

Research Programme 2017 - 2019

May 2017

Introduction

Purpose

1. In April 2016 the Responsible Gambling Strategy Board published the National Responsible Gambling Strategy 2016-19. Research to improve our understanding of a number of topics is crucial to the success of the Strategy in reducing gambling-related harm. This paper sets out the Board's current view of the priorities for research to be commissioned in the period from April 2017 to March 2019.
2. Our hope is that by being specific about the research needed to fill current evidence gaps, we will encourage a wide range of academics, research agencies and others to help deliver the work.¹
3. The research topics we set out are diverse and could be approached from many different angles. We hope that researchers from a wide range of disciplines will bring forward their expertise to help us obtain the evidence and insights we need.
4. This is intended to be a living document, subject to change in the light of new learning or emerging issues. It will be updated annually, although we will be prepared to consider new research requirements at any point should the need arise.
5. We published a draft of this research programme in December 2016 and invited comments from all stakeholders on whether we were focusing on the right things and prioritising the most important topics. This finalised version includes a number of changes based on the comments received. We are grateful to all those who commented.

Roles and Responsibilities

6. As the Gambling Commission's expert advisors, the Responsible Gambling Strategy Board works within the existing legislative framework for regulation of gambling. Government policy regards gambling as a legitimate leisure activity, to be permitted provided it is consistent with the licensing objectives of the Gambling Act 2005. Our task, within that policy framework, is to provide advice on how best to strike an appropriate balance between protection of the vulnerable and the desirability, other things being equal, of giving players freedom over how they spend their leisure time.
7. In May 2016, the Responsible Gambling Strategy Board and GambleAware published a Research Commissioning and Governance Procedure which describes how research priorities are set and how research programmes are commissioned under the tripartite agreement between the Board, GambleAware and the Gambling Commission.² The purpose of the Procedure is to give transparency about the arrangements and to provide assurance that research priorities are set independently and are delivered with integrity.

¹ Which itself supports Priority Action 10 of the strategy to widen the research field.

² [Research Commissioning and Governance Procedure](#), Responsible Gambling Strategy Board, April 2016

8. In brief:

- **The Responsible Gambling Strategy Board** is responsible for establishing and maintaining this research programme. For each project, the Board will produce a research project brief outlining the policy context, setting the research questions to be addressed, explaining how these questions relate to strategic priorities, and describing how the research output is likely to be used.
- **GambleAware** is responsible for developing and maintaining a commissioning plan based on this programme and seeking to deliver as much of it as possible within the limitations of available funding (while also meeting GambleAware's charitable objects). GambleAware may commission other research projects outside the scope of the programme, but consistent with its objectives, to the extent resources allow. GambleAware may also seek to identify other sources of funding to deliver the programme, such as appropriate research grants.
- **The gambling industry** has no influence on the setting of priorities, on the research projects themselves or on the publication of research reports. It does have responsibility for supporting the research by making data and other information available. All sectors of the gambling industry should regularly and routinely share data and make it available for research. The Strategy also assigns responsibility to the industry for improving methods of identifying harmful play (Priority Action 5), for piloting interventions designed to inhibit harmful play or mitigate its effects (Priority Action 6) and for ensuring that any such interventions are robustly, publicly (and often independently) evaluated to ensure that any learning is shared (Priority Action 3). GambleAware, the Gambling Commission and the Responsible Gambling Strategy Board will take action to facilitate and support this activity.
- **The Gambling Commission** also has a role to play in commissioning and delivering research and has a statutory role to give advice on the incidence of gambling, the manner in which gambling is carried on, the effects of gambling and the regulation of gambling. It has the power to commission research itself. The Commission generally follows the convention of focusing on participation and prevalence research, as well as other research that enhances its role as a source of credible statistics on gambling in Great Britain.

Structure of this document

9. The research projects in this document are grouped under the headings of the priority actions set out in the Strategy. Some projects may, in practice, be relevant to more than one of the priorities.
10. For most priority actions it is possible to define the research projects necessary to underpin them very specifically. Generally, we anticipate that these projects will be commissioned by GambleAware. For other priority actions, precise specification is more difficult. E.g. it is impossible to identify all the evaluations that will be required over the time period covered. Some interventions that will need to be evaluated are yet to be developed. In these cases, we have set out a more thematic approach. We anticipate that many of these projects will be led by stakeholders other than GambleAware, often by gambling operators or their representatives.

11. For each specific project, we have set out:

- **Description and purpose:** A high-level outline of the issue and why it is important
- **Research questions:** What we want to find out
- **What we already know:** A brief overview of existing research and evidence
- **Possible research techniques:** An indication of the nature of the research. This should not be interpreted as restrictive. We welcome innovative or alternative approaches.

12. In some areas any follow-up activity will be dependent on the initial stages of research on the topic. Where this is the case, we have provided some thoughts on what the follow up stages may need to cover.

Quality assurance

13. GambleAware, as commissioners of most elements of this programme, will set out their principles for ensuring research is of high quality, represents value for money and is likely to be influential towards the objective of minimising gambling-related harm.

