

Developing a new approach for measuring gambling behaviours and harms in Great Britain





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We have no potential conflicts of interest for our presentation.

The Gambling Commission

- **The Gambling Commission in Great Britain was set up under the Gambling Act 2005.**
- **We regulate the individuals and businesses that provide gambling in Great Britain, including the National Lottery to ensure:**
 - gambling is not a source of crime or disorder
 - gambling is conducted in a fair and open way
 - children and other vulnerable people are protected from being harmed or exploited by gambling
- **Players generated £15.1bn for the 1,873 licensed operators that made up the customer facing gambling industry in 2022/23.**
 - £4.2bn was generated through lotteries (GGY equivalent) and £10.9bn was generated across the rest of the consumer facing industry.

Evidence Gaps and Priorities

Theme 1

Early Gambling Experiences
and Gateway Products

Theme 2

The range and variability of
gambling experiences

Theme 3

Gambling-related harms and
vulnerability

Theme 4

The impact of operator
practices

Theme 5

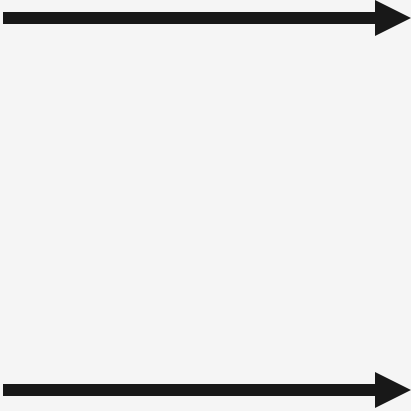
Product characteristics and
risk

Theme 6

Illegal gambling and crime

Enhancing our understanding of consumer behaviour

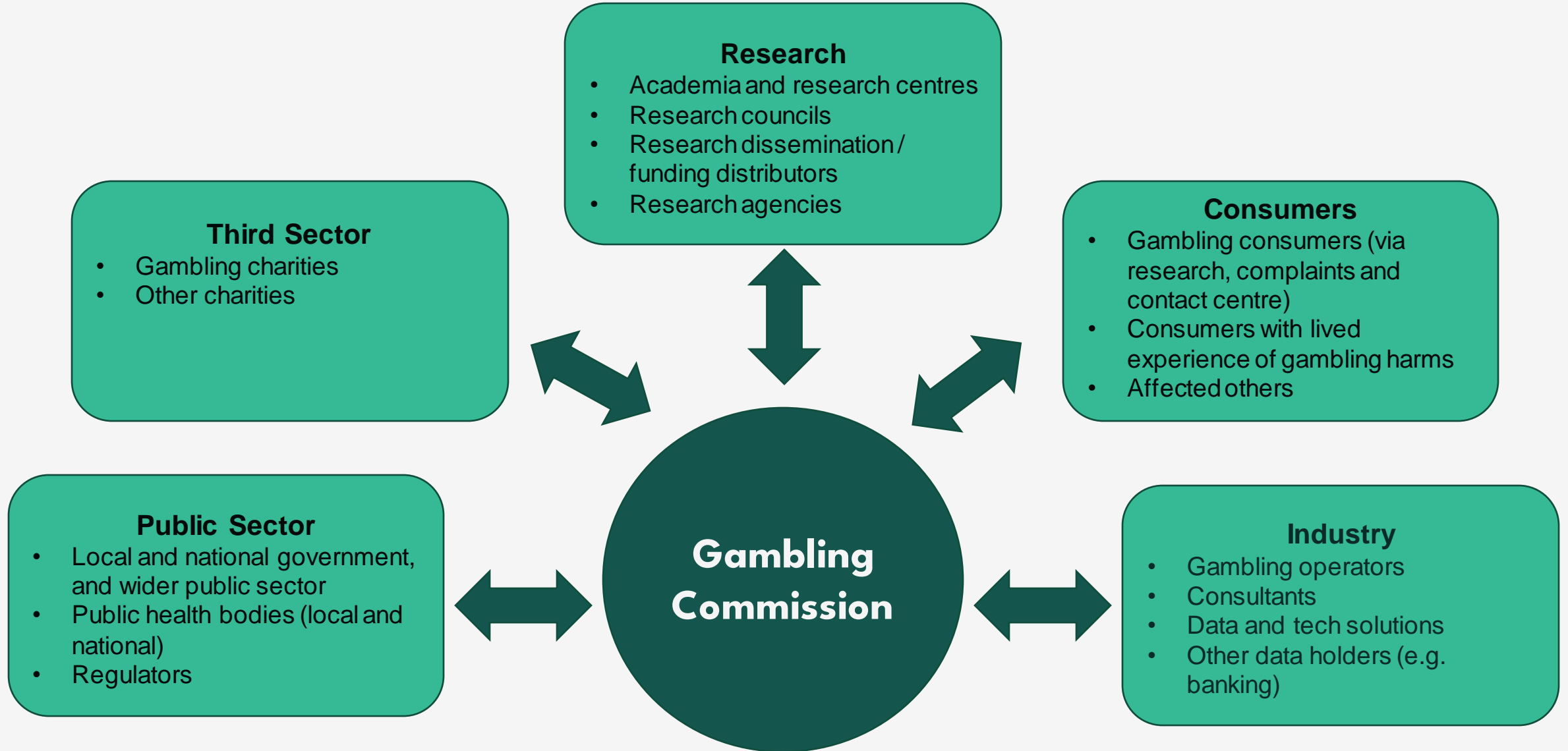
- Health Surveys – England, Scotland, Wales
- Quarterly Telephone Survey
- Online Tracker
- National Lottery Tracker
- Consumer Research



