

GAMSTOP

# Evaluating the effectiveness of the national online self-exclusion scheme

June 2021



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## 1. Executive summary

### About GAMSTOP

There are over 1.2 million people in the UK at moderate or higher risk of experiencing problematic gambling<sup>1</sup>. GAMSTOP was established in 2018 to offer a scheme to enable consumers to choose to exclude themselves from all online gambling websites and applications that integrate with the scheme. In April 2020, integration with the scheme was made a condition of registration for all operators licensed by the UK Gambling Commission. As of December 2020, when this project commenced, GAMSTOP had 170,000 registered service users.

### About Sonnet

Sonnet Advisory & Impact CIC is a social enterprise that provides research, consultancy and advisory support to organisations including charities, social enterprises, impact-focused corporates and public bodies. Amongst other work, our team has completed over 150 impact evaluations for organisations across a wide range of sectors including compulsive behaviours, children's services, education, housing, health and social care, leisure and wellbeing, arts and culture.

### About this report

Sonnet was engaged by GAMSTOP to undertake research to assess its effectiveness and to build a more detailed understanding of who is using the scheme. Rather than focus upon the customer experience elements of effectiveness alone, we planned a research project to assess the broader impacts of GAMSTOP's scheme. This was grounded in the stories of 41 consumers who agreed to be interviewed by our research team, and developed further by a large scale effectiveness survey.

Our research included:

- 3,300 demographic survey responses: see Section 3 for analysis of findings and Appendix 3 for all survey questions and responses;
- 41 consumer interviews, during which we heard the stories of how online gambling had affected their lives before registering with GAMSTOP, their experience of using the scheme, and their perception of the impact of using the GAMSTOP scheme. Analysis of key themes emerging from interviews can be found in section 4; and
- 1700 effectiveness and impact survey responses, the structure of which was informed by the stories of the 41 consumers who took part in interviews: see section 5 for analysis of findings and Appendix 4 for all survey questions and responses.

During the course of this work, we planned active steps to minimise the risk of bias in the results of our work. These ranged from the use of randomised selection of consumers for interview through to ensuring that survey

*The findings from this study are grounded in the real stories of 41 consumers, and survey data from 1,700 respondents to a survey enquiring into the effectiveness of GAMSTOP.*

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<sup>1</sup> An overview of other research that provides contextual information on problematic gambling can be found in Appendix 2 to this report.

response rates were large enough to be statistically significant<sup>2</sup>. Details of the process we followed can be found in Appendix 1 to this report.

This summary gives an overview of key findings and conclusions from our work.

### *Effectiveness of GAMSTOP – delivery of consumer objectives*

This study shows very strongly that **GAMSTOP is successfully achieving a reduction in gambling-related harm** with far-reaching positive impacts for consumers being clearly shown in our interviews and survey. 70% of consumers reported an improvement in their anxiety and stress levels and 63% reported improvements in the quality of significant relationships, amongst others.

We can see this conclusion supported by a range of responses to our survey, including that;

- 82% of GAMSTOP consumers have stopped or reduced their gambling since registration;
- 80% report that the self-exclusion scheme delivered on their intended outcomes;
- 84% of consumers report that they feel safer from gambling-related harm and the same proportion report feeling more in control of their gambling; and
- 89% of GAMSTOP consumers report that they found the process of registering with and using the service to be easy.

*Over 80% of GAMSTOP consumers report that the scheme is effective across a range of different measures. Importantly, 84% of consumers report that they feel safer from gambling-related harm.*

*82% of GAMSTOP consumers have stopped or reduced their gambling after registering for self-exclusion.*

*GAMSTOP enables consumers to make safer choices about online gambling.*

GAMSTOP delivers effectively both from the perspective of positive consumer experiences and the important outcomes of feeling safer and more in control. Those who did not report a positive change tended towards neutral rather than negative views.

Consumers have a broad range of intended outcomes from using GAMSTOP. Many wish to stop online gambling (56%), or to stop gambling altogether (20%), but a significant minority (13%) wanted a short break from gambling. For those that wish to abstain from all forms of gambling, we would note that GAMSTOP can support part of their need: consumers may need other support services to enable them to stop other forms of gambling.

There seems to be particular opportunity to enhance GAMSTOP's offering for short breaks by offering shorter exclusion periods (12% of respondents requested this). It is possible that shorter exclusion options might attract other consumers to use the scheme.

71% of consumers opt for a five year exclusion (the longest available). Over 40% of respondents want to see longer exclusion periods, as they find it stressful knowing that an exclusion period will end after only five years: they want to be able to self-exclude and relax knowing that the issue is dealt with for as long as possible.

Our findings show that GAMSTOP is effective across all age groups, gender groups and, importantly, for all types of online gambling.

<sup>2</sup> Both surveys had response rates large enough to give 95% confidence in the findings with an error margin of less than 5%.

### *Effectiveness of GAMSTOP – improvement in consumer wellbeing*

Consumers tended to be motivated to register with GAMSTOP for a combination of reasons including financial losses but also a range of other wellbeing concerns. Amongst other wellbeing improvements, our study highlights that:

- 70% of consumers reported improvements in their levels of anxiety and stress following registration;
- 77% felt more in control of their personal/household finances;
- 60% reported an improved ability to focus at work (bearing in mind that 75% of respondents were likely to be in employment, this is likely to equate to some 80% of those in part-time or full-time work);
- 63% of consumers reported an improvement in the quality of their family relationships; and
- 40% reported a reduction in their consumption of alcohol (which is a significant finding, given that we found relatively little evidence of dual addictions in our interviews, but did note that, for some, alcohol had an impact by reducing inhibitions).

Respondents selected, on average, 5 wellbeing improvements from the list of 9 options that were offered. Whilst some respondents cited neutral impacts, few indicated negative outcomes against these measures.

**The majority of consumers have found that GAMSTOP has achieved their intended objective, made them feel safer and more in control, and has led to important improvements in their wellbeing.**

### *Utilisation of GAMSTOP*

**GAMSTOP is being used by a broad spectrum of ages, socio-economic groups, household compositions and regions of the UK.** The close match of many features to Census data suggests that there are no gaps in coverage. We note that some sources suggest that certain demographic groups may be at greater risk of experiencing gambling problems: there may be opportunities to reach out to ensure these groups access the scheme.

Interviewees and survey respondents have highlighted some opportunities to improve upon website design and content (which is already positively viewed by over 75% of consumers) by considering offering content in other languages and reviewing the layout of content to make it as accessible and supportive as possible to those who may be in a time of crisis during their visit. This could enhance GAMSTOP's ability to engage groups that may be at risk of experiencing problems.

Approximately 50% of consumers find GAMSTOP from their own internet searches for help. A further 20% find GAMSTOP from links on operator websites. The remaining 30% are directed to GAMSTOP from other sources, including friends and family and specialist support services. Online gambling is an activity that was typically described by interviewees as solitary and tending to lead to isolation: consumers tend to be seeking a solution in isolation.

*Significant improvements in consumer wellbeing are reported in the survey. This is striking, given that 30% of respondents had been registered for less than one year. The measures we used indicate long-term reductions in gambling-related harm. Consumers consistently reported multiple positive wellbeing impacts arising from GAMSTOP.*

*GAMSTOP is being used by a broad cross-section of the population, with no apparent gaps in its coverage.*

*Many consumers find GAMSTOP from their own internet searches for help, or from links on gambling operator websites.*

*We recommend that GAMSTOP review its marketing and outreach strategy to ensure that it reaches high risk groups and those seeking short breaks, amongst others.*

Consumers are supportive of GAMSTOP and would want it to have a high profile in order to ensure that other people can benefit. 70% of consumers would like to see more television advertisements for GAMSTOP, and over 50% wish to see operators showing GAMSTOP more prominently on their websites.

### **Effects of the Covid-19 pandemic**

30% of respondents to our effectiveness survey had registered within the 12 months prior to the date of the survey, and had, therefore, registered during the period in which national lockdowns were introduced in response to the Covid-19 pandemic.

We found that 2% of respondents started gambling for the first time during lockdowns, 9% reported that their gambling had increased during lockdowns, and 15% reported feeling more tempted to gamble during lockdown and acted upon that urge. It is reassuring to see others reported that, despite increased temptation, they had not seen an adverse effect. This aligned well to interviews in which we heard that consumers had experienced isolation and boredom more during lockdowns, but also that some people who were working from home had found gambling to be more readily accessible during office hours.

Generally, the adverse effects of lockdowns were more likely to be reported by younger age groups: approximately 35% of respondents aged 18 to 24 reported no effect, compared to over 50% of those aged 45 and over.

Further research may help to understand the full effects of lockdowns in future. It should be encouraging to see that people experiencing these issues have found help from GAMSTOP.

### **Overall conclusion**

Since the launch of GAMSTOP in 2018, over 170,000 consumers have registered to self-exclude from gambling. The vast majority of them report a very positive experience of using the service, and our research highlights that it is effective both in terms of delivering consumers' objectives but also in alleviating a wide range of gambling-related harms. GAMSTOP is being used by a broad cross-section of the population, and its support is effective for a wide range of consumer objectives and background stories.

*GAMSTOP should seek the most prominent possible signposting on gambling operator websites, both as a source of help for those who wish to stop gambling and for those who are seeking a short break.*

*It is encouraging that the majority of consumers did not engage in gambling during the national lockdowns of 2020 and 2021.*

*For others, isolation, loneliness and boredom led to escalation of gambling risk, and some gambled for the first time during this period. It is, however, encouraging to see that they found effective help through self-exclusion with GAMSTOP.*



## Recommendations

GAMSTOP is working effectively, and we would encourage it to continue and grow, we would also encourage the gambling industry and other support organisations to continue to fund, support and partner with it. We also recommend that:

1. **GAMSTOP should introduce a broader range of exclusion periods:** 12% of consumers would like to see shorter exclusion periods available, and over 40% would like longer exclusion periods. We further recommend that other organisations, including gambling website operators should refer consumers to the scheme for short breaks as well as for longer terms.
2. **GAMSTOP should use the findings from this report to develop a targeted engagement strategy** to reach those who exhibit a broader range of motivations and risk factors (e.g. 53% of female consumers are over 44 years old, whilst 64% of male consumers are 44 or younger). We can also see that certain game types seem to pose a greater risk for some groups, and that motivations such as the amount of time spent on gambling websites or a feeling of having lost control may help to target those at risk of gambling-related harm.
3. **GAMSTOP's website should be reviewed to make content as accessible as possible:** although the website appearance is extremely positively regarded by 49% of consumers, this was lower than other website features. Some interviewees suggested improvements could be made to make it feel more encouraging and less "clinical".
4. **GAMSTOP should seek the most prominent position possible on operator websites:** 50% of consumers want to see more prominent links to GAMSTOP on operator websites, and particularly to emphasise its value as a more effective provider of short breaks;
5. **GAMSTOP should seek opportunities to engage with consumers who have never accessed specialist gambling-related support:** For the 53% of consumers who have not accessed any kind of support, GAMSTOP has an opportunity to add value to the work of other organisations by seeking to understand the reasons that they have chosen not to seek other support. **Support organisations should work together as closely as possible to ensure that consumers benefit from the most integrated journey possible.**
6. **GAMSTOP should actively seek to reach out to and engage with family and friends of consumers** who have experienced gambling-related harm. Friends and family were involved in supporting 28% of consumers. There is an opportunity to raise awareness amongst friends and family to enable them to offer support, but also to encourage those at risk of problematic gambling to seek support from them.
7. **More can be done to understand the specific issues relating to unlicensed gambling websites:** we heard from interviews that these can be an unhelpful source of temptation for consumers, and 10% of consumers have reported accessing unlicensed gambling operator websites in our survey.
8. **More research into the harmful effects of advertising is needed:** whilst this was not a specific part of our review, consumers have been keen to tell us in interviews and survey 'free response' sections about their frustrations relating to advertising, which is an unhelpful and dangerous reminder of their challenges.

## Overview of key findings

### GAMSTOP reaches a representative cross-section of the population

- Gender balance consistent with other research studies, showing 71% male consumers
- GAMSTOP's consumer ethnicity profile matches closely to census data
- 75% of GAMSTOP consumers are in full or part time employment
- 23% of GAMSTOP consumers are in single person households, 62% households with no children



Nearly 50% of GAMSTOP consumers found the scheme from internet searches

71% of consumers choose the longest available exclusion period of 5 years

### GAMSTOP consumers have a broad range of intended outcomes:

56% of consumers wanted to stop online gambling, 20% wanted to stop all forms of gambling

13% of consumers wanted to achieve a short break from gambling



Consumers register for complex combinations of reasons including both financial losses and other forms of gambling-related harm including feeling that they are spending too much time on gambling websites and feeling a loss of control over their gambling.



89% of consumers found the experience of registering with GAMSTOP to be easy or very easy

80% of consumers report that GAMSTOP delivered on their desired outcome

Over 80% of consumers who wanted to stop online gambling report that GAMSTOP is effective

82% of GAMSTOP consumers have stopped or reduced online gambling using UK-regulated websites following self-exclusion.



