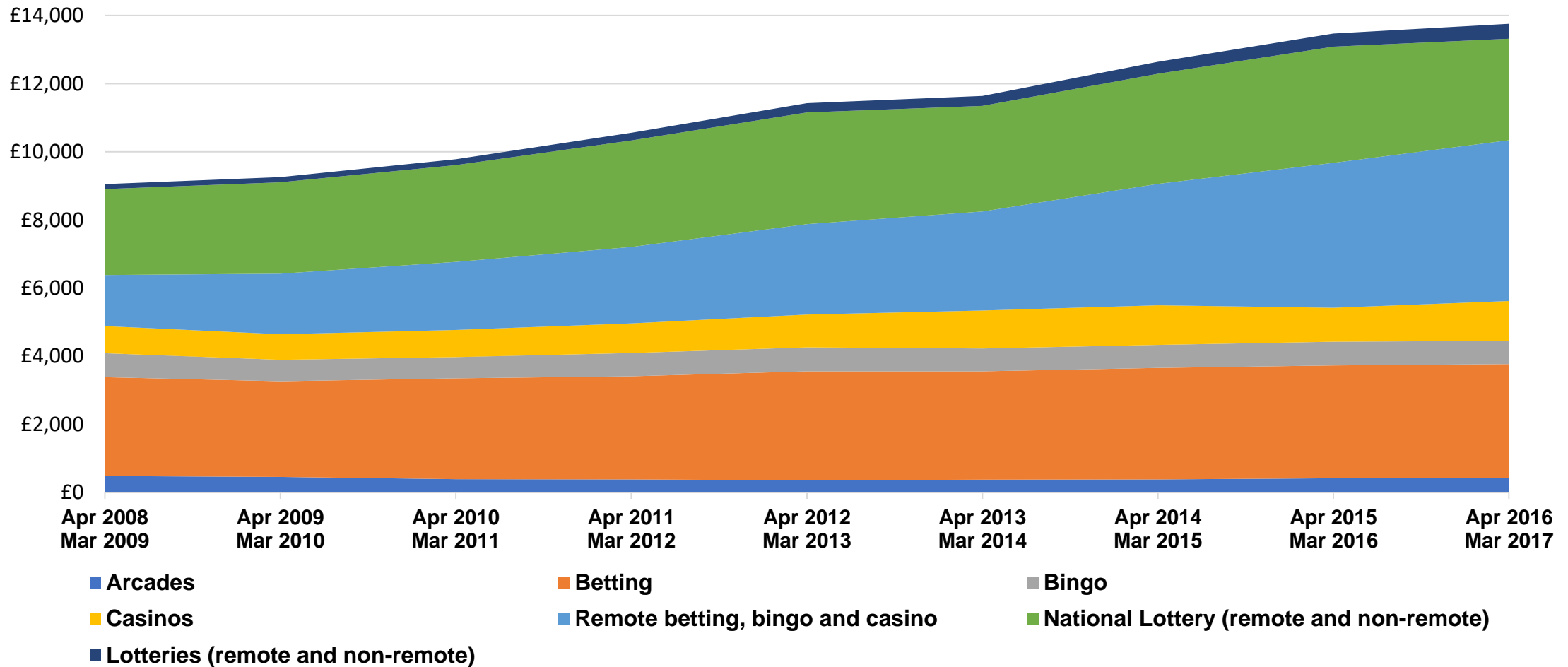


Process to date

- Extensive data mapping exercise completed
 - Segmentation of sectors and products
 - Data availability
 - Data collection opportunities
 - Our views on priority areas
- Research brief published by RGSB
- Invitation to tender published by GambleAware
- **Briefing workshop – 4 June 2018**

Overview of the gambling industry

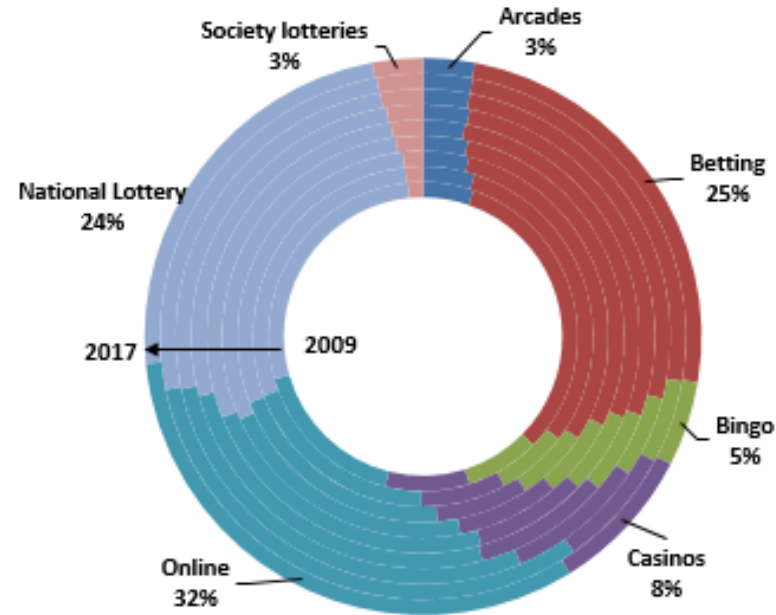
GB Gambling Market Size (£m)