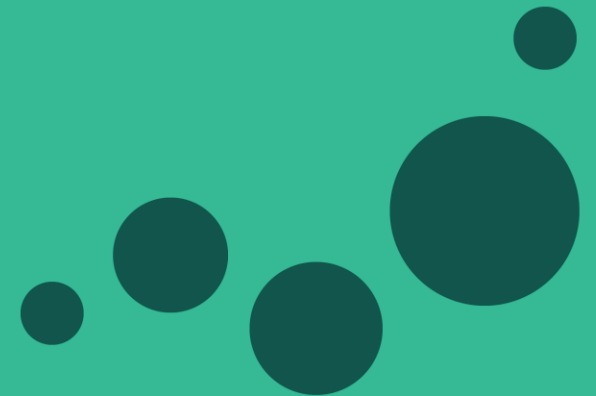
2023/24 onwards

- Gambling Survey for Great Britain (GSGB)**
Official Statistics measures covering gambling participation and impact of gambling.
- Consumer Voice Research**
Deep dives into key policy issues, emerging trends etc
- Data Innovation**
Data pilot projects

Evidence Ecosystem



Developing the Gambling Survey for Great Britain



Developing the GSGB



Consultation 2020/21

Stage 1

Methodology pilot

Test suitability of a
'push to web'
methodology and
understand impact of
methodology change

Oct 2021-March 2022

Stage 2

Experimental phase

Test and
refine methodology
Step 1, 2 and
3 experiments

July 2022-June 2023

Stage 3

Official statistics

Implement
new methodology on
a permanent basis

Data collection July
2023 onwards



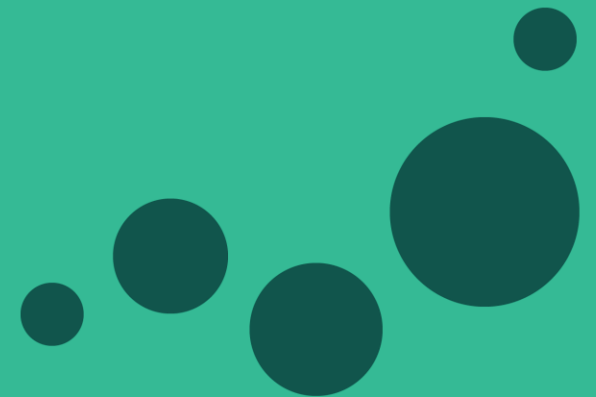
What will the GSGB provide?