84% of GAMSTOP consumers report feeling more in control of their gambling choices as a result of self-exclusion



70% of consumers report reduced anxiety and stress

77% felt more in control of their personal or household finances

60% of consumers reported feeling more able to focus at work

63% felt that the quality of their family relationships had improved after self-exclusion

84% of consumers feel safer from gambling-related harm since self-exclusion with GAMSTOP



## 2. Introduction

### *History of GAMSTOP*

Gambling Commission research suggests that numbers of both 'at-risk' gamblers and those experiencing gambling problems amount to some 1.8% of the UK population. That equates to approximately 1.2 million people at risk of gambling-related harm.

The National Online Self Exclusion Scheme (now trading as GAMSTOP) was established by the Remote Gambling Association in 2016 on request of the Department for Culture, Media and Sport (DCMS) and the Gambling Commission. The background to the instruction from DCMS to develop GAMSTOP in 2016 included the emergence of data to show the increasing extent of online gambling in the UK, and with it the growth in problematic gambling. Further analysis on current patterns is included in Appendix 2 of this report.

A gambling self-exclusion scheme enables anyone to block their access to a particular form of gambling voluntarily. Whilst many gambling operators allow a user to block their account *with that specific company* for a period of time, a broader self-exclusion scheme allows a customer to instigate the block across all operators that integrate with it. Hence, a customer who registers with GAMSTOP will be able to exclude themselves from all gambling operator websites and mobile application platforms for a period of their choice.

The scheme was introduced in order to bring a sector-wide scheme into the online gambling industry, similar to those that have been in place for venues such as bookmakers and casinos for some time. The scheme is principally funded by fees paid by licensed operators for connections to its database. The service is made available with no charge for consumers who register. Throughout this report, we differentiate between 'online' gambling and gambling 'in-person', by which we mean any form of gambling that is linked to a particular place or venue.

Key milestones in GAMSTOP's development include:

- Early 2017: work was completed by KPMG to scope and design the self-exclusion scheme.
- April 2018: GAMSTOP's website was launched for consumers to begin registering. At this time, it was voluntary for operators to integrate with the scheme, and we understand that many chose to do so.
- September 2019: ownership of the organisation was changed to achieve independence from the gambling industry. It is now a Company Limited by Guarantee, owned by its members and with an independent Board of five Directors.
- April 2020: the requirement for all British-licensed gambling operators to integrate with the scheme was enforced by the Gambling Commission under their Licence Conditions and Codes of Practice.
- December 2020: GAMSTOP registered its 170,000<sup>th</sup> user.

## Theory of Change

In 2020, GAMSTOP developed a Theory of Change<sup>3</sup>, seeking to map the impact of its work, with a particular focus on support for people who have experienced problematic gambling. The Theory of Change refers to four key activity streams:

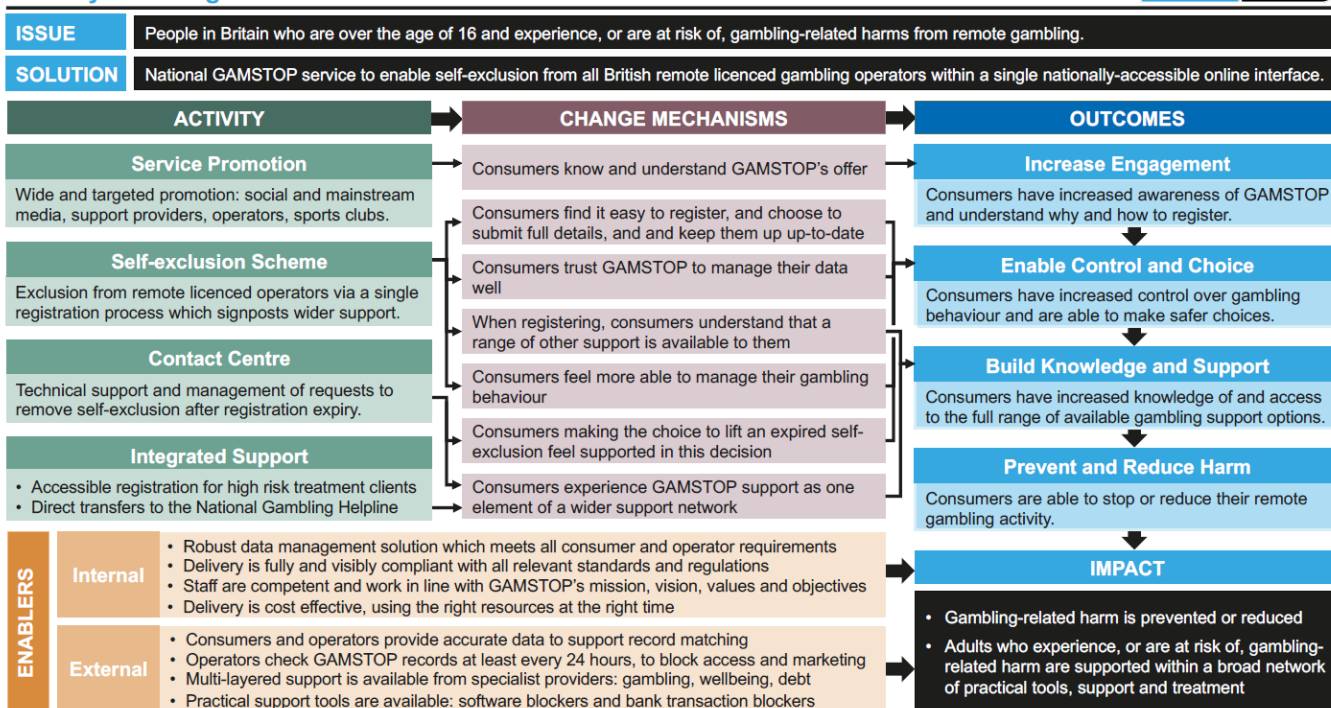
- **Service Promotion:** promoting GAMSTOP's services widely and via targeted segmentation, and via multiple channels: social and mainstream media, treatment and support providers, operators, and sports clubs.
- **Self-exclusion Scheme:** enabling consumers to register for exclusion from all British remote licenced operators via a single, nationally-accessible online registration process, which signposts wider support for a range of issues including:
  - Gambling: working together with GamCare, the operator of the National Gambling Helpline, amongst its broader support service offering;
  - Emotional wellbeing: working with and signposting to Samaritans; and
  - Debt: signposting consumers to The National Debtline for support relating to financial matters.
- **Contact Centre:** providing technical support to enable consumers to register and update their personal details, and managing consumer enquiries including requests to remove self-exclusion after the expiry of their chosen registration period; and
- **Integrated Support:** providing an accessible registration process for individuals at high risk of harm, as identified by treatment providers (including: Gordon Moody, National Gambling Treatment Service, and GamCare). In particular, the Contact Centre has the capability to transfer a caller directly to the National Gambling Helpline, which can offer support for both consumers and close family members.

The theory of change produced is shown overleaf:

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<sup>3</sup> A Theory of Change, sometimes call a 'Logic Model' is an analysis that shows the logical causal link between an activity and the outcomes it achieves. Outcomes equate to change (positive or negative) in the lives of people who have used or benefitted directly from the activity, the communities around them and, more broadly, for society as a whole. Definitions of key terms used can be found in Section 4 of this report.

## Theory of Change



Amongst other features of this work, we note that GAMSTOP's impact (i.e. the element of the outcome achieved which is attributed to the activities) comprises both a primary and a secondary outcome:

- *Primary outcome:* a reduction in gambling-related harm is achieved; and
- *Secondary outcome:* consumers who have experienced problematic gambling have accessed support from other specialist services, which has contributed to or enhanced achievement of the primary outcome of reducing gambling-related harm.

The Theory of Change is assumed at this stage, although part of the aims of our research included to obtain evidence to support certain aspects of it. Key messages within the theory of change include: enabling consumers to take informed action, make safer choices in respect of gambling, and to choose and access the support that they need, when they need it. In addition to its self-exclusion activity, GAMSTOP facilitates consumer awareness and choice by providing information about its own service and signposting to other organisations.

### The research brief

GAMSTOP set a brief for this research aimed at developing a clear understanding of four key issues. We explain these four areas below together with an explanation of how we interpreted and built upon the core brief in planning this work:

- The **demographic profile** of registered consumers: building a clear picture of who is making use of the service and assessing that profile against other research on problematic gambling and the broader population as a whole to identify trends and patterns. The objective is to understand whether GAMSTOP can improve its awareness raising activity in order to reach particular groups likely to be at higher risk, or, equally importantly, to identify groups expected to be at risk who are not using the service where GAMSTOP has an opportunity to target profile-raising activity in future;

- **Consumers' motivation to register** with GAMSTOP: if GAMSTOP has a clear understanding of why people choose to register (e.g. are there common 'trigger' events and are there particular desired outcomes?), it may be better able to target and refine its service to enhance its impact further;
- **Consumers' experience** of GAMSTOP provision: the service needs to be accessible and easy to use. It is important to understand in detail what the consumer journey through GAMSTOP's service is in reality, and to understand what works well and supports positive outcomes. We also set out to identify opportunities to change or refine the service. This covers the consumer journey from registration, to updating their details, and on to renewal or decision to end their exclusion; and
- **Consumers' perception of the impact** of GAMSTOP provision: the interpretation of effectiveness needs to go beyond the 'customer service' aspect of effectiveness. We planned our work to consider the broader changes achieved by consumers following their choice to use the self-exclusion scheme. This will help GAMSTOP to deepen its understanding of the harm that it is preventing or reducing and to understand any issues with which it is not helping as effectively as it would like. This, in turn, will help them to plan for future service enhancement. This particular aspect of the brief is essential for the validation or refinement of the Theory of Change after our work has concluded.

### *Sonnet's approach to this study*

A detailed explanation of our approach is included at Appendix 1. We set out below a brief summary of the work we have undertaken during the course of this evaluation:

- A summary **literature review** (findings can be found in Appendix 4), which was intended to understand what is already known about the demographic profile of online gambling website consumers and the harms related to online gambling. This was also intended to understand where any gaps in knowledge lay in relation to aspects of the brief and our interpretation of it: enabling us to plan the research phases of our work to fill these gaps;
- A **demographic survey** which was issued to some 51,833 GAMSTOP consumers who had consented to participate in research projects. Findings from this survey are shown in Section 3. This was intended to provide a view of the profile of GAMSTOP users, partly to meet that aspect of the brief, but also to enable us to plan subsequent stages of the research;
- **Interviews** with 41 GAMSTOP consumers were undertaken to explore key issues relating to their experiences of using the scheme and the impact they had observed arising from it. The interviews were planned to ensure coverage of demographic groups (which we called 'archetypes') that represented both the majority consumer groups but also any that were less well-represented in the survey responses. Key themes emerging from these interviews are presented in Section 4; and
- A **survey exploring the experiences of GAMSTOP consumers and the effectiveness of the service** was issued to the same 51,833 consumers as the demographic survey. This was planned to build upon and test themes and key issues emerging from the interviews. Findings from this survey are presented in section 5.


A key part of this has been to listen to the voices of service users, which we do not believe has previously been done on this scale in relation to online gambling. We are very grateful to everyone who has taken part in this research, and particularly those who volunteered their time to take part in the interview process.

Throughout this report, we have included illustrative case studies which are based upon interviews that we conducted. They combine regularly occurring features of consumer stories together to create ‘pseudonymised’ examples of how GAMSTOP has helped real people. Names have been changed, and in combining various elements of their stories together, we are protecting the anonymity of individuals who took part in the interviews.

This report refers regularly to Gambling-related harm, which follows the language used in GAMSTOP’s own theory of change. We have applied a definition consistent with that proposed by Langham (2016)<sup>4</sup>, namely: “Any initial or exacerbated adverse consequence due to an engagement with gambling that leads to a decrement to the health or wellbeing of an individual, family unit, community or population.”

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<sup>4</sup> Langham, E., Thorne, H., Browne, M., Donaldson, P., Rose, J., & Rockloff, M. (2016). Understanding gambling related harm: a proposed definition, conceptual framework, and taxonomy of harms. *BioMed Central Public Health*, 16: 80. doi: 10.1186/s12889-016-2747-0



*“I think this service saved my life as I know it. Best thing I ever did is cancel my demons by using this amazing service.”*

### **Illustrative case study 1**

Ben is in his early 30s. He lives alone in a privately rented flat. He works full time in an office job. He describes himself as a compulsive gambler, and suffered with gambling addiction for six years. His weekly payday on Fridays would be the start of his gambling and it would continue throughout the week at all hours of the day. He would take regular breaks away from his desk to use online gambling apps during the working day. His gambling led to financial difficulties resulting in over ten thousand pounds of debt: far beyond what he could afford to repay within six months, let alone within the month.

At one point he was gambling up to £300 per spin on online slot machines, and was borrowing money from anyone he knew to keep playing. He knew he needed to stop when he felt he had lost everything and his partner left him. He was highly stressed, feeling desperate and realised that his job would be the next thing to go. Starting with the NHS website, he found Gamblers Anonymous. He joined his local group and found out about GAMSTOP through another member. He enjoyed hearing the stories of other members, but chose to leave after attending a few meetings.