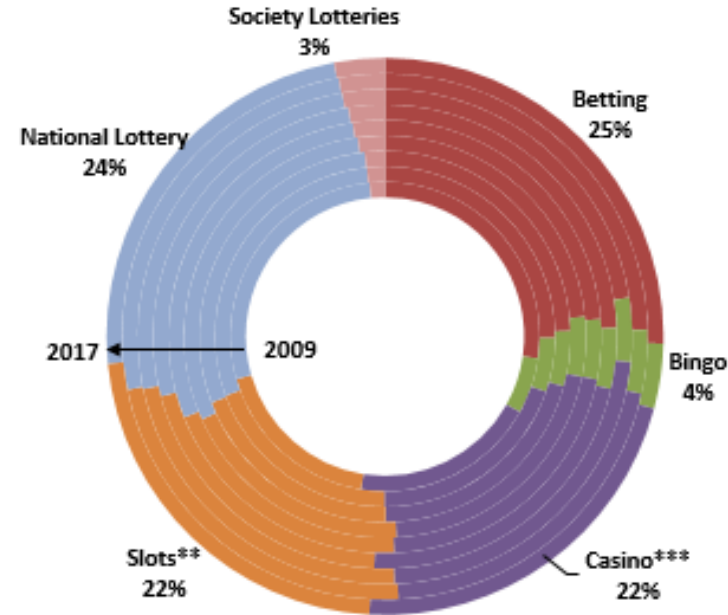
Overview of the gambling industry



Sector GGY* by licence held



Sector GGY* by product group



* GGY = Effectively stakes minus prizes (amount retained by operators)

** Slot B2 content, B1, B3 C & others

*** Including roulette B2 content

Overview of data available

Figure 1: Non-remote

Sector	GGY (£m)	Product category	Is play data systematically recorded in a form that can be interrogated?	Is there any cross-operator collection of play data?	What proportion of play data is attributable to known individuals?
ARCADES	414	Machines	Yes	Yes	Extremely low
BETTING (OFF-COURSE)	3,354	Over the counter (OTC)	Yes	No	Very low
		Self-service betting terminals (SSBTs)	Yes	Yes	
		Machines	Yes	Yes	Low
BETTING (ON-COURSE)		Horse/dog track/point-to-point	No	No	None
BINGO	687	Stage/main game	No	No	None
		National (linked) game			
		Machines	Yes	No	None
		Electronic Bingo Terminals	Yes	Yes	High
CASINO	1,164	Table games	No	No	Very low
		Machines	Yes	Yes	Medium
NATIONAL LOTTERY	2,979*	Draw-based games	No	N/A	None
		<u>Scratchcards</u>			
LOTTERIES	442*	Lottery	Yes	No	Medium
		<u>Scratchcards</u>	No	No	None

* Combined remote and non-remote GGY



Overview of data available

Figure 2: Remote

Sector	GGY (£m)	Product category	Is play data systematically recorded in a form that can be interrogated?	Is there any cross-operator collection of play data?	What proportion of play data is attributable to known individuals?
CASINO	2,620	Slots	Yes	Yes	All
		Table games, card games, and other			
		Poker (peer-to-peer)			
BETTING	1,939	Betting (incl. in-play, ante post and virtual events)	Yes	Yes	All
		Betting exchange	Yes	No	
		Pool betting	Yes	Yes	
BINGO	162	Bingo	Yes	Yes	All
NATIONAL LOTTERY	2,979*	Draw-based games	Yes	N/A	All
		Interactive Instant Win Games (IIWGs)			
LOTTERIES	442*	Lottery draws	Yes	Yes	All

* Combined remote and non-remote GGY



Caveats

- These tables are summaries and do not reflect some of the complexities and nuances in relation to this issue. **Full detail will be provided in a larger data file to be shared later this week.**
- They provide an overview for each sector, giving our assessment of what we think is typical in each. However, data collection within each sector will differ from operator to operator, sometimes significantly so.
- Existence of data does not necessarily mean it will be easily obtainable or amenable to analysis.
- B2B suppliers may often see play data across operators, but are unlikely to be able to attribute this to individuals.



Priority areas for analysis

1) Remote gambling – in all its forms:

1. Online betting – where we know very little (including exchanges, pool betting)
2. Slots/Casino – where we currently have an aggregate understanding
3. National Lottery instant wins – including high frequency draw based games.
4. Bingo
5. Poker
6. NL draw based games

2) Non-remote betting where systematically recorded (i.e. Self Service Betting Terminals, Over the Counter betting where tickets are scanned)

3) Electronic bingo terminals

4) Machines – important, but likely to be reviewed as part of an evaluation of change in B2 regulations



Areas requiring methodology development

These are products which are high priority in terms of minimising harm but where we need to start capturing data and don't currently have an easy means by which to do so.

- 1) **Casino table games**
- 2) **Scratchcards**
- 3) **NL draw based games** (land based, retail environments)

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Vision

Consortium (or consortia) with lead agency(ies) (project management not research function) of a range of stakeholders with complementary skillsets- from project management to complex data analysis to synthesising information to simplifying concepts

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Budget and timeframe

Budget: £1.5 million

Timeframe: 3 – 4 years

Expected start date: October

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Next steps

- Participants to be sent notes from this workshop; participants' contact details; EOI form; by 8 June
- EOIs to be submitted by 25 June 2018
- Submit questions by 20 July 2018
- Submit proposals by 27 July 2018 (for all or selected components)
- GC, RGSB and GA to review proposals: 27 July to 7 September 2018
- Series of individual and/or group interviews/ consultations to develop consortium or consortia
- GA to inform bidders by in early September 2018
- Finalise details and launch project – mid to late September 2018