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Patterns of Play

Technical Report 3: Follow-on Survey Stage

Authors: Robert Ashford, Helena Wilson, Mari Toomse-Smith, Sokratis Dinos, Jessica Messling, Anna Keyes and Alexander Martin

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Prepared for: GambleAware

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NatCen Social Research
35 Northampton Square
London EC1V 0AX
T 020 7250 1866
www.natcen.ac.uk

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Glossary

Betting: betting generally relates to events external to the gambling environment (e.g., results of cricket matches).

In-play betting: in-play betting is betting on a sports match between the start and end of a particular match, i.e., while the match is taking place. In the case of cricket, where some matches are played over more than one day, 'in-play' refers to bets placed between the start and end of each individual day. *In-play betting* stands in contrast to traditional *pre-match betting* whereby wagers are placed before the match starts.

Gaming: gaming outcomes are generated within the gambling environment (e.g., by the roulette wheel). Gaming covers a range of gambling activities: bingo, live and virtual casino games, poker, slots, and instant wins.

Stake: stake is the amount wagered on the outcome of an individual gamble; for example, on the winner of a horse race or the number selected from one spin of a roulette wheel. Sometimes operators add a bonus to the stake as a promotional device, but here the stake is taken to refer only to the customer's own money put at risk.

Spend: total amount gambled by the customer minus any winnings. If spend is negative, this means that the customer has collected winnings greater than his or her stakes.

Gross Gambling Yield (GGY): the amount retained by operators from customer stakes after the payment of winnings but before the deduction of the costs of the operation. In this report the terms Gross Gambling Yield and spending/spend losses all refer to the same thing: the customers give some money as stakes and may get back some money in winnings. What the operator then keeps is called Gross Gambling Yield, whereas for consumers it is what they as a group have lost/spent. The terms are used interchangeably depending on the context in which a statistic is presented.

Session: a session refers to the successive play of gambling games, e.g., the customer plays slots games over a period of 20 minutes before going away. In the data, we do not observe exact start and end times because *gaming* data are summarised over 15-minute windows. For analysis, we define a session as *gaming* spread over closely adjacent 15-minute windows where there is a reasonable presumption that the whole represented a single block of time dedicated wholly or partly to gambling.

Player/customer/account-holder: these terms have been used interchangeably throughout this report and denotes the user of the online gambling accounts analysed in this report.

Sampled account: this refers to the gambling account used from July 2018- June 2019 that was included in the account data stage analysed in Technical Report 2.

1 Methodology

1.1 Sampling

The aim for the third stage of Patterns of Play research programme was to conduct a follow-on survey of players included in the industry account data (see Technical Report 2: Account Data stage), to further our understanding of online patterns of play. Two operators agreed to take part in the survey stage which took place in September 2021. The two operators were responsible for sending accounts an email invitation (and reminders) to the survey as the account data was completely anonymous to the research team (we did not hold any personal identifiable information of players).

A small pilot was carried out prior to the mainstage of the survey to test the study design and processes, which established the survey methods were robust and reliable. 500 accounts from each operator were used for the pilot and were ineligible for inclusion in the mainstage of the survey. For the mainstage of the survey, a list of 19,500 ID numbers from the account data were sent to each of the two operators. Due to the gap in time between the account data (July 2018 to June 2019) and the survey (September 2021) some of the 19,500 accounts were excluded from the survey by the operator, due to various reasons such as being inactive for a prolonged time, closed accounts, blocked accounts, self-excluded accounts or other reasons.¹ The operators provided a summary of the accounts excluded from being invited to the survey, see table 1 below for detail. In total, 16,935 accounts across the two operators were eligible for invitation to the survey. This represented 42.3% of the accounts provided by the two operators.

Table 1: Accounts held by two operators

Eligibility and ineligibility reasons	Proportion of accounts
Ineligible due to inclusion in pilot survey	2.5%
Excluded due to inactive for a certain period of time	33.3%
Excluded due to closed/suspended/blocked/self-excluded account	12.3%
Excluded due to other reasons ²	9.6%
Invited to survey	42.3%

See section 1.6 for more information regarding the representativeness of the survey data and considerations for data interpretation.

¹ Each operator had slightly different policies for excluding accounts.

² Other reasons included, but were not limited to, non-English language preference for accounts or operators not able or permitted to send an email invitation to the account.

1.2 Survey design

The 16,935 accounts across the two operators eligible for invitation to the survey were sent an email (directly from the operators) inviting them to take part on 1st September 2021. The invitation email contained survey information and NatCen's contact information for questions or to request withdrawal from the study. Players who yet to complete the survey and had not opted-out were sent two reminder invitations, one 9 days, and the other 13 days, after the initial invitation email. Participants were given a £5 electronic voucher, that could not be used for gambling activity, upon completion of the survey. The survey was closed on 21st September 2021.

The questionnaire started by explaining that earlier in the research project, several online gambling companies provided the research team with fully anonymised data about how some of their customers had been using their online gambling accounts. Participants were asked for consent to link their survey responses to their corresponding anonymous account data. Participants were informed that their linked data would be fully confidential and would not contain any information that could be used to identify them. Respondents who did not provide consent to link their data were not asked any further survey questions but still received a £5 electronic voucher. The research team were not able to link account data to any personal information from the web survey for respondents who did not provide consent to data linkage. Consent to data linkage was reconfirmed at the end of the survey after respondents had provided all their survey responses. The gambling operators were not informed which accounts had taken part in the survey.

The questionnaire length was around 15 minutes and participants were able to skip any questions and withdraw consent at any time. The content of the questionnaire was informed by the 12 in-depth interviews with online gamblers (see Technical Report 1) as well as by preliminary analysis of the account data (see Technical Report 2; e.g. whether gamblers have multiple accounts, whether proxies of problem gambling based on spending/frequency of play correlated with problem gambling measures, etc; see also analysis section 1.5). It was further developed by researchers at NatCen and GambleAware, with input from the Gambling Commission and academics in gambling research. Some standard measures such as the Problem Gambling Severity Index (PGSI) or the Attitudes Towards Gambling Scale (ATGS-8) were used. Other questions were taken and adapted from comparable gambling and health surveys. The web questionnaire asked about current gambling habits, change in online gambling behaviours since June 2019, past gambling behaviours (overlapping with the account data time period), problem gambling and safer gambling use as well as questions on socio-demographic characteristics. Following the completion of the survey, survey responses were linked to account data for respondents who provided consent to link their data and who reconfirmed this at the end of the survey.³ The questionnaire is included in appendix A.

During the course of the study the scope of the survey changed and the potential for what data could be reported on was limited. This was due to the size of the survey being limited to only two of the seven gambling operators and the time gap between the end of the account data period and survey data collection being substantial (2 years and 3 months). Some questions included in the survey were not analysed and reported on due to various reasons linked to the issues above:

- There were low response rates for categories of certain variables resulting in disclosive data concerns.

³ The survey was designed to ensure that the research team were not able to link account data to any personal information from the web survey for respondents who did not provide consent (and reconfirmed consent) to data linkage. Furthermore, the gambling operators were not informed which accounts had taken part in the survey.

- The research team decided that analysis with certain survey questions would not be appropriate, such as attempting to analyse current drinking habits and drug use to past account spend and play type. Reporting on these questions were not included in this report.

1.3 Survey response

In total, 1,849 individuals (10.9% of invited accounts) completed the web questionnaire and provided full consent to data linkage and only these accounts were usable for data analysis (Table 1.1.3.1).^{4,5}

Prior to survey weighting it was identified that the response rate was very low amongst accounts that were active on less than 14 days in the account data period between July 2018 and June 2019. These accounts were under-sampled at the industry account data sampling stage (see Technical Report 2, section 1.1, table 1 for more detail) and as the non-response suggests accounts with very little activity over the course of a year are less likely to be primarily gambling with their sampled operator in September 2021. Survey responses from these accounts were excluded from the survey dataset prior to weighting as survey data from those accounts could not be considered representative of the population of less active accounts. Furthermore, accounts that did not meet the criteria required for inclusion in the account data analysis (as outlined in section 1.1) were excluded from the survey dataset prior to weighting.

Following the above exclusions, the final survey dataset for analysis contained survey responses and corresponding account data for 1,806 accounts. Of those who took part in the survey 10.4% were active on 14 to 50 days in the account data period between July 2018 and June 2019, 37.5% were active on 51 to 100 days and 52.2% were active on 101 or more days (Table 1- see Survey Data File).

1.4 Survey weighting

Survey weights were produced and applied to the data to control for bias introduced by sample design, ineligibility, and non-response. Weights were produced for a responding sample of n = 1806, consisting of survey respondents who were active on 14 days or more according to the account data. More details of the weighting strategy can be found in Appendix B.

1.5 Analysis

The vast majority of analysis conducted in this report is linking the survey responses to the account data from Stage 2 of the study. The account data (analysed separately in Technical Report 2) linked to the survey data was total account spend in the sampled period and type of gambling (betting or gaming or both) played on the account. Account spending levels amongst survey respondents were split into quintiles for analysis and hence the grouped categories used in this report were as follows: £0 or less (i.e. profit made), 1p to £100, £100.01 to £265, £265.01 to £700 and more than £700.

⁴ Survey response tables can be found in accompanying Survey Data File.

⁵ A total 557 individuals did not provide consent to data linkage at the start of the questionnaire. A further 131 individuals completed the questionnaire but withdrew their consent to data linkage at the end of the questionnaire. Finally, 116 individuals partially completed the questionnaire but stopped prior to the data linkage reconfirmation question.

Significance testing was carried out on the results. The term 'significant' refers to statistical significance at the 95% level and is not intended to imply substantive importance.

The significance tests were carried out in order to test the relationship between variables in a cross tabulation, usually an outcome variable, crosstabulated with an explanatory variable such as total account spend or type of gambling played on the account. The test is for the main effects only (using a Wald test⁶). For example the test might examine whether there is a statistically significant relationship between problem gambling and total account spend.⁷

A p-value is the probability of the observed result occurring due to chance alone. A p-value of less than 5% is conventionally taken to indicate a statistically significant result ($p < 0.05$). It should be noted that the p-value is dependent on the sample size, so that with large samples differences or associations which are very small may still be statistically significant. Using this method of statistical testing, differences which are significant at the 5% level indicate that there is sufficient evidence in the data to suggest that the differences in the sample reflect a true difference in the population.

All differences reported in this report are statistically significant, unless stated otherwise. Where patterns are reported as similar, any observed differences were not statistically significant.

1.6 Limitations/considerations for data interpretation

The main limitation to the survey findings is the survey was a self-selected sample of individuals from the account data that fit the following specific criteria; eligible to be invited to the survey (meaning they had to have gambled with one of the two operators who took part in the survey and were not either ineligible or excluded from being invited to the survey⁸), active for at least 14 days in the account data period, and willing to take part in the survey. Survey weights were used to control for bias introduced by sample design, ineligibility, and non-response, however, the survey data should not be interpreted as being representative of the online gambling industry. Instead, the survey data was weighted to be representative of all account-holders with these two operators who were active for at least 14 days in the account data period of July 2018 to June 2019. The power of the survey comes from the comparison of survey data to the account data as more confidence can be given to relationships *between variables in the survey sample* being representative of relationships between variables in the wider population. This allows us to explore how past and current gambling behaviours and problem gambling status (survey data) differs across different levels of total spend or play type in the account data.

⁶ The Wald test is statistical test used to calculate the significance of parameters in a statistical model. The Wald test is used in analysis of data in this report to establish whether the association among particular variables is statistically significant. For example the test might help to establish whether there is a statistically significant relationship between mean number of other accounts used to gambling in 2018/19 and between past account play type (betting only, gaming only or both). The test calculates the statistical significance of parameters in a logistic regression model of number of other past accounts used prevalence in order to establish whether past account play type is significantly associated with number of other accounts used in 2018/19.

⁷ It is worth noting that the test does not establish whether there is a statistically significant difference between any particular pair of subgroups (e.g. the highest and lowest subgroups). Rather it seeks to establish whether the variation in the outcome between groups that is observed could have happened by chance or whether it is likely to reflect some 'real' differences in the population.

⁸ Inactive, closed, suspended, blocked or self-excluded accounts were not eligible for invitation to the survey. See section 1.1 for more details of ineligible and excluded accounts.

Given that accounts that were inactive for a period of time were not able to be invited to the survey, the survey data will be skewed towards accounts that are currently active and will not provide a picture of gamblers who have stopped gambling on their online account with their sampled operator since 2018/19. Conversely, with the response rate of the survey being 10.9%, the survey will have picked up very few of the extremely high spenders identified and analysed in the Stage 2 account data analysis (see Technical Report 2). We therefore reiterate again that the survey data were analysed, and findings should be interpreted, in terms of their comparison against the account data (e.g. total account spend or play type), rather than being viewed as prevalence rates for the wider population for certain behaviours or characteristics.

Finally, the survey asked respondents to recall both their current and past gambling habits which is a cognitively difficult exercise to do (especially past gambling habits). Heirene *et al.* (2021) compared self-report survey responses on spending and number of bets in the immediately preceding 30 days with an online operator with actual account records.⁹ Only 4% reported spend to within 10% of the actual figure and only 7% reported frequency to within 10% of the actual figure. Given that respondents tend to be quite bad at recalling even their recent online gambling behaviour, the results for these questions should not be overstated or generalised.

⁹ Heirene, R. M., Wang, A., & Gainsbury, S. M. (2021). Accuracy of self-reported gambling frequency and outcomes: Comparisons with account data. *Psychology of addictive behaviors: journal of the Society of Psychologists in Addictive Behaviors*, 10.1037/adb0000792. Advance online publication. <https://doi.org/10.1037/adb0000792>.

2 Findings

The achieved sample for the survey was 1,806 respondents, all of whom were active on more than 14 days according to the industry account data between July 2018 and June 2019.¹⁰ As outlined in Chapter 1 Methodology, the survey data was weighted to be representative of all gamblers with these two operators who were active on more than 14 days between July 2018 and June 2019. When interpreting the survey analysis, it should be borne in mind that the survey data is a sample of individuals from the account data that went through multiple selection points. They were; eligible to be invited to the survey (gambled with one of the two operators who took part in the survey and were not either ineligible or excluded from being invited to the survey), active for at least 14 days in the account data period, and willing to take part in the survey.

The findings below should therefore not be interpreted as being representative of all accounts collected and analysed in *Technical Report 2: Account Data Stage* or of the whole GB online gambling industry. Instead, the importance and relevance of the survey comes from the comparison of survey data to the account data (see Technical Report 2 for more detail), showing how past and current gambling behaviours and problem gambling status differs across different account data spend levels and play type. In this report, we will refer to the gambling accounts used from July 2018 to June 2019 and included in the account data stage as 'sampled accounts' (the one they received the survey invitation email from).

All tables referenced in the following chapter can be found in the accompanying Survey Data File.

2.1 Wider picture of past gambling behaviours

Unless otherwise stated, all questions in this section were framed around the period July 2018 to June 2019 (the account data period).

2.1.1 Past online gambling with other operators

Other accounts

One of the main limitations of the account data analysis is that it only shows players' gambling habits with one online gambling operator and we do not observe any other gambling in which individuals may have engaged using accounts with other operators (or indeed any of their gambling at land venues). The most engaged online gamblers may use several different accounts, spreading high spending across different operators such that they are not identified as heavy gamblers in any of them. This is why the Report on the account data presented estimates of proportions of online gamblers who spent beyond specified high thresholds as lower-bound estimates. Survey respondents were asked some questions regarding their past gambling behaviours between July 2018 and June 2019, to collect data on other online gambling accounts used.

Survey respondents were asked whether they gambled with more than one online gambling company in the account data period and if so how many online gambling

¹⁰ Survey responses from accounts that were active on less than 14 days in the account data period were excluded from the survey dataset prior to weighting and analysis due to very low response rates and therefore data could not be viewed as representative of that population. See section 1.3 for more details.

accounts they used in this time period, other than their sampled account. 40% of respondents reported that they did not gamble with more than one gambling company, 12% of respondents reported using one account with another gambling operator, 18% reported using two, 13% reported using three, 6% reported using four and 11% reported using 5 or more accounts with other gambling operators (Table 3). As shown in Figure 1, those whose total spend was between 1p and £100 on their sampled account were least likely to report using other gambling accounts compared to those who made a profit (spend of £0 or less) and those who had the larger account total spends.¹¹

Figure 1 Mean number of other gambling accounts in 2018/19 by total spend with sampled account



Base: All respondents

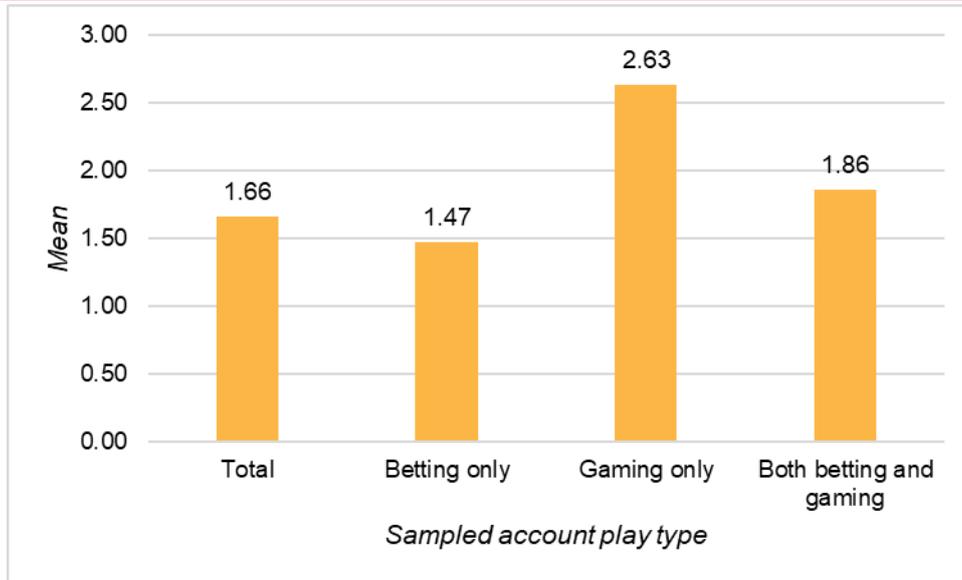
Source: Patterns of Play survey data file- Table 3

Figure 2 shows, those who gambled only on betting products or both betting and gaming products with their sampled account were more likely to report using fewer other gambling accounts compared to those who gambled only on gaming products.¹² Similarly, those who gambled only on gaming products were more likely to report using 5+ accounts (26%) than those who gambled only on betting products (8%) (Table 3). In other words, people who gambled on gaming products were more likely to use multiple accounts than those who gambled on betting products. Possible reasons for this include; fragmentation of the gaming market (e.g. specialist bingo sites), more “brand loyalty” in the betting market because of the high street presence of the leading operators or a disillusion with gaming operators being more widespread because the outcome of gaming events are dependent on the operator’s system rather than external events (e.g. sport betting).

¹¹ See section 1.5 for an explanation of the spend level bands used.

¹² It should be noted that the classification of respondents as betting only or gaming only customers is specific to their sampled operator account in 2018/19 and does not mean that they did not engage in other gambling activities on other accounts.

Figure 2 Mean number of other gambling accounts in 2018/19 by play type with sampled account



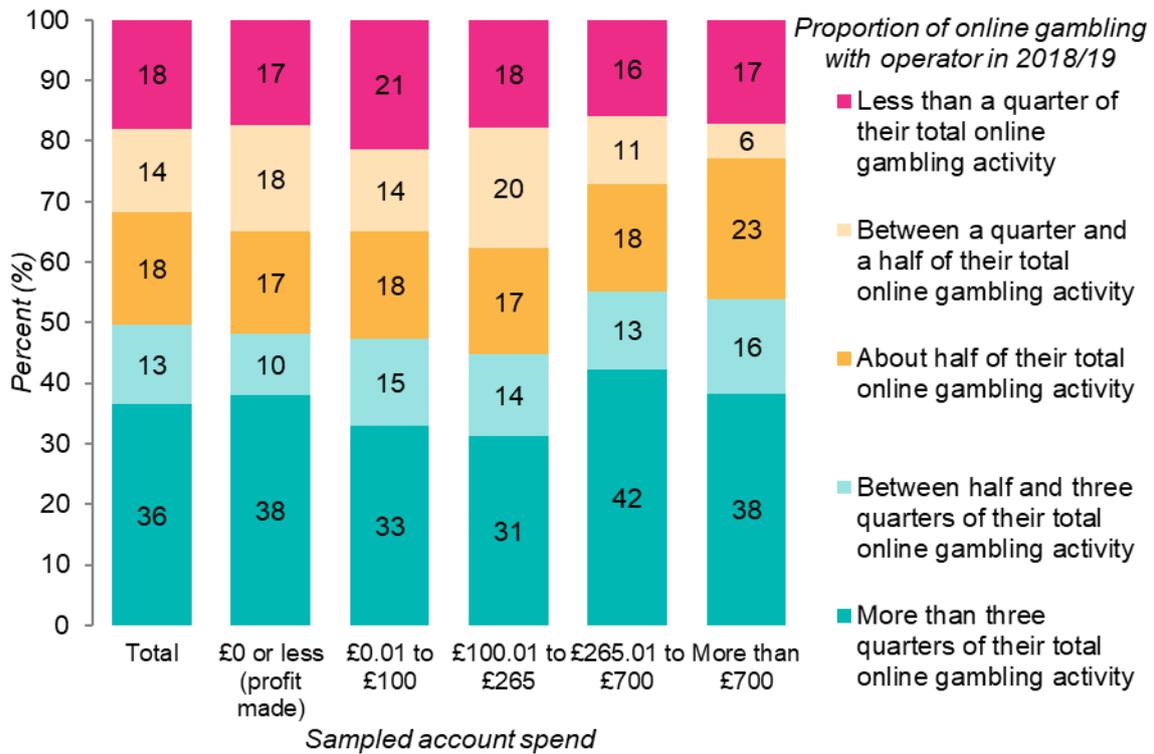
Base: All respondents

Source: Patterns of Play survey data file- Table 3

Respondents who said they gambled with more than one gambling company were asked to estimate the proportion of their total online gambling activity¹³ in the account data period that was on their sampled account. As shown in Figure 3, 36% reported more than three quarters of their activity was with their sampled account, 13% between a half and three quarters, 18% about half, 14% between a quarter and a half and 18% less than a quarter of their total online gambling activity. Patterns were similar across different levels of total account spend in 2018/19.