- A greater understanding of gambling behaviours across Great Britain.
- Better detection and understanding of patterns and trends in gambling behaviour.
- Ability to detect change amongst sub population groups.
- Timely and regular outputs.
- Open and transparent data source for all to use.
- Opportunities for continuous improvement.

A new baseline for gambling behaviours

- **GSGB sets a new baseline.**
- **Provides timely and regular data allowing us to track movement and changes in behaviour.**
- **Open and transparent about survey methodology strengths and limitations.**
- **Defined period of development is complete but continuous improvement will continue.**
- **Further experimentation to understand impact of change in methodology.**
- **Understanding the broader context around the impact of gambling amongst gamblers.**

What do we know so far? Year 1 Wave 1 findings



Year 1 (2023) Wave 1 findings

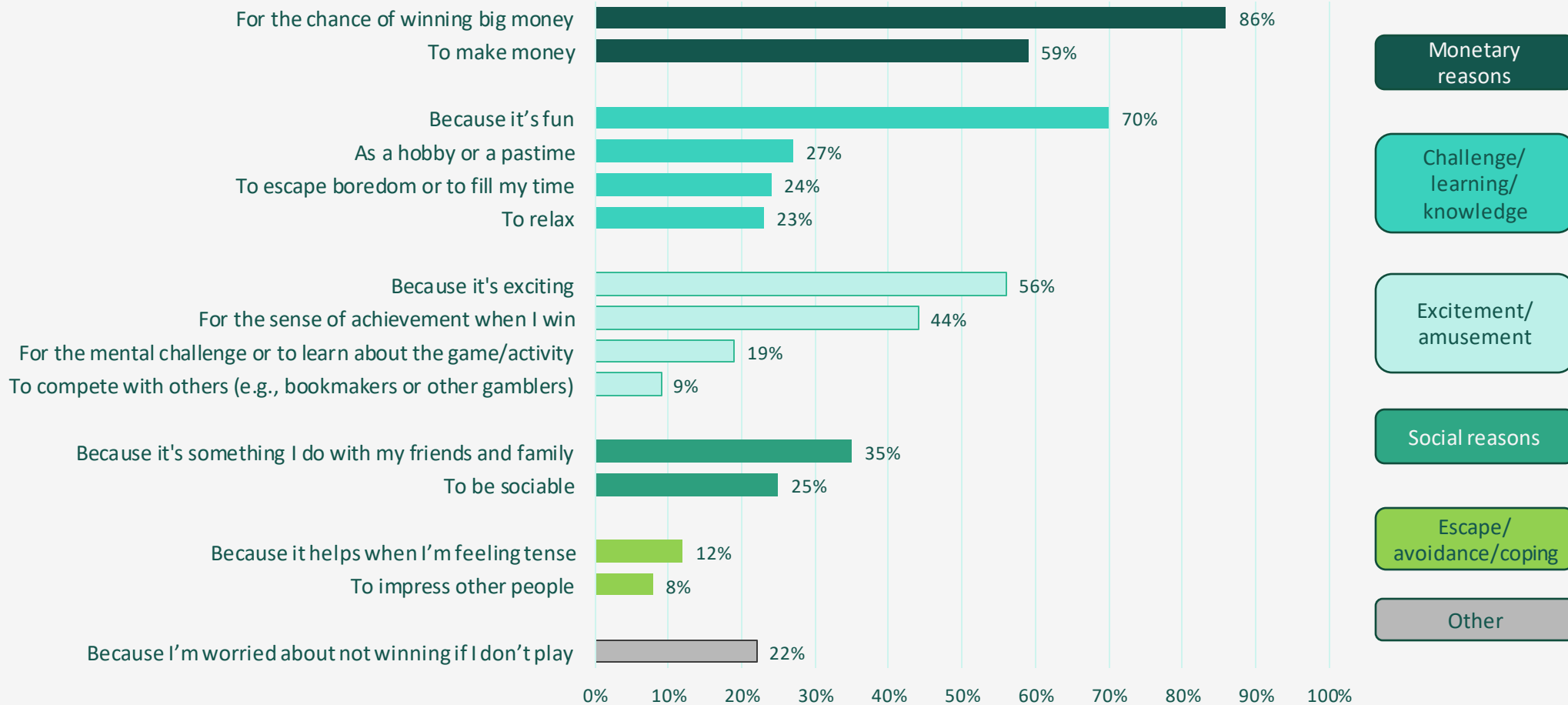
- First publication.
- Data collected July - November 2023.
- Based on 4,801 respondents.
- Wave specific publication focuses on participation - who is gambling, what activities are people gambling on and reasons/motivations for gambling.