Overarching principles

14. Two cross-cutting priority actions of the National Responsible Gambling Strategy that have not been connected to any specific research projects are also relevant:

- **Priority Action 11 – Horizon scanning:** The gambling industry is changing at a fast pace, introducing new products and ways of engaging with customers. It is important that the programme of research makes the most of opportunities to identify risks that are likely to materialise in the future, as well as those we currently face.
- **Priority Action 12 – Public engagement:** Gamblers, including those that have experienced harm, and their families and friends, are likely to be able to offer important insights to research. Consideration should be given to ways of capturing these insights in all research projects undertaken as a result of this programme.

Research requirements

Priority Action 1: Understanding and measuring harm

“We have stressed the importance of seeking more comprehensive information about the nature and extent of gambling-related harm, so that considered judgements can be made about the type and quantum of resources needed to address it. In principle, better understanding ought also to make it easier to identify appropriate indicators by which to assess the success of the strategy.”

Page 18, The National Responsible Gambling Strategy

15. The Strategy explained the importance of understanding and measuring the true nature and extent of gambling-related harm. Gambling-related harm is different from simply identifying the number of problem gamblers within a population. It includes the harms experienced by other people, not just the gambler. This includes families and children of gamblers, but also extends to negative impacts on employers, communities and society more generally. It can be temporary, episodic or longer term in nature, and can occur at all levels of gambling participation.
16. Achieving the goal of measuring gambling-related harm would be a significant achievement, though we recognise that it is a challenging task. If successful, the outcome would be a significant improvement on simply estimating numbers of problem gamblers. It would help us to understand more comprehensively the extent of harm to individuals, as well as their families, children, wider society, employers and the economy. It would allow different aspects of harm to be measured, e.g. to health (including mental health), criminal justice, welfare, debt and employment.
17. GambleAware has already commissioned the first stage of this work. The first stage has focused on scoping different types of harm which need to be measured. Depending on what it shows, it will be important to make quick decisions about commissioning the next phase. The projects set out below indicate our current thinking on how this could be taken forward.

Specific projects

Project 1.1: Developing and identifying effective indicators of gambling-related harm

Description: GambleAware will soon publish the results of work undertaken by PwC to set out the different types of harm that need to be measured, e.g. health (including mental health), criminal justice, welfare, debt and employment. Project 1.1 of this programme must build on these findings to develop and identify the indicators that can be used to measure and monitor levels of gambling-related harm in each of these areas.

The aim is to move us from a theoretical framework of what gambling-related harm looks like, to a practical set of indicators and metrics which can be used to measure the level of gambling-related harm and allow this to be monitored over time.

The key difference between this work and the identification of problem gamblers, on which we currently rely, is that it will capture impacts on 'affected others', such as children, families, employers, communities and society as a whole.

Each type of gambling-related harm is likely to have its own unique characteristics. Therefore, this phase of research might be better described as a number of specialist projects, rather than one single activity.

The work should result in recommendations about what metrics need to be constructed and measured (or what data should be collected), and proposals for the design of any future surveys to measure gambling-related harm.

Research questions:

- What metrics or data need to be collected in order to monitor gambling-related harm?
- What survey approaches might be needed to supplement this data collection? What sampling strategy would be needed (i.e. which groups of people would surveys target?)
- How can attribution effects (i.e. cause and effect) be dealt with in any measurement or monitoring activity?
- What qualitative insight can be obtained to accompany and supplement more quantitative descriptions of harm?

What we already know: This work will build on the first phase already in progress, as well as other research on the cost of gambling-related harm, such as that undertaken by the Institute of Public Policy Research (IPPR) and the NIHR School for Primary Care Research (conducted by academics at Bristol University).

Possible research techniques: Obtaining a better understanding of harm will need to include the use of qualitative research techniques, such as in-depth interviews and focus groups. It may be necessary to commission specialist modules of research projects looking at different areas of harm. Although different specialists may need to lead work on different areas of harm, these will still need to be coordinated to ensure that the end product helps create a complete and consistent understanding of gambling-related harm.

Project 1.2: Building and testing a mechanism for measuring and monitoring gambling-related harm

Description: This project will use the knowledge generated from Project 1.1 to pilot and implement a systematic process for measuring and monitoring gambling-related harm over time.

This is likely to be based on the use of existing data where relevant information is already collected (including both published data and negotiation of access to unpublished sources of data) and survey instruments (which could include bespoke surveys targeting particular population groups and questions designed to be included in existing surveys).

The outcomes should become the basis for on-going measurement of levels of gambling-related harm, allowing year-on-year changes to be reported.

Research questions:

- How can data about harms be captured by surveys? How robust and reliable are these data?
- Can the tracker or monitoring mechanism indicate an overall 'level' of gambling-related harm?
- Can it credibly demonstrate changes from one time period to another?
- Can it provide good coverage of all different areas of gambling-related harm?
- Can data be collected cost effectively?
- Can the headline results be communicated effectively and convincingly?