¹³ Online gambling activity was not defined to survey respondents and may have been interpreted in a variety of ways, such as spending levels, amount staked, time spent gambling etc.

Figure 3 Proportion of online activity that was with the sampled account in 2018/19 by total spend with their sampled account

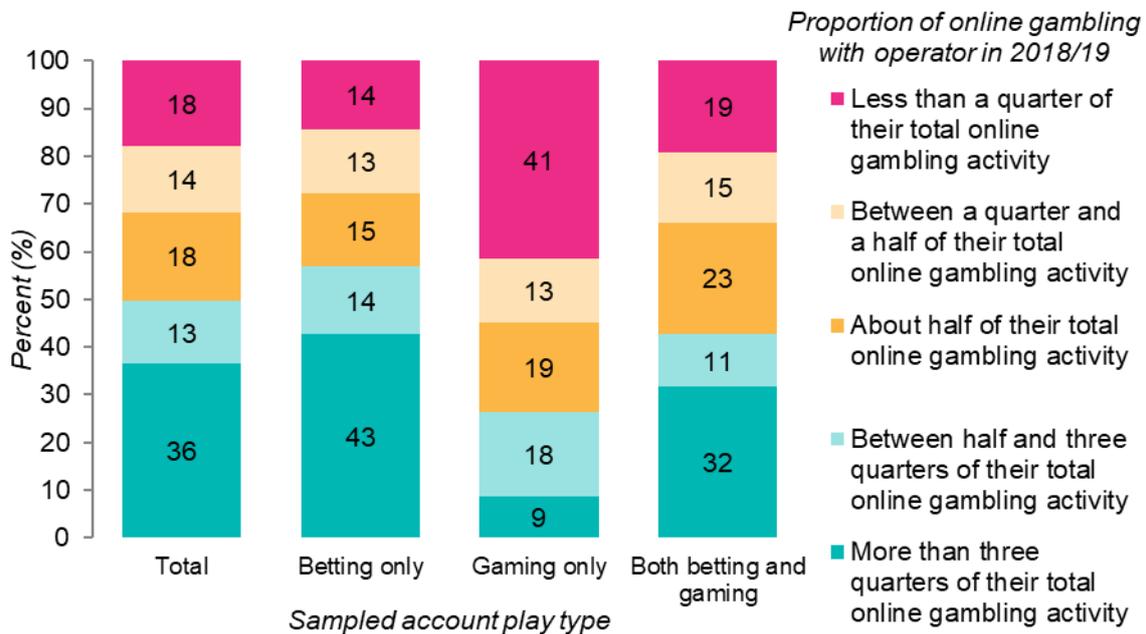


Base: Participants who gambled with other operators 2018/19
 Source: Patterns of Play survey data file- Table 4

Figure 4 shows those who used their sampled account for betting products only or both betting and gaming products were more likely to report that more than three quarters of their total online gambling activity was with their sampled account (43% and 32% respectively) compared to those who gambled only on gaming products (9%). Similarly, those who gambled only on gaming products were more likely to report that less than a quarter of their total online gambling activity was with their sampled account (41%) than those who gambled only on betting products (14%) or both (19%). In other words, customers who gambled on gaming products were more likely than those who gambled on betting products to spread their gambling over multiple accounts.

Based on the account data, Technical Report 2 found that, on average, gaming customers spent more than twice as much as betting customers over the year and were more likely to fall into the highest spending groups. From the survey, gaming customers were also more likely to have been spending significant additional amounts at other operators' websites. Thus it seems probable that differences in spending levels associated with betting and gaming are even more pronounced than those reported in Technical Report 2, where it was only possible to observe each individual's activity with one operator.

Figure 4 Proportion of online activity that was with the sampled account in 2018/19 by sampled account play type in 2018/19



Base: Participants who gambled with other operators 2018/19
 Source: Patterns of Play survey data file- Table 4

In-play betting

Those who reported betting online on sports events via a website or app with other operators in the account data period were asked if they ever bet in-play with those other accounts; 71% reported they did while 29% said they did not. For those used in-play betting on their sampled account, 73% reported also betting in-play with another operator. For those whose sampled account did not show in-play betting, 46% reported in-play betting elsewhere (Table 5). This suggests that engaging in in-play betting may itself be a reason for using multiple accounts to the extent that operators may have different offerings in terms of which events are live-streamed on their websites or promotional offers for certain events.

Demographics

Returning to the number of other online accounts used by respondents in 2018/19, analysis was done against IMD deciles, gender and age. There was no clear trend in terms of IMD decile and number of other online accounts respondents used. Similarly, there was no clear difference between men and women (Tables 6 and 7).

Those aged under 25 years and those aged 35 to 44 years were most likely to report using a greater number of other online accounts in 2018/19 than other age groups (Table 8).

2.1.2 Offline gambling 2018/2019

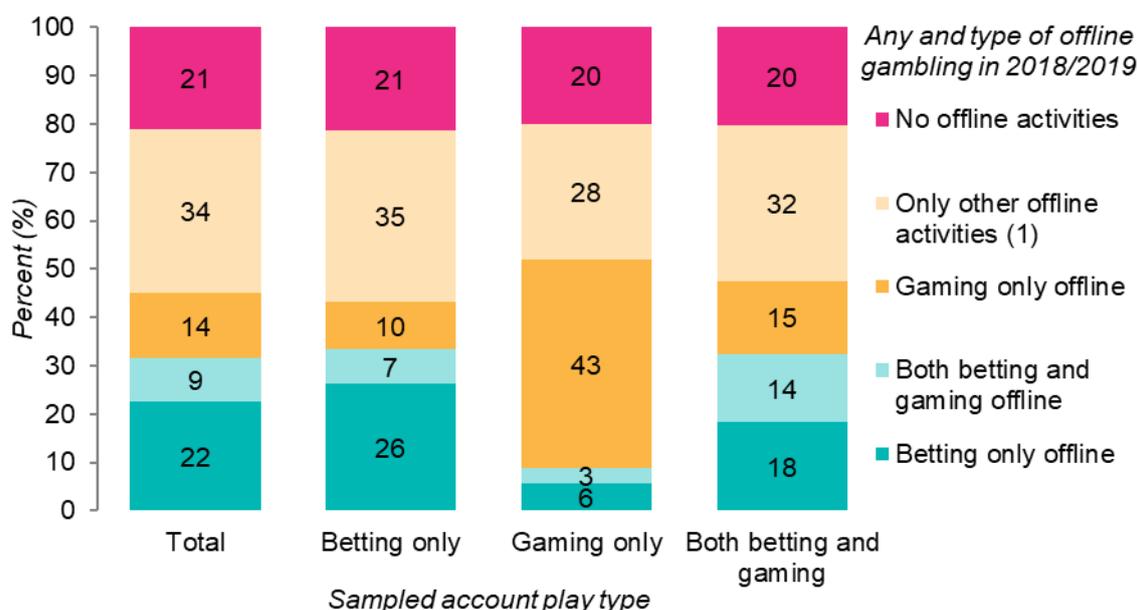
Respondents were asked if they took part in any offline/in person gambling activities in the account data period, as shown in Figure 5. 21% percent of respondents did not take part in any offline activities in that period, 22% took part in offline betting and no

gaming, 14% took part in offline gaming and no betting, 9% took part in both offline betting and gaming and 34% only took part in other offline activities (e.g. National Lottery Draw, Scratchcards, other lotteries, football pools, private betting or another form of gambling).

Offline play patterns were similar across different levels of total spend with their sampled account, although those with the largest total spend with sampled account (more than £700) were more likely to play on gaming only offline (20%) than those with low total account spends (10% who spent 1p to £100 and 9% who spent £100.01 to £265) (Table 9).

Whatever products respondents used on their sampled account (whether it be gaming, betting, or both), they were all equally likely to not take part in any offline activity in 2018/19 (in the range 20-21%; see Figure 5). Respondents who used their sampled account for gaming only were more likely to take part in offline gaming activities (46%)¹⁴, compared to respondent who used their sampled account for betting only (17%). Respondents who used their sampled account for betting only were more likely to take part in offline betting activities (33%), compared to respondents who used their sampled account for gaming only (9%). In other words, respondents' offline activities (e.g. betting or gaming) tended to mirror their online preferences for betting or gaming. This is consistent with evidence from the account data that relative participation-rates (by gender and age) in online activities are very similar to those estimated for corresponding offline activities as reported by the *Health Survey for England, 2018*.

Figure 5 Offline gambling activity in 2018/19 by sampled account play type in 2018/19



Base: All respondents

Source: Patterns of Play survey data file- Table 9

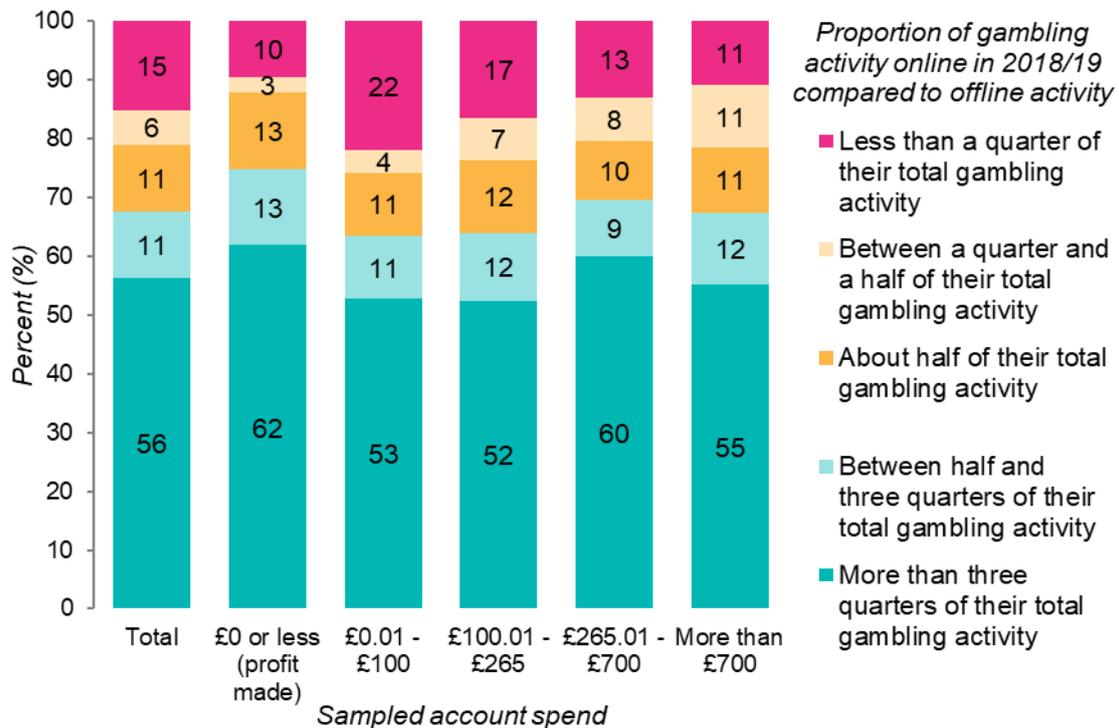
Respondents who reported taking part in any offline/in person gambling activity in were asked to estimate what proportion of all their gambling activity¹⁵ (both offline and online) took place online in the account data period. The majority of respondents (56%) said online gambling accounted for more than three quarters of their total gambling activity (see Figure 6).

¹⁴ Combining both gaming offline and both betting and gaming offline categories.

¹⁵ Online gambling activity was not defined to survey respondents and may have been interpreted in a variety of ways, such as spending, staked, time spent etc.

Online gambling was more likely to account for the majority of respondents' total gambling activity for those who made a profit on their sampled online account (i.e. spent £0 or less) compared to those who lost money, as shown in Figure 6.

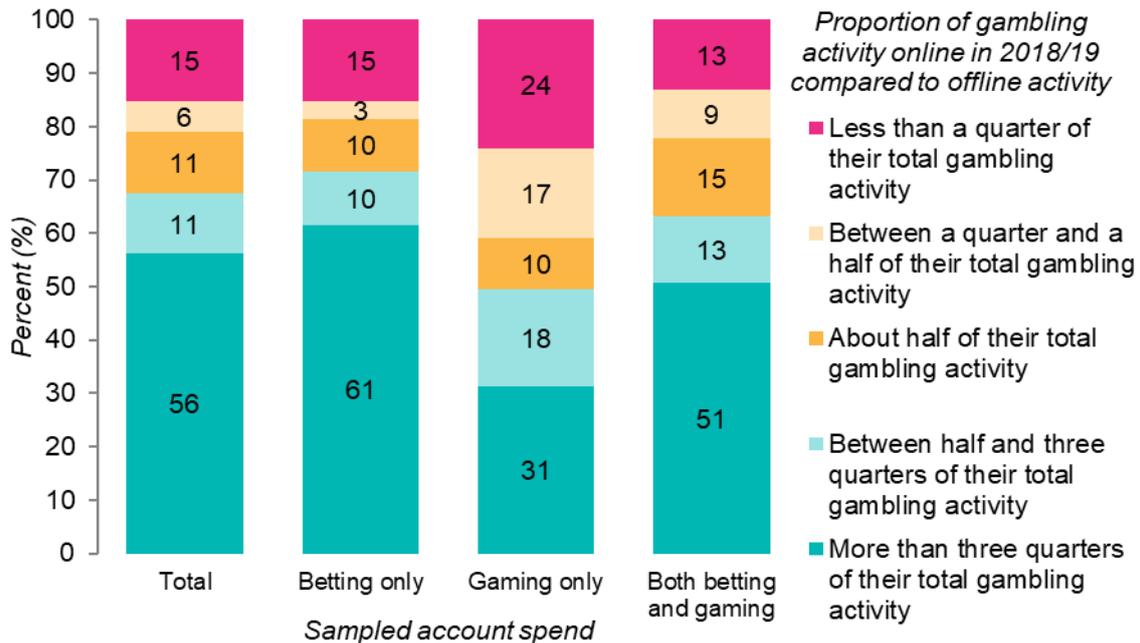
Figure 6 Proportion of gambling activity that was online in 2018/19 by total spend with sampled account in 2018/19 compared to offline activity



Base: Participants who gambled offline in 2018/19
 Source: Patterns of Play survey data file- Table 10

Respondents who used their sampled account for gaming products only were more likely to report that offline gambling accounted for more than half their gambling activities, compared to those who used betting products or both betting and gaming products (Figure 7). Yet again, this suggests that the difference in spending between gaming and betting customers found from the account data would have been greater had it been possible to observe individuals' total gambling activity.

Figure 7 Proportion of gambling activity that was online in 2018/19 by play type with sampled account in 2018/19 compared to offline activity



Base: Participants who gambled offline in 2018/19
 Source: Patterns of Play survey data file- Table 10

There were no clear differences in whether respondents spent any money offline/in-person in the account data period according to their IMD decile (Table 11). Female respondents were more likely to spend money offline between July 2018 and June 2019 (84%) than male respondents (78%), although this was not statistically significant (Table 12). Patterns were similar across different age groups (Table 13).

Fixed odds betting terminals maximum stake change

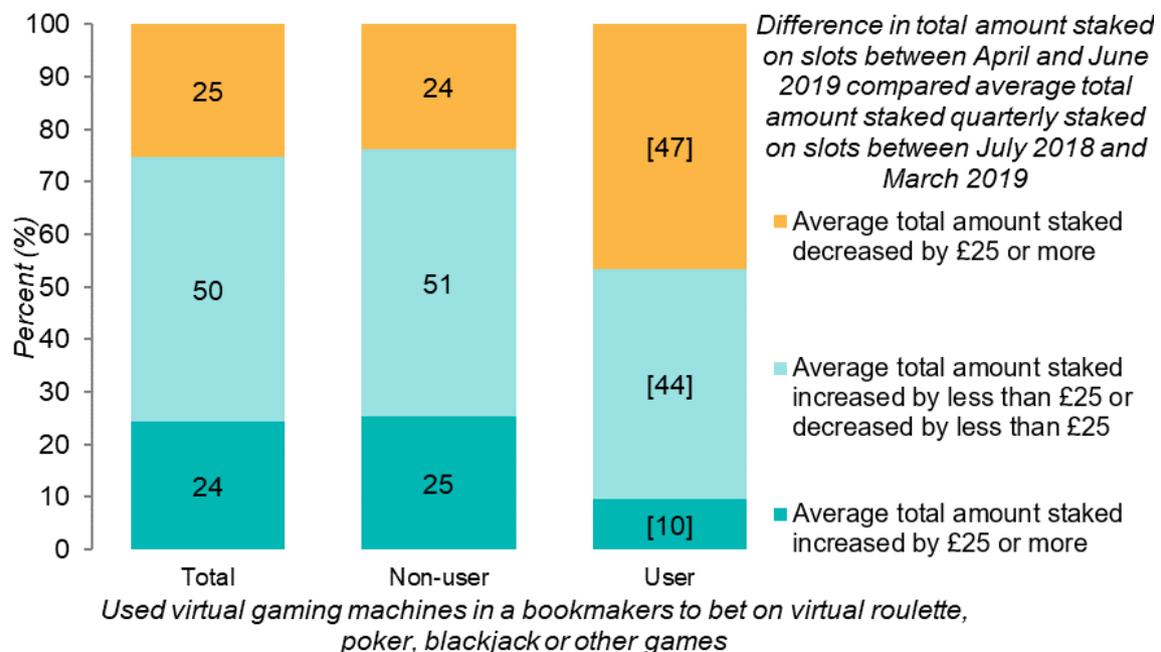
In April 2019 new laws around the maximum stake for virtual gaming machines in bookmakers were introduced.¹⁶ Respondents who reported that they spent money on virtual gaming machines in a bookmaker to bet on virtual roulette, poker, blackjack or other games in the account data period were asked if they changed their gambling behaviour as a result of this change. The majority of respondents (65%) reported that they did not change their gambling activities as a result of the change. The most common change reported was gambling on gaming machines for shorter periods (13%), gambling more on different offline activities (11%) and started gambling on online slots machines (10%). Less than 10% of respondents reported gambling on gaming machines for longer periods or gambled more on other online activities (Table 14).

As the fixed odds betting terminals maximum stake change occurred 9 months into the account data period (April 2019), there was the opportunity to explore the impact of this change on online gaming behaviours. Players' online slot, live casino and virtual casino total amount staked in April to June 2019 were compared to their total amount staked in the 9 months prior. Of all those who gambled on slots with their sampled account at least once, the quarterly mean total amount staked was £113.14 across the whole year. 24% increased the amount they staked on online slots between April and June 2019 by £25 or more compared to their average quarterly amount staked between July

¹⁶ From the 1 April 2019 B2 gaming machines (Fixed Odds Betting Terminals (FOBTs)) had their maximum stake per spin reduced from £100 to £2.

2018 and March 2019. 25% decreased the amount they staked on online slots by £25 or more and the remaining 50% had an increase or decrease of less than £25. Of those who said in the survey that they used virtual gaming machines in a bookmarker, 47% had a decrease in amount staked on online slots with their sampled account between April and June 2019 compared to their average quarterly staked between July 2018 and March 2019 and 10% had an increase. Survey respondents who used virtual gaming machines were more likely to have a decrease in the amount they staked (47%) compared to those who did not use virtual gaming machines (24%). However, it should be noted that the base size for virtual gaming machines users who gambled on slots was small (n =34) (Figure 8). There is therefore no evidence from this data that new restrictions on the stake size in FOB-Ts led to users switching spend to online slots games.