Since registering with GAMSTOP, Ben has been able to stop gambling completely, which he felt was the right solution for him. With the exclusion in place, he felt much safer and says that he experienced no temptation to gamble during lockdown. He chose the five year exclusion, which felt long enough to help a permanent change in his behaviour. He has been able to build up his savings since he stopped gambling, and has started to repay some of the debt owed to his family and friends. He has kept up with debt management plan payments owed to lenders.



### 3. User demographics

GAMSTOP holds certain data points on its users which it collects on registration, notably: date of birth, gender and address. However, the data is limited to those pieces of information that are needed to enable online gambling companies to match user records to the GAMSTOP self-exclusion list. A key objective of this evaluation was to build up a more detailed picture of GAMSTOP users to enable us to build a deeper understanding of the user base, and, in particular, to understand who GAMSTOP is reaching most effectively and to identify any gaps that create potential for further development.

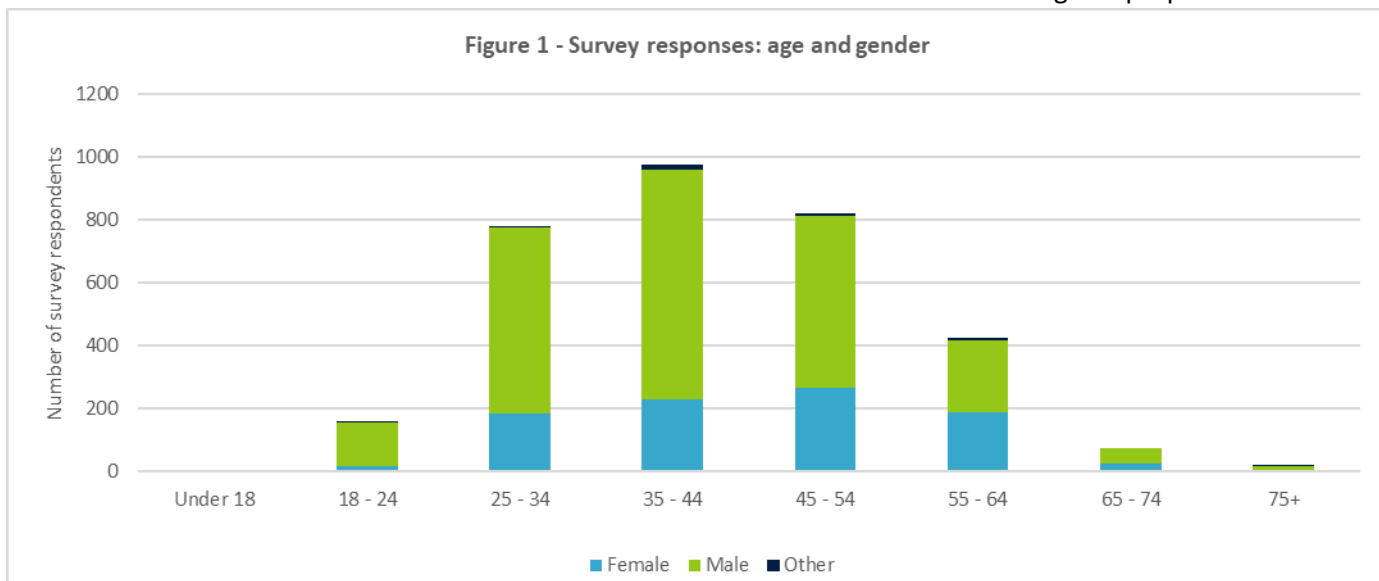
Our demographic survey was designed to be simple and require minimal time to complete. 16 questions were chosen to capture data on users age, household income, gender, location and household composition. The full list of survey questions and responses are detailed in Appendix 3. The questions were designed to have the lowest possible risk of ‘triggering’ a safeguarding risk such that they would be accessible to the largest possible number of potential respondents. The survey included an option for respondents to share their contact details with us to be contacted for an interview. We chose that approach rather than an ‘opt-in’ tick box response in order to ensure that people offering to take part in an interview had fully considered this request before making the offer.

We received 3,272 responses to the survey from the 51,833 users contacted, corresponding to a 6.3% response rate and a 95% confidence level with an error margin of less than 5% (considering the total userbase of 170,000). We state the error margin in that way in order to allow for the risk of selection bias (see Appendix 1), although the calculated error margin is less than 2.0%.

*GAMSTOP is used by a broad cross section of ages and ethnic groups, consistent with averages for the wider population. Male consumers outnumber other gender groups, in line with other studies on gambling.*

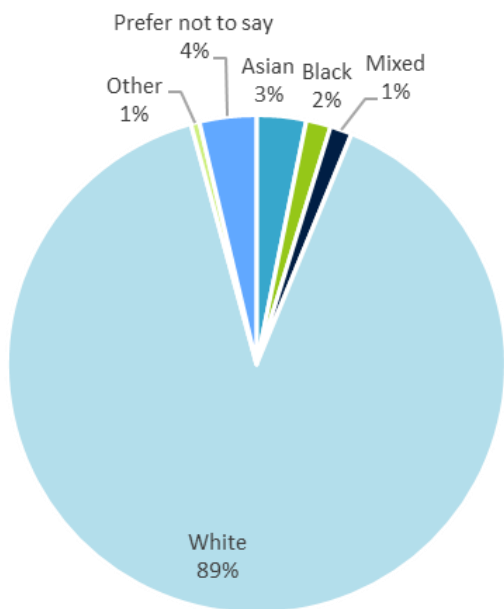
#### Age, Gender and Ethnicity

The largest group (30%, n=978) of respondents were aged 35-44, followed by 45-54 year olds (25%, n=821) and 25-34 year olds (23%, n=784). Looking at ages across genders we found that most female respondents (29%, n=264) were aged 45-54 compared to the largest group of male respondents (32%, n=730) aged 35-44. This varied significantly to GAMSTOP’s own user data which showed the highest proportion of both



female (38%) and male (44%) users in the 24-34 age group. Overall female GAMSTOP users are older than the males. 53% (n=479) of all female GAMSTOP users are over 44 years old compared to 36% (n=834) of male users. 22% (n=199) of female users are under 35 compared to 32% (n=733) of male users.

Figure 2 - Ethnicity of survey respondents



The ethnic makeup of survey respondents largely reflected that of the UK population<sup>5</sup> – 89% (n=2,910) White (compared to 86% White for the population as a whole), 3% (n=104) Asian (compared to 7.5%), 2% (n=52) Black (compared to 3.3%) and 1% (n=46) Mixed (compared to 2.2%). White males made up the majority (64%, n=2,061) of all survey respondents, followed by White females (25%, n=821) and then Asian males (3%, n=86). We note that some studies, including a recent secondary data analysis study conducted by YouGov for GambleAware (Gunstone and Gosschalk, 2020), suggest that BAME adults are more likely to experience gambling problems than white adults<sup>6</sup>. We note that the GambleAware study uses specific measurements tools to define those experiencing gambling problems (using the PGSI scale): GAMSTOP is accessible to all, and so may be used by a broader population than those who fit the criteria for that particular analysis<sup>7</sup>. Our survey shows that GAMSTOP is reaching a wide range of groups, with no apparent gaps, but we note the importance of seeking to ensure that all groups (particularly those for whom English is not a first language) are able to find and use the GAMSTOP scheme.

### Household income and composition

**GAMSTOP consumers reflect a wide range of socio-economic groups.** They are predominantly in single adult households or living with one other adult, and with no children. This is consistent with the wider population of the UK

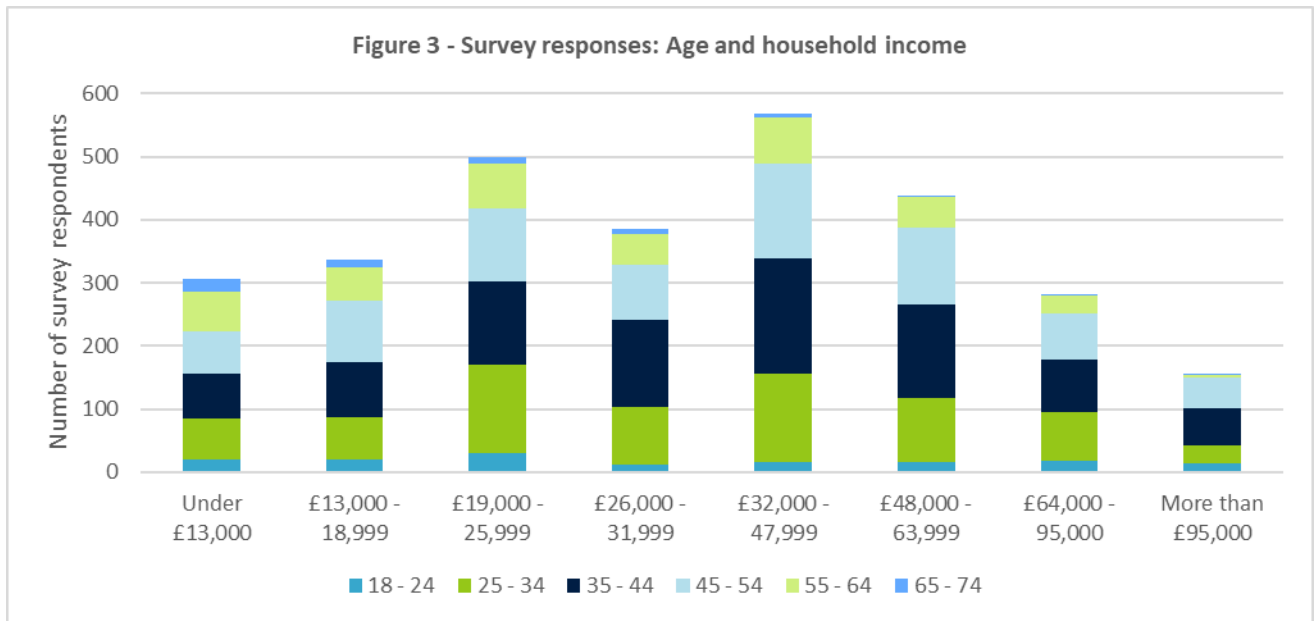
Survey respondents reflected a range of household income levels, spread relatively evenly across the income brackets. The proportion of those on higher salaries (above £48,000 per annum), 29% (n=877) of respondents, is higher than that of the UK population of whom 25%<sup>8</sup> earn above this threshold. 30% of respondents in both the 35-44 age group (n=290) and 45-54 (n=242) age group earn above this level.

<sup>5</sup> <https://www.ons.gov.uk/census/2011census>

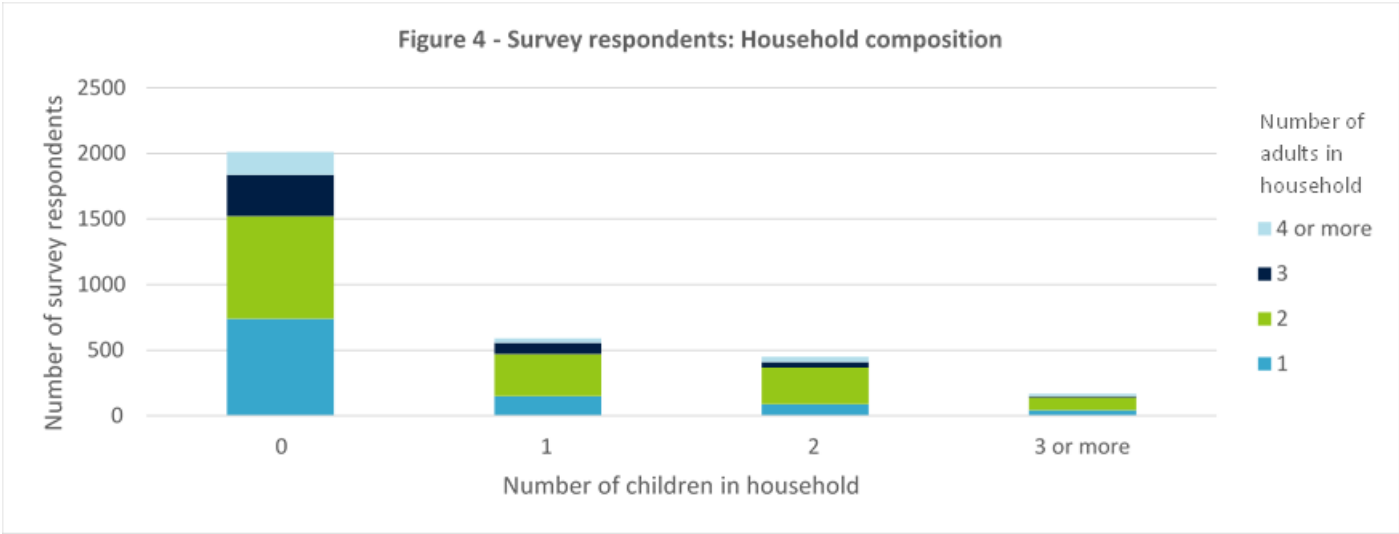
<sup>6</sup> It is not yet clear as to whether there may be differences in the usage patterns in respect of online gambling as opposed to all forms of gambling.