It may also be possible to identify a 'multiplier' that can be applied to give a reasonable 'rule-of-thumb' estimate of harm without having to carry out bottom-up calculations. E.g. *for every PGSI-screen problem gambler, the average direct and indirect harm is 'X'.*

What we already know: This work will build on the two earlier phases of research.

Possible research techniques: A toolkit to measure gambling-related harm may require a combination of primary data collection through a survey alongside collection and tracking of published statistics. Any new survey instrument should be developed to the highest possible standards, incorporating cognitive testing and validation. It will need to be developed carefully, with critical thinking about how best gambling-related harms can be measured and reported.

It may also be possible to identify other opportunities to collect data, e.g. by exploring whether crime data could be recorded in a way that captures gambling as an aggravating factor, as is done for alcohol and drugs.

Priority Action 2: Engagement with relevant public sector bodies and other agencies to encourage greater acceptance of responsibility for delivering the Strategy

"...a wider range of public and other organisations need to accept their responsibilities for working in partnership to reduce gambling-related harm, in particular those individuals and organisations involved in mental or other health services, social welfare or criminal justice."

Page 19, The National Responsible Gambling Strategy

18. Priority Action 2 recommends that gambling-related harm is treated as a public health issue, leading to a wider range of organisations using their skills and resources to tackle the problem.
19. Success requires progress to be made in two key areas: (i) tackling gambling-related harm in a comprehensive way alongside other public health issues like alcohol, drug misuse, or obesity, and (ii) encouraging a wider range of public (and other) organisations to accept their responsibilities for working in partnership to reduce gambling-related harm.
20. Projects 1.1 and 1.2 should play an important role by demonstrating the real impacts of gambling-related harm.

21. There are opportunities for secondary data analysis to improve our understanding of gambling-related harm and how it presents alongside other health-related conditions, including mental health. This project could make use of published data sets, as well as interrogation of data from treatment providers (via GambleAware's Data Reporting Framework) to analyse the comorbidities of those gamblers presenting at treatment services. It will help us better understand:

- What other conditions are those experiencing, or at risk of, problem gambling more likely to suffer from?
- When conditions are present in combination, which is likely to trigger someone to seek help from health (or other) services?
- Given these conditions, to what services might we reasonably expect those suffering gambling-related harm to present, and in what numbers? What costs to public services are associated with this?

Priority Action 3: Consolidating a culture of evaluation

“The gambling industry is now committing significant resources to harm minimisation, over and above its voluntary contributions to the Responsible Gambling Trust (now GambleAware). It is important that those resources are well-directed, that any interventions are robustly evaluated and that information is routinely shared with other operators and stakeholders so that appropriate lessons can be learnt”.

Page 20, The National Responsible Gambling Strategy

22. The Strategy expects every significant harm minimisation intervention to be routinely evaluated in line with the good practice principles outlined in the Evaluation Protocol.³ Evaluations should be published or otherwise shared, so that learning is disseminated.
23. Process evaluations can provide interesting insights into whether an intervention was implemented as intended. But it is only *impact* evaluations that can provide the necessary evidence of effectiveness.
24. This is an area where accelerated progress is required. When we publish our progress report on the first year of the Strategy we will highlight initiatives at sector level that should be subject to evaluation, but individual operators should consider taking steps to evaluate the impact that their own player protection initiatives are achieving.

Roles and responsibilities in evaluation

25. The Strategy states that the industry should take the lead in evaluating harm minimisation interventions. Where this involves activities that are required by the Gambling Commission's Licence Conditions and Codes of Practice (LCCP), we would expect to see these evaluations delivered in close partnership with the Commission. We would also expect the Commission and the Government to play a role, alongside industry, in evaluating the impact of any changes that result from the Gambling Review or any other legislative changes.

³ [Evaluation Protocol](#), Responsible Gambling Strategy Board, April 2016.

26. We expect GambleAware to play a significant role in the success of this priority action. Support by GambleAware does not mean it will provide funding. Its input is more likely to involve facilitation and coordination and is likely to involve:

- **Improving the capacity and ability of the industry to conduct and commission evaluations:** Following the publication of the Evaluation Protocol, work is in progress to support the industry to undertake robust evaluations. GambleAware has begun delivery of bespoke evaluation training and has also started to plan the development of evaluation 'FAQs', access to workshop materials and expert advice, details of appropriate evaluation contractors, and guidance on how to commission an evaluation. We expect this work to continue, and to evolve as the industry's requirements change or become more apparent.
- **Practical coordination of evaluations:** Independent evaluations are perceived as more objective and robust, resulting in more credible results and increased stakeholder confidence. There may be circumstances where the industry provides money to GambleAware to commission and manage an independent evaluation of a particular initiative or intervention.⁴
- **Facilitating the sharing of learning:** The successful consolidation of a culture of evaluation should see every significant new intervention routinely subjected to impact evaluation. These evaluations should be published and findings shared between operators.