Figure 8 Online slots total amount staked change with sampled account between April and June 2019 compared to quarterly average between July 2018 and March 2019 by past virtual gaming machines in a bookmakers users and non-users



Base: Participants who gambled on online slots in account data
 Source: Patterns of Play survey data file- Table 15

Another possibility is that, faced with new restrictions on stake size, users would have switched activity to online versions of the casino games they had been playing on FOB-Ts (no stake restrictions apply online). Of all those who gambled on virtual casino with their sampled account at least once, the quarterly mean total amount staked across the whole year was £66.78. 14% increased the amount they staked on online virtual casino between April and June 2019 by £25 or more compared to their average quarterly staked between July 2018 and March 2019. 9% decreased the amount they staked on online virtual casino by £25 or more and the remaining 77% had an increase or decrease of less than £25. The proportions of average stake change were similar for virtual gaming machines in a bookmarker users and non-users (Table 17). Analysis by live casino change could not be done due to the small number of live casino players with their sampled account who also reported that they used virtual gaming machines in a bookmarker between July 2018 and June 2019 (Table 16).

The above data indicates that the legislation on B2 machines in bookmakers did not result in an increased use of similar online gambling products by users of virtual gaming machines in bookmakers. If anything, a small decrease in online slots play was observed. However, caution to this conclusion should be applied due to sample sizes being small. Causality could also not be attained from this study design and any changes may have not necessarily been sustained beyond this data period (from July 2019 onwards).

2.1.3 Demographics

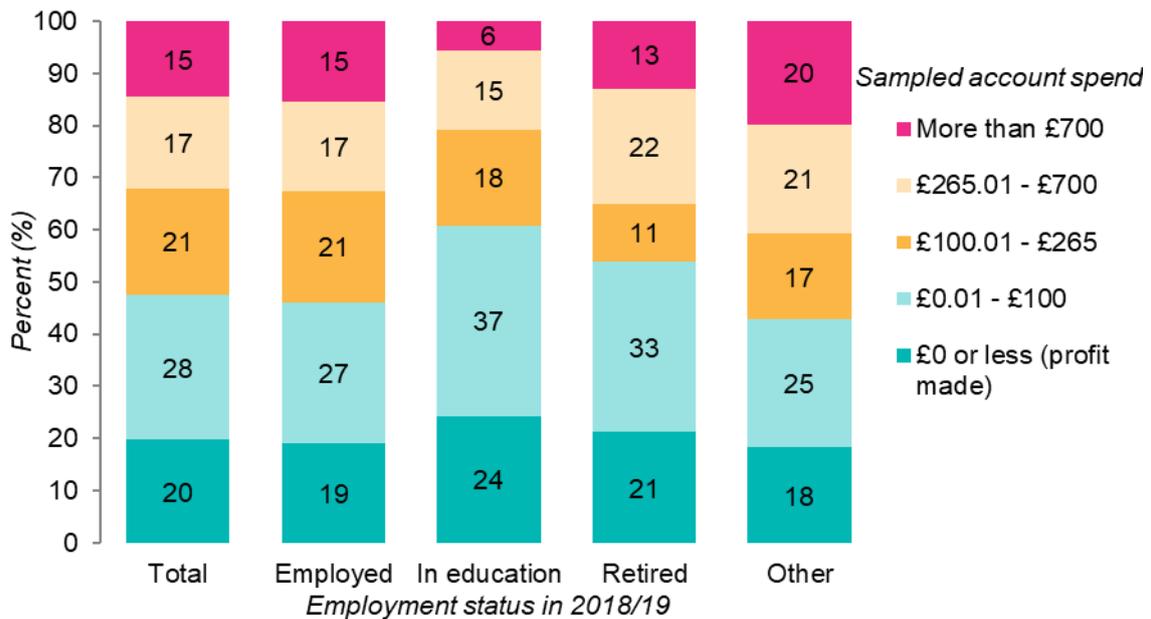
One of the other limitations of the account data was that we had information on the player's age, gender and IMD decile they lived in but no other demographic information. One of the key questions of this research programme was to explore how patterns of play vary for different types of people. The *Health Survey for England* presents figures about participation in online gambling by age, gender, ethnicity etc. but nothing about how relative spending differs between groups. This section will add to this by including analysis on; ethnicity, religion, past employment status, qualifications, past financial status, past relationship status, past household size and whether household contained children split by total account data spend and account play type in 2018/19 with their sampled account.

In general, spending levels and account play type did not vary very much by different socio-demographic measures. There were fairly similar patterns of total spends and play type with their sampled account in 2018/19 for white respondents and respondents from other ethnicities¹⁷ and by religion (Tables 18 and 19).

Survey respondents were asked their current employment status, whether this had changed since December 2018 and if so, what it was in December 2018, as shown in Figure 9. Respondents who reported being in education were less likely to have the highest total spend (more than £700) on their sampled account. Otherwise, these groups had fairly similar patterns of total spends with their sampled accounts for those who were in education, retired, employed or something else.

¹⁷ Due to small numbers of participants from non-white ethnicities, this report used a binary ethnicity variable for analysis. See Appendix A for full ethnicity question asked.

Figure 9 Total account spend with sampled in 2018/19 by employment status in 2018/19



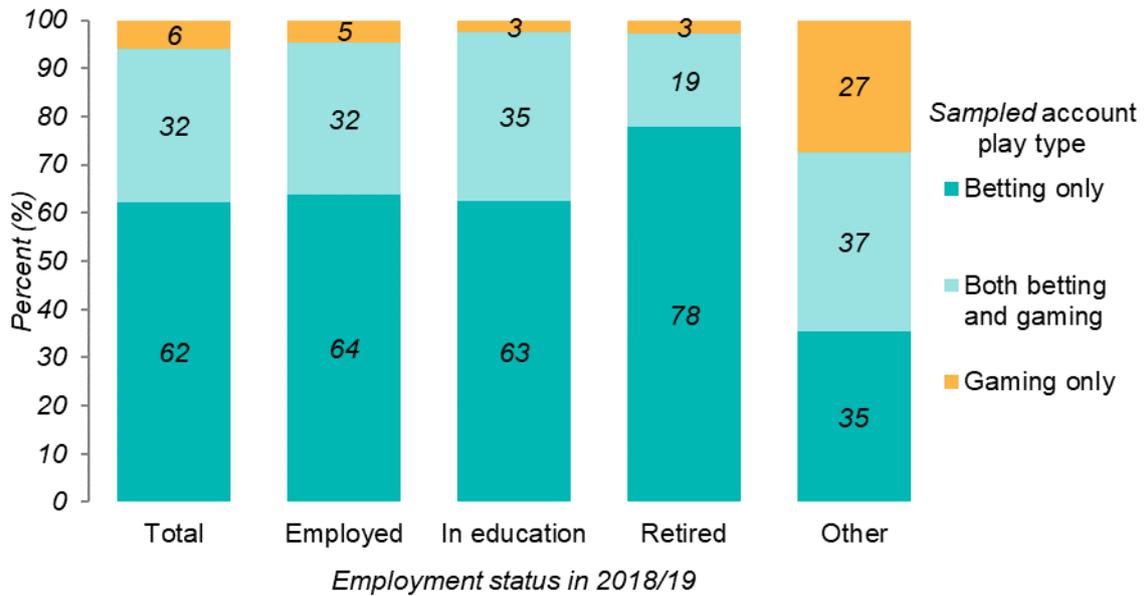
Base: All respondents

Source: Patterns of Play survey data file- Table 20

Looking at the same data by account play type, Figure 10 shows respondents who said they were retired were most likely to use their sampled account for betting products only and those who reported something else¹⁸ were least likely to use betting products only (35%). Those who had reported something else were most likely to have used their sampled account for gaming products only.

¹⁸ It was not possible to report on the other category in more detail. The other category includes: on a government scheme for employment training, doing unpaid work for a business that they own or a relative owns, waiting to take up paid work already obtained, looking for paid work or a Government training scheme, intending to look for work but prevented by temporary sickness or injury, permanently unable to work because of long term sickness or disability, looking after home or family.

Figure 10 Account play type with sampled account in 2018/19 by employment status in 2018/19



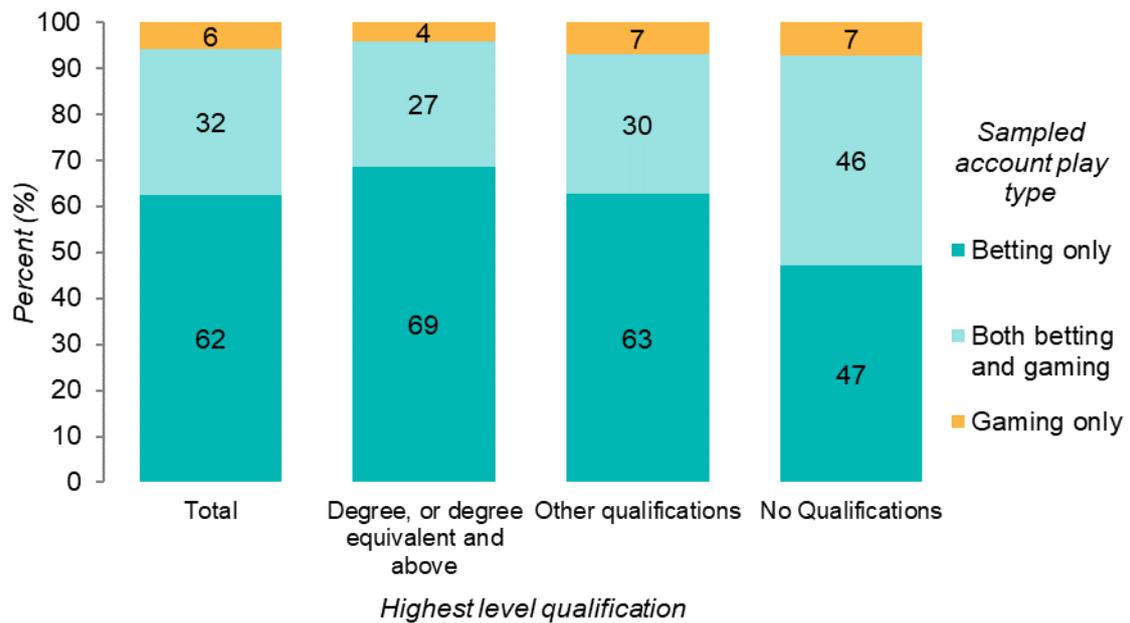
Base: All respondents

Source: Patterns of Play survey data file- Table 20

Survey respondents were asked if they had any educational qualifications for which they received a certificate and if so, whether their highest qualification was degree level or above (Figure 11).¹⁹ Patterns were fairly similar across different levels of total spends with their sampled accounts. Those who reported having no qualifications were less likely to use their sampled account for betting products only (47%) than those who said their highest qualification was a degree, degree equivalent (69%) and those who said another qualification (63%). Respondents who reported having no qualifications were more likely to use their sampled account for both betting and gaming products (46%) compared to those whose highest qualification was a degree, degree equivalent and above (27%) and those who said another qualification (30%). Respondents in these groups were all equally likely to use their sampled account for gaming products only (Table 21).

¹⁹ 1% of participants answered don't know or prefer not to answer to this question.

Figure 11 Account play type with sampled account in 2018/19 by highest qualification

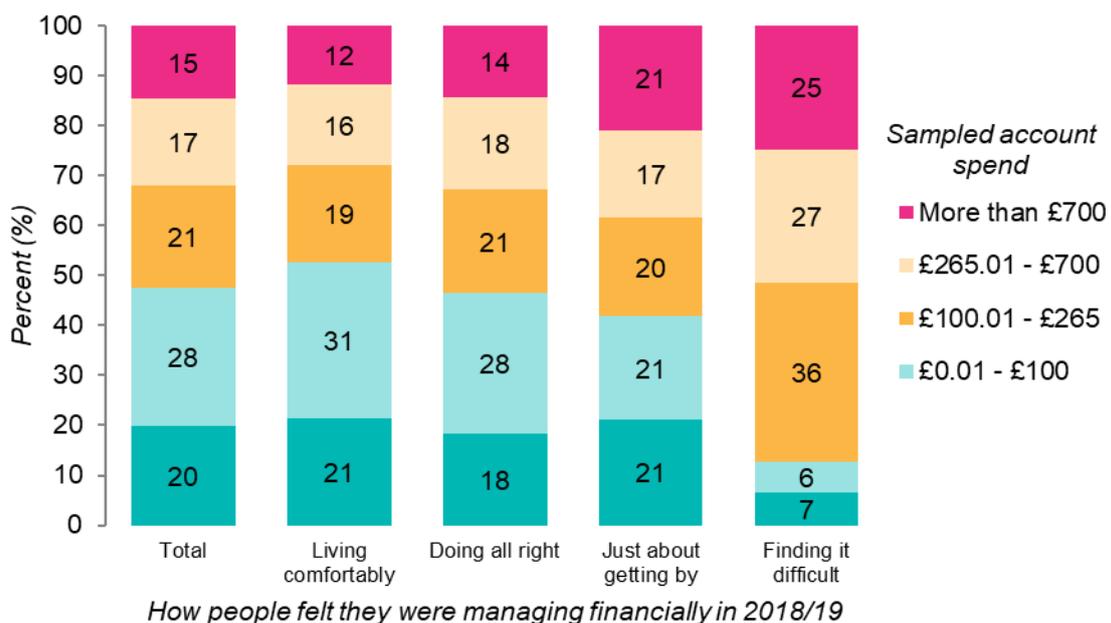


Base: All respondents

Source: Patterns of Play survey data file- Table 21

Survey respondents were asked how well they would say they personally were managing financially, whether this had changed since December 2018 and if so, what it was in December 2018. As shown in Figure 12, those who said they were finding it difficult to manage financially or just about getting by financially in 2018/19 were more likely to have a total spend with their sample operator account of more than £700 (25% and 21% respectively) compared to those who said they were living comfortably (12%). This is consistent with risk of harm being highest for the highest spending customers.

Figure 12 Total account spend with sampled account in 2018/19 by how people felt they were managing financially in 2018/19



Base: All respondents

Source: Patterns of Play survey data file- Table 22

There were fairly similar proportions of different account play type for the sampled account across different managing financially levels (Table 22).

Survey respondents were asked their current legal marital or registered civil partnership status, whether this had changed since December 2018²⁰ and if so, what it was in December 2018. 55% had never been married or registered in a civil partnership in December 2019, 33% were married or in a civil partnership and 8% were separated or divorced.²¹ They each had similar patterns of total spends and account play type with their sampled accounts (Table 23).

There were fairly similar patterns of total account spends and account play type with their sampled account for respondents with different numbers of occupants in their household in 2018 (Table 24). There were also fairly similar patterns of total account spends with their sampled account for respondents who said they had children or did not have children in their household in 2018/2019. Respondents who said they did not have children in their household in 2018/19 were more likely to use their sampled account for betting products only (66%), equally likely to use their sampled account for gaming products only (5%), and less likely to use their sampled account for both betting and gaming products (28%), compared to respondents who did have children in their household (57%, 7% and 36% respectively) (Table 25).

2.2 Change in online gambling since 2018/2019

One of the main benefits of the survey stage is that it adds a longitudinal element to the study, being able to explore how people's gambling behaviours changed over time and how past gambling habits (from the account data) correlate with respondents' reported current gambling habits.

2.2.1 Current gambling compared to past gambling

Respondents were asked if they spent any money on gambling activities in the last 4 weeks preceding the survey. Those who said they had taken part in online gaming, online betting or betting exchange were asked how they thought their online gambling frequency had changed since June 2019. 19% of respondents had not taken part in any online gaming, online betting or betting exchanges in the last 4 weeks. 35% said their online gambling had stayed the same since June 2019, 22% had said it had increased and 23% had said it had decreased (Table 26). The higher rate of respondent saying they had stopped or decreased (42%) their online gambling since June 2019 compared to those reporting an increase (22%) is likely due to the fact that, as all respondents included in this analysis must have been active for at least 14 days in the account data period of July 2018 to June 2019, there is greater scope for them to have decreased their gambling than increased. On the other hand, gamblers who had closed or stopped using their account for a long period of time were excluded from the sample. Respondent bias or recall error from respondents may also have contributed to this.

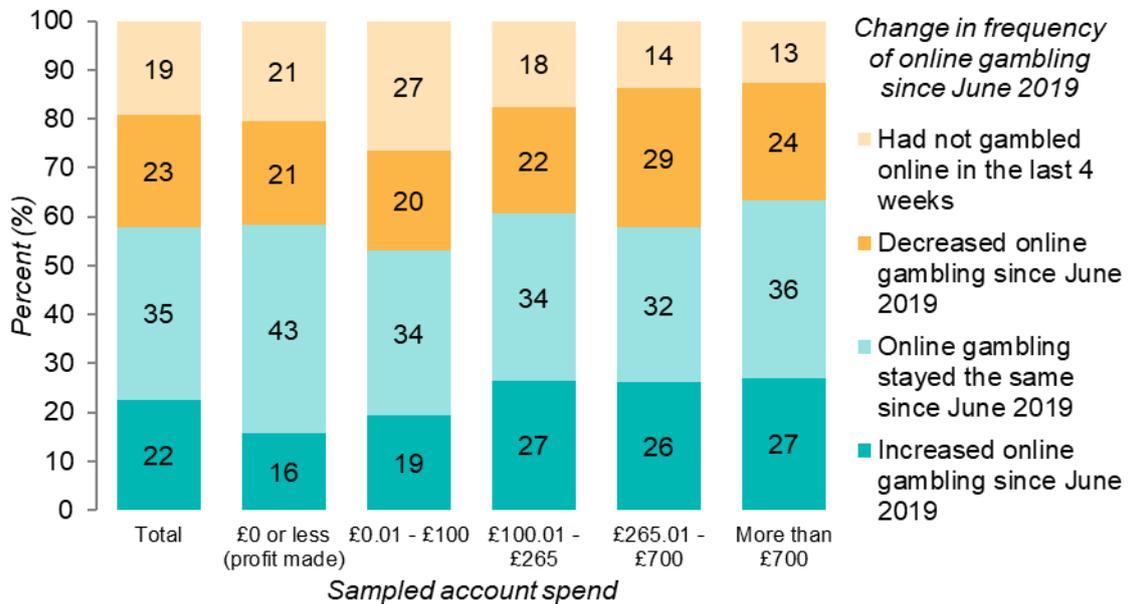
Figure 11 shows the above data by total account spend. Respondents who had the highest total spends on their sampled account were least likely to have not taken part in any online gambling or betting exchanges in the last 4 weeks. Respondents who

²⁰ December 2018 was chosen as it was the mid-point of the account data period.

²¹ 3% of participants responded with a different relationship status or answered don't know/prefer not to say to this question.

spent the least (including those who made a profit) on their sampled account were the least likely to have increased their online gambling since June 2019.

Figure 11 Total spend with sampled account in 2018/19 by change in frequency of online gambling since June 2019

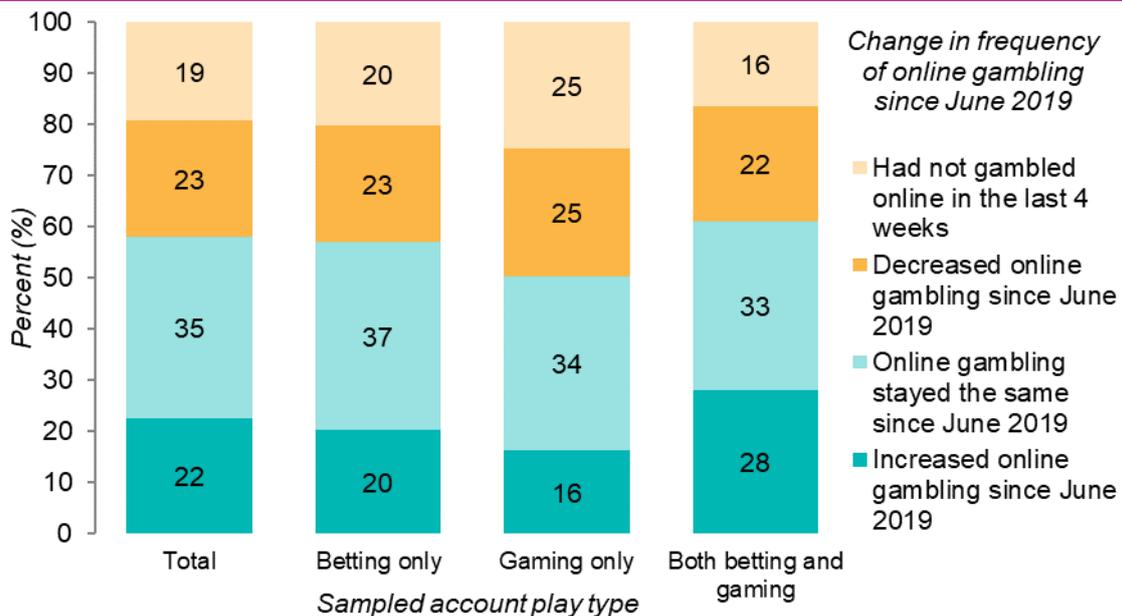


Base: All respondents

Source: Patterns of Play survey data file- Table 26

Respondents who used their sampled account for both betting and gaming products were more likely to say their gambling had increased since June 2019 (28%) compared to respondents who used betting products only (20%) or gaming products only (16%). Respondents who used their sampled account for gaming products only were more likely to report not taking part in any online gambling in the past 4 weeks (25%) than those who used betting products only (20%) and who used both betting and gaming products (16%). There was no difference in proportions of respondents with different play type for those who reported their online gambling had stayed the same, increased or had decreased (Figure 12).