Gambling
Survey
for
Great
Britain



Understanding why people gamble

Reasons for gambling (themes) – past 12 month gamblers

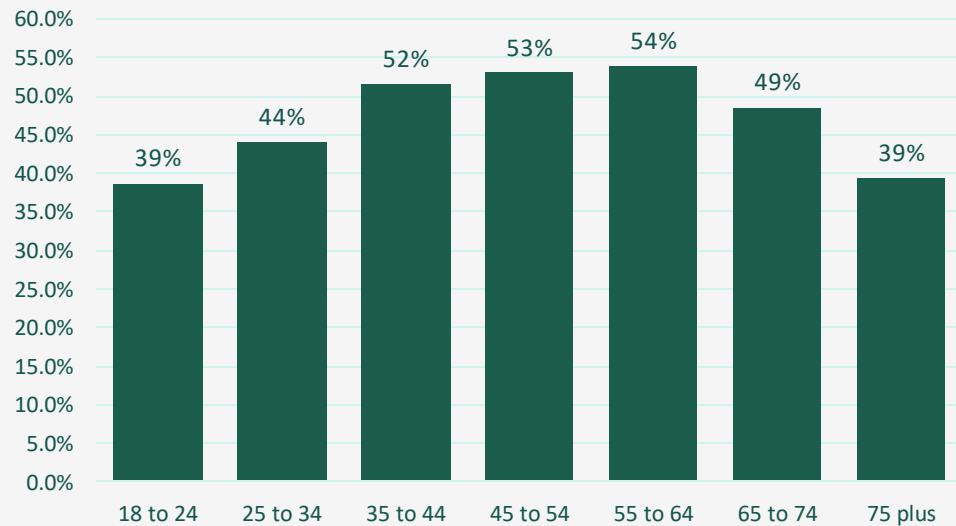


Base: Productive individuals who gambled in the last 12 months
Unweighted bases of those providing a valid response (n=2824 – 2854)
Respondents could select more than one statement