Project 3.1: Evaluation – analysis of best practice and key lessons learnt

Description: In order to facilitate shared learning from industry-led evaluations of harm minimisation interventions, we may need to review completed evaluations to determine key recommendations and identify successful initiatives. This project will aim to consolidate what works and what doesn't work and to identify best practice and lessons learnt, whilst considering how effectively evaluation is being carried out by the industry.

Research questions:

- Which harm minimisation initiatives have worked, and which have not?
- If initiatives have not worked, what can we learn and how can the sector / industry move forward?
- How effectively is industry evaluating initiatives?

What we already know: To date a number of evaluations have been published, including:

- Evaluation of the Multi-Operator Self-Exclusion Scheme in bookmakers
- Evaluation of player awareness system implementation
- Campaign evaluation for the Senet Group
- NCF Playing Safe evaluations.

We expect more evaluations to have taken place by the end of the Strategy period.

⁴ This level of independence may afford other advantages – e.g. there may be circumstances where operators are not permitted to have further contact with those affected by the intervention (such as self-excluders).

Possible research techniques: There are established techniques available to review existing evaluations and feed best practice and key learnings into the development of new initiatives and harm minimisation practices. Reviews could be considered by theme or sector, depending on the number and quality of evaluations completed.

Priority Action 4: Increased understanding of the effects of product characteristics and environment

“An effective harm minimisation strategy needs to address not only the individual player, but also features of the product (stake size, speed of play, volatility and so on) and the environment in which play is offered (opening hours, location, layout etc.). It should be conscious of the interaction between any of these factors, and recognise the potentially varying levels of risk associated with different gambling activities”.

Page 21, The National Responsible Gambling Strategy

27. The research required for this priority action will help us better understand if, how and why some gambling products are more harmful than others.

28. To begin to answer these questions, we will need to understand:

- How and why people play particular products, and how this varies by different types of premises.
- How and why the way people gamble differs between products and by socio-economic characteristics of players (and the answers they give to problem gambling screening questions).
- Gamblers' motivations for gambling in particular environments, or in particular ways.
- Why do people start, continue or stop gambling, and what triggers them to move in and out of harmful periods of play?
- What role does marketing and advertising play?
- How are children affected by the normalisation of gambling in society?

29. Answering some of these questions will involve analysis of real play data, provided by the gambling industry. We think that all sectors of the gambling industry should regularly share data and make it available for research.

30. It is possible that, in practice, some of the projects set out below will need to be delivered as a series of smaller projects covering specific products or sectors.

Specific projects

Project 4.1: The effect of advertising on children, young people and vulnerable people

Description: An increase in the volume of advertising, combined with advances in technology offering opportunities for increased marketing and advertising, has exacerbated a longstanding concern - the effect of gambling advertising, particularly on children and young people. There are other groups of people, such as those with mental health problems, who might also be considered more vulnerable to harm.

It is important that we improve our understanding of the effect of gambling advertising on these groups. It is likely that this will require projects which assess young people's perception of gambling advertising (including of the National Lottery), and the impact it has on their behaviour.

This should not focus only on broadcast media. It is important that this includes social media, sports sponsorship other forms of marketing.

Research questions:

- What does content analysis tell us about the real level of exposure to advertising and marketing of children, young people, and other vulnerable groups? Answering this question would involve analysing the tone and content of advertising and when and where it takes place.
- What impact does gambling advertising have on children and other vulnerable groups' attitudes towards gambling, responsible gambling and gambling behaviour?
- What are these groups' perceptions about gambling from its marketing and advertising?
- Does a perceived 'normalisation' of gambling, from widespread advertising, influence behaviour?
- Does advertising affect not only *whether young or vulnerable* people gamble, but *how* they gamble?
- What other factors play a significant role in children's participation, e.g. parental facilitation?

What we already know: Newly introduced questions in the Gambling Commission's Young Persons Omnibus have started to provide some quantitative insight into young people's exposure to advertising, their perceptions of gambling, and gambling behaviour.

New research could draw on:

- Gambling advertising: A critical research review. Per Binde (2014)
- IPSOS Mori Young Persons omnibus
- Gambling and Social Media (DEMOS)
- Wider research on young people and their use of alcohol and tobacco.

Possible research techniques: This research will require primary qualitative and quantitative research with children, young people and other groups that could be considered at greater risk of suffering gambling-related harm.

Project 4.2: Analysis to describe patterns of play on different gambling products and in different environments

Description: The machines research programme, which was based on data showing real patterns of play, greatly improved our understanding of how people gamble on these products. It was followed by the publication, by the Gambling Commission, of further data on machine play in bookmakers, adult gaming centres and bingo premises.

Currently, we have a limited understanding of how people play on other gambling products, and how this differs by environment or location. Most notably, greater insights are needed on how people gamble online.

Real play data need to be analysed to provide descriptive statistics on play. Where similar games are offered in different environments (such as roulette on machines and online), the figures should be compared.