Figure 12 Account play type with sampled account in 2018/19 by change in frequency of online gambling since June 2019



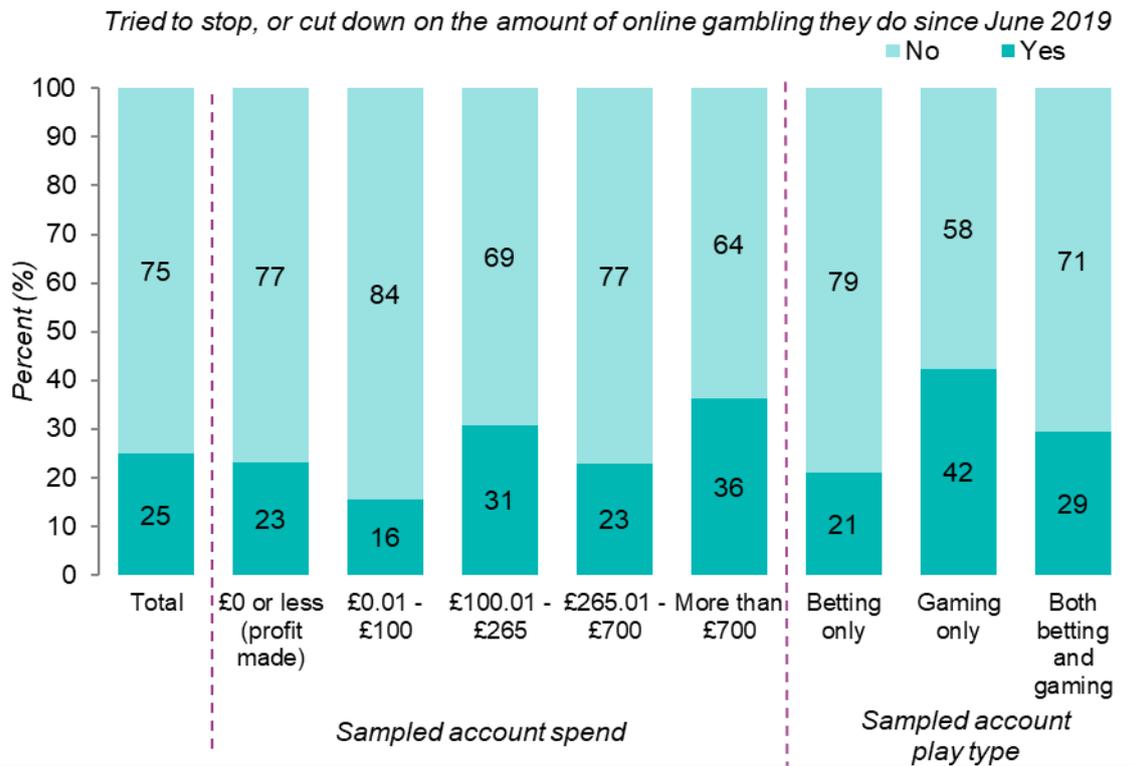
Base: All respondents

Source: Patterns of Play survey data file- Table 26

Attempts to change behaviour

Those who said they had taken part in online gaming, online betting or betting exchange in the last 4 weeks and reported that their online gambling had increased or stayed the same since June 2019 were asked if, since June 2019, they had ever tried to stop, or cut down on the amount of online gambling they did. 25% of respondents said they had while 75% said no they had not. Those with the largest total account spend in 2018/19 (more than £700) were most likely to report they had (36%) while those with the smallest net account spend (1p to £100) were least likely (16%) followed by accounts who made a profit (£0 spend or less) (23%). Respondents who used their sampled operator account in 2018/19 for gaming products only were most likely to report that they had tried to stop, or cut down on the amount of online gambling they did (42%), compared to those who only used betting products (21%) or who used betting and gaming products (29%) (Figure 13). This indicates that attempts to stop or cut down gambling are particularly associated with use of gaming products.

Figure 13 Tried to stop, or cut down gambling since June 2019 by total account spend and account play type with sampled account in 2018/19

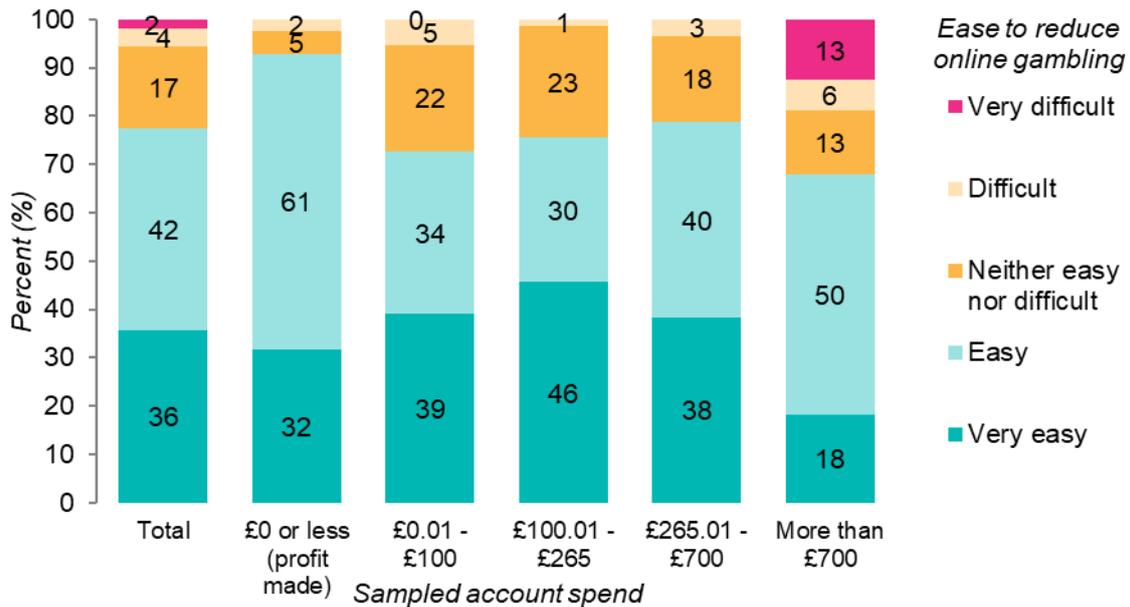


Base: Those who reported an increase or no change in their online gambling since June 2019

Source: Patterns of Play survey data file- Table 27

Those who said they had taken part in online gaming, online betting or betting exchange in the last 4 weeks preceding the survey and reported that their online gambling had reduced since June 2019 were asked how easy or difficult it was for them to reduce their online gambling. 36% said it was very easy, 42% said it was easy, 17% said it was neither easy or difficult, 4% said it was difficult and 2% said it was very difficult. Respondents who spent less on their sampled account were more likely to find it easier to reduce their online gambling, and people who spent more were more likely to find it difficult. 93% of those who spent £0 or less (i.e. made a profit) on their sampled account said it was easy or very easy to reduce their online gambling, compared to 68% who spent more than £700. 2% of those who spent £0 or less (i.e. made a profit) said it was difficult or very difficult to reduce their online gambling, compared to 19% who spent more than £700. Patterns were fairly similar across different play type with their sampled operator account in 2018/19 (Figure 14).

Figure 14 Ease of reducing online gambling since 2018/19 by total account spend with sampled account in 2018/19



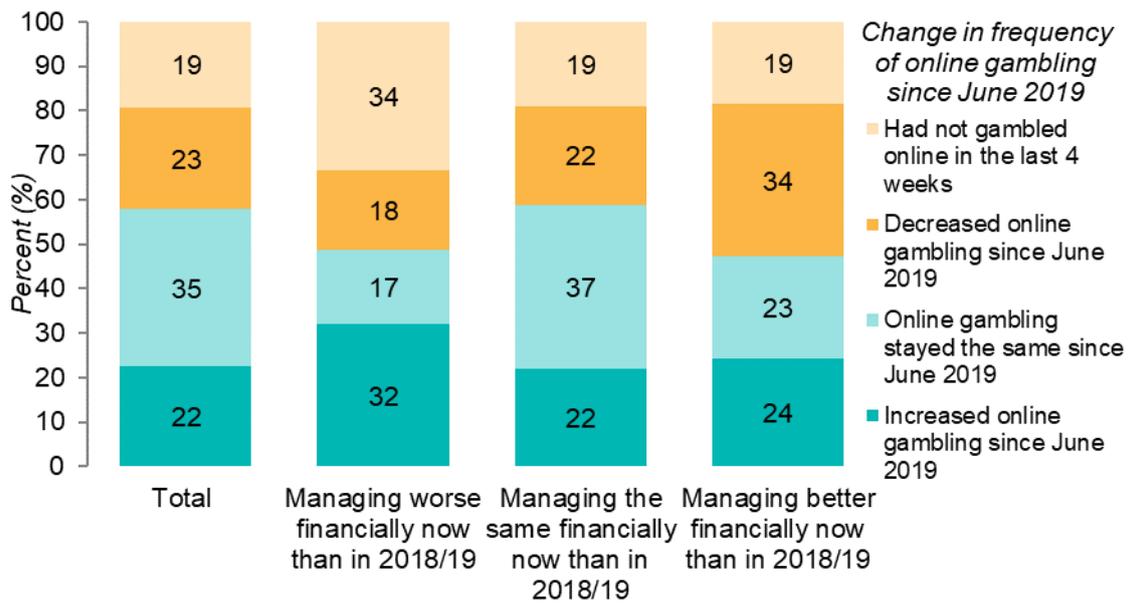
Base: Respondents who reported a decrease in their online gambling since June 2019
 Source: Patterns of Play survey data file- Table 28

2.2.2 Change in online gambling by change in life events

As outlined in the preceding section, respondents who said they had taken part in online gaming, online betting or betting exchange in the last 4 weeks preceding the survey were asked how they thought their online gambling frequency had changed since June 2019. Respondents were also asked if the number of people in their household had changed since 2018/19. Patterns were similar across the different household size changes (Table 29).

Respondents were asked how well they felt they were doing financially in the last 12 months, and how well they felt they were doing financially in December 2018. Respondents who felt they were managing the same financially now as in December 2018 were more likely to say their online gambling had stayed the same (37%) compared to those who were managing worse (17%) and who were managing better (23%) financially. Those who felt they were managing better financially now than in December 2018 were most likely to have decreased their gambling since June 2019 (34%) compared to those who were managing the same (22%) or managing worse (18%) (Figure 15).

Figure 15 Change in how people felt they were managing financially since 2018/19 by change in frequency of online gambling since 2018/19



Change in how people felt they were managing financially since 2018/19

Base: All respondents

Source: Patterns of Play survey data file- Table 30

2.3 Problem gambling and attitudes

2.3.1 PGSI, harms and self-identified gambling problem

This section looks at how past gambling behaviours (account data) correlate with current problem gambling identifiers such as the Problem Gambling Severity Index (PGSI) screen, gambling harms questions and whether the respondent feel they have ever had a gambling problem.

Problem Gambling Severity Index (PGSI)

Survey respondents who gambled on any type of product in the last 4 weeks preceding the survey were asked the questions which make up the Problem Gambling Severity Index (PGSI) screen, asking about their gambling over the past 12 months (therefore representing September 2020 to September 2021).²² The PGSI has nine questions assessed on a four-point scale from 0 to 3 (never = 0, sometimes = 1, most of the time = 2 and almost always = 3). The PGSI questions are:

1. Have you bet more than you could really afford to lose?
2. Have you needed to gamble with larger amounts of money to get the same feeling of excitement?
3. When you gambled, did you go back another day to try to win back the money you lost?

²² Ferris, J.A. and Wynne, H.J., 2001. The Canadian problem gambling index. Ottawa, ON: Canadian Centre on substance abuse.

[https://www.greo.ca/Modules/EvidenceCentre/files/Ferris%20et%20al\(2001\)The_Canadian_Problem_Gambling_Index.pdf](https://www.greo.ca/Modules/EvidenceCentre/files/Ferris%20et%20al(2001)The_Canadian_Problem_Gambling_Index.pdf)

4. Have you borrowed money or sold anything to get money to gamble?
5. Have you felt that you might have a problem with gambling?
6. Has gambling caused you any health problems, including stress or anxiety?
7. Have people criticized your betting or told you that you had a gambling problem, regardless of whether or not you thought it was true?
8. Has your gambling caused any financial problems for you or your household?
9. Have you felt guilty about the way you gamble or what happens when you gamble?

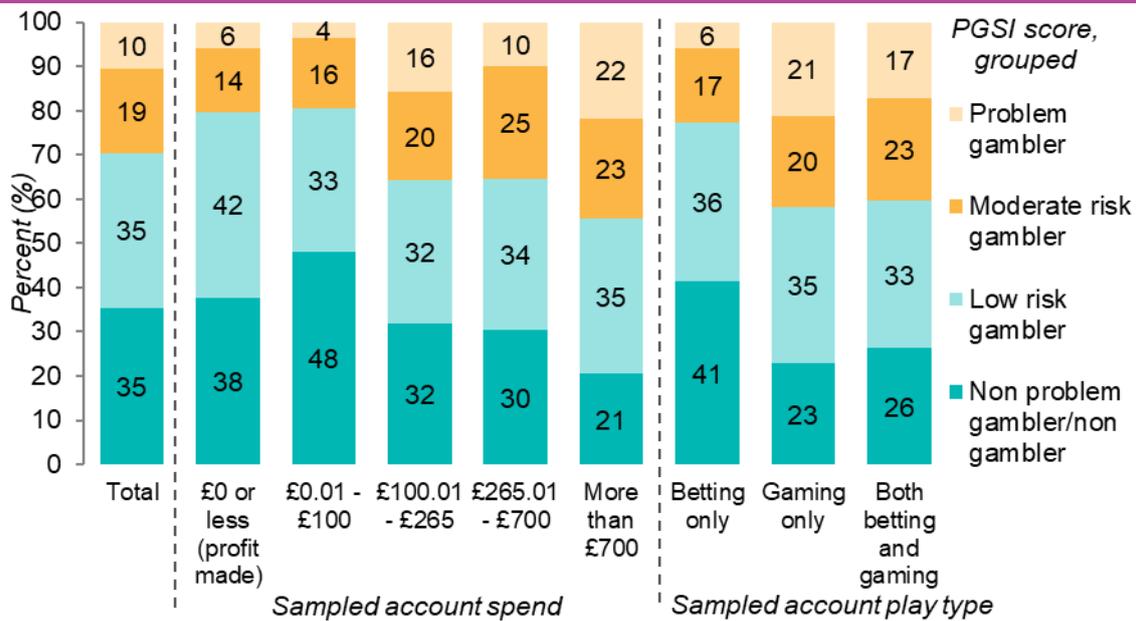
The scores on each item are then summed, creating a total score ranging from 0 to 27. A PGSI score of eight or more represents a problem gambler, scores between three and seven represent 'moderate risk' gambling, a score of one or two represents 'low risk' gambling and a score of 0 represents non-problem gambling.²³ Of account-holders who took part in the survey 35% were scored as non-problem gamblers, 35% as low risk gamblers, 19% as moderate risk gamblers and 10% as problem gamblers (Figure 16). The figures for at-risk and problem gambling are much higher than the estimated population prevalence-rates among all adults from the *Health Survey for England*. This is to be expected because the sample excludes all those in the wider population who were either non-gamblers in 2018/19 or only offline gamblers in 2018/19. Further, only those who played online for fourteen days or more in 2018/19 and who reported having gambled in the last 4 weeks are included, thus excluding less active online players.

Respondents who spent more money across the account data period in 2018/19 with their sampled accounts were more likely to be identified as problem gamblers (for their gambling between September 2020 and September 2021) than those who spent less; see Figure 16.

Those who gambled only on gaming products or on both betting and gaming products in 2018/19 with their sampled accounts were more likely to be identified as problem gamblers (for gambling between September 2020 and September 2021) than those who gambled only on betting products; 41% of those who gambled only on betting products were identified as non-problem gamblers compared to 23% of those who gambled only on gaming products and 26% on both types of products. 6% of those who gambled only on betting products were identified as problem gamblers compared to 21% of those who gambled only on gaming products and 17% on both types of products (Figure 16). This is consistent with the pattern identified in data from the *Health Survey for England 2018*, where the problem gambling prevalence-rate for past-year online bettors was 3.7% but 8.5% among past-year online players of "slots, casino or bingo" games.

²³ Gambling Commission (2021). Problem gambling screens
<https://www.gamblingcommission.gov.uk/statistics-and-research/publication/problem-gambling-screens>
(Accessed 03.03.2022)

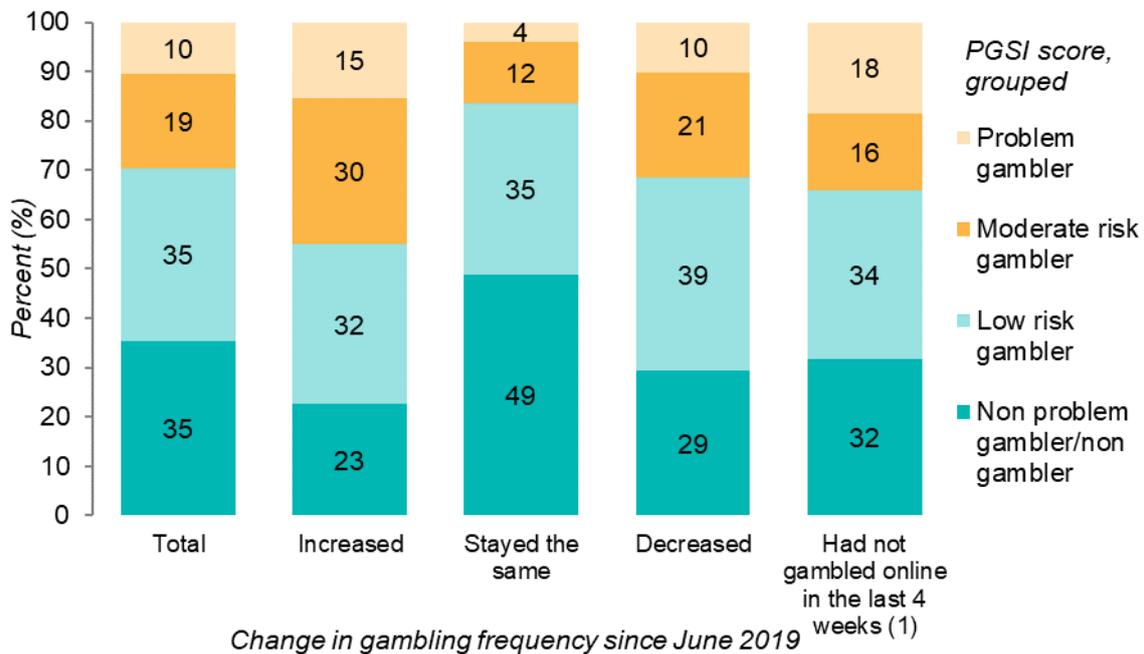
Figure 16 Problem Gambling Severity Index (PGSI) by total account spend and account play type with sampled account in 2018/19



Base: Respondents who have gambled in the last 4 weeks
 Source: Patterns of Play survey data file- Table 31

PGSI status was also compared to respondents self-reported change in frequency of their online gambling since June 2019. Respondents who reported their online gambling had stayed the same since June 2019 were most likely to be identified as non-problem gamblers (49%) compared to those who reported their online gambling had decreased (29%) or increased (23%) since June 2019. Respondents who had reported an increase in their gambling since June 2019 or had not gambled online (but had gambled on other activities) in the last 4 weeks were more likely to be identified as problem or moderate risk gamblers (45% and 34% respectively) than those who had reported their online gambling had stayed the same since June 2019 (16%) (Figure 17).

Figure 17 Problem Gambling Severity Index (PGSI) by change in gambling frequency since June 2019



Base: Respondents who have gambled in the last 4 weeks
 Source: Patterns of Play survey data file- Table 32

Short Gambling Harm Screen (SGHS)

Survey respondents who gambled on any type of product in the last 12 months were asked the Short Gambling Harm Screen (SGHS), asking if they had experienced any of the following issues as a result of their gambling in the last 12 months (therefore representing September 2020 to September 2021).²⁴ The SGHS issues asked about are;

1. Reduction of their available spending money
2. Reduction of their savings
3. Less spending on recreational expenses such as eating out, going to movies or other entertainment
4. Had regrets that made them feel sorry about their gambling
5. Felt ashamed of their gambling
6. Sold personal items
7. Increased credit card debt
8. Spent less time with people they care about
9. Felt distressed about their gambling
10. Felt like a failure.