<sup>7</sup> Further research might eventually be undertaken to assess GAMSTOP consumers using a tool such as PGSI, although such assessment was outside the scope of this evaluation. Such analysis might enable a like-for-like comparison with other data sets.

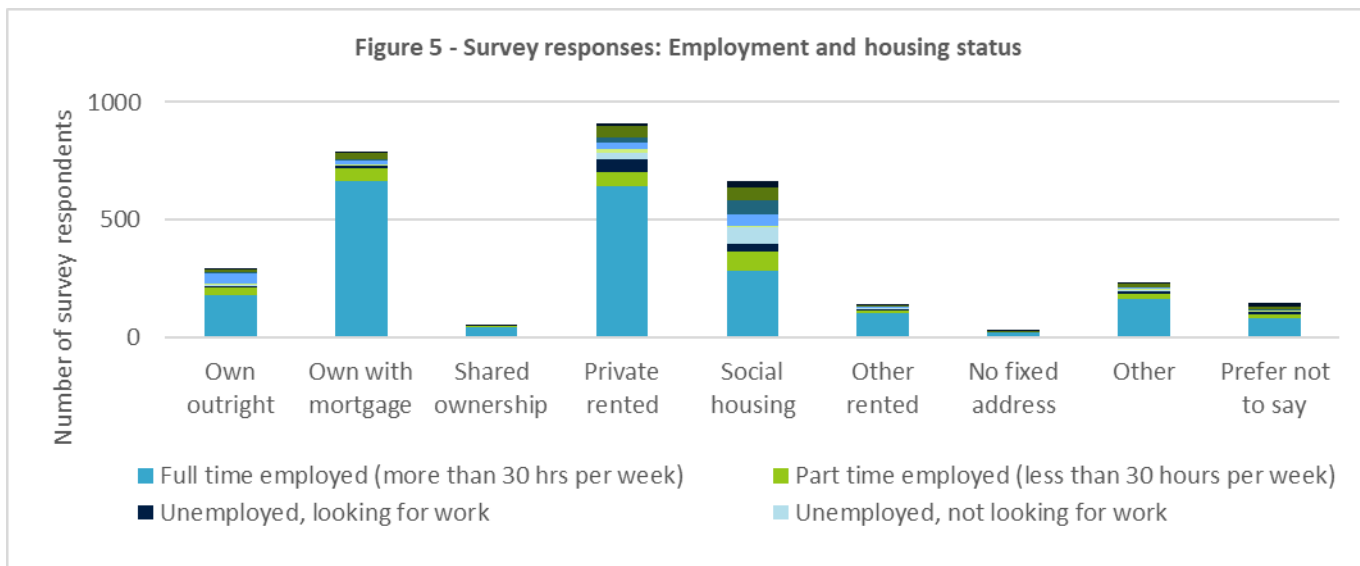
<sup>8</sup> ONS UK Gross Household Income, 2015/16.



The survey data revealed that the majority of respondents (63%, n=2,025) have no children in their household. Most were living either alone or with one other adult. Single person households made up 23% (n=742) of total the sample. Single parent households account for 9% (n=283) of responses. This broadly reflects UK population data<sup>7</sup>, which shows that 71% of households have no children and that 30% of households are one-person households.



### Employment and housing status



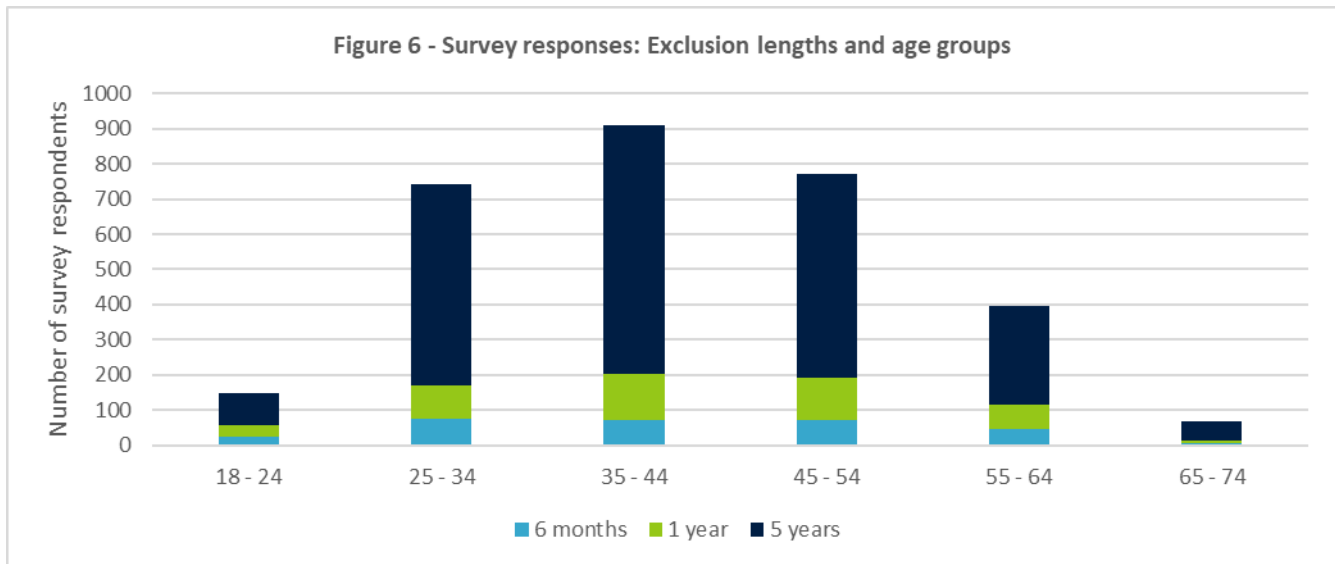
Overall, this study shows that GAMSTOP consumers align closely to the trends for the wider population, which suggests that there are **no clearly identifiable gaps in utilisation of the scheme**. In particular, GAMSTOP’s consumer base is effectively representative of ethnicity, employment and household composition data for the population as a whole.

Over 75% (n=2,462) of respondents were in full or part-time employment, with only 4% (n=137) being unemployed and looking for work. Across all employment statuses, the largest group of users lived in private rented accommodation. However, for those that work full time, the largest group (31%, n=667) own their property with a mortgage, closely followed by 29% (n=642) privately renting. 20% (n=665) of respondents live in social housing and 43% (n=282) of this group are in full-time employment.

### Exclusion lengths and finding GAMSTOP

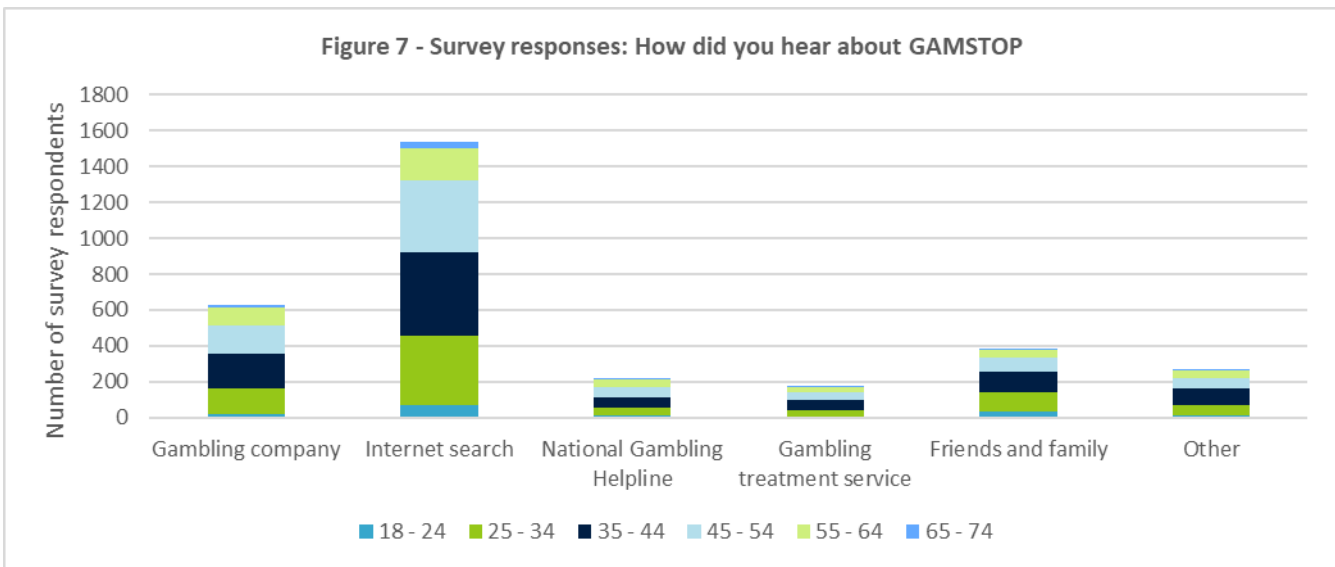
The majority (71%, n=2,303) of respondents opted for the maximum exclusion length of 5 years. 58% (n=92) of 18-24 year olds opt for a 5 year exclusion compared to 74% (n=54) of 65-74 year olds. 16% (n=26) of 18-24 year olds selected a 6 month exclusion compared to just 7% (n=71) of 35-44 year olds. 73% (n=1,668) of males chose a 5 year exclusion compared to 67% (n=599) of females. 9% (n=200) of males opted for 6 months compared to 11% (n=101) of females.

*GAMSTOP consumers typically request the longest available exclusion period. They find GAMSTOP from internet searches or from signposting by gambling website operators. Male consumers are marginally more likely to choose a longer exclusion than female consumers.*



Almost half (48%, n=1,548) of respondents found GAMSTOP through an internet search, implying that these users were unaware of GAMSTOP before searching for ‘How to stop gambling’ or similar terms. This percentage was largely consistent across all age-groups.

23% (n=98) of 55-64 year olds heard about GAMSTOP through a gambling company compared to just 14% (n=22) of 18-24 year olds. 22% (n=34) of the younger age group heard about GAMSTOP from friends and family compared to 7% (n=5) of 65-74 year olds.



Within the ‘Other’ category, both Gamblers Anonymous and Youtube came up frequently in free text responses. The high proportion of users using internet searches to find GAMSTOP suggests a lack of awareness of the service across all demographics. Searching for the service relies on users to self-assess their issue, choose to search for help online and then find and register on GAMSTOP. As a result of this, there may be additional users that could benefit from the service but remain unaware of its existence.



## *What does this tell us about who GAMSTOP is reaching... are there any gaps?*

### **Our findings**

Our analysis gives a much clearer view as to the breadth of consumer base that is being reached by GAMSTOP, across a range of characteristics. In a number of respects, the profile of GAMSTOP users aligns well against the broader population, notably in relation to ethnicity for which the proportions of ethnic groups included in the survey were broadly consistent with 2011 census data. This is an important indication that **GAMSTOP is effectively reaching a broad consumer base that is representative of the population as a whole.**

A key divergence from the broader pattern noted from population data was the gender balance emerging from the survey, with 71% (n=2,297) of GAMSTOP users reporting their gender as 'male'. **That findings is consistent with other research, which shows that males tend to be more likely to participate in gambling than other gender groups<sup>9</sup>.**

**GAMSTOP's registration data shows that it reaches a predominantly younger age group** than might be expected from broader population statistics based on census data. We note that our survey was completed by a more balanced population across all age groups. It is particularly interesting to note that female GAMSTOP consumers tend to be older than males. There is a potentially important lesson from our survey that, **despite the predominantly young age of GAMSTOP consumers, there are significant opportunities to continue to reach out specifically to older age groups.**

The finding that 75% (n=2,462) of service users are employed is broadly consistent with the population as a whole. The responses highlight that **GAMSTOP has reached consumers across all income bands.** We note that there is an above average group of people in the higher income bands than would be expected across the population as a whole. This may imply that there is a higher risk of problematic online gambling amongst higher income groups, but it may also highlight that this group is more likely to seek out self-exclusion as a means of addressing their challenges. GAMSTOP should continue to be mindful that it is reaching a broad range of income groups, but may wish to **explore specific initiatives to reach out to people with below national average household income.** There were no particular age groups that deviated from this trend, although we note that older users (aged 65 to 74) tended to report lower incomes, which is perhaps to be expected on the basis that many of them will be of retirement age.

### **Planning further enquiry in interviews**

Clearly, it is always possible to do more to broaden the reach of an organisation, and we included enquiry as to how GAMSTOP might enhance its profile and awareness of its self-exclusion scheme as part of our interview process.

We made specific enquiries in relation to social considerations that might influence gambling habits, which might create a preference towards gambling in-person for some groups. Many of these venues have been closed for significant parts of 2020 and 2021, which may have resulted in some groups looking to online gambling options instead of other, more social, settings.

In response to the findings on gender mix, **our interviews were planned to ensure that we heard from people who reported their gender as female, non-binary or transgender,** and specifically seeking to **ensure that we**

<sup>9</sup> The Gambling Commission's 2018 Health survey found that 1.2% of men are likely to be experiencing gambling problems compared to 0.2% of women (in response to either of the two scoring methodologies used in that study).



**covered a range of age groups** in order to assess whether there was a particular pattern of behaviour to explain the profile of gender and age groups represented in this survey.