Research questions:

- How do people gamble in different environments and premises? (A top priority will be to establish a better understanding of online gambling, but further data and analysis should also cover casinos, bookmakers, bingo, arcades, scratchcards and lotteries)
- To what extent are differences in behaviour due to the circumstances of people gambling in different environments and/or an interaction between the environment and the product itself?
- Key metrics to understand include:
 - How much people stake?
 - How fast they play?
 - How long they play for?
 - Whether players adopt higher or lower risk approaches to their play?
 - Session outcome (how much people win or lose)?
 - Whether return to player messaging has any impact on players' behaviour?
 - What impacts are made by 'autoplay' and 'bet again' features?

What we already know: We have a reasonable understanding of patterns of play on certain types of gaming machine, but this has still been limited to play within sessions. Future research should explore opportunities to provide a greater insight into the experience and impact of gambling across sessions. It will also need to acknowledge that the demographics of players will also be different across types of premises and environments (e.g. online).

Possible research techniques: The project should build on approaches employed in GambleAware's machines research programme. Real play data should be subjected to analysis to produce descriptive statistics on differences in intensity of play and session outcome for a variety of gambling products/games.

Project 4.3: Understanding consumer vulnerability by linking data on play with individuals' socio-economic background and attitudes to gambling

Description: Project 4.2 will provide a better understanding of how people play, particularly online, but will not allow us to understand the potential for harm caused by different products unless further research is undertaken which takes into account the characteristics of players and the impact their gambling has on them.

Research should seek to match real play data with data on the individual gambler and data from surveys of players to enable analysis of how people's play varies by socio-demographic status, attitudes to gambling, and problem gambling status. Where play data is not systematically recorded (i.e. anonymous, terrestrial gambling) consideration should be given to how it can be collected.

Research questions:

- Are any particular forms of gambling more strongly associated with gambling-related harm, for example gaming machines in bookmakers? If so, is there evidence of a causal relationship?
- How does people's play vary by a range of socio-economic and demographic characteristics?
- How does play vary relative to people's responses to screening questions about problem gambling status or gambling-related harm, and other questions about attitudes to gambling?
- How do these behaviours vary across products and over time?
- Does use of the gambling management tools, such as setting time or money limits, have any correlation with a reduction in possible indicators of harm?

What we already know: Research on loyalty card holders provided valuable insights into people who use gaming machines in licensed betting offices. However, these insights are limited to a small subset of gamblers (loyalty card holders) on a single form of product. Further research should expand our understanding of harm associated with machines, as well as with other forms of gambling, such as online and casinos.

Data will also become available from GambleAware's Data Reporting Framework on the primary gambling activity that people receiving treatment associated with the harm they experienced.

Possible research techniques: There are some circumstances where play is attributable to a known individual (e.g. play where a loyalty card is used, or online gambling where all play is account-based). Where play data is not recorded and/or is not attributable to a known individual, relationships will need to be generated by new primary research. This research may involve a combination of in-venue observational research, interviews with players and self-report gambling diaries.

These approaches could be supplemented by in-depth interviews or focus groups with gamblers who participate in a wide range of activities, in a range of venues. This could explore the factors that led to them suffering harm and their motivations for taking up different forms of gambling. It would be useful to focus this work on people who have suffered gambling problems. Care would be needed with sampling to avoid bias towards or against specific products.

Project 4.4: Online gambling: The impact of accessibility and the effect of being online in decision making and behaviour

Description: Remote now makes up the largest sector of the British gambling industry. Given its scale and broad range of issues that need to be explored, it is likely that the brief for this research will need to break it down into sub-projects.

The Strategy highlights the prevailing trend of a shift towards online gambling, including via mobile phones and other portable devices. We need to understand the effects of this trend, particularly increased availability and other characteristics of remote gambling, such as the perception of anonymity which comes from lack of face-to-face interaction with the gambling operator.

The Gambling Commission also recently consulted on its approach to virtual currencies and 'in-game' items, which can be used to gamble. A key concern was the protection of children who could be exposed to gambling. Research on remote gambling should cover the full range of activities defined as within the scope of regulation.

Research questions:

- What effect does the instant accessibility offered by online gambling have on the risk of harm?
- Does greater accessibility contribute to the maintenance and development of problematic play? Does this play a more causal or exacerbating role?
- Are there other features of online play that could lead to harm, such as terms regarding withdrawing funds, increased exposure to marketing and in-play betting?
- How does 'being online' influence people's play – do people behave differently than they would in land-based environments?
- What risks are associated with gambling markets that use virtual currencies and 'in-game' items – particularly in relation to young people?
- To what extent are these risk factors offset by the potential for greater protections in online play (e.g. all play is account-based)?

What we already know: We know how many people gamble online and the rate of problematic gambling among this population. GambleAware is also supporting a programme of activity with the remote sector to develop algorithms to identify harmful play and to trial and test interventions to reduce harm.

There is also research, from disciplines such as psychology and sociology, which has explored why people can behave very differently when online.

New research could also draw on:

- Key issues in product-based harm minimisation, Parke et al, 2016
- British Gambling Prevalence Surveys 1999, 2007 and 2010
- Getting grounded in problematic play: Using digital grounded theory to examine problem gambling and harm minimisation opportunities for remote gambling (when available)
- Gambling Australian Productivity Commission report, 2010
- Harvard analysis of Bwin customer data.