The majority of respondents (74%) reported that they did not experience any of the issues listed while 26% of respondents reported at least one. The most common issues reported were a reduction of their available spending money (14%), regrets that made

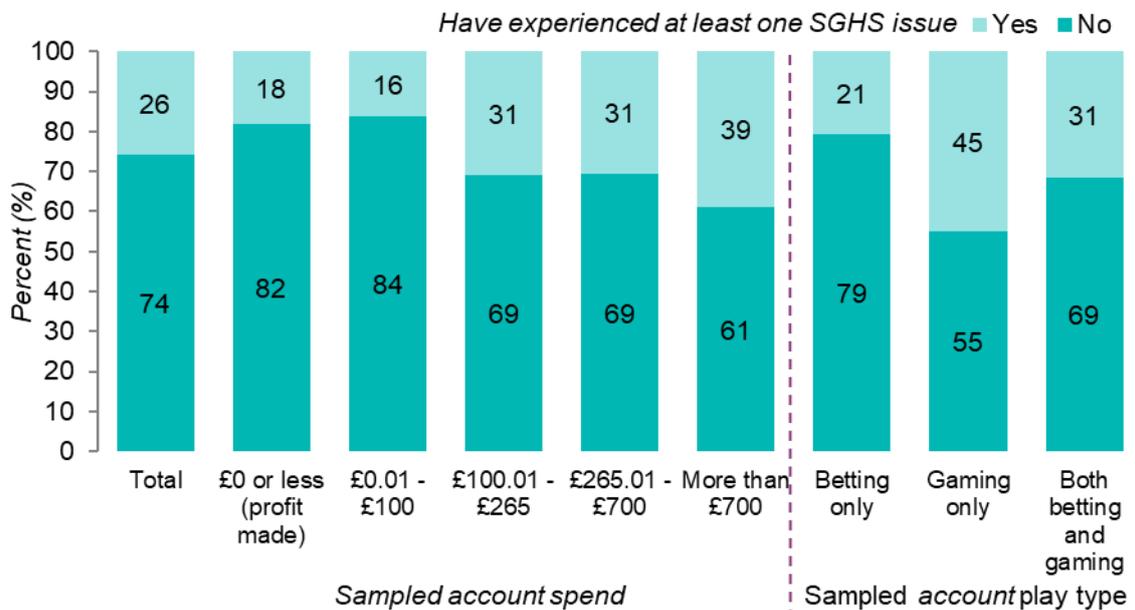
²⁴ Browne, M., Goodwin, B. C., & Rockloff, M. J. (2018). Validation of the Short Gambling Harm Screen (SGHS): A Tool for Assessment of Harms from Gambling. *Journal of gambling studies*, 34(2), 499–512. <https://doi.org/10.1007/s10899-017-9698-y>

them feel sorry about their gambling (10%) and less spending on recreational expenses such as eating out, going to movies or other entertainment (9%) (Table 34).

Those who spent more money in 2018/19 with their sampled accounts were more likely to report these issues than those who spent less (Figure 18). Those who spent a total of more than £700 across the year with their sampled account were more likely to report at least one of the listed issues (39%) compared to those who spent £0 or less (i.e. made a profit) (18%) or who spent 1p to £100 (16%). Those who spent more than £700 across the year with their sampled account were more likely to report a reduction of their available spending money (25%) compared to those who spent £0 or less (i.e. made a profit) (10%) or who spent 1p to £100 (7%). Similarly, those who spent more than £700 with their sampled account were more likely to report having regrets that made them feel sorry about their gambling (21%) compared to those who spent £0 or less (6%) or who spent 1p to £100 (5%). This pattern was similar for reported reduction in savings, less spending on recreational expenses, feeling ashamed of their gambling and feeling distress about their gambling.

Those who gambled only on gaming products in 2018/19 with their sampled accounts were more likely to report at least one of these issues (45%) than those who gambled only on betting products (21%). Those who gambled only on gaming products were also more likely to report a reduction of their available spending money (26%) compared to those who gambled only on betting products (11%). This pattern was similar for reported reduction in savings (12% compared to 6%) (Figure 18).

Figure 18 Short Gambling Harm Screen (SGHS)



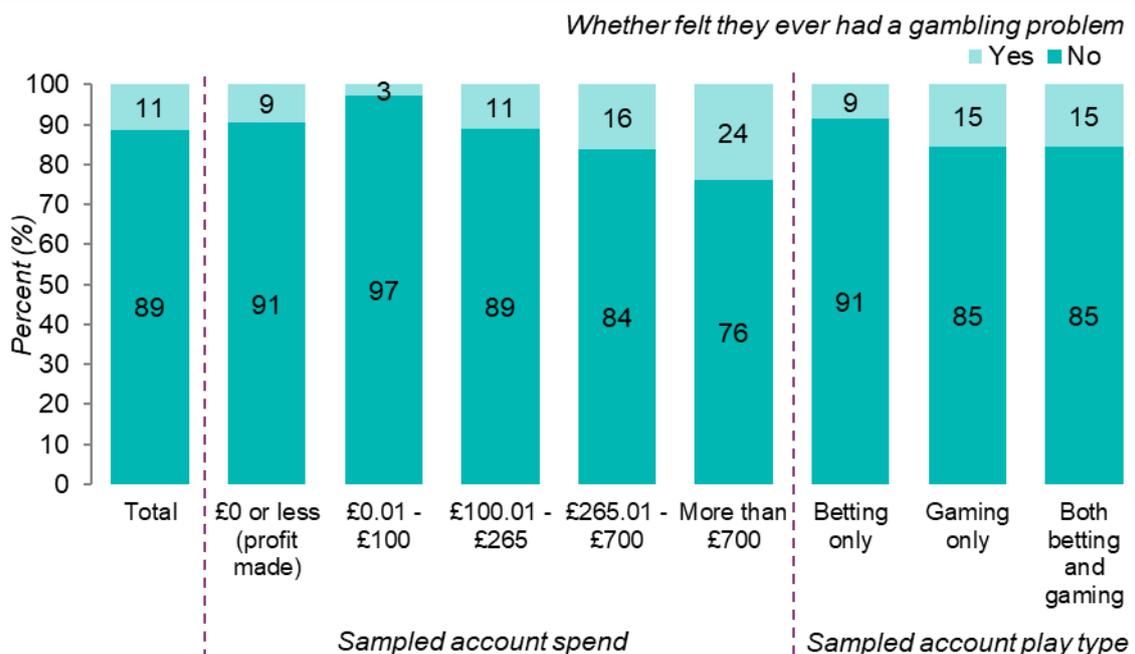
Base: Respondents who have gambled in the last 4 weeks
 Source: Patterns of Play survey data file- Table 33

Self-identified gambling problem

All survey respondents were asked if they felt they had ever had a gambling problem and if so when they first thought they had a gambling problem. 89% of respondents reported that they did not feel they ever had a gambling problem while 11% did. 6% of respondents reported that they first thought they had a gambling problem in the last 3 years while 6% reported more than 3 years ago.

Those who spent more than £700 with their sampled account were more likely to report that they thought they had ever had a gambling problem (24%) compared to those who spent £0 or less (i.e. made a profit) (9%) or who spent 1p to £100 (3%). Those who gambled only on gaming products or on both betting and gaming products in 2018/19 with their sampled accounts were more likely to report that they thought they ever had a gambling problem (both 15%) than those who gambled only on betting products (9%) (Figure 19). As indicated by the analysis of PGSI scores, this data further suggests that high spend and a preference for gaming activities are markers for gambling problems.

Figure 19 Gambling problem by total account spend and account play type with sampled account in 2018/19



Base: All respondents

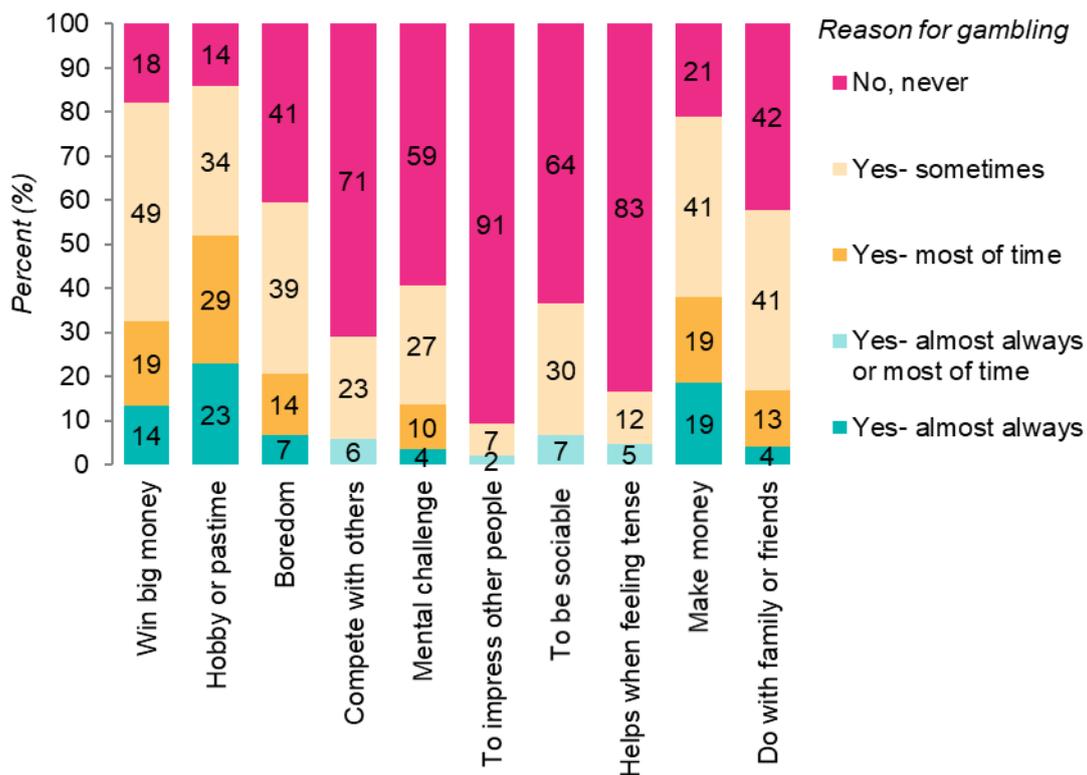
Source: Patterns of Play survey data file- Table 34

2.3.2 Motivation for gambling

All respondents who reported that they gambled on at least one activity in the last 4 weeks preceding the survey were asked about the reasons why they took part in gambling. They were asked a series of 10 questions about reasons for gambling and whether that was the case almost always, most of the time, sometimes or never.²⁵ These responses were then compared to the different levels of 2018/19 total spend and play type to explore if reasons for gambling differed across these categories. It should be noted however that respondents' current motives for gambling may have changed since their 2018/19 spend levels and play type (Figure 20).

²⁵ The motives questions were a cut down for of The Reasons for Gambling Questionnaire. Canale, C., Santinello, M., & Griffiths, M. (2015). Validation of the reasons for gambling questionnaire (RGQ) in a British population survey. *Addictive Behaviors*, 45, 276 – 280. doi: <http://dx.doi.org/10.1016/j.addbeh.2015.01.035>

Figure 20 Motivation for gambling



Base: Participants who have gambled in the last 4 weeks
 Source: Patterns of Play survey data file- Tables 35-44

Those who gambled only on gaming products in 2018/19 with their sampled were more likely to report that gambling being a hobby or pastime was a reason they gambled almost always, most of the time or sometimes (96%) compared to 2018/19 betting only respondents (85%) or both betting and gaming respondents (85%) (Table 36).

Those who spent more money in 2018/19 with their sampled accounts were slightly more likely to report gambling to escape boredom or fill their time was almost always a reason they gambled (12% of those who spent more than £700) compared to those who spent £0 or less (i.e. made a profit) (4%) or who spent £1 to £100 (6%). Those who gambled only on gaming products in 2018/19 with their sampled accounts were more likely to report that this was a reason they gambled most of the time (26%) or sometimes (57%) than those who gambled only on betting products (12% most of the time and 36% sometimes) (Table 37).

Those who spent more money in 2018/19 with their sampled accounts were slightly less likely to report that gambling being sociable was almost always or sometimes a reason they gambled (25% of those who spent more than £700) compared to those who spent £0 or less (i.e. made a profit) (39%) or who spent 1p to £100 (36%). Patterns were fairly similar across different play type with their sampled account (Table 40).

Those who spent more money in 2018/19 with their sampled accounts were more likely to report that gambling helps when they are feeling tense was a reason they gambled (22% those who spent £100.01 to £265, 20% those who spent £265.01 to £700 and 25% those who spent more than £700) compared to those who spent £0 or less (i.e. made a profit) (11%) or who spent 1p to £100 (10%). Those who gambled only on gaming products in 2018/19 with their sampled accounts were more likely to report that

this was a reason they gambled (39% who said yes) than those who gambled only on betting products (12%) or both (21%) (Table 42).

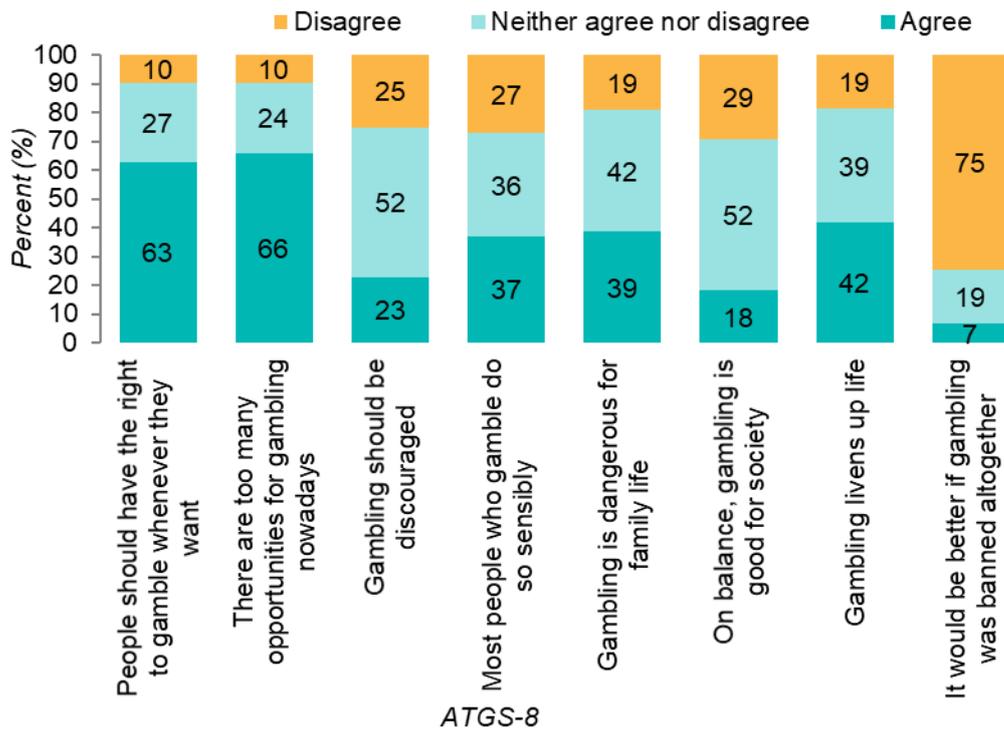
Those who spent more money in 2018/19 with their sampled accounts were more likely to report gambling being something they do with family or friends was a not a reason they gambled (54% those who spent more than £700) compared to those who spent £0 or less (i.e. made a profit) (44%) or who spent 1p to £100 (36%). Those who gambled only on betting products in 2018/19 with their sampled accounts were more likely to report that this was a reason they gambled (62%) than those who gambled only on gaming products (42%) (Table 44).

2.3.3 Attitudes towards gambling

All survey respondents were asked the Attitudes Towards Gambling Scale (ATGS-8) questions which are eight statements about gambling for which respondents are asked to indicate how much they agree or disagree with each (strongly agree, agree, neither agree nor disagree, disagree or strongly disagree). The ATGS- 8 question statements are:

1. People should have the right to gamble whenever they want by past total account spend and account play type.
2. There are too many opportunities for gambling nowadays by past total account spend and account play type
3. Gambling should be discouraged by past total account spend and account play type
4. Most people who gamble do so sensibly by past total account spend and account play type
5. Gambling is dangerous for family life by past total account spend and account play type
6. On balance, gambling is good for society by past total account spend and account play type
7. Gambling livens up life by past total account spend and account play type
8. It would be better if gambling was banned altogether by past total account spend and account play type.

Figure 21 Attitudes towards Gambling Scale (ATGS-8)



Base: All participants

Source: Patterns of Play survey data file- Tables 45-52

The above responses in Figure 21 were then compared to the different levels of 2018/19 total spend and play type to explore if attitudes towards gambling differed across these categories. It should be noted however that respondents' attitudes towards gambling may have changed since their 2018/19 spend levels and play type.

Those who gambled only on betting products or both betting and gaming in 2018/19 with their sampled accounts were more likely to agree with the statement that people should have the right to gamble whenever they want (63% and 67% respectively) than those who gambled only on gaming products (43%) (Table 45). Those who gambled only on gaming products or only on betting products in 2018/19 with their sampled accounts were more likely to agree with the statement that there are too many opportunities for gambling nowadays (77% and 69% respectively) than those who gambled on both betting and gaming products (59%) (Table 46).

Those who gambled only on betting products or both betting and gaming in 2018/19 with their sampled accounts were more likely to disagree with the statement that most people who gamble do so sensibly (28% and 28% respectively) than those who gambled only on gaming products (10%) (Table 48). Those who gambled only on betting products in 2018/19 with their sampled accounts were more likely to disagree with the statement that, on balance, gambling is good for society (33%) than those who gambled only on gaming products (23%) or both (24%) (Table 50). Those who gambled only on betting products in 2018/19 with their sampled accounts were more likely to disagree with the statement that it would be better if gambling was banned altogether (79%) than those who gambled only on gaming products (63%) (Table 52).

The survey respondents' responses to the ATGS-8 questions were compared to those asked in a general population survey (in the year to December 2020), where respondents were randomly selected regardless of whether they gambled or not.²⁶

For some statements the respondents in the Gambling Commission general population survey were **more likely** to agree with the statement that this survey respondents.²⁷ Respondents from the Gambling Commission general population survey were more likely to agree that there are too many opportunities for gambling nowadays (83% compared to 66%). They were also much more likely to agree that gambling should be discouraged (63% compared to 23%) and that gambling is dangerous for family life (75% compared to 39%). They were also more likely to agree that it would be better if gambling was banned all together (31% compared to 7%).

Respondents from the Gambling Commission general population survey were **less likely** to agree that gambling livens up life (28%) compared to this survey respondents (42%).

2.4 Safer gambling

2.4.1 Safer gambling tools

All respondents were asked if they had ever used certain safer gambling tools. Responses to these questions were compared to the different levels of 2018/19 total spend and play type.

Respondents were asked if they have ever used the time out tool. 19% of respondents said they had while 81% said they had not. Respondents with a low total spend amount (1p to £100) with their sampled operator account were least likely to report using this tool (6%) compared to the other spend levels (20% to 28% use). Those who gambled only on gaming products or on both gaming and betting products in 2018/19 with their sampled accounts were more likely to report using this tool (35% and 27% respectively) than those who gambled on betting products only (13%) (Table 53).

Respondents were asked if they have ever used financial limit tools. 42% of respondents said they had while 58% said they had not. Respondents with a lowest total spend amount with their sampled operator account were least likely to report using these financial limit tools (29% of those who spent 1p to £100) compared to those with the highest spend levels (64% of those who spent more than £700). Those who gambled only on gaming products in 2018/19 with their sampled accounts were more likely to report using this tool (55%) than those who gambled on betting products only (39%) (Table 54).

Respondents were asked if they have ever used the reality check tool. 32% of respondents said they had while 68% said they had not. Patterns across different levels of total spend and play type were not related to the use of financial limits; respondents with the lowest total spend amount with their sampled operator account were least likely to report using the reality check tool compared to those with the highest spend levels. Finally, those who gambled only on gaming products in 2018/19 with their sampled accounts were more likely to report using this tool than those who gambled on betting products only (Table 55).

²⁶ Gambling Commission (2021): Gambling behaviour in 2020: Findings from the quarterly telephone survey. <https://www.gamblingcommission.gov.uk/statistics-and-research/publication/year-to-december-2020>.

²⁷ Note that these observed differences and were not statistically tested.

Respondents were asked if they have ever used multi-operator exclusion tools. 6% of respondents said they had while 94% said they had not. Patterns across different levels of total spend and play type were similar to financial limit use; compared to respondents with the highest spend levels, those with the lowest total spend amount with their sampled operator account were least likely to report using these financial limit tools. Those who gambled only on gaming products in 2018/19 with their sampled accounts were more likely to report using this tool than those who gambled on betting products only (Table 56).