Our interviews were planned to **ensure that we heard from people in as broad a range of income bands as possible** in order to understand whether there would be differing stories emerging as to the effects of gambling for higher or lower income groups, and to understand whether the broader patterns leading up to the decision to register were different for any particular group.

### **Planning further enquiry to follow on from this research**

GAMSTOP may wish to assess whether the emergence of online gambling options in recent years has increased the extent of problematic gambling amongst younger age groups. That may be a subject for research to follow on from this work.

Some further enquiry might prove useful as to reasons for higher response rates from older age groups in relation to the survey, but also to explore whether there is a similar pattern in response rates by age banding in other research.

### *What does this tell us about how people find GAMSTOP and the exclusion length they choose?*

#### **Our findings**

**GAMSTOP consumers tended to have found GAMSTOP either by seeing signposting on gambling company websites or from internet searches around seeking help to stop gambling.** With online gambling being a largely solitary activity, the two key means of finding GAMSTOP were initiated by consumers acting on their own online, rather than from reaching out to others for advice and help. This highlights the importance of maintaining a high profile presence online, and, particularly, for **GAMSTOP to consider regularly its outreach and marketing strategy in order to ensure that it appears prominently as a response to searches for help.** It may also be a prompt to seek a high ranking for searches for online gambling in general. It further **highlights the importance for GAMSTOP of taking a prominent position as a source of help on gambling company websites.**

**The vast majority of consumers selected the longest available exclusion period of five years,** with relatively few selecting shorter periods.

#### **Planning further enquiry**

We planned our interviews to understand the consumer journey in more detail, notably seeking to understand how and when consumers began to seek help. This is discussed further in the next section.

Our analysis from the survey prompted us to consider what the underlying reasons behind the choice of exclusion period might be, and whether other options would have been helpful for consumers at the point of registration or renewal. We included this enquiry in our interviews.

*“You changed and saved my life, marriage and employment... thank you 🙏”*

### **Illustrative case study 2**

Ahmed is a young man in his late twenties. He is recently married, but has no children. He works in a professional services firm in a city centre location. He started gambling after a close childhood friend unexpectedly passed away. He believes that grief was the trigger for his gambling. It worsened again when his father was diagnosed with cancer.

When he was at his lowest, Ahmed was gambling during any spare minute he had – while at work, during his lunchbreak and on his commute. He spent all his savings and went into arrears on his mortgage and almost lost his house. He attempted to conceal these issues from his family with an increasingly complex web of lies, but he found it highly stressful to keep track of which lies he had told to which people, and he feared being found out. Feelings of shame and embarrassment prevented him from speaking to anyone or seeking help. He felt that his life was a lie.

Ahmed wanted to run away from everything. He went through bouts of depression and was regularly calling in sick for work. At one point he couldn't eat due to stress. His wife almost left him when she found out about the extent of the gambling. She researched support for gambling addiction online, and found GAMSTOP. Ahmed completed the registration process with support from his wife. He then went on to have counselling through GamCare.

Since addressing his addiction, including self-exclusion through GAMSTOP, Ahmed has stopped gambling, which he feels is the step that he needed to take. He has been able to repair his marriage, building a stronger and more trusting relationship. He has also been able to share his experience with his family who have supported him. He is calmer and feels his mind is much clearer. He no longer experiences episodes of depression. He now feels able to support his family while his father undergoes cancer treatment.

## 4. Consumer stories

### Archetypes and other groups for interview

The demographic survey results informed our design of six ‘archetypes’ from which to select consumers for interview<sup>10</sup>. We set out to speak to five users from each of the six archetypes outlined below and an additional 10 users from ‘outlier’ categories. The ‘outlier’ profiles are those that reflect a minority of survey respondents but are important to ensure that GAMSTOP hears from the most diverse range of consumers possible in the course of this work. The core archetypes, factoring in exclusions for overlaps<sup>11</sup>, cover 76% of all survey respondents.

*We randomly selected interviewees using archetypes that represented over 75% of the population of GAMSTOP consumers. We ensured that steps were taken to hear the views of minority groups alongside the majority group views.*

The table below shows the archetypes, the percentage of survey respondents that each archetype represents (excluding overlaps with other archetypes) and the number of interviews successfully conducted to represent each of these groups:

Archetype/group	Interviews completed
Archetype 1 - Male, White, aged 35 – 44 (19% of respondents)	5 interviews
Archetype 2 - White, Female, with children (10% of respondents)	3 interviews
Archetype 3 – Users aged 25 – 34 (21% of respondents, excluding white females with children)	6 interviews
Archetype 4 - Male, without children, living in private rented accommodation (7% of respondents, excluding White aged 35-44 and users aged 25-34)	6 interviews
Archetype 5 - Full time employed, urban dweller, owns property with a mortgage (9% of respondents, excluding White males aged 35-44, white females with children and users aged 25-34)	9 interviews
Archetype 6 – Single person household (10% of respondents, excluding all other applicable archetypes)	3 interviews
Students (1.1% of respondents)	1 interview
Gender variant / non-conforming (0.4% of respondents)	1 interview
Aged 65-74 (2.2% of respondents)	3 interviews
Black, Asian, Mixed or other ethnicity (6.2% of respondents)	4 interviews

<sup>10</sup> In this context, we identified combinations of two or three demographic indicators that were particularly frequently represented. We termed these combinations ‘archetypes’. Lists of respondents who had consented to be contacted for interview and who met these criteria were extracted. We then used a random number generator to select consumers from these lists to be invited to take part in interviews.

<sup>11</sup> Some consumers fell into more than one archetype. The table indicates the archetypes which were excluded from each profile in order to avoid overlap.

## Diversity

To ensure that the interview captured the full range of GAMSTOP user journeys, we selected some consumers from under-represented groups to take part in interviews. Despite the majority of GAMSTOP users being both white and male (which is consistent with other research study findings), it was important to take this opportunity to hear the stories of others, whose voice may have been unheard or under-represented previously. The stories gathered from the interviews were used to inform the wider effectiveness survey. It was essential that the interviews were representative of the broadest possible range of GAMSTOP consumers.

We must acknowledge, however, that there is a risk that some groups remain under-represented. This might particularly relate to groups including: younger consumers (particularly those aged under 18<sup>12</sup>) who live with their parents, and consumers from cultural or religious backgrounds where gambling to any extent is prohibited.

## Interview discussion topics

We devised a short list of discussion topics as a structure for the interviews, intended to capture the ‘effectiveness’ of GAMSTOP and the stories to show consumers’ journeys through using the scheme. In this context, ‘effectiveness’ means both the coverage of the exclusion scheme and the change occurring in users’ lives as a result of registering with the service.

Discussion topic	Research Objective
<b>Would you be willing to tell us how you came to register with GAMSTOP? What prompted you to register? What did you expect from it?</b>	To understand customer journey and motivations for registering.
<b>Would you be willing to describe a day in your life before you registered with GAMSTOP?</b>	To draw out what they believe to be the consequences of gambling for them personally prior to registration, and to build an understanding of what prompted them to act and choose self-exclusion. Typically, this conversation naturally moved towards how life after self-exclusion contrasts with life before, enabling us to understand whether and how gambling-related harms have been eliminated or reduced.
<b>Would you be happy to describe your experience using GAMSTOP? (To cover both experience of the exclusion tool and life experience)</b>	To capture the effectiveness of the service and the customer service experience found by consumers.
<b>Have you used any other self-exclusion tool or accessed any other form of gambling related support? What was your experience of using these?</b>	To understand whether and how other services contribute alongside GAMSTOP to positive outcomes for the user and to gain a better picture of the support landscape for gambling. To understand whether outcomes desired by customers are more frequently or effectively delivered if multiple forms of support are used together, and whether there are circumstances in which GAMSTOP is sufficient as a standalone service.
<b>Would you be willing to tell us whether COVID and lockdown have had any effect on your gambling?</b>	To understand the extent to which COVID / lockdown might have exacerbated gambling-related harm.

<sup>12</sup> Whilst we did receive some responses from consumers aged under 18, these were very few in number.



Following our safeguarding strategy (see Appendix 1), we prepared an additional set of factual/non-emotive questions to be used if interviewees started showing signs of a traumatic reaction during the interview. This strategy, however, did not need to be deployed, as there were no interviews in which we had safeguarding or trauma concerns.

The interviews were conducted as semi-structured focus interviews to allow for open, but guided discussion. This approach was taken to allow for consistent themes to be raised for discussion, whilst allowing the interviewee freedom to tell their story around those themes. More open discussion is also helpful in avoiding acquiescence and response bias in the process. This discourse allowed themes to emerge, which were then used to inform the more prescriptive survey format and questions discussed in chapter 5. The interview topics and emerging themes were reviewed and discussed after each batch of eight interviews to ensure that the questions being asked allowed for a good conversation to take place and placed the right emphasis and weighting on the discussion.

During the course of interviews, as part of our discourse analysis, the research team met to review the key themes and issues emerging from interviews. This enabled us to review the effectiveness of the survey questions and to refine areas for specific enquiry in later interviews.

### *Divergence of views between archetypes*

Interviews did not reveal significant differences in patterns of behaviour or views between the different groups represented. In fact, consistent themes emerged from the vast majority of the interviews and there was no significant divergence of views based on users' gender, ethnicity, age group, housing status or household composition (i.e. no particular group seemed more likely to disagree or raise a particular alternative view than any other). The themes that emerged from interviews are explored below.

*During the course of our interviews, we found no marked divergence of views between archetype or minority groups. We used an open questioning approach that allowed interviewees the freedom to tell their own stories, with guidance, rather than directed questions from the interviewer.*

### *Emerging themes*

#### **Reasons for registering**

Users often registered after a significant loss or series of losses and after realising the amount of time they had spent on gambling websites. One interviewee said *'I pretty much buried myself gambling. It's been a problem for the past 20 years. My losses were spiraling. I had to stop the hemorrhaging immediately.'* In some cases the trigger for realising the amount of time they were spending on gambling websites was realising that they were missing quality time with friends or family, and children in particular. Stress was also a factor in registration: for some, the stress focused on seeing their losses increasing, but for others a particular stress point was losing track of the lies they were telling to various friends and family to cover up their gambling.

Some, however, were able to pre-empt their addictive behaviour and saw GAMSTOP as a preventative measure they could put in place. For some consumers the trigger point for registering was a much lower level of loss (hundreds of pounds) than others who had lost significant amounts (tens of thousands of pounds). Other users were urged to register by their family and friends who had recently discovered the extent of their gambling, or did so as part of a wider gambling addiction support programme. A small number of this group felt that they had subconsciously self-sabotaged their gambling by, for example, leaving the computer logged-on to gambling websites on a regular basis, increasing the likelihood of being 'caught' as a 'cry for help'.

*Consumers choose to self-exclude for a wide range of reasons, including financial losses as well as realising the amount of time spent on gambling websites. Some use GAMSTOP as a way to take preventative action, alongside those who use it as part of a broader plan to stop problematic gambling.*

Many users registered on GAMSTOP after having first tried self-excluding from individual gambling websites. The sheer number of other gambling websites made it impossible to stop gambling after just self-excluding from one, as new accounts can easily be opened elsewhere to repeat a cycle.

### **Life before GAMSTOP**

Payday was frequently mentioned as the starting point for gambling in a particular week or month – *'Payday was on Thursday or Friday and my gambling spree would last the whole weekend. I would only stop when I had cleared out my bank account.'* The amount of time spent gambling varied widely across interviewees. Some would gamble almost every spare minute of the day on mobile phones but most reported that they typically gambled during evenings and weekends. There were a small number of interviewees who reported that they didn't gamble particularly often but, when they did, they suffered high losses after betting high stakes.

*Interviewees consistently reported concerns for their own wellbeing, particularly in relation to relationships with friends and family and ability to focus at work. A small number had contemplated suicide.*

Some users mentioned gambling alongside drinking alcohol, typically reflecting that alcohol reduced their inhibitions. However, alcoholism as a co-addiction did not emerge as a frequent factor in our interviews. Two interviewees specifically mentioned that their gambling had dramatically increased following the death of a loved one and felt their gambling urges were driven by grief. A minority of interviewees expressed that they had contemplated suicide at some point before taking steps to address their gambling.

A significant number felt that their quality of relationships with friends and family had suffered as a result of gambling, with various stories of people being physically in a room with others but being focused exclusively on the gambling app on their phone. Some found that this issue impacted upon their working day, with the ability to access gambling apps on mobile devices making it possible to gamble at their workplace. Some noted that this had become easier during lockdowns, with reduced scrutiny from employers over their working habits.



## Experience using GAMSTOP

All interviewees felt that GAMSTOP provided an effective barrier against online gambling. One interviewee said *'The only thing that has actually worked is GAMSTOP. It's off and on. A tap was turned and I can't turn it back on again.'* Some users were able to find workarounds but did not feel that this was a fault of the scheme as they had taken, in some cases, extreme measures to do so<sup>13</sup>. Consumers typically felt that the messaging on the site was clear and they understood what they were signing up to. Some users had issues with the registration process, resulting in delays before the exclusion was implemented (e.g. whilst they supplied the required information to confirm their identity). They were still able to gamble during this time and had incurred additional losses before their registrations were activated.