Possible research techniques: The research will need to engage with players to better understand their interactions with the sector. Consideration will need to be given to the nature of primary research and how participants can be recruited.

Answering these research questions, and others in the research programme, could provide the opportunity to make use of neuroscience experiments. These could be used to understand what players' neurological/biological responses are to particular game characteristics and features. The approach would require input from experimental scientists to develop it effectively.

Project 4.5: Longitudinal study: Why do people move in and out of harmful play?

Description: This research will explore the factors that cause people to start, continue and stop gambling. It would also look at how their gambling takes place across different products and environments (including remote and the National Lottery), and the reasons for switching between different forms of gambling.

In particular, this research should aim to identify triggers of harmful play, and factors that lead to recovery. These insights could have a wide range of implications for policy making and the design of prevention and treatment interventions.

Research questions:

- How do motivations to gamble vary by product?
- Are particular products more likely to be 'gateway' activities, and what does a typical 'progression' in gambling look like?
- What types of change in players' lives are likely to lead to, or reduce, harmful play?
- What role do factors like marketing and advertising play?
- How does this vary according to demographics and other characteristics that might be seen as markers of 'vulnerability'?
- What helps players to make positive decisions regarding harm prevention, including the use of gambling-management tools?
- What role does a player's view of the operator play? What information about an operator does a player use to make decisions?
- How much do people actually spend (previous attempts to measure this have been unsuccessful and new research would need appropriate cognitive testing)?

What we already know: Harmful gambling can be episodic and is often non-linear - people move in and out of problematic behaviour. This work could build on a range of existing research:

- Changes in machine gambling behaviour (NatCen, 2014)
- Gambling careers: a longitudinal, qualitative study of gambling behaviour (Reith)
- Longitudinal research studies (ALSPAC, Millennium Cohort Study)
- Gambling advertising: a critical research review (Per Binde review).

Possible research techniques: Although cost implications have previously deterred efforts to conduct longitudinal research, innovations in online engagement may provide the possibility of delivering longitudinal research in a way that represents value for money. There are also options to consider exploiting existing longitudinal studies (especially those which already have a gambling element). A scoping study may be needed as an initial step in this research.

Priority Action 5: Improving methods of identifying harmful play

“There is a need to continue to improve the methods used to identify harmful play across all sectors of the industry – through the use of data, through observation and interaction by well-trained staff, through effective messaging which prompts self-reflection, or in other ways”.

Page 22, The National Responsible Gambling Strategy

31. We have not specified projects in this area as it is important that the industry leads. However, we will play a role holding others to account if the work does not progress at pace. In line with Priority Action 3, the effectiveness of this work should also be evaluated to demonstrate its effectiveness and allow improvements to be made as required.
32. There has been considerable recent effort in developing and testing algorithms, to explore their ability to predict problematic play on gaming machines. Similar work, supported by GambleAware, is now being undertaken in relation to remote play to determine how algorithms can detect potentially harmful play online.
33. Algorithms can only ever be part of a package of approaches to identify potentially harmful play. More traditional approaches, such as staff interactions are required. Initiatives to improve the quality and consistency of staff interactions should also be evaluated.

Priority Action 6: Piloting interventions

“Identifying harmful play is of little use in itself unless it is followed by successful intervention designed to inhibit it, or to mitigate its effects. There is now welcome acceptance among many operators of the need to experiment with different forms of intervention – customer interaction, messaging, debit card blocking and so on – either at the level of individual firms or collectively through industry groups such as IGRG and the Senet Group. It is important that these good intentions, and the work done to date, continue to be translated into concrete action”.

Page 24, The National Responsible Gambling Strategy

34. The impact evaluation of gambling management tools and other harm prevention interventions should be a central focus of the evaluation work discussed under Priority Action 3.
35. We want to see operators, often working in collaboration with each other, designing and implementing pilot projects to test interventions to reduce gambling-related harm.

We would expect to see this approach adopted over a wide range of different types of support and intervention, and to be taking place in all sectors of the industry.

36. Our report on the first year of the Strategy concludes that not as much progress has been made in this area as we had hoped. We are considering what more can be done to stimulate activity of this type. In the meantime, we recommend that operators give increased attention to trialing, testing and evaluating the impact of:

- Reality checks
- Timeouts
- Expenditure limit setting
- Other types of messaging
- Self-exclusion by product
- Payment methods.

37. Trials and evaluations should consider:

- The impact on harm suffered by players
- How and when these tools are promoted (which, to improve targeting, should be informed by work covered by Priority Action 5)
- Levels of awareness and take up
- Changes in players' understanding and behaviour
- Reasons why some customers might be put off using them (and whether these vary between different socio-demographic groups).

38. Valuable insights could be obtained from behavioural economics, which provides insights into how people make decisions and use the information that is provided to them.

39. We also hope to see results of impact evaluations being shared between operators and not treated as a competitive exercise.