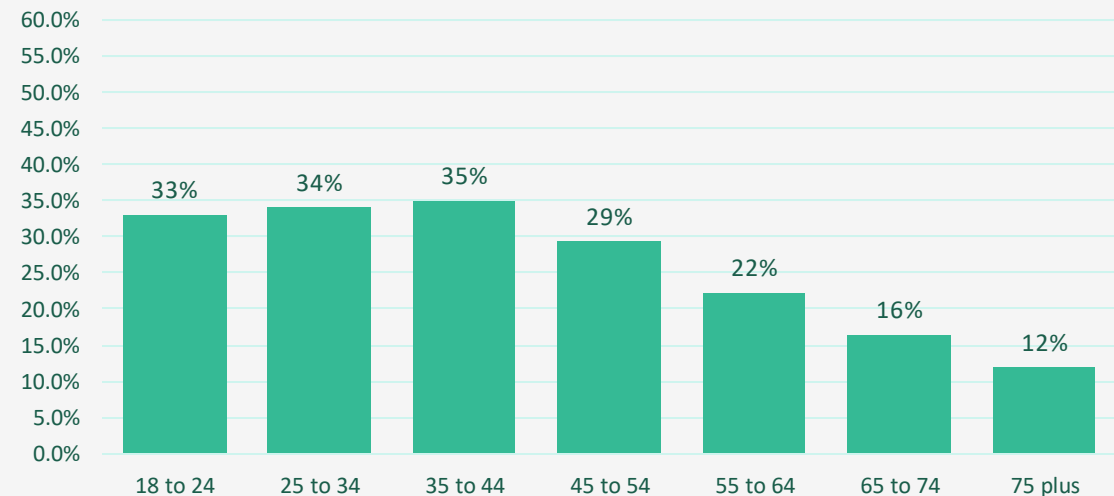
Participation in gambling in the last 4 weeks

Past 4-week participation	Overall participation		Excl. those who only play lottery draws	
	%	N	%	N
Gambled on any activity	48%	2271	27%	1273
Gambled online	38%	1775	16%	730
Gambled in person	29%	1392	18%	876
Male participation	53%	1227	31%	712
Female participation	43%	1036	23%	558

Gambled in the past 4 weeks by age

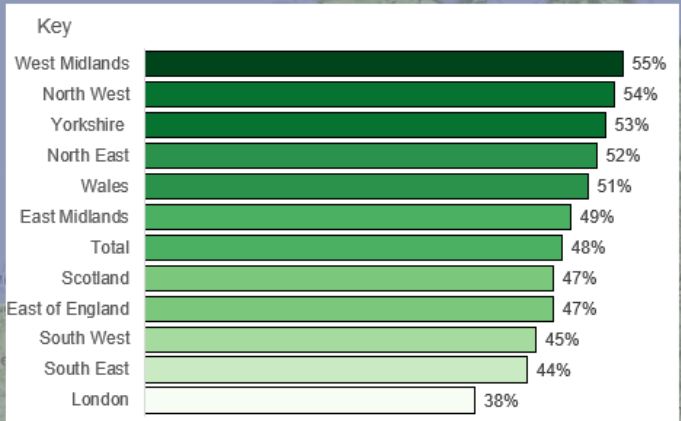
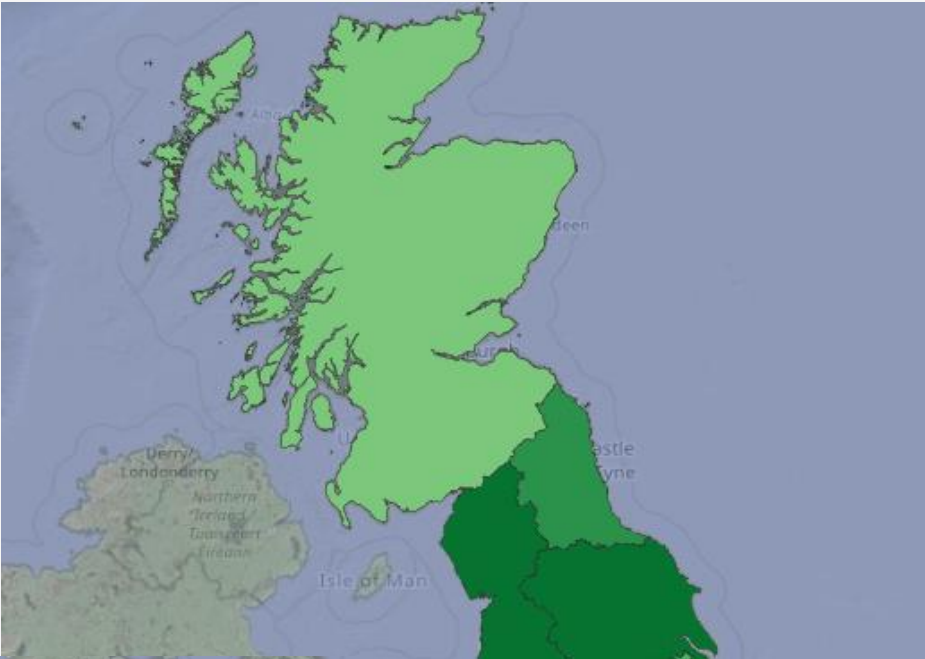