*GAMSTOP was reported to provide an effective barrier against online gambling. The effectiveness of the barrier depends upon full disclosure of information and use of the online GAMSTOP account to keep details up-to-date.*

## Life after GAMSTOP

Increased time for other activities was one of the most regularly mentioned effects of stopping online gambling. These included quality time with family, more focused and productive time during work and time spent enjoying hobbies. Interviewees described how they have been able to build up savings or address their debt through a payment plan, which has improved their stress levels and overall mental wellbeing.

*Interviewees consistently reported improvements in their wellbeing after self-exclusion using GAMSTOP. Improvements included financial wellbeing, personal relationships, ability to focus at work and physical and mental health.*

Some interviewees had completely stopped all types of gambling, whilst others commented how they continued to gamble but with controls in place. For example, one user shared that they still gambled online under the supervision of their partner. Another shared that they would occasionally visit a betting shop, but would only enter the premises with a fixed amount of cash in hand and without a debit card: this enabled them to place a strict limit on how much could be lost during that visit.

*Some continue to gamble but do so feeling safer and better able to control their spending. Some have sought supervision from friends or family to help them maintain control.*

Gambling in-person was seen as a completely different offering and experience to online gambling. *'The difference is doing something publicly. People are watching, listening. If I were to say that I was putting £200 on a horse, the guy at the pub wouldn't take the bet. He'd tell me I was stupid.'* Online gambling was viewed as higher risk, as gambling in-person is done in the presence and view of others (including venue staff). This results in real-time scrutiny (whether actual or perceived) and exposure for the gambler, creating a social barrier and limiting their willingness to gamble compared to online platforms. A small numbers of interviewees had continued gambling without any controls in place. These included users whose self-exclusion period had lapsed and did not want, or did not feel ready, to reinstate it.

<sup>13</sup> Where interviewees gave details of the workaround strategies they had used, we have summarised these in a separate report for GAMSTOP. Several interviewees indicated that they were aware that it is possible to work around the system but had specifically sought to avoid finding out what approaches others have used. Out of respect for the wishes of this group, and others who may feel the same way, we do not include details of workarounds within this report.

*“Took away any temptation, it has really worked for me.”*

### **Illustrative case study 3**

Steve is a student in his second year of a three year degree course. Whilst he was in recovery from a medical procedure, the country entered lockdown as a result of the Covid-19 pandemic. He had previously returned home to live with his parents during his recuperation, attending lectures online but missing his student life. He felt bored and isolated and decided to try online gambling as a way to occupy his time. He had previously bought the occasional scratchcard, but was otherwise new to gambling. The gambling soon became all-consuming, and he realised how much time he was spending on the gambling websites. His losses began to mount up but he was just about living within his means. He became anxious that he was losing control, and he had the feeling that the gambling could become a slippery slope leading to deeper problems. He became withdrawn and was constantly using his phone for gambling. He was aware that his parents were becoming worried about his withdrawn behaviour. Three months after placing his first bet, he decided to put a stop to it.

Steve called the National Gambling Helpline having seen it mentioned on the back of scratchcards. The helpline suggested that he could register with GAMSTOP. He felt that he was taking action early enough to be able to control his gambling through self-exclusion with GAMSTOP. He registered for self-exclusion for five years. He decided not to seek other support at that time, and has since been able to stop all forms of gambling, which he believes has given him the break he needed. Lockdown had a significant impact on him as he had never experienced this level of gambling before. The experience scared him and he has decided that he will avoid all forms of gambling in future.

If given the choice, he would have opted for an exclusion of more than five years. Since putting GAMSTOP in place he has been more able to focus on his studies. He feels much happier not being stuck in the cycling of gambling, losing and chasing losses. He has also restored his relationship with his family, who don't know, and may never know, why he became withdrawn during this time.

## Use of other tools and support

We heard a wide range of views on the use of other support. Many users felt that GAMSTOP alone was enough to address their problem gambling. Very few users mentioned other online exclusion tools (e.g. software or transaction blocking systems).

*Family and friends are not always seen as potential sources of support. Feelings of shame and concern that their behaviour would not be understood are a barrier to what might otherwise be an effective source of support. More could be done to help people to understand and be aware of how to support a loved-one who is at risk of experiencing problematic gambling.*

For those that had sought further support, some had gone to speak to their GP but typically described this as a negative experience. Their reasons for feeling this way tended to derive from the feeling that their problem was either not taken seriously or that there was a lack of awareness about who could help and how that support could be accessed. GamCare often came up as the first port of call for counselling. Some consumers had accessed private counselling services, but this was often in cases where they were attending counselling for wider issues as well as gambling. Some consumers reported that they had attended

*Some GAMSTOP consumers felt that self-exclusion alone had been sufficient help. Others have accessed support including counselling from other organisations or self-help groups.*

*It is essential that front-line services such as GP surgeries have a good quality understanding of support options for individuals experiencing gambling problems, including knowledge of GAMSTOP.*

Gamblers Anonymous<sup>14</sup>. Opinions on support from Gamblers Anonymous ranged from the very positive to those who felt it was not for them, as they perceived it to be too difficult to access in their area or too male-dominated in their local group. Gordon Moody was also mentioned by some as a source of support: one interviewee found the all-female programme on offer particularly helpful. Another shared his perspective 'Went to my GP and the addiction services the council offered. They were of some help. All help involves individual effort and meaning it and trying to do it. If at the back of your mind you're always thinking 'a little gambling won't hurt', you're not going to get there.'. Whilst it is not possible to assess whether outcomes would have been better for an interviewee had they accessed other support, we can assess data from the subsequent survey to compare outcomes for consumers who accessed other support with those who chose not to.

Family and friends were not typically seen as the go-to place for support. Many users felt their family wouldn't understand their addiction and instead chose to open to someone further removed from their personal life, such as a work colleague. For some, though, help from family and friends was found to be effective, but in some cases this was sought in an oblique way such as the 'self-sabotage' example noted above. In some cases, interviewees felt more able to open these conversations having first put self-exclusion through GAMSTOP into place such that they could also assure others that they had started to take action to address the problem. For a small number of interviewees, support from friends and family included passing control over household finances to a spouse or partner

<sup>14</sup> Noting that GA, by definition, allows users to attend without disclosing their issue or attendance at the group, in line with our practice for all interviews, we have not shared the names of individuals outside of the research team. Interviewees were assured of the confidentiality of the discussion, and as such we emphasise that case studies included in this report are 'pseudonymised' hybrid stories that draw on consistently emerging elements of real user stories, but do not relate to particular individuals.

*GAMSTOP has the opportunity to do more to reach out to consumers who have chosen not to seek support, and to highlight a broad range of options at the point of registration.*

A significant minority of users told us that they had never spoken about their gambling to anyone prior to taking part in the interview. They had decided to come forward and speak for research purposes, in the hope that sharing their experience might help someone else. By definition, this group had not accessed other support services beyond self-exclusion through GAMSTOP.

### **Effect of lockdown on gambling**

Users were very quick to respond 'yes' or 'no' to the question of whether lockdowns during the Covid-19 pandemic had affected their gambling behaviour. Their response usually depended on for how long their exclusion had been in place. Users who had addressed their gambling prior to lockdown were not typically impacted by it but recognised how dangerous lockdown could have been if they had still been gambling during this time. For those who typically bet on live sport, which was cancelled or curtailed for significant period during the pandemic, their gambling tended to have decreased. Users with young children also mentioned that home-schooling and lack of childcare options meant they no longer had any free time to gamble.

*Many interviewees had self-excluded prior to March 2020 and so reported no particular effects. Some reported either escalation of commencement of gambling during lockdown due to isolation, boredom and easy accessibility of gambling websites at a time when social activities and other gambling options had been suspended.*

Some interviewees reported that they had developed a new problem with gambling during lockdown. Working from home created new opportunities to gamble online during working hours, although we note that some users reported that gambling during working hours had been an issue prior to lockdowns as a result of the accessibility of gambling websites from mobile devices. One interviewee said, 'My gambling went out of control again during lockdown. I was working from home, work is on my laptop so I could have one tab open gambling while at work.' Some reported that the lifestyle change from not commuting created additional disposable income which they felt able to use for gambling. Loneliness, isolation and boredom were frequently referenced as motivating factors for gambling during the pandemic.

### **Improvements to GAMSTOP**

Most interviewees felt the most important thing GAMSTOP could do to improve would be to increase the visibility and awareness of its service. A few spoke about how telling others about the service who had otherwise never heard of it. Many users were angered or distressed by the prevalence of gambling adverts online, and through social media in particular. The majority of interviewees felt that GAMSTOP should be more prominent online to counteract the effects of these adverts.

*Consumers encouraged GAMSTOP to take steps to be more prominent in online advertising to raise awareness. They also encouraged the use of case studies to engage visitors and act as an encouragement to seek support.*

Users felt that the tone of the language on the website could be warmer and more encouraging. The website was described by some as 'clinical' and 'policing'. GAMSTOP could do more to understand how a new visitor might be feeling when on the site, as they would typically visit after recently experiencing a loss. The effects of this might be that their rational/cognitive capacity is reduced, meaning that simpler language and more reassurance would help to draw them in. The importance of this is noted below in relation to the registration process, in which a user

will need to have clear recall of their personal information. User stories could also help visitors to engage and find comfort in the fact that they are not alone. One interviewee also suggested a chatbot function on the site to answer immediate queries without having to break anonymity and speak with another person.

*The identity verification phase of registration was cited by some as a challenging aspect of the registration process. We understand that GAMSTOP has recently introduced changes to improve that process.*

Some users struggled with accessibility and found the signing-up process somewhat arduous. Common issues related the process of providing confirmation of their identity in order for the block to be effective. Some consumers who struggled with this attributed the challenge to their state of chaos and crisis at the time they were attempting to register. A number felt that additional support was needed to ensure the ban was implemented as quickly as possible to prevent a relapse. Users also raised the issue of potential language

barriers, with the site being English only. They felt that the site could be made available in other languages and could use more simple terms. The term 'self-exclusion', for example, may not be clear to everyone.

We asked consumers how they felt about receiving communication from GAMSTOP. Again, we very quickly received firm 'yes' or 'no' answers to the offer of follow-up communications from most interviewees.

Some consumers felt very strongly that they did not want to receive any communication that might remind them of their gambling issues and, in particular, found the idea of a reminder that their exclusion will come to an end to be potentially stress-inducing. 'I didn't want any contact. I just wanted to ignore the problem. I just wanted to bury my head and forget the mistake I made.' This group only need to have confirmation that the exclusion is active at the outset. This aligns well to GAMSTOP's current approach of minimising communication.

Others expressed interest in receiving communication on where to find additional support or, in some cases, recognising milestones achieved through GAMSTOP (e.g. on the anniversary of their registration). Some interviewees very clearly remembered the exact date they last placed a bet and felt very proud of their abstinence since that moment, and would like to celebrate this. One user thought that supportive communication during the first 90 days after sign up would be particularly helpful as this is when one feels most fragile and tempted to gamble.

There are clear challenges in balancing the opposing, but strongly held, views of GAMSTOP customers in relation to communication preferences. Given the potential operational and other challenges of implementing change (not least the potential complexity of offering opt-ins for communications during the registration process), our recommendation is that GAMSTOP consider feasible options for offering some further communications for those that would like to opt-in to receive updates.

*Consumer communication preferences are extremely diverse. Some would prefer to have no communication after registration is confirmed, whilst others feel that regular updates and encouragements would be beneficial. GAMSTOP may wish to offer more options to consumers at the point of registration to meet this range of needs.*



## Exclusion length preferences

The majority of interviewees felt that there should be longer exclusion options. Many reported that they would have signed up to a lifetime ban, if it had been offered, and would choose it for a renewal of their exclusion, if it were to be available. For those unaware of what happens when their exclusion comes to an end<sup>15</sup>, there was a real sense of fear at the thought of being exposed to gambling websites again.

There were, however, a significant minority of interviewees who stated that they would have not signed up to the service if a six month exclusion period had not been offered, as they would not have felt comfortable selecting one of the longer exclusion options. *'I wouldn't have registered if there wasn't a six month option. It was difficult to commit to sign up'*. For one user whose formal exclusion period had lapsed, the view was that a shorter three month exclusion might be more palatable as a renewal term. This highlights the diverse range of exclusion preferences: some want a permanent ban, whilst others want to be able to introduce short-term breaks, or 'trial' exclusion with a shorter period. Further enquiry and analysis of this important issue was included within our subsequent survey (see section 5).

*Opinion is divided as to the preferred exclusion length. Some would wish to be able to choose a lifetime exclusion, but others would find that idea off-putting and want to trial a shorter period or use GAMSTOP to achieve a short break rather than a permanent exclusion. GAMSTOP may wish to consider offering both shorter and longer term exclusions than the current range.*

## Conclusions

### Our findings

**Interviewees were very positive about the effectiveness of GAMSTOP.** Some highlighted issues related to the registration process, where a minority had found difficulties in confirming their identity. We understand that GAMSTOP has recently revised that part of the process: monitoring the performance of the new approach will be important to ensure that it is working as intended.