2.4.2 Self-control strategies

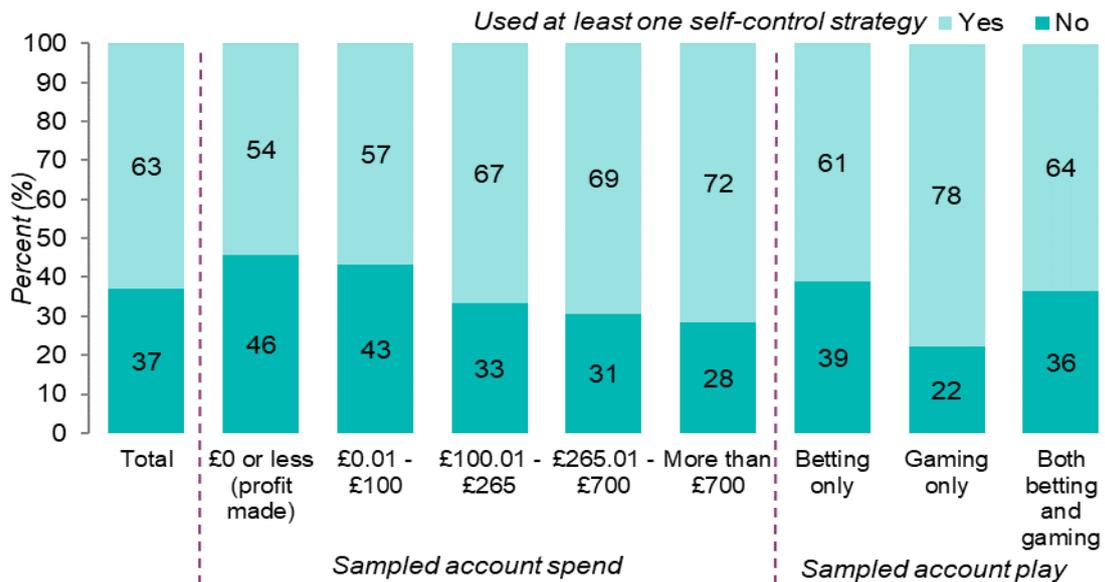
Respondents who gambled on any gambling activity in the last 4 weeks preceding the survey were asked if they used any of the listed self-control strategies to avoid harm from gambling. These strategies were:

1. Set a spending limit in advance
2. Keep track of the money you spend
3. Limit the amount of alcohol you consume
4. Limit the amount of time playing
5. Think about the negative consequences of excessive gambling
6. Limit how often you play
7. Restrict access to additional cash
8. Play with friends and/or family present
9. Limit the amount of cannabis you consume.

The most common strategies selected were; keeping track of the money they spend (40%), setting a spending limit in advance (37%) and limiting how often they play (19%). Thirty-seven percent of respondents did not report using any of the listed self-control strategies.

Those with higher total account spend in 2018/19 with their sampled account were more likely to report setting a spending limit in advance (46% of those who spent £265.01 to £700 and 41% of those who spent more than £700) compared to those who spent £0 or less (profit made) (32%) or those with low net account spend of 1p to £100 (30%). Those with higher total account spend in 2018/19 with their sampled account were more likely to report at least one of the listed strategies (69% of those who spent £265.01 to £700 and 72% of those who spent more than £700) compared to those who spent £0 or less (profit made) (54%) or those with low net account spend of 1p to £100 (57%). Patterns were similar across different 2018/19 play types with their sampled account (Figure 21).

Figure 22 Current self-control strategies by total account spend and account play type with sampled account in 2018/19

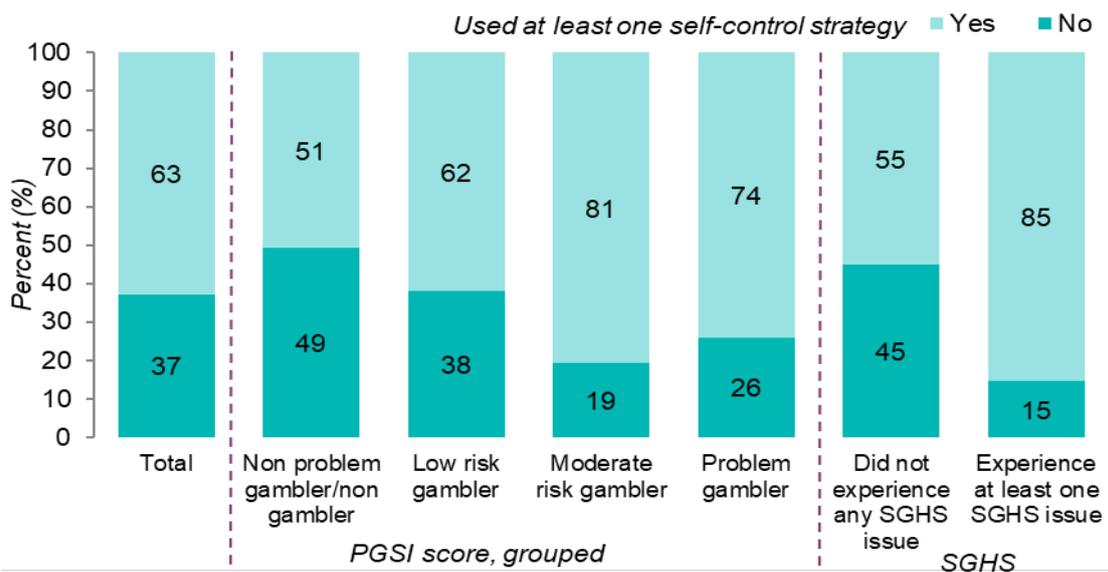


Base: All respondents

Source: Patterns of Play survey data file- Table 57

Those who were identified as moderate risk gamblers or problem gamblers (based on their gambling in the last 12 months) were more likely to report at least one of the listed self-control strategies (81% and 74% respectively) compared to those identified as non-problem gamblers (51%) or low risk gamblers (62%). Those who reported experiencing at least one of the Short Gambling Harm Screen (SGHS) issues as a result of their gambling were more likely to report at least one of the listed self-control strategies (85%) than those who reported not experiencing any of the SGHS issues as a result of their gambling (55%) (Figure 23). Self-management tools use can therefore be a marker of problem gambling risk and potentially taken into account by operators when assessing customer risk.

Figure 23 Current self-control strategies by PGSI and SGHS



Base: All respondents

Source: Patterns of Play survey data file- Table 58

3 Summary of findings

3.1.1 Past gambling behaviours

Following on from the account data stage, the survey data provided a wider picture of players' (who were active on at least 14 days in 2018/19) online gambling behaviours with other operators and offline behaviours. Those who had a total spend with their sampled account of between 1p and £100 were most likely to report that they only gambled online with their sampled operators compared to those who made a profit (spend of £0 or less) and those who had the largest account total spend of more than £700. Although it was not explored in the survey analysis, the accounts with a net profit or largest spend are likely to be accounts with the highest volume of gambling. It should therefore be borne in mind that estimates presented in the account data (Technical Report 2), especially those that relate to atypical behaviour (e.g. heavy spend of time or money or repeated incidence of high loss sessions) to be lower-bound estimates of individuals overall gambling.

Survey respondents who gambled on gaming products only with their sampled account in 2018/19 were more likely to report that they gambled with more than one gambling company in 2018/19 and were more likely to report using 5+ accounts than those who gambled on betting products only. Similarly, those who gambled on gaming products only were more likely to report that less than a quarter of their total online gambling activity was with their sampled account than those who gambled on betting products only or both. The above survey data suggests that players' gaming behaviours are likely to be more dispersed across multiple gambling operators and accounts. The account data conclusions (Technical Report 2) which are based on only one online gambling account, that gaming was associated with an appreciably higher probability of incurring heavy losses and, of those who spent to the highest levels, an appreciably higher proportion had addresses in the most deprived neighbourhoods than betting, should further be seen as lower-bound estimates and further research is required around how online gaming spend is dispersed across multiple accounts.

Of players' who were active on at least 14 days in 2018/19, a large proportion (79%) reported that they also took part in offline gambling activities between July 2018 and June 2019. Respondents were more likely to take part in offline gambling activities that were the same as their online activities (e.g. accounts that bet online only were most likely to bet offline only and the same for gaming). Of survey respondents who took part in offline gambling in 2018/19, 68% said online gambling made up more than half of their total gambling activity, compared to 21% who said offline gambling made up more than half of their total gambling activity.

Survey respondents who said they were finding it difficult to manage financially or just about getting by financially in 2018/19 were more likely to have a total spend with their sample operator account of more than £700 (25% and 21% respectively) compared to those who said they were living comfortably (12%).

3.1.2 Change in online gambling since 2018/19

Respondent who had a higher total spend on their sampled account were most likely to report that they had taken part in online gaming, online betting or betting exchange in the last 4 weeks and were more likely to report an increase in their online gambling since June 2019. Respondents who used their sampled account for gaming products only were more likely to report not taking part in any online gambling in the past 4

weeks than those who used betting products only and who used both betting and gaming products.

Of those who said their online gambling had increased or stayed the same since June 2019, respondents with the largest account spend in 2018/19 and those who used their sampled account for gaming products only were most likely to report that they had tried to stop or cut down the amount of online gambling they did. Of those who said had gambled in the past 4 weeks but had said their online gambling had reduced since June 2019, respondents with the largest account spend in 2018/19 were most likely to report it was very difficult or difficult to reduce their online gambling.

Respondents who felt they were managing better financially now than in December 2018 were most likely to have decreased their gambling since June 2019.

Looking at gamblers' responses about their gambling activity in the 4 weeks preceding the survey, there is a pattern for 'heavier' gamblers in the account data (i.e. in 2018/19) to either still be gambling with the same frequency or to have increased their gambling since 2018/19 suggesting that spend is a good indicator of future patterns of play. It should be noted however that those who may have completely stopped gambling online with their account are not represented by this data.

3.1.3 Problem gambling, harms, attitudes and safer gambling

Amongst survey respondents who gambled on any type of gambling product in the last 4 weeks, those who spent more money across the account data period in 2018/19 with their sampled accounts were more likely to be identified as problem gamblers (for their gambling between September 2020 and September 2021) than those who spent less. Those who gambled in the last 4 weeks and who gambled on gaming products only or on both betting and gaming products in 2018/19 with their sampled accounts were more likely to be identified as problem gamblers (for gambling between September 2020 and September 2021) than those who only gambled on betting products.

Survey respondents who gambled on any type of product in the last 12 months were asked the Short Gambling Harm Screen (SGHS), asking if they had experienced any of the following issues as a result of their gambling in the last 12 months (therefore representing September 2020 to September 2021). Those who spent more money in 2018/19 with their sampled accounts were more likely to report at least one of the SGHS issues than those who spent less. Similarly, those who gambled on gaming products only in 2018/19 with their sampled accounts were more likely to endorse at least one of these issues than those who gambled only on betting products.

Following the same trend of problem gambling status and experience of harms, those with higher spend levels in 2018/19 and those who engaged in gaming products only were more likely to report using safer gambling tools and self-control strategies.

The above findings on PGSI and SGHS show that past account spend in 2018/19 can be seen as a useful predictor of future gambling status and of players' experiencing gambling related of harms two to three years later. Play type can also be a useful predictor. The above findings further add evidence to the call that it would be appropriate to focus more attention on the risks when taking part in gaming activities, rather than much of the recent debate being focused on betting.

Respondents attitudes to gambling were generally more positive than the general population.²⁸ Respondents were less likely to agree to statements that gambling should be discouraged, that gambling is dangerous for family life, that it would be better if gambling was banned altogether and were more likely to agree that gambling livens up life. A similar proportion of survey respondents agreed to the statement that people should have the right to gamble whenever they want compared to the general population. Despite this, a majority of survey respondents agreed that there are too many opportunities for gambling nowadays (66%), although this was lower than the proportion of the general population agreeing to this statement (83%). On whether gambling is dangerous for family life, 39% of respondents agreed.

²⁸ Gambling Commission (2021): Gambling behaviour in 2020: Findings from the quarterly telephone survey. <https://www.gamblingcommission.gov.uk/statistics-and-research/publication/year-to-december-2020>.

Appendix A: Survey questionnaire

Questionnaire

1. Authenticate page

Welcome to the Gambling Survey! This survey is part of a wider programme of research funded by GambleAware. Invitations to the survey have been emailed to selected participants by gambling companies on behalf of NatCen.

To take part please click on your unique login link in the invitation email.

If you are having problems logging in or any other technical issues, then please get in touch using our contact details below:

Email: XXX

Freephone: XXXX

2. Data linkage

IntroWhy

Why have I been asked to take part?

This survey is part of a wider programme of research funded by GambleAware. As the first step, several online gambling companies gave NatCen fully anonymised data about how some of their customers have been using their online gambling accounts. The data includes information on what games people played or what they bet on, as well as how much money they spent or won. The anonymised data is for a period starting in July 2018 and finishing in June 2019.

We have analysed the data and have written a report that you can view here: <https://natcen.ac.uk/news-media/press-releases/2021/march/new-interim-research-findings-detail-gambling-habits-from-140,000-online-gambling-accounts-in-great-britain/>.

Since the data is completely anonymised, there is very little we can infer about how different people gamble. To be able to do this, we have created a survey for the people whose data was included in our dataset. As we don't know who was included, we have asked gambling companies to send an email on our behalf to people who they included in the dataset.

Your account with {operator} was included in this dataset. We would be very grateful if you would help us to understand how people gamble online better by filling out this short survey.

Click next to continue

3. Consent

{ASK ALL}

DLConsent

ANALYSIS: "DL consent"

Consenting to linking your survey answers to this account data:

We would like to ask for your consent to link your responses to the questions in this survey with your anonymised online gambling account data provided by {operator}. The process by which we link your survey answers with your anonymised online gambling account data provided by {operator} will be fully confidential and will not contain any information that could be used to identify you. The linked data will be used for statistical and research purposes only.

By giving your consent you are only giving permission to link survey information to your anonymised account data provided by {operator} from July 2018 to June 2019, and nothing else. You can withdraw your permission to link your online gambling account and survey data prior to October 2021 by writing to: NatCen Social Research, 35 Northampton Square, London EC1V 0AX, or you can telephone: XXXXX. You do not need to give a reason.

To find out more about how the data linkage process will work, please visit our taking part page and Privacy Policy: <https://natcen.ac.uk/taking-part/studies-in-field/gambling-survey-2021/>

1. I consent to my survey answers being linked to my online gambling account data with {operator} from July 2018 to June 2019.
2. I do not wish to give consent for NatCen to link my survey responses with my account data. => **route to Contact (none of survey questions).**

SOFT CHECK: If DLConsent = 2 "Are you sure? It is very important for this study for us to be able to link your data"

NODK/NOREF

Gambling status

{ASK IF DLConsent = 1}

Crrnt_GambleAct [MULTICODE]

ANALYSIS: "Gambling activities in last 4 weeks"

The following questions will ask about your gambling in the **last 4 weeks**, that is since [system date – 28 days].

Have you spent any money on any of the following activities in the **last 4 weeks**? Please select all that apply

1. Tickets for the National Lottery Draw, Thunderball, Set for Life and Euromillions and tickets bought online
2. Scratchcards (but not online or newspaper or magazine scratchcards)

3. Tickets for any other lottery, including charity lotteries
4. The football pools
5. Bingo cards or tickets, including playing at a bingo hall (not online)
6. Fruit or slot machines
7. Virtual gaming machines in a bookmakers to bet on virtual roulette, poker, blackjack or other games
8. Table games (roulette, cards or dice) in a casino
9. Playing poker in a pub tournament/ league or at a club
10. Online gambling like playing poker, bingo, instant win/scratchcard games, slot machine style games or casino games for money
11. Online betting with a bookmaker on any event or sport
12. Betting exchange (This is where you lay or back bets against other people using a betting exchange. There is no bookmaker to determine the odds. This is sometimes called 'peer to peer' betting.)
13. Betting on horse races in a bookmaker's, by phone or at the track
14. Betting on dog races in a bookmaker's, by phone or at the track
15. Betting on sports events in a bookmaker's, by phone or at the venue
16. Betting on other events in a bookmaker's, by phone or at the venue
17. Spread-betting (In spread-betting you bet that the outcome of an event will be higher or lower than the bookmaker's prediction. The amount you win or lose depends on how right or wrong you are.)
18. Private betting, playing cards or games for money with friends, family or colleagues
19. Another form of gambling in the last 4 weeks, please specify
20. Have not spent any money on gambling in the last 4 weeks: [EXCLUSIVE]

{IF Crrnt_GambleAct <> (10 Online gambling AND 11 Online betting AND 12 Betting Exchange)}

Crrnt_OnlCheck

Can I check, you have not spent any money on;

- online gambling like playing slot machine style games or casino games, poker, bingo, instant win/scratchcard games, or
- on online betting with a bookmaker on any event or sport, or
- on betting exchanges in the last 4 weeks?

1. Yes, that is correct
2. No, I have spent money on one or more of those activities. (If you select this option you will be returned to the previous question)

IF =2 THEN empty Crrnt_OnlCheck AND return to Crrnt_GambleAct

{IF (Crrnt_GambleAct = 10 Online gambling OR 11 Online betting OR 12 Betting Exchange)}

Crrnt_OnlAcnts

ANALYSIS: "Multiple online gambling accounts in last 4 weeks"

We would like you to think about any online accounts that you have with gambling companies which you have used **in the last 4 weeks**. Please do not include any lottery accounts, such as National Lottery. Do you use a gambling account with {operator}, and/or gambling accounts with other gambling companies?

1. I only use an account with {operator}
2. I use accounts with {operator} and other gambling companies
3. I only use accounts with gambling companies other than {operator}

{IF Crrnt_OnlAcnts = 2 or 3}

Crrnt_OnlAcntsNum

ANALYSIS: “Number of online gambling accounts in last 4 weeks”
How many gambling accounts have you used **in the last 4 weeks** (IF
Crrnt_OnlAcnts = 2; **, excluding your account with {operator}**)? Please do
not include any lottery accounts, such as National Lottery.

Numeric[1...100]

Current online gambling behaviour with sampled operator.

Ask this section IF (Crrnt_GambleAct = 10 Online gambling OR 11 Online betting OR 12 Betting exchange) AND (Crrnt_OnlAcnts = 1 or 2)

Crrnt_SampOpAct [MULTICODE]

ANALYSIS: “Online gambling activities in last 4 weeks with operator”

In the last 4 weeks, that is since [system date -28 days], which of the following did you spend your own money on with your online {operator} account?
Please select all that apply

1. Online betting on horse races via a website or app
2. Online betting on sports events via a website or app
3. Online betting on dog/greyhound races via a website or app
4. Online betting on esports via a website or app
5. Online betting on virtual sports or races via a website or app
6. Online betting on any other events via a website or app
7. Online poker via a website or app
8. Online casino games (roulette, cards or dice games) via a website or app
9. Online slot games via a website or app
10. Online bingo via a website or app
11. Online instant wins via a website or app
12. None of these :[EXCLUSIVE]

{IF 2 in Crrnt_SampOpAct}

Crrnt_SampOpSportInPlay

ANALYSIS: “In-play betting in last 4 weeks with operator”

In the last 4 weeks, that is since [system date - 28 days], did you bet in-play when betting on sports with your online {operator} account? In-play betting means betting on things after the match/event has started.

1. Yes
2. No

Current online gambling behaviour with other operators.

Ask this section IF ((Crrnt_GambleAct = 10 Online gambling OR 11 Online betting OR 12 Betting exchange) AND (Crrnt_OnlAcnts = 2 or 3))

Crrnt_OthOpAct [MULTICODE]

ANALYSIS: "Online gambling activity with other operator in last 4 weeks"

In the last 4 weeks, that is since [system date - 28 days], which of the following did you spend your own money on with your online gambling accounts, excluding your {operator} account? Please select all that apply

1. Online betting on horse races via a website or app
2. Online betting on sports events via a website or app
3. Online betting on dog/greyhound races via a website or app
4. Online betting on esports via a website or app
5. Online betting on virtual sports or races via a website or app
6. Online betting on any other events via a website or app
7. Online poker via a website or app
8. Online casino games (roulette, cards or dice games) via a website or app
9. Online slot games via a website or app
10. Online bingo via a website or app
11. Online instant wins via a website or app
12. None of these :[EXCLUSIVE]

{IF 2 in Crrnt_OthOpAct}

Crrnt_OthOpSportInPlay

ANALYSIS: "In-play betting with other operator in last 4 weeks"

In the last 4 weeks, that is since [system date - 28 days], did you bet in-play when betting on sports with your online gambling accounts, excluding your {operator} account? In-play betting means betting on things after the match/event has started.

1. Yes
2. No

{IF (Crrnt_OnlAcnts = 2)}

Crrnt_OthOpProport

ANALYSIS: "Proportion of online gambling with operator"

Thinking about your online gambling In the last 4 weeks with {operator} and then your online gambling with other companies, would you say that your online gambling activity with {operator} accounts in the last 4 weeks for...

Help button: What is meant by online gambling?

Online gambling refers to gambling via a website or app on activities such as playing slot machine style games, casino games, poker, instant win/scratchcard games or betting on any event or sport or betting exchanges. Please do not include any lottery accounts, such as National Lottery.