Gambled in past 4 weeks by age - Excluding those who only play lottery draws

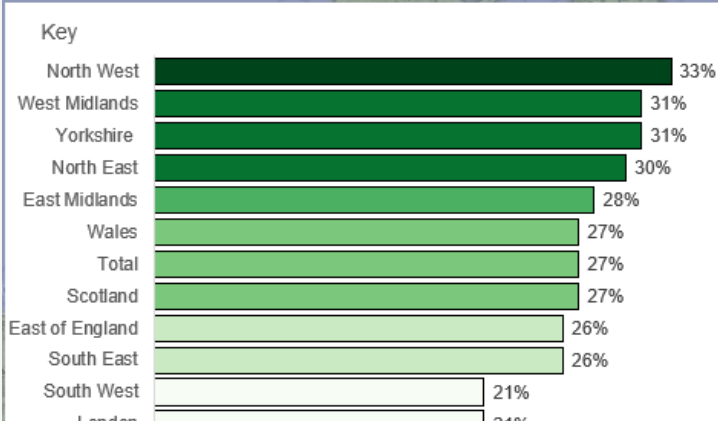
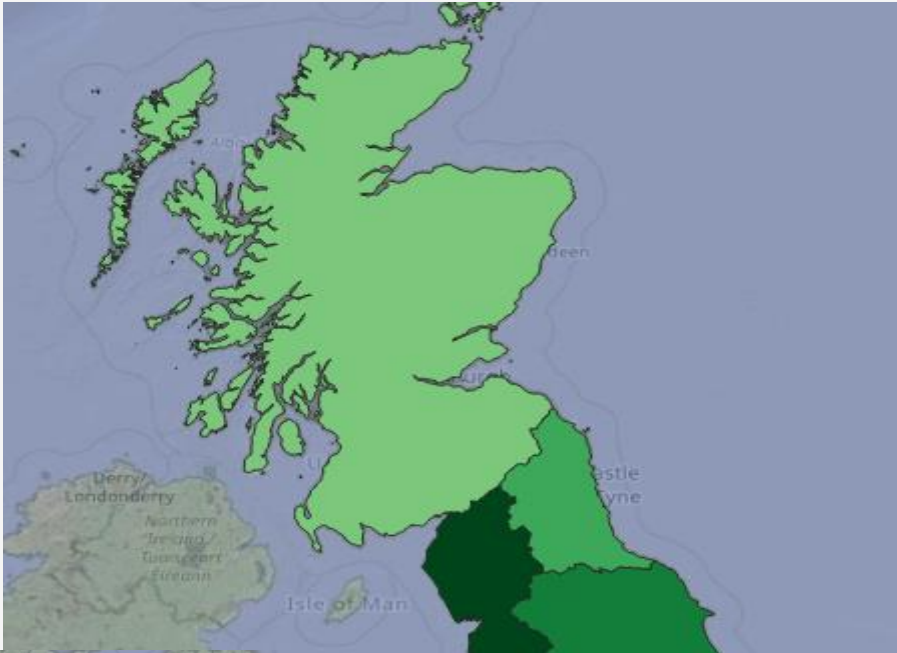


Participation in gambling in the last 4 weeks

Percentage of respondents by region who have gambled in the last 4 weeks



Percentage of respondents by region who have gambled in the last 4 week (excluding those who only play lottery draws)