The interviews were extremely informative and delivered valuable insights into gambling behaviour. It was evident from everyone that we spoke to that gambling was no longer an activity that they found enjoyable and had not been for some time. Users were aware that their behaviour was risky and, perhaps, irrational but often felt compelled to continue. This was often why users chose not to share their gambling with friends and family, as they would not understand this compulsion and instead ask them why they continued playing. **GAMSTOP may wish to consider whether it has the opportunity to provide resources for, or signpost to others who can support, families and friends of consumers who have experienced problematic gambling.**

Whilst many interviewees wanted to stop online gambling altogether, or, indeed, to abstain from all forms of gambling, **not all users wanted to stop gambling completely.** Some wanted to take a short term break whilst others were prepared to give up online gambling but wanted to maintain access to in-person gambling options.

We also developed a better understanding of the differences between in-person and online gambling behaviour. **The anonymity and invisibility of online gambling is what makes it so much riskier than gambling in-person.** To an extent, this may be related to the presence of other people, with those at risk of gambling-related harm potentially feeling pressure or scrutiny that causes them to moderate their activity.

<sup>15</sup> For clarity, the exclusion remains in place unless and until the customer chooses to end it. The exclusion cannot be ended during the formally selected exclusion period. A customer can also choose to renew the formal exclusion period, in which case the exclusion cannot be terminated until that subsequent period has ended.



The extent to which gambling problems can be hidden also emerged from our conversations. One interviewee commented that drug and alcohol addictions present a physical manifestation to show the extent of a problem that isn't found with gambling. This means that problematic gambling can go unnoticed for long periods of time. It can be very lonely and hiding the problem from friends and family only makes the harm, including damage to mental wellbeing, worse.

Users had widely ranging views on receiving communication and the type of support that they thought would work for them. This was not linked to gender or age but seemed to be based on personality types. It was clear from this that a one size fits all approach to support and treatment would not be appropriate or effective.

Both the key themes and more nuanced perspectives heard through this research stage were used to inform our following survey on the effectiveness of the GAMSTOP service.

### **Planning further enquiry**

The effectiveness and impact survey (see Section 5) was planned in light of the interviews undertaken and the stories and views we heard. It particularly includes:

- Understanding the types of gambling undertaken prior to self-exclusion;
- Enquiry into the wellbeing impacts following on from self-exclusion;
- Understanding whether consumers had accessed other forms of support;
- Seeking views on the effectiveness of GAMSTOP's website and different stages of the consumer journey through using the scheme; and
- The motivating factors that prompted consumers to register with GAMSTOP.

The results of the effectiveness and impact survey are analysed in section 5. Results of responses to all questions can be found in Appendix 4.

*“This last year I haven’t gambled at all - it was hard at first but now I don’t miss it and the money I have saved is unbelievable”*

#### **Illustrative case study 4**

Laura is in her late 20s. She lives with her partner and works as a delivery driver. She started gambling around ten years ago at age 16. She stopped for a while but then restarted online gambling five years ago after a relationship breakup as she missed the rush and excitement of the games and was feeling bored and lonely.

At first, her losses were within her means, but they gradually increased until each month she was left with only the amount needed to pay her share of the rent. She regularly looked to her partner for help with other bills, but she kept her gambling secret. She realised that the relationship was on the point of breaking up, and that she needed to act in order to save it.

She had previously self-excluded from individual gambling websites, but always found a new one to replace the old. She searched online for ‘How to stop gambling’ and found GAMSTOP. It did just what she wanted it to do and she didn’t feel she needed any follow-on support. She has spoken about her problems with her partner, and the relationship is now much stronger. She now has someone to talk to if she feels tempted to gamble online.

Laura found the registration process straightforward and was pleased that the service was free to access. She put an exclusion in place for five years, and will renew again for as long as possible after that period ends. At one point she found a way to get around the exclusion but then amended the details on her GAMSTOP account to ensure the block would be as effective as possible.

She is getting married this year and has now built up some savings. Since Laura’s family and partner know about the gambling so they are able to spot the red flags and step in to help. Laura still gambles occasionally at the high street bookmakers. She allows herself to take a £5 note to place a bet on football, and tells her partner what she is doing. Offline gambling to her is very different and has natural social protections which stop it getting out of hand. People can see what you are doing. Everything is anonymous online.

## 5. Effectiveness of GAMSTOP

As is noted at the end of the last section, we tailored the effectiveness and impact survey to address key themes that emerged from interviews, in addition to questions required to address the core research brief.

This survey was both longer and required more thought and reflection on the part of respondents than the demographic survey. As a result of this, we expected and received fewer responses to this second survey (1,703 responses).

Our email invitation to users included a warning to inform respondents of the potential risk that the survey questions might trigger a traumatic response. All survey questions were voluntary, giving respondents the option to skip over any questions that they did not wish to complete for this reason. We are unaware of any respondents having traumatic responses during the process of completing the survey. Some partially completed the survey (i.e. did not reach the final question and select 'Submit'), which might be a result of the time needed or complexity as well as some who may have started to find it challenging and decided to stop. These partial responses are not included in our analysis. We trust that those that may have stopped for this reason did not suffer any ill-effects. In response to our email invitations to take part in the survey, we received three responses from consumers who felt it was 'inappropriate' or 'irresponsible' to contact users and remind them of their gambling. This correspondence was passed on to GAMSTOP to consider whether there was a need to offer further support.

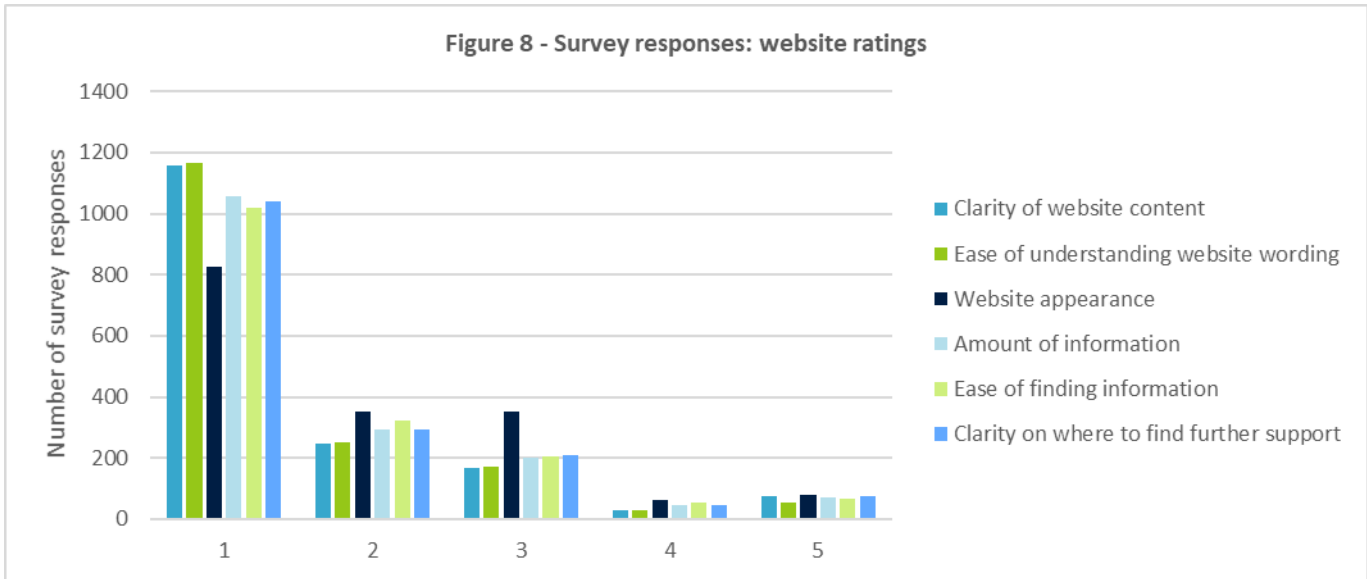
The second survey attracted 1,703 responses, giving 95% confidence as to accuracy with an error margin of less than 5%. As noted above for the demographic survey, we are stating the error margin in these terms in recognition of the risk of selection bias (see Appendix 1), however the calculated error margin is less than 2.5%.

### GAMSTOP website, sign up process and operations

94% (n=1,576) of survey respondents had an active GAMSTOP exclusion in place.

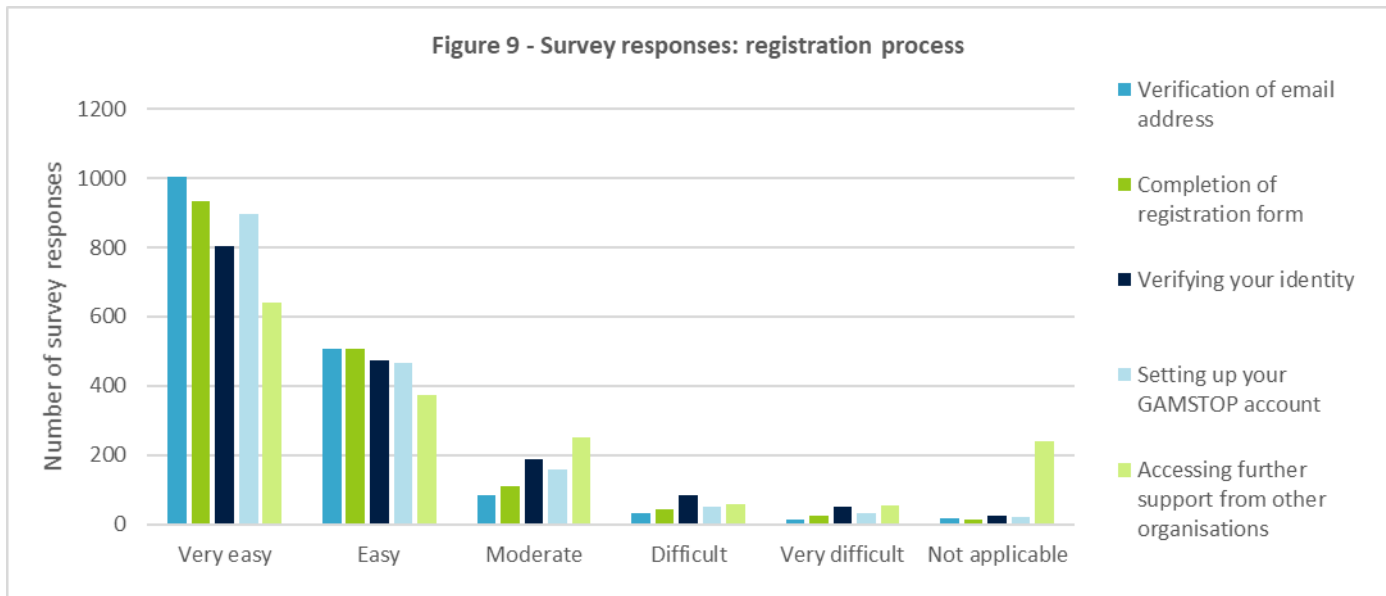
The survey asked users to score the GAMSTOP website on a range of factors with 1 being the most positive and 5 being the least (we interpret 3 as neutral). The chart below shows how users generally had a favourable view of the website but with website appearance being rated the lowest of the attributes included in the question. Between 69% (n=1,159) and 70% (n=1,166) had a strongly positive perception (score of 1) of the clarity of the website and the ease of understanding of the website wording respectively. 61-63% (n=1,056, n=1,020, n=1,038) of respondents gave the most positive score for the amount of information, the ease of finding of information and clarity on where to find further support. Only 49% (n=824) of users gave the most favourable score for website appearance, showing a clear discrepancy between this as compared to other features. These findings reflect interview feedback that users clearly understood what they were signing up to but felt the website could be improved to be more engaging.

*Users report a positive experience of using the GAMSTOP website and the registration process. There is an opportunity to improve further on website design.*



Over three quarters (77%, n=1,294) of users registered with GAMSTOP on their first visit to the website. Of those that did not, the majority (58%, n=241) felt they needed more time to think about it. 22% (n=93) were either unable to sign up or did not understand the sign up process, 10% (n=42) didn't think GAMSTOP was for them and 9% (n=38) felt that they needed more information.

The survey also asked users to rate the stages involved in the registration process. The results show that most users found the process very easy but with accessing further support and identity verification being the least easy steps to complete.



The table below shows an analysis of the proportion of respondents who rated each stage ‘easy’ or better:

Registration process stage	Respondents who found this ‘easy’ or ‘very easy’
Verification of email address	91% (n=1,508)
Completion of registration form	89% (n=1,440)
Verifying your identity	79% (n=1,276)
Setting up your GAMSTOP account	84% (n=1,362)
Accessing further support from other organisation	63% (n=1,015)

These ratings are in line with feedback from two interviewees, who found the ID verification stage of registration particularly difficult and frustrating. The ratings were consistent across age groups, indicating that no particular age group found the process easier or harder. 15% (n=238) of respondents answered ‘Not applicable’ in relation to accessing further support from other organisations. It is challenging to interpret what this means – users could have either not wanted further support or did not see any signposting to further support by responding in this way.