Priority Action 7: Self-exclusion

Introduction and why it's important

Indicators of success - "(We would expect to see) schemes in place and followed by evaluations designed to improve their effectiveness and assess the extent they are effective at reducing gambling-related harm and not, for example, simply displacing activity into other forms of gambling. We would also hope to see improvements in levels of awareness amongst gamblers of the possibility of self-exclusion."

Page 25, The National Responsible Gambling Strategy

40. Work on multi-operator self-exclusion schemes is well advanced. These schemes should be evaluated to assess the extent they are effective at reducing gambling-related harm, and how they might be improved.

41. Evaluation will require the selection of suitable metrics to measure impact. Ultimately, we want to understand whether self-exclusion, and multi-operator approaches in

particular, has actually helped people reduce or avoid gambling-related harm. Process evaluations alone will not be sufficient.

42. Evaluations should also consider capturing wider benefits, such as whether those that self-exclude experience an overall reduction in direct marketing.

Specific projects

Project 7.1: Self-exclusion: Awareness and barriers

Description: A significant amount of investment is taking place in multi-operator self-exclusions schemes. Sector level evaluations are underway or being planned. It will be important to understand the impact of this investment on gambling-related harm.

As well as evaluating the effectiveness of these schemes, it may also be necessary to understand, across all sectors, consumers' awareness of self-exclusion and barriers to its use. This could be included in evaluations themselves, but it may be beneficial to plan for cross-sector research (to be led by GambleAware) to gain a broader perspective. This cross-sector work could also provide an opportunity to consolidate learning from the various sector level evaluations of impact and process.

Research questions:

- Why do more people who could benefit from self-exclusion not use it?
- Is it because of a lack of awareness, or other barriers?
- What are players' perceptions of self-exclusion? Who do they think it is for? Does there appear to be a stigma attached? If so, how can self-exclusion be normalised and promoted?
- What do gamblers want from this type of tool?

What we already know: There is emerging international evidence that the language used around responsible gambling is important and can discourage take up of gambling management tools (e.g. 'responsible' may be considered judgemental and implies irresponsibility). Research could build on:

- Self-exclusion as a gambling harm minimisation measure in Great Britain: An overview of the academic evidence and perspectives from industry and treatment (GambleAware)
- Australian Productivity Commission report on gambling
- GambleAware commissioned review of operator-based harm minimisation
- Gambling Commission exploratory work (using omnibus survey) on general awareness and uptake of self-exclusion.

Possible research techniques: This research may need to combine quantitative surveys to test wider awareness with more in-depth research with smaller groups of gamblers to understand their attitudes and how they make decisions.

Priority Action 8: Education to prevent gambling-related harm

“Too little is still known about the potential role of education in preventing or mitigating gambling-related harm, particularly in relation to children and young persons for whom damaging life-time patterns of behaviour can become established.

Page 26, The National Responsible Gambling Strategy

43. In principle, prevention of harm is better than cure, and so the role of education (as a key form of prevention) needs to be better understood. The research should cover education for the whole population, but look in particular at what might work with young people.
44. The Strategy recognises that developing effective preventative education has proved challenging in relation to other areas of public health. It would be valuable to learn from the experiences of others and to consider what could be usefully transferred to the specific challenges of minimising gambling-related harm.
45. It will be important to identify which pilots are suitable for wider delivery and demonstrate which approaches do not represent value for money, allowing resources to be allocated to more productive interventions.

Specific projects

Project 8.1: How do we know what works in preventative education?

Description: Research needs to explore the potential for education to be used as a harm minimisation tool. A number of pilots are already taking place. However the best methodology for assessing their impact and how they could be scaled up to the national level is not currently clear. We need to undertake critical thinking about what works, what doesn't work, and how this can vary for different people in different circumstances. This project therefore needs to focus on what constitutes success in preventative education and how it can be measured, when success is likely to manifest in knowledge change before it influences behaviour.

Research questions:

- What does success in preventative education look like and how can it be measured?
- Who is most likely to benefit from preventative education?
- What techniques are most likely to prove effective with different demographic groups?
- What lessons can be learnt from comparable areas of public health, and can these be applied to the design of initiatives to minimise gambling-related harm?

What we already know: Education has been shown to be relatively effective at improving knowledge and changing attitudes, but the evidence on its ability to engender behaviour change is far from conclusive. There also remains uncertainty over the potential for any unintended consequences. This is particularly important when considering work with

young people. It would be valuable to review its role in areas of public health, such as prevention of alcohol-related harm.

There are a number of preventative education pilots on young people engagement programmes currently being conducted by Fast Forward and Demos, which already provide examples of action research in this area.

Possible research techniques: This work would involve a critical thinking piece to identify key indicators of success that can be used in the evaluation of education initiatives and to facilitate progress.

The research should take account of insights from behavioural economics and other disciplines, and should result in a clear strategic approach to the use of education as a harm minimisation tool.

Priority Action 9: Building the quality and capacity of treatment

“We welcome the progress the Trust (now GambleAware) has made in establishing and implementing a core database in the form of the Data Reporting Framework. The Trust (GambleAware) intends to use this and other evidence to explore the impact of treatment on different groups and to investigate how the quality and effectiveness of brief interventions and more sustained treatment, residential or otherwise, can be improved.”