1. More than three quarters of your total online gambling activity
2. Between half and three quarters of your online gambling activity
3. About half of your total online gambling activity
4. Between a quarter and a half of your total online gambling activity
5. Less than a quarter of your total online gambling activity

Not a current online gambler

{IF Crrnt_OnlCheck = 1 (Haven't gambled online in last 4 weeks)}

Crrnt_LastOnlineGamble

ANALYSIS: "Last gambled online"

You previously said that you have not spent money in the past 4 weeks gambling online, whether that is;

- placing bets online with a bookmaker on any event or sport, or
- on online gambling like playing slot machine or casino games, poker, bingo, instant win/scratchcard games, or
- on betting exchange for money.

When was the last time you spent money on any of these activities?

1. 4 weeks to 3 months ago ({system date – 28 days} to {system date - 3 months})
2. 3 to 6 months ago ({system date - 3 months} to {system date - 6 months})
3. 6 to 12 months ago ({system date - 6 months} to {system date - 1 year})
4. 12 to 18 months ago ({system date - 1 year} to {system date - 18 months})
5. 18 to 24 months ago ({system date - 18 months} to {system date - 2 years})
6. 2 to 3 years ago ({system date - 2 years} to {system date - 3 years})
7. Over 3 years ago (before {system date - 3 years})

Crrnt_LastOnlineGambleReason [MULTICODE]

ANALYSIS: "Reason for not gambling online anymore"

What are the main reasons why you have not gambled online since then? Please select all that apply

[RANDOMISE ORDER 1-10]

1. I have less money to spend now
2. I want to save money / spend money on other things
3. I have less time / I'm too busy now
4. I have fewer opportunities to gamble
5. I have lost interest in the activities I used to do
6. I made a conscious choice to stop or reduce my gambling
7. My priorities have changed
8. There was a change in my health
9. I only used to gamble on occasion
10. I prefer gambling in person now (e.g. at a bookmaker)
11. Other, please specify

General questions about current online gambling behaviours

{IF (Crrnt_GambleAct = 10 or 11 or 12)}

Crrnt_OnlineGambChange

ANALYSIS: "Change in frequency of online gambling since June 2019"

Thinking about all the online gambling you have done since June 2019, would you say that your betting and gaming has:

Help button: What is meant by online gambling?

Online gambling refers to gambling via a website or app on activities such as playing slot machine style games, casino games, poker, instant win/scratchcard games or

betting on any event or sport or betting exchanges. Please do not include any lottery accounts, such as National Lottery.

1. Increased a lot
2. Increased a little
3. Stayed the same
4. Decreased a little
5. Decreased a lot

{IF (Crrnt_OnlineGambChange = Increased a lot OR increased a little)}

Crrnt_IncWhy [MULTICODE]

ANALYSIS: "Reason for increase in online gambling since June 2019"

Why is it that your online gambling has increased since then? Please select all that apply

[RANDOMISE ORDER 1-13]

1. I had more spare time
2. I had more money
3. I was bored
4. It cheers me up
5. It was something I could still do
6. I just wanted to
7. So I could socialise with family/friends
8. I wanted to take advantage of offers and bonuses from gambling companies
9. It helped me to relax
10. It helped take my mind off things
11. I started doing more online gambling to replace in-person gambling
12. To make money
13. I wanted to try new types of games/products/betting
14. Other, please specify :OTHER

{IF (Crrnt_OnlineGambChange = Increased a lot OR increased a little OR no change)}

Crrnt_TriedStop

ANALYSIS: "Tried to stop gambling since June 2019"

Since June 2019, have you tried to stop, or cut down on the amount of online gambling you do?

1. Yes
2. No

{IF (Crrnt_OnlineGambChange = Decreased a lot OR decreased a little)}

Crrnt_DecWhy [MULTICODE]

ANALYSIS: "Reason for decrease in online gambling since June 2019"

Why is it that your online gambling has decreased since then? Please select all that apply

[RANDOMISE ORDER 1-12]

1. I had less spare time
2. I had less money
3. I wanted to be more careful with money
4. Activities I previously enjoyed, like sports, weren't available
5. I lost interest
6. My friends/family were gambling less
7. I was concerned about potentially having less money
8. Missed social aspects of betting with friends/family

9. I couldn't attend sports events/races in person
10. Felt other things were more important
11. I only used to gamble on occasions
12. I made a conscious decision to gamble less
13. Other, please specify :OTHER

{IF (Crrnt_OnlineGambChange = Decreased a lot OR decreased a little)}

Crrnt_DecEase

ANALYSIS: "Ease to reduce online gambling"

How easy or difficult was it for you to reduce your online gambling?

1. Very easy
2. Easy
3. Neither easy nor difficult
4. Difficult
5. Very difficult

{IF (Crrnt_OnlineGambChange = Decreased a lot OR decreased a little)}

Crrnt_DecHow [MULTICODE]

ANALYSIS: "Methods to reduce online gambling"

Which, if any, of the following did you use to reduce your online gambling? Please select all that apply.

1. Used a website tool such as deposit limits, timing reminders, time outs etc.
2. Set personal mental limits such as on the amount of time or on how much money I spent gambling
3. Took a break from online websites
4. Self-excluded from gambling companies websites or premises
5. Used software to stop me seeing adverts
6. Used blocking software to stop me accessing gambling websites
7. Asked my bank to block payments to gambling companies
8. Other (please specify)
9. None of the above :[EXCLUSIVE]

Other offline gambling behaviours

{IF (Crrnt_GambleAct = 10 or 11 or 12) AND ((Crrnt_GambleAct = 1 - 9) or (Crrnt_GambleAct = 13 - 18))}

Crrnt_OfflineProport

ANALYSIS: "Proportion of gambling online in last 4 weeks"

Thinking about your online gambling and then your offline gambling over the **past 4 weeks**, would you say that your **online gambling activity** accounts for...

Help button: What is meant by online gambling and offline gambling?

Online gambling refers to gambling via a website or app on activities such as playing slot machine style games, casino games, poker, instant win/scratchcard games or betting on any event or sport or betting exchanges. Please do not include any lottery accounts, such as National Lottery.

Offline gambling refers to all other types of gambling, such as lotteries, gaming machines, betting in a bookmaker's, that do not take place via a website or app.

1. More than three quarters of your total gambling activity
2. Between half and three quarters of your total gambling activity
3. About half of your total gambling activity
4. Between a quarter and a half of your total gambling activity
5. Less than a quarter of your total gambling activity

{ASK IF Crrnt_GambleAct = 1-19}

PGSI [GRID QUESTION: ONE PAGE]

For the next set of questions about gambling, please indicate the extent to which each one has applied to you in the **past 12 months**, that is since [system date - 1 year]

In the past 12 months, how often...

Please select one answer on every row

GRID ROWS:

1. ...have you bet more than you could really afford to lose?
2. ...have you needed to gamble with larger amounts of money to get the same excitement?
3. ...have you gone back to try to win back the money you'd lost?
4. ...have you borrowed money or sold anything to get money to gamble?
5. ...have you felt that you might have a problem with gambling?
6. ...have you felt that gambling has caused you any health problems, including stress or anxiety?
7. ...have people criticised your betting, or told you that you have a gambling problem, whether or not you thought it is true?
8. ...have you felt your gambling has caused financial problems for you or your household?
9. ...have you felt guilty about the way you gamble or what happens when you gamble?

GRID COLS:

1. Very often
2. Fairly often
3. Occasionally
4. Never

Past gambling behaviours (July 2018-June 2019)

Past_Behaviours

The following section will ask you questions regarding how you gambled between July 2018 and June 2019. It may be difficult to recall exactly how you gambled in this period, your best guess will be fine. You can always select 'don't know', if you are not sure.

The following may help you recall: July 2018 was when the knockout stage of the 2018 FIFA World Cup took place, the Ryder Cup in Paris took place in September 2018 and Tiger Roll won the Grand National in April 2019 for the second year in a row. Manchester City won the Premier League in the 2018/19 season and Liverpool beat Tottenham in the Champions League final in June 2019.

Press next to continue.

Past online gambling behaviours

{ASK ALL}

Past_MultiAccnts

ANALYSIS: "Multiple online gambling accounts in 2018/19"

Thinking of your **online gambling** between July 2018 and June 2019, did you gamble with more than one gambling company?

Help button: What is meant by online gambling?

Online gambling refers to gambling via a website or app on activities such as playing slot machine style games, casino games, poker, instant win/scratchcard games or betting on any event or sport or betting exchanges. Please do not include any lottery accounts, such as National Lottery.

1. Yes
2. No

{IF Past_MultiAccnts = Yes}

Past_MultiAccntsNum

ANALYSIS: "Number online gambling accounts in 2018/19"

How many online gambling accounts did you use, **other than your account with {operator}**, between July 2018 and July 2019? If you are unsure on the exact number, please give an estimate. By use, we mean completed at least one transaction at any point in that period.

Numeric [1..100]

{IF Past_MultiAccnts = Yes}

Past_OtherAccntProporSpend

ANALYSIS: "Proportion of online gambling with operator in 2018/19"

Thinking about your online gambling with {operator} between July 2018 and June 2019 and then all your online gambling with other companies between July 2018 and June 2019, would you say that your **online gambling activity with {operator}** accounted for...

1. More than three quarters of your total online gambling activity
2. Between half and three quarters of your total online gambling activity
3. About half of your total online gambling activity
4. Between a quarter and a half of your total online gambling activity
5. Less than a quarter of your total online gambling activity

{IF Past_MultiAccnts = Yes}

Past_OtherAccntAct [MULTICODE]

ANALYSIS: "Online gambling activities with other operators in 2018/19"

Between July 2018 and June 2019, which of the following did you spend your own money on with your online gambling accounts, **excluding your {operator} account**? Please select all that apply

1. Online betting on horse races via a website or app
2. Online betting on sports events via a website or app
3. Online betting on dog/greyhound races via a website or app
4. Online betting on esports via a website or app
5. Online betting on virtual sports or races via a website or app
6. Online betting on any other events via a website or app
7. Online poker via a website or app
8. Online casino games (roulette, cards or dice games) via a website or app
9. Online slot games via a website or app
10. Online bingo via a website or app
11. Online instant wins via a website or app
12. None of these :[EXCLUSIVE]

{IF Past_OtherAcntAct = 2}

Past_OtherAcntSportInPlay

ANALYSIS: "In-play betting with other operators in 2018/19"

Between July 2018 and June 2019, did you bet in-play when betting on sports with your online gambling accounts, excluding your {operator} account? In-play betting means betting on things after the match/event has started.

1. Yes
2. No

Past other/offline gambling behaviours

{ASK ALL}

Past_OfflineGambAct [MULTICODE]

ANALYSIS: "Offline gambling activity in 2018/19"

Now thinking about any offline/in person gambling that you may have taken part in during the same period, that is between July 2018 and June 2019, do you recall spending any money on any of the following activities? Please select all that apply.

1. Tickets for the National Lottery Draw, including Thunderball and Euromillions and tickets bought online
2. Scratchcards (but not online or newspaper or magazine scratchcards)
3. Tickets for any other lottery, including charity lotteries
4. The football pools
5. Bingo cards or tickets, including playing at a bingo hall (not online)
6. Fruit or slot machines
7. Virtual gaming machines in a bookmakers to bet on virtual roulette, poker, blackjack or other games
8. Table games (roulette, cards or dice) in a casino
9. Playing poker in a pub tournament/ league or at a club
10. Betting on horse races in a bookmaker's, by phone or at the track
11. Betting on dog races in a bookmaker's, by phone or at the track
12. Betting on sports events in a bookmaker's, by phone or at the venue
13. Betting on other events in a bookmaker's, by phone or at the venue
14. Spread-betting (In spread-betting you bet that the outcome of an event will be higher or lower than the bookmaker's prediction. The amount you win or lose depends on how right or wrong you are.)
15. Private betting, playing cards or games for money with friends, family or colleagues
16. Another form of gambling in the last 12 months, please specify
17. Did not spend any money on offline/in person gambling in this period:
[EXCLUSIVE]

{IF Past_OfflineGambAct = 7}

Past_VirtualGamingChange [MULTICODE]

ANALYSIS: "Change in gambling due to change in max stake for virtual machines"

As you may recall, the maximum stake for virtual gaming machines in a bookmaker's changed in April 2019. As a result of this change, did you change your gambling behaviour? Please select all that apply

1. Yes – I gambled on gaming machines for longer periods
2. Yes – I gambled on gaming machines for shorter periods
3. Yes – I gambled more on different offline activities
4. Yes – I started gambling on online slots machines
5. Yes – I gambled more on online slots machines
6. Yes – I started gambling on online casino games
7. Yes – I gambled more on online casino games

8. Yes – I gambled more on other online activities
9. No – I did not change my gambling activities as a result of the change, I don't recall. :[EXCLUSIVE]

*Answer options 4 and 5 cannot both be selected. If so
SOFT CHECK "You cannot select both of these answer options. If you had never previously used online slot machines, select 'Yes - I started gambling on online slots machines'. If you had previously used online slot machines and increased your usage, select 'Yes – I gambled more on online slots machines'."*

*Answer options 6 and 7 cannot both be selected. If so
SOFT CHECK "You cannot select both of these answer options. If you had never previously used online slot machines, select 'Yes - I started gambling on online casino games'. If you had previously used online slot machines and increased your usage, select 'Yes – I gambled more on casino games'."*

{IF Past_OfflineGambAct <> 17}

Past_OfflineProportStake

ANALYSIS: "Proportion of gambling online in 2018/19"

Thinking about all your online gambling between July 2018 and June 2019 and then all your offline gambling between July 2018 and June 2019, would you say that your online gambling activity accounted for...

Help button: What is meant by online gambling and offline gambling?

Online gambling refers to gambling via a website or app on activities such as playing slot machine style games, casino games, poker, instant win/scratchcard games or betting on any event or sport or betting exchanges. Please do not include any lottery accounts, such as National Lottery.

Offline gambling refers to all other types of gambling, such as lotteries, gaming machines, betting in a bookmaker's, that do not take place via a website or app.

1. More than three quarters of your total gambling activity
2. Between half and three quarters of your total gambling activity
3. About half of your total gambling activity
4. Between a quarter and a half of your total gambling activity
5. Less than a quarter of your total gambling activity

Problem gambling / attitudinal questions

{ASK ALL}

ATGS_8 [GRID QUESTION: ONE PAGE]

The following question list things that some people have said about gambling. Please indicate how much you agree or disagree with each one.

Please select one answer per statement

GRID ROWS:

1. People should have the right to gamble whenever they want
2. There are too many opportunities for gambling nowadays
3. Gambling should be discouraged
4. Most people who gamble do so sensibly
5. Gambling is dangerous for family life
6. On balance, gambling is good for society
7. Gambling livens up life
8. It would be better if gambling was banned altogether

GRID COLS:

1. Strongly agree
2. Agree
3. Neither agree nor disagree
4. Disagree
5. Strongly disagree

Problem gambling related questions

{ASK IF Crrnt_GambleAct = 1-19}

Motiv [GRID QUESTION: ONE PAGE]

Thinking about all the betting or gambling you did in the last 12 months, that is since [system date – 1 year], please state whether these are reasons that you took part in betting or gambling.

I took part in these activities at that time...

Please select one answer on every row

GRID ROWS:

1. For the chance of winning big money
2. As a hobby or pastime
3. To escape boredom or fill my time
4. To compete with others
5. For the mental challenge
6. To impress other people
7. To be sociable
8. Because it helps when I'm feeling tense
9. To make money
10. Because it's something I do with family or friends

GRID COLS:

1. Yes – almost always
2. Yes – most of the time
3. Yes – sometimes
4. No, never

{ASK IF Crrnt_GambleAct = 1-19}

SGHS [MULTICODE]

ANALYSIS: "Issues from gambling in last 12 months"

Have you experienced any of these issues as a result of your gambling in the last 12 months, that is since [system date – 1 year]? Please select all that apply.

1. Reduction of my available spending money
2. Reduction of my savings
3. Less spending on *recreational* expenses such as eating out, going to movies or other entertainment.
4. Had regrets that made me feel sorry about my gambling
5. Felt ashamed of my gambling
6. Sold personal items
7. Increased credit card debt
8. Spent less time with people I care about
9. Felt distressed about my gambling
10. Felt like a failure
11. None of the above :[EXCLUSIVE]

{ASK ALL}

GamProb

ANALYSIS: "Gambling problem"

Do you feel you have ever had a gambling problem?

1. Yes
2. No

{IF GamProb = Yes}

GamProbWhen

ANALYSIS: "First acknowledged gambling problem"

How long ago did you first think that you had a gambling problem?

1. In the last 6 months
2. Between 6 months and a year ago
3. Between one and two years ago
4. Between two and three years ago
5. More than three years ago

{IF GamProb = Yes}

StopGam

ANALYSIS: "Tried to stop gambling"

Have you tried to stop, or cut down your gambling because of this?

1. Yes
2. No

{IF StopGam = Yes}

HelpP [MULTICODE]

ANALYSIS: "Source of support"

Which, if any, of the following have you approached or used for support, advice or treatment with cutting down your gambling? Please select all that apply.

Treatment

1. GP
2. Mental health services (e.g. counsellor, therapist)
3. Social worker, youth worker or support worker
4. Specialist treatment service for gambling (e.g. National Gambling Treatment Service)
5. Other addiction service (e.g. drug or alcohol)
6. Online therapy for gambling e.g. CBT
7. Face to face therapy for gambling

Support and advice

8. A support group (e.g. Gamblers Anonymous)
9. A faith group
10. Your spouse/partner
11. Friends or family members
12. Your employer
13. Books, leaflets or other printed materials
14. Websites (e.g. BeGambleAware.org, Citizen's Advice, GamCare)
15. Online forum or group
16. A telephone helpline (e.g. National Gambling Helpline)
17. Self-help apps or other self-help tools
18. Self-exclusion (e.g. block software or blocking bank transactions)
19. Another source of support, advice or treatment, please specify
20. None of these :[EXCLUSUIVE]

Safer gambling measures

{ASK ALL}

Crrnt_SGSelfExc

ANALYSIS: "Ever self-excluded from gambling company for 6 months"

We would now like to ask you about the self-exclusion tool which is available on all gambling companies and gives you the option to bar yourself voluntarily from gambling through that operator / location for a minimum of six months. Please note that we are not referring to what are known as 'time outs' which is when you are barred from an operator but for a shorter period e.g. 24 hours / one month.

Have you ever self-excluded from a gambling company, for a minimum of six months for any reason?

1. Yes
2. No
3. Don't know

{IF Crrnt_SGSelfExc = Yes}

Crrnt_SGSelfExcWhy [MULTICODE]

ANALYSIS: "Reason for self-excluding"

Why did you use the self-exclusion tool? Please select all that apply

1. To help control the amount you were gambling with that particular operator
2. To help control the amount you were gambling overall
3. To close the account with that operator e.g. to reduce marketing
4. For another reason, please specify :OTHER
5. Don't know :[EXCLUSIVE]

NDOK

{IF Crrnt_SGSelfExc = Yes}

Crrnt_SGSelfExcNum

ANALYSIS: "Number of companies self-excluded from"

How many gambling companies have you ever self-excluded from?

Numeric[1...100]

{ASK ALL}

Crrnt_SGTools [GRID QUESTION: ONE PAGE]

In addition to self-exclusion there are other tools which some gambling companies make available to help customers to manage the amount they gamble or the way in which they gamble. From the table below please select whether you have ever used the tool:

Please select one answer per statement

GRID ROWS:

1. Time out - like self-exclusion but you are barred for a shorter amount of time
2. Financial limits - spend / loss or deposit limits
3. Reality check - where you ask for a reminder to appear on screen that you have been playing for a certain duration
4. Multi-operator self-exclusion - where you can request to exclude from a number of operators / locations at once. For example, MOSES (for betting shops), SENSE (for casinos), BACTA (for adult gaming centres), BISES (for bingo premises) or GAMSTOP (for online gambling).

GRID COLS:

1. Have never used
2. Used

{ASK IF Crrnt_GambleAct = 1-19}

Crrnt_SGSelfControl [MULTICODE]

ANALYSIS: "Self-control strategies to avoid harm"

Do you use any of the following self-control strategies to avoid harm from gambling?

Please select all that apply

1. Set a spending limit in advance
2. Keep track of the money you spend
3. Limit the amount of alcohol you consume
4. Limit the amount of time playing
5. Think about the negative consequences of excessive gambling
6. Limit how often you play
7. Restrict access to additional cash
8. Play with friends and/or family present
9. Limit the amount of cannabis you consume
10. None of the above :[EXCLUSIVE]

{IF Crrnt_SGSelfControl = response to one of the categories}

Crrnt_SGSelfControlHelp

ANALYSIS: "Helpfulness of self-control strategy"

How helpful would you say each of the following self-control strategies have been?

Display selected strategies from previous question.

1. Not at all helpful
2. Mildly helpful
3. Somewhat helpful
4. Very helpful

Socio-demographic information

DemIntro

To finish, we would like to ask you some questions about yourself and your household. This section includes questions about your demographic characteristics and socio-economic status that will help us better understand gambling behaviours. Each question is voluntary, and you are free to not answer any question- just click next to skip a question.