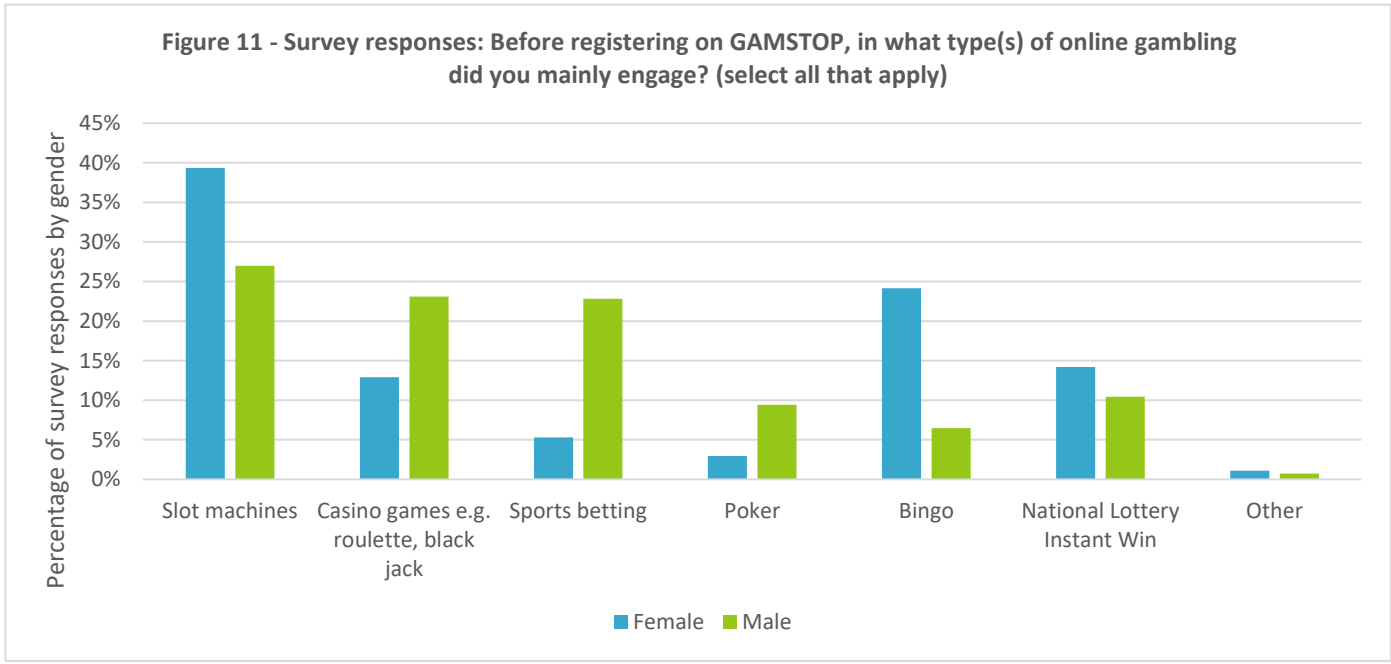
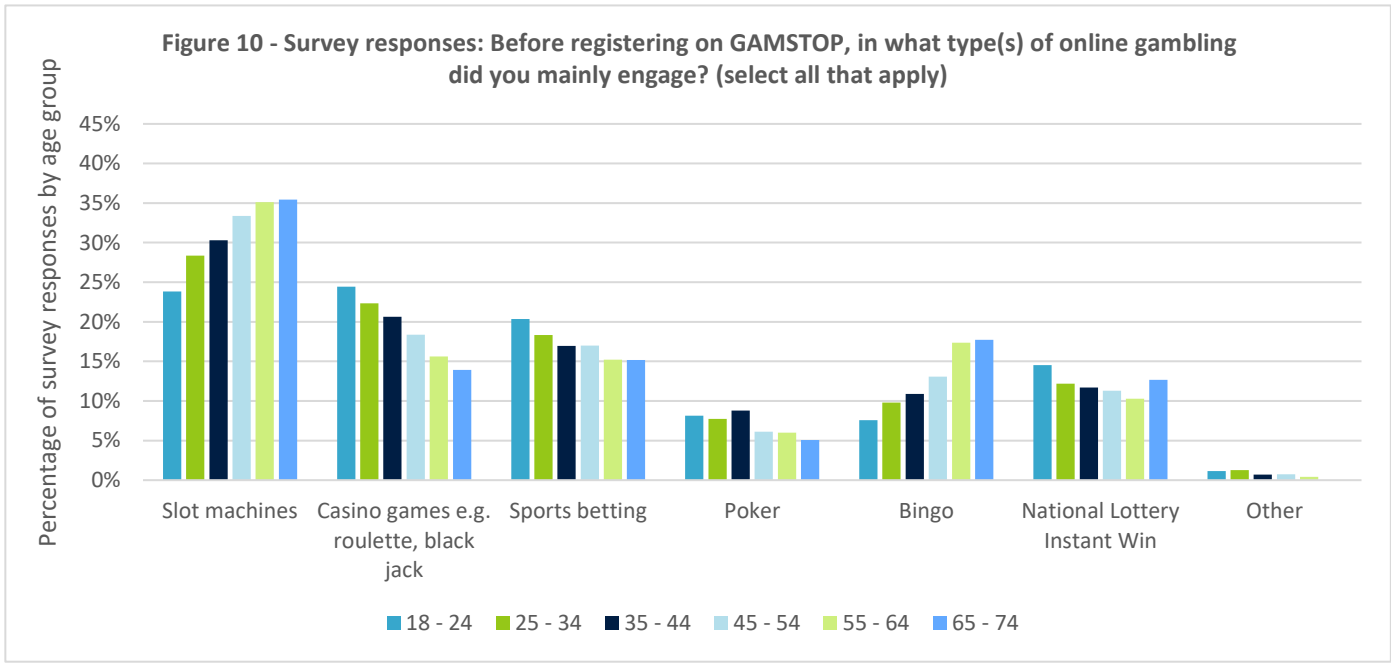
Some 21% (n=358) of users had used the GAMSTOP contact centre. The majority of users who has used the helpdesk felt the staff were friendly and knowledgeable and found that their inquiry was dealt with effectively and efficiently. However, only 41% (n=146) were clearly directed to further support and 23% (n=82) responded that they had not been directed to further support. The remaining user responses in the range between those extreme positions could indicate that they had been offered signposting to further support but had not taken this up, that signposting was not appropriate for their inquiry, or that the signposting to further support was given but was not clear. It is also important to consider protocols for handling inquiries: many users contact the helpdesk expressing anger that their ban cannot be lifted, and signposting to support in this instance may be challenging.

### Types of gambling

Survey users were asked which types of gambling they engaged in before registering with GAMSTOP. Here we can see some patterns emerging across gender and age groups. Older consumers and females are more likely to play slot machines and Bingo, whereas younger age groups and males are more likely to play casino games and partake in sports betting. This also fits in with the demographic data from the first survey showing larger proportions of older women and younger men registering with GAMSTOP.

*Consumers report engaging with a wide range of gambling types, although slot machine games were a particularly prominent category, and especially for older and female respondents. Younger consumers were more likely to participate in casino games and sports betting.*





**We return later to analysis of the effectiveness of GAMSTOP’s service, however, we note that there was no particular change in pattern of reported success for any given category of gambling shown above.**



*“I had to give further information and I didn't feel the process was clear enough.”*

### **Illustrative case study 5**

Katya is 56. She works in an IT department, and lives on her own. She initially started gambling online when she felt stressed, as a way of relaxing. Gambling was a pastime but never felt like an addiction: it had never resulted in significant losses. She maintained a strong social life and good friendships. Two or three times a month she would play Bingo in town with her friends.

During national lockdowns resulting from the Covid-19 pandemic, Katya felt bored at home. She was unable to socialise, and felt isolated and in need of some excitement. She began to increase her visits to online gambling websites. After a few weeks, she began to feel stressed and anxious: she realised that her losses were beginning to mount up, and she was unable to concentrate on anything other than gambling without feeling that she was missing the thrill. Katya began to realise that she had a problem, and she tried installing an app on her phone to block access to gambling sites. That helped for a short while, but she just moved on to playing on her desktop computer. This was a particularly dangerous change: Katya was working from home, and began to keep an online casino open in a browser window alongside her work. Her work started to suffer.

Katya had never been addicted to anything else so she was surprised when she became addicted to this. She wasn't enjoying the games anymore and was losing more than she could afford: she was starting to be living off her savings. She found a link to GAMSTOP on the casino website that she mainly used and decided to register for a self-exclusion.

Now that the exclusion is in place, she feels it works well. GAMSTOP has stopped her online gambling. She buys a lottery ticket once a week when she goes shopping but doesn't engage in any other type of gambling. This is the first time she has ever spoken to anyone about her gambling: she still feels too ashamed to tell her family.



## Reasons for registering

The charts to below show user motivations for registering with GAMSTOP. Both questions give the options for multiple responses.

56% (n=1,287) of users wanted to stop online gambling with a further 8% (n=187) wanting that outcome, but to leave open the option for gambling in-person. 59% (n=418) of female respondents were hoping to stop online gambling, compared to 55% (n=827) of male respondents. Men were more likely to be looking to stop gambling altogether and women were more likely to want to take a short break from gambling.

*Consumers have a broad range of objectives. Whilst many want to stop online gambling, a significant minority simply want a short break or to be empowered to make safer choices to continue gambling in other ways.*

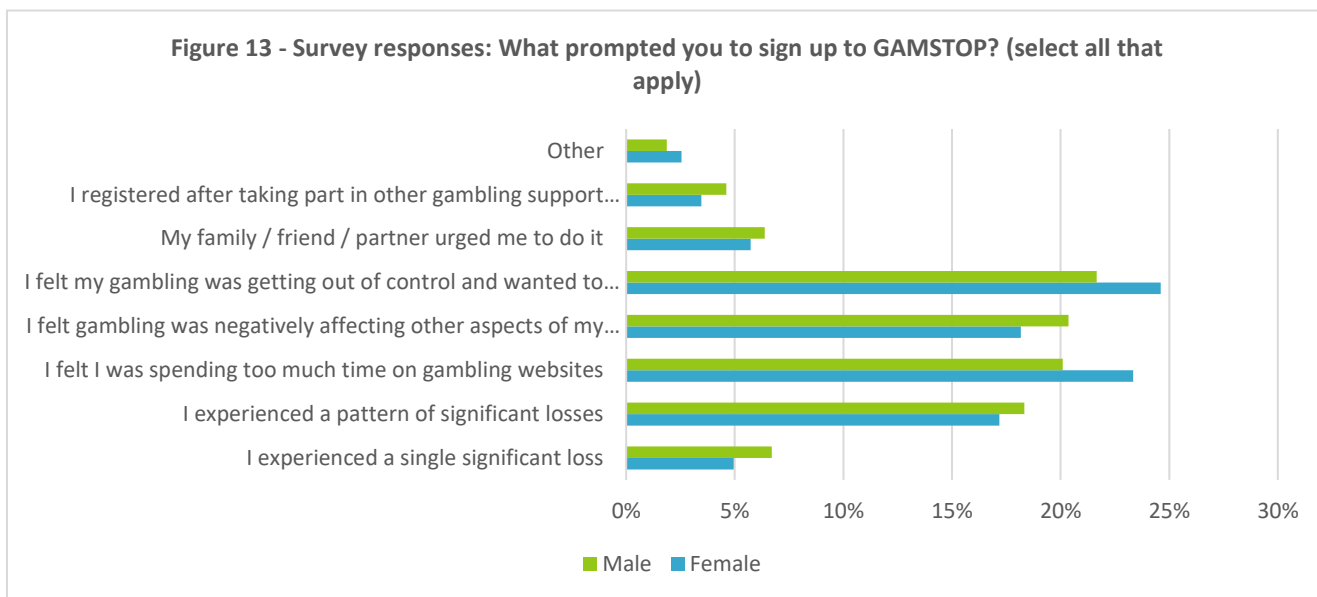


Across the age groups, again the majority were hoping to stop online gambling. 60% (n=342) of 45-54 year olds expressed this view compared to 52% (n=257) of 25-34 year olds. The age group with the largest proportion wanting to stop gambling completely was 25-34 year olds (24%, n=119). 10% (n=9) of 18-24 year olds wanted to stop online gambling but maintain access to in-person gambling options and between 12-17% across all age groups wanted to take a short break from gambling.

*Whilst financial losses are a key motivator, other factors including the amount of time spent on gambling and negative effects on wellbeing are of similar importance.*

The question on prompts to register attracted, on average, 2.6 choices from each respondent, indicating that consumers will choose self-exclusion for a combination of reasons. The most common responses for the trigger point for registering were feeling that their gambling was getting out of control (23%, n=1,018) and that they were spending too much time on gambling websites (21%, n=953). However, we note that, if the two financial loss-related options were to be aggregated, they would be marginally more frequently reported than these non-financial triggers. We also note that 'loss of control' could also include financial issues. More responses were received for a long term pattern of losses (18%, n=813) rather than a single loss (6%, n=286), which is in line with

the stories that we heard during the interviews. In the survey free response section for reasons for registering other than those listed, three users reported contemplating or attempting suicide prior to self-exclusion.