Participation by activity – Last 4 weeks

Lotteries	%	N
Lotteries	36.7%	1742
- Tickets for National Lottery	31.3%	3264
- Tickets for National Lottery – Online	24.5%	1159
- Tickets for National Lottery – In person	17.2%	814
Tickets for other charity lotteries	16.2%	765
- Tickets for other charity lotteries - Online	14.4%	680
- Tickets for other charity lotteries – In person	6.4%	301

Scratchcards and Instant Wins	%	N
Scratchcards	13.2%	626
- National lottery scratchcards	11.8%	559
- Other scratchcards	4.9%	232
Instant win games	6.9%	326
- National lottery online instant win games	5.7%	269
- Other online instant win games	3.3%	155

Bingo	%	N
Bingo	4.7%	225
- Bingo played online/in app	2.7%	126
- Bingo played in person	3.3%	154

Betting	%	N
Betting	9.9%	472
- Betting on sports/racing online/via app	8.7%	413
- Betting on sports/racing in person	3.3%	158
- Betting on outcome events online	2.0%	94
- Betting on outcome events in person	1.4%	65
- Bet in-play	3.9%	183
- Used a betting exchange	1.0%	46

Casino	%	N
Casino games	3.2%	150
- Casino games online	2.6%	124
- Casino games played in a casino	1.2%	59
- Casino games played on a machine in a venue	1.2%	57
- Casino games played with a live dealer	1.1%	53

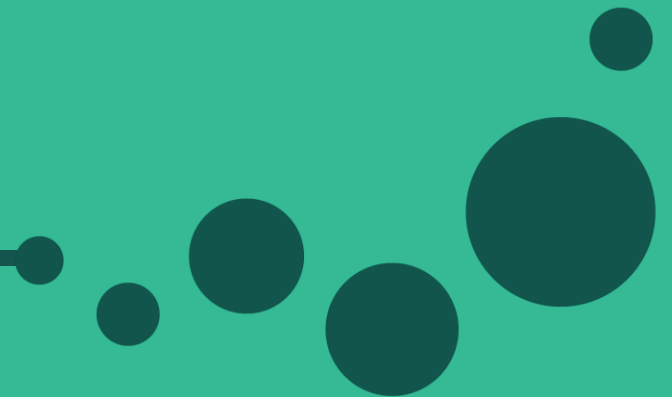
Other Activities	%	N
Football pools	1.6%	78
Private betting e.g. with friends	3.2%	151
Another form of gambling	1.3%	63

Type of sports bet	%	N
Live football	6.5%	310
Live horse/dog racing	3.7%	178
Other live sports	1.3%	61
Live tennis	0.6%	30
Virtual games/races	0.4%	17
E-sports	0.1%	6

Fruit and Slots	%	N
Fruit/slot games	5.1%	244
- Fruit/slots online	3.3%	157
- Fruit/slots in person	3.5%	166
- in a pub/bar/club	1.5%	70
- in a gaming centre/arcade	1.7%	83
- in a casino	0.6%	28
- in a bingo hall/social club	0.4%	19
- in a bookmakers	0.3%	13

Any activity	%	N
Any gambling activity	47.9%	2271

Developing our understanding about the impact of gambling



Measuring the wider impacts of gambling

“Gambling-related harms are the adverse impacts from gambling on the health and wellbeing of individuals, families, communities, and society.”

Wardle et al (2018)

Our aim:

To gain a broader understanding of the wider harms that people may experience as a result of their own or someone else’s gambling

We are not aiming to develop a headline score or psychometric scale of gambling-harms, or to replace the PGSI



Measuring the wider impacts of gambling

2020

The Commission started piloting new survey questions designed to understand the harms and negative consequences experienced by both gamblers and affected others. These built on work by Browne et al (2016) and Langham's taxonomy of harms.

2021

The questions were iteratively tested on an online tracker survey on a quarterly basis, trialling different response options and running validation checks. Stakeholder engagement with lived experience, policymakers and industry took place.