Press next to continue.

{ASK ALL}

Gender

ANALYSIS: "Gender"

What is your gender?

1. Male
2. Female
3. Other (please specify) :**OTHER**

{ASK ALL}

Age

ANALYSIS: "Age"

What is your age?

Numeric[16...120]

{ASK ALL}

EthGrp

ANALYSIS: "Ethnic group"

To which of these ethnic groups do you consider you belong?

1. White - English / Welsh / Scottish / Northern Irish / British
2. White – Irish
3. White - Gypsy or Irish Traveller
4. Any other white background (please describe) :**OTHER**
5. Mixed - White and Black Caribbean
6. Mixed - White and Black African
7. Mixed - White and Asian
8. Any other mixed background (please describe) :**OTHER**
9. Asian or Asian British – Indian
10. Asian or Asian British – Pakistani
11. Asian or Asian British – Bangladeshi
12. Asian or Asian British – Chinese
13. Any other Asian/Asian British background (please describe) :**OTHER**
14. Black or Black British – Caribbean
15. Black or Black British – African
16. Any other Black/Black British background (please describe) :**OTHER**
17. Arab
18. Any other (please describe) :**OTHER**

{ASK ALL}

Religion

ANALYSIS: "Religion"

What is your religion?

1. No religion
2. Christian (Including Church of England, Catholic, Protestant and all other Christian denominations)
3. Buddhist
4. Hindu
5. Jewish
6. Muslim
7. Sikh
8. Any other religion, please describe :**OTHER**

RelStatusNow

ANALYSIS: "Current relationship status"

What is your legal marital or registered civil partnership status?

1. Never married and never registered in a civil partnership.
2. Married.
3. In a registered civil partnership.
4. Separated, but still legally married.
5. Separated, but still legally in a civil partnership.
6. Divorced.
7. Formerly in a civil partnership which is now legally dissolved.
8. Widowed.
9. Surviving partner from a registered civil partnership.

{IF RelStatusNow = RESPONSE}

RelStatusChange

ANALYSIS: "Relationship status same as 2018"

Was your legal marital or registered civil partnership status of “{DISPLAY RESPONSE TO RelStatus}” the case on 31st December 2018?

1. Yes
2. No, my legal marital or registered civil partnership status was different then.

{IF RelStatusChange = 2}

RelStatusPast

ANALYSIS: “Relationship status in 2018”

What was your legal marital or registered civil partnership status on 31st December 2018?

1. Never married and never registered in a civil partnership.
2. Married.
3. In a registered civil partnership.
4. Separated, but still legally married.
5. Separated, but still legally in a civil partnership.
6. Divorced.
7. Formerly in a civil partnership which is now legally dissolved.
8. Widowed.
9. Surviving partner from a registered civil partnership.

EducAttain1

ANALYSIS: “Educational qualification”

Do you have any educational qualifications for which you received a certificate?

1. Yes
2. No

{IF EducAttain1 = No}

EducAttain2

ANALYSIS: “Professional qualification”

Do you have any professional, vocational or other work-related qualifications for which you received a certificate?

1. Yes
2. No

{IF EducAttain1 = Yes OR EducAttain2 = Yes}

EducAttain3

ANALYSIS: “Highest level qualification”

Was your highest qualification ...

1. At degree level or above
2. Or another kind of qualification

NHActiv

ANALYSIS: “Employment status last week”

Which of these descriptions applies to what you were doing last week? If more than one applies, then please select the one you were doing most of the time.

1. Going to school or college full time (including on vacation)
2. In paid employment or self-employed (or temporarily away)
3. On a government scheme for employment training
4. Doing unpaid work for a business that you own or a relative owns
5. Waiting to take up paid work already obtained
6. Looking for paid work or a Government training scheme
7. Intending to look for work but prevented by temporary sickness or injury
8. Permanently unable to work because of long term sickness or disability
9. Retired from paid work
10. Looking after home or family

11. Doing something else (specify)

NHActivChange

ANALYSIS: "Employment status same as 2018"

Was this the case on 31st December 2018?

1. Yes
2. No, I was doing something different then

{IF NHActivChange =No}

NHActivPast

ANALYSIS: "Employment status in 2018"

Which of these descriptions applies to what you were doing around December 2018/January 2019? If more than one applies, then please select the one you were doing most of the time.

1. Going to school or college full time (including on vacation)
2. In paid employment or self-employed (or temporarily away)
3. On a government scheme for employment training
4. Doing unpaid work for a business that you own or a relative owns
5. Waiting to take up paid work already obtained
6. Looking for paid work or a Government training scheme
7. Intending to look for work but prevented by temporary sickness or injury
8. Permanently unable to work because of long term sickness or disability
9. Retired from paid work
10. Looking after home or family
11. Doing something else (specify) :OTHER

{IF NHActiv = Paid employment}

PayFreq

ANALYSIS: "Pay frequency"

Are you normally paid weekly or monthly?

1. Weekly
2. Monthly
3. Other, please specify :OTHER

WellOffNow

ANALYSIS: "How managing financially in last year"

In the last 12 months, that is since [system date -1 year], how well would you say you personally were managing financially?

1. Living comfortably
2. Doing all right
3. Just about getting by
4. Finding it quite difficult
5. Finding it very difficult

{IF WellOffNow = RESPONSE}

WellOffChange

ANALYSIS: "Managing financially same now as 2018"

And would say you were personally {WellOffNow response} financially around the 31st December 2018?

1. Yes
2. No, I would say my financial situation was different then.

{IF WellOffChange = 2}

WellOffPast

ANALYSIS: "How managing financially in 2018"

Thinking about around the 31st December 2018, how well would you say you personally were managing financially?

1. Living comfortably
2. Doing all right
3. Just about getting by
4. Finding it quite difficult
5. Finding it very difficult

Household

{ASK ALL}

HHOccupantsNow

ANALYSIS: "Current number household occupants"

How many people live in the household you live in now, including yourself?

HELP BUTTON: What is a household?

One person living alone or a group of people (not necessarily related) living at the same address who share cooking facilities and share a living room or sitting room or dining area.

NUMERIC [1...20]

{IF HHOccupantsNow > 1}

HHChildrenNow

ANALYSIS: "Current number children in household"

How many of the other household occupants are **under the age of 18 years old**? Enter 0 if there are no household occupants under the age of 18.

NUMERIC [0...12]

{ASK ALL}

HHOccupantsChange

ANALYSIS: "Number of household occupants changed since 2018"

Has the number of household occupants changed since 31st December 2018?

1. Yes
2. No

{IF HHOccupantsChange = Yes}

HHOccupantsPast

ANALYSIS: "Number household occupants in 2018"

How many people did you live with as part of a household on 31st December 2018, including yourself?

NUMERIC [1...20]

{ASK ALL}

HHChildrenChange

ANALYSIS: "Number of children in household changed since 2018"

Has the number of household occupants **under the age of 18 years old** changed since 31st December 2018?

1. Yes
2. No

{IF HHChildrenChange = YES}

HHChildrenPast

ANALYSIS: "Number of children in household in 2018"

How many people **under the age of 18 years old** did you live with as part of a household on 31st December 2018?

NUMERIC [0...20]

{ASK ALL}

SrcInc [MULTICODE]

ANALYSIS: "Source of household income"

We would like to get some idea of your household's income. Please record which of these you or other members of your household receive. Please select all that apply

1. Earnings from employment or self-employment
2. State retirement pension
3. Pension from former employer
4. Personal Pensions
5. Job-Seekers Allowance
6. Employment and Support Allowance
7. Income Support
8. Pension Credit
9. Working Tax Credit
10. Child Tax Credit
11. Child Benefit
12. Housing Benefit
13. Council Tax Benefit / Reduction
14. Universal Credit
15. Other state benefits
16. Interest from savings and investments (e.g. stocks & shares)
17. Other kinds of regular allowance from outside your household (e.g. maintenance, student's grants, rent)
18. No source of income :[EXCLUSIVE]

Income

ANALYSIS: "Income calculated per"

Thinking of the income of your **household as a whole**, which of the following bands represents **the household's total income from all sources over the last 12 months** before any deductions for taxes, National Insurance contributions, health insurance payments, superannuation payments etc.? Firstly, please enter if you want to give your answer per week, per month or per year.

Per week	Per month	Per year
Less than £100	Less than £433	Less than £5,200
£100 to £199	£433 to £846	£5,200 to £10,399
£200 to £299	£847 to £1,299	£10,400 to £15,599
£300 to £399	£1,300 to £1,732	£15,600 to £20,799
£400 to £499	£1,733 to £2,165	£20,800 to £25,999
£500 to £699	£2,166 to £3,032	£26,000 to £36,399
£700 to £999	£3,033 to £4,332	£36,400 to £51,999
£1,000 to £1,4999	£4,333 to £6,499	£52,000 to £77,999
£1,500 or more	£6,500 or more	£78,000 or more

1. Per week
2. Per month
3. Per year

{IF Income = Per week}

IncomePerWeek

ANALYSIS: "Income per week"

Thinking of the income of your **household as a whole**, which of the following bands represents **the household's total income from all sources over the last 12 months** before any deductions for taxes, National Insurance contributions, health insurance payments, superannuation payments etc.?

1. Less than £100
2. £100 to £199
3. £200 to £299

4. £300 to £399
5. £400 to £499
6. £500 to £699
7. £700 to £999
8. £1,000 to £1,4999
9. £1,500 or more

{IF Income = Per month}

IncomePerMonth

ANALYSIS: "Income per month"

Thinking of the income of your **household as a whole**, which of the following bands represents **the household's total income from all sources over the last 12 months** before any deductions for taxes, National Insurance contributions, health insurance payments, superannuation payments etc.?

1. Less than £433
2. £433 to £846
3. £847 to £1,299
4. £1,300 to £1,732
5. £1,733 to £2,165
6. £2,166 to £3,032
7. £3,033 to £4,332
8. £4,333 to £6,499
9. £6,500 or more

{IF Income = Per year}

IncomePerYear

ANALYSIS: "Income per year"

Thinking of the income of your **household as a whole**, which of the following bands represents **the household's total income from all sources over the last 12 months** before any deductions for taxes, National Insurance contributions, health insurance payments, superannuation payments etc.?

1. Less than £5,200
2. £5,200 to £10,399
3. £10,400 to £15,599
4. £15,600 to £20,799
5. £20,800 to £25,999
6. £26,000 to £36,399
7. £36,400 to £51,999
8. £52,000 to £77,999
9. £78,000 or more

HouseholdBills

ANALYSIS: "Keeping up with bills"

Over the past year, which of the following statements best describes how well your household is keeping up with your bills and credit card payments?

1. Pay all bills and credit card payments on time and in full
2. Pay most bills and credit card payments on time and in full
3. Struggle to keep up with bills and credit card payments

Health and wellbeing

{ASK ALL}

GenHelf

ANALYSIS: "General health"

How is your health in general, would you say that it is:

1. Very good
2. Good
3. Fair
4. Bad
5. Very bad

Longill

ANALYSIS: "Long-standing illness"

Do you have any long-standing illness, disability or infirmity? By long-standing I mean anything that has troubled you over a period of time, or that is likely to affect you over a period of time?

1. Yes
2. No

{IF Longill = Yes}

Limitill

ANALYSIS: "Limiting long standing illness"

Do any of these long-standing illnesses, disabilities or infirmities limit your activities in any way?

1. Yes
2. No

DrinkNow

ANALYSIS: "Alcohol consumption frequency"

How often do you have a drink containing alcohol?

1. 4 or more times per week
2. 2-3 times per week
3. 2-4 times per month
4. Monthly or less
5. Never

{IF DrinkNow = 1-4}

DrinkNow2

ANALYSIS: "Typical units of alcohol consumed per day when drinking"

How many units of alcohol do you drink on a typical day when you are drinking?

1. 1-2
2. 3-4
3. 5-6
4. 7-9
5. 10 or more

{IF DrinkNow2 = RESPONSE}

DrinkNow3

ANALYSIS: "Frequency of typical alcohol consumption"

How often have you had {DrinkNow2} units on a single occasion in the last year?

1. Daily/almost daily
2. Weekly
3. Monthly
4. Less than monthly

5. Never

{IF DrinkNow = 1-4}

DrinkGam

ANALYSIS: "Alcohol when gambling"

How often do you drink alcohol at the same time as betting or gambling?

1. Every time I gamble
2. Most of the times I gamble
3. Sometimes when I gamble
4. Never

DrinkPast

ANALYSIS: "Alcohol consumption frequency in 2018/19"

On average, how often did you have a drink containing alcohol between July 2018 and June 2019?

1. 4 or more times per week
2. 2-3 times per week
3. 2-4 times per month
4. Monthly or less
5. Never

DrugIntro

The following questions ask whether or not you have ever used drugs. Please answer them honestly. The answers you give are completely confidential.

Note: Please DO NOT tell us about drugs you have been given on prescription.

Press next to continue.

DrugEver

ANALYSIS: "Recreational drugs use"

Have you ever taken or used any drugs for recreational purposes, excluding alcohol, tobacco and caffeine?

- 1 Yes, in the past 12 months
- 2 Yes, but not in the last 12 months
- 3 No
- 4 Don't wish to answer

NORF

IF DrugEver = 1

DrugProb

ANALYSIS: "Drug problem"

During the past 12 months, would you say drugs have...

1. Not been a problem in my life
2. Been a minor problem in my life
3. Been a moderate problem in my life
4. Been a major problem in my life
5. Been a serious problem in my life

{IF DrugProb = 2-5}

DrugGam

ANALYSIS: "Drugs when gambling"

How often do you take drugs at the same time as betting or gambling?

1. Every time I gamble
2. Most of the times I gamble
3. Sometimes when I gamble
4. Never

IF DrugGam = 1-3

DrugGamble

ANALYSIS: “Drug problem relates to gambling”

Would you say that your problem with drugs was...

1. Not related to my gambling
2. Slightly related to my gambling
3. Moderately related to my gambling
4. Strongly related to my gambling
5. Totally related to my gambling

QSatis

ANALYSIS: “Current life satisfaction”

Overall, how satisfied are you with your life nowadays where 0 is ‘not at all satisfied’ and 10 is ‘completely satisfied’?

0..10

QWorth

ANALYSIS: “Current things in life are worthwhile”

Overall, to what extent do you feel that the things you do in your life are worthwhile where 0 is ‘not at all worthwhile’ and 10 is ‘completely worthwhile’?

0..10

QHappy

ANALYSIS: “Happiness yesterday”

Overall, how happy did you feel yesterday where 0 is ‘not at all happy’ and 10 is ‘completely happy’?

0..10

QAnxious

ANALYSIS: “Anxiousness yesterday”

On a scale where 0 is ‘not at all anxious’ and 10 is ‘completely anxious’, overall, how anxious did you feel yesterday?

0..10

Admin (Recontact, incentives)

ReconfirmDLConsent

ANALYSIS: “Reconfirm DL consent”

At the start of the questionnaire you gave consent to link your responses to the questions in this survey with your anonymised online gambling account data provided by {operator} from July 2018 to June 2019.

We would like to reconfirm that you still consent to NatCen linking your survey answers to your anonymised gambling account data from July 2018 to June 2019. If you withdraw your consent, we will not be able to analyse your responses to this survey you just gave.

1. I still consent to my survey answers being linked to my gambling account data.

2. I would like to withdraw my consent to my survey answers being linked to my gambling account data.

SOFT Check: If ReconfirmDLConsent =2 “Are you sure? If you withdraw your consent, we will no longer be able to analyse your responses to this survey that you just completed.”

NODK/NOREF

{ASK ALL}

ReConConsent

ANALYSIS: “Consent for future contact”

If at some future date we wanted to talk to you for a further study, may we contact you to see if you are willing to help us again? If yes, you will need to give us your name and contact details.

1. Yes
2. No

NODK/NOREF

IF ReConConsent = Yes

ReConName

What is your full name?

Title [Title]

First name [STRING: 20] NODK/NOREF

Surname [STRING: 20] NODK/NOREF

IF ReConConsent = Yes

ReConEmail

What is your email address?

: STRING[60]

IF ReConConsent = Yes

PhoneNum

And what is your phone number?

: NUMERIC[11] **SOFT Check:** Phone numbers should contain only numbers, start with 0 and have at least 9 digits. Please check

{IF (DLConsent = 2) OR (ReConConsent = No) OR (ReConEmail <> RESPONSE)}

Contact

ANALYSIS: “Consent to contact for incentive”

Thank you for completing this survey. To receive the £5 e-voucher for completing the survey you will need to provide us with your first name and an email address.

Are you willing to provide your first name and an email address to NatCen Social Research for the purpose of sending you a £5 e-voucher. This information will be kept separately from your questionnaire responses and will be securely deleted at the end of the study.

1. Yes
2. No

NODK/NOREF

{IF Contact =No}

EndS

If you do not provide an email address, you will not be able to receive the £5 e-voucher. Are you sure you do not want to provide one? Note, you will not be able to return to the questionnaire at a later date if you change your mind.

1. Yes, I don't want to provide an email address
2. No, I would like to provide (an email address)

NODK/NOREF

IF EndS = 2 THEN empty Contact AND empty EndS AND return to Contact

{IF Contact = Yes}

Name2

What is your first name?

:STRING[100] NODK/NOREF

{IF Contact = Yes}

Email2

What is the email address you would like to use to receive your £5 e-voucher?

: STRING[60] NODK/NOREF, contains @

Thank you page

{ASK ALL}

ThankYou

Thank you for completing the survey about your gambling behaviours. We are very grateful for your participation, which will help us improve understanding of how the characteristics and patterns of gambling relate to the potential for harm. We hope that your experience of taking part was positive. {IF (ReConEmail = RESPONSE) OR (Email2 = RESPONSE) : "You will receive the £5 e-voucher for completing the survey in the next couple of weeks to the email address you provided at the previous question."}

If you are looking for help, advice or support in relation to your or someone else's gambling, please go to: [BeGambleAware.org](https://www.begambleaware.org) or contact the National Gambling Helpline on 0808 8020 133. This service is free of charge and confidential. Help is available 24 hours a day, 7 days a week. For more organisations, you can visit the following webpage: <https://www.begambleaware.org/finding-the-right-support>

If you have any questions or need help, please contact:

Email: XXXXX

Freephone: XXXXX

Appendix B: Weighting strategy

The survey weighting strategy was developed to control for bias introduced by sample design, ineligibility, and non-response. Weights were produced for a responding sample of $n = 1806$, consisting of survey respondents who were active on 14 days or more according to the account data. The weighting process consisted of five stages. Stages 1 to 4 of weighting were split by operator and then the weights for the two operators were combined for the fifth and final calibration stage:

- i. The first stage was to rescale the selection weights to adjust for the removal of cases that were active for less than 14 days from the estimated population for weighting purposes. Selection weights estimate the difference in probability of an account being sampled. For this survey, more frequently active accounts were over-sampled so selection weights vary by frequency of activity. Rescaling was split by operator to account for different activity patterns in their respective populations.
- ii. The second stage was to model whether a sampled case was eligible and therefore invited to participate in the survey. Logistic regression models were run with the binary outcome variable of whether individuals were invited to participate, weighted by the rescaled selection weights and split by operator. The final model included the following variables: age categories, gender, spending quintiles, activity category (which was also used for sampling stratification), gambling type (bet only, gaming only, or both), and six variables for specific activities (`any_bingo`, `any_casino`, `any_slots`, `any_poker`, `any_dogs`, and `any_horse`). From this model, the predicted propensity to be invited to participate was estimated for each sampled case. Invitation weights were trimmed separately by operator at the 0.5 and 99.5 percentiles.
- iii. The third stage was to model whether an eligible invited case responded to the survey. Logistic regression models were run for the invited cases, split by operator and weighted by combined selection and invitation weights. The final model included age categories, gender, spending quintiles, activity category, and gambling type. From this model the predicted propensity to respond was estimated for each invited case. Non-response weights were trimmed separately by operator at the 0.5 and 99.5 percentiles, or top 5 cases where they were too extreme to use the 99.5 percentile.
- iv. The fourth stage was to combine the selection, invitation, and non-response weights and trim separately by operator, either the top 3 cases or the 99.5 percentile.
- v. The fifth and final stage was to calibrate the combined stage 4 weights to population estimates for three variables: spending quintiles, gambling type, and activity category. Calibration weighting adjusts the weights so that characteristics of the weighted achieved sample match population estimates, thus reducing residual bias. Calibration estimates were taken from invited cases weighted by selection weights. The whole sample was calibrated together, rather than being split by operator. After calibration, the top two cases were trimmed to finalise the weights.

As a consequence of the relatively low response rate and significant differences between population and responding sample profiles (the main differences being age categories (fewer respondents under 31) and activity categories (few respondents active for less than 51 days), the efficiency of the final weights is relatively low (39%) with a DEFF of 2.57. The calibration stage ensured that weighted estimates of spending quintiles, gambling type, and activity category include minimal bias. However, residual bias remains in the specific activity variables, such as `any_bingo`.