Page 27, The National Responsible Gambling Strategy

Although GambleAware is developing improved systems to inform the commissioning of treatment. Research and evaluation can play a role in finding ways of improving access to treatment and in understanding its effectiveness.

Specific projects

Project 9.1: What works in gambling treatment?

Description: We need to have a strong evidence base on the effectiveness of different types of treatment to help establish the right mix of treatment services to be delivered in Great Britain. This evidence will also have implications on our understanding of how much money is needed to fund the optimal level and types of treatment.

Evaluation is required to understand the impact of treatment services on different groups and to investigate the quality and effectiveness of different modes of delivery (e.g. brief interventions/psychosocial treatment and residential). Evaluation should pay close attention to understanding the value for money of different approaches.

Research questions:

- What works and for whom?
- What approaches represent best value for money?
- How can existing delivery be improved?

What we already know: Emerging evidence from the Data Reporting Framework should provide insight into the relative effectiveness of different modes of treatment delivery. This needs to be combined with impact evaluation, including the collection of evidence on those who undergo treatment.

Possible research techniques: A wide range of evaluation methods could be applied. The earlier section on evaluation outlines key features of the approach we would expect to evaluate more generally.

Project 9.2: Treatment: Delivery gap analysis

Description: Research should be used to build up a picture of demand for treatment services, which can be compared with the services that are actually supplied.

Analysis is required to link work on what we know about who is affected by gambling-related harms with who presents for treatment. We know there is a large discrepancy between the numbers receiving treatment and the numbers of people estimated to be problem or at-risk gamblers. It is likely that a large number of people who could benefit from support are not receiving it.

A better insight into unmet demand for treatment and support could be used to target interventions to bring more people who need it forward for treatment.

Research questions:

- Are there geographic gaps in availability of treatment services?
- Is the right mix of treatment service available across the country?
- Are people with certain demographic or socio-economic characteristics not coming forward for treatment?
- Is there sufficient treatment available for young people (if not, this may lead to a need for additional specific research in this area)?
- Are there any barriers to access of treatment?

What we already know: Information to support this will be available from:

- Information from the Data Reporting Framework (DRF)
- BGPS and Health Surveys
- Exploring area-based vulnerability to gambling-related harm (Geofutures)
- First phase study on gambling-related harm (PWC).

Possible research techniques: This project could be aided by an analysis of the profile of treatment service users and what we know about demographic characteristics of problem gamblers and those suffering gambling-related harm. The research would also draw on existing data and evidence collected through the Data Reporting Framework.

Project 9.3: Opportunities for improving treatment through technology

Description: Technology could play an increased role in delivering treatment and encouraging people who need it to come forward.

Research questions: Research needs to help us understand how treatment services work better in a world where people live more digital lives.

What we already know: The remote sector has experienced significant growth, and more people are accessing services online.

Possible research techniques: There will be increased opportunities to harness social media to promote the availability of treatment. E.g. in other fields, such as fitness and healthy eating, virtual networks are used to support clients to meet their goals. A review of lessons from elsewhere could form the starting point for this work.

Project list and priorities

The table below outlines the key priorities and indicates our recommendations on the sequencing for commissioning. The timing for commissioning will be set out in GambleAware's commissioning plan, which will take into account capacity and availability of funding.

Six projects are highlighted as of particular high priority. Projects marked as high priority reflect their importance in addressing key public policy issues (such as project 4.1, 4.2 and 9.1), combined with the need to commence early enough to influence other work (such as 1.1, 1.2 and 8.1).

In practice, commissioning will need to be flexible and adaptive to developments in the gambling market and policy environment.

Table 1: Project list and priorities

Priority Action	Project	Project Title	Priorities		
			High Priority	Sequence	Dependencies
1	1.1	Developing an identifying effective indicators of gambling-related harm	High	1	Dependent on 1.1
	1.2	Building and testing a mechanism for measuring and monitoring gambling-related harm		(To follow Project 1.1)	
3	3.1	Evaluation – analysis of best practice and key lessons learnt		12	Dependent on sufficient industry-led evaluation being completed
4	4.1	The effect of advertising on children, young people and vulnerable people	High	2	
	4.2	Analysis to describe patterns of play on different gambling products and environments	High	3	
	4.3	Understanding consumer vulnerability by linking data on play with individuals' socio-economic background and attitudes to gambling		8	
	4.4	Online gambling: The impact of accessibility and the effect of being online in decision making and behaviour		6	
	4.5	Longitudinal study: Why do people move in and out of harmful play?		7	
7	7.1	Self-exclusion: Awareness and barriers		11	Dependent on all multi-operators schemes being in operation
8	8.1	How do we know what works in preventative education?	High	4	
9	9.1	What works in gambling treatment?	High	5	
	9.2	Treatment: Delivery gap analysis		9	
	9.3	Opportunities for improving treatment through technology		10	