2022

Testing moved into the pilot of the GSGB for further development, and the data and our approach were independently analysed by University of Glasgow, and peer reviewed by Robert Williams and Rachel Volberg.

2023

Development continued, including:

- Acting on recommendations from the peer review
- Experimental phase testing of binary and scale response options
- Qualitative research to understand 'occasionally' response option

Measuring the wider impacts of gambling

- Stakeholder engagement held at the end of 2021
 - Industry
 - People with lived experience of gambling harm
 - Policy and academics
 - Online consultation survey
- There was widespread agreement on the need for further measurement of harms, both to self and others
- Participants were asked about what kinds of harms should be covered, and responses mapped well to the three domains of resources, relationships and health

Measuring the wider impacts of gambling

Severe harms as a result of gambling

Yes/no response options

- Losing something of significant financial value (such as home, business or car) or been declared bankrupt
- Relationship breakdown (e.g. spouse, partner, family member, or friend)
- Experiencing violence or abuse
- Committing a crime to finance gambling or pay gambling debts
- Considering or attempting suicide

The same questions are asked to past 12-month gamblers about their own gambling, and to all respondents about someone else's gambling

Other negative consequences of gambling

Very often / fairly often / occasionally / never

- Reducing or cutting back everyday spending (e.g. food, bills and clothing)
- Using savings, credit cards or loans
- Experiencing conflict or arguments with family, friends or colleagues
- Feeling isolated from other people
- Lying to family or others
- Being absent or performing poorly at work or study
- Borrowing money or selling possessions (PGSI)
- Feeling guilty (PGSI)
- Having health problems, including stress or anxiety (PGSI)

Qualitative research (NatCen, 2023)

- Participants tended to express that experience of an ‘occasional’ harm was negative or adverse in some way, even where they felt the impacts were very minimal.
- The adverse impacts experienced by participants ranged from feeling "annoyed" or "frustrated" to more significant effects including anxiety and cutting back on daily essentials.
- It will be important to note that ‘occasional’ harms capture a range of adverse impacts, with some being very minimal while others are more severe.

“I suppose the bigger thing was what I buy foodwise. It was very much having to just go to Asda, buy what was reduced and pretty much make up batches of soup because that was the cheapest thing that was healthy that I could eat.”

Female, 55+, affected other

“It [using savings] didn't have an impact on me in a massive way. It was just frustration, anger, irritation.”

Male, 35-54, gambler

Plans for release of findings – July 2024

- Severe harms such as significant financial loss, relationship breakdown, violence or abuse, or crime will be reported separately from other negative consequences.
- Negative consequences will be reported individually according to response options, so that the % of respondents answering ‘occasionally’, ‘fairly often’ and ‘very often’ is clear.
- We will also present the relationship between responses to the new questions and responses to the PGSI.
- The findings will be accompanied by a technical report outlining in detail the full approach to developing the new questions.

Next steps

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Year 1 (2023) Waves	Fieldwork dates	Publication
Wave 1	31 Jul-16 Nov	Feb 2024
Wave 2	6 Nov-7 Mar	Jun 2024
2023 Annual report		Jul 2024

Year 2 (2024) Waves	Fieldwork dates	Expected publication
Wave 1	Jan-Mar 2024	Sep 2024
Wave 2	Apr-Jun 2024	Nov 2024
Wave 3	Jul-Sep 2024	Feb 2025
Wave 4	Sep-Dec 2024	Apr 2025
2024 Annual report		May 2025

Next steps

- **Improved evidence base for understanding gambling behaviours in Great Britain**
- **Newly developed GSGB area on GC website to host**
 - Latest reports
 - Data tables
 - Interactive dashboard
 - Topical reports
- **Access to the raw data on the UK Data Service (UKDS) after each annual publication for use by the wider evidence ecosystem**
- **Continuous improvement**

Questions?



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safer, fairer and crime free**

www.gamblingcommission.gov.uk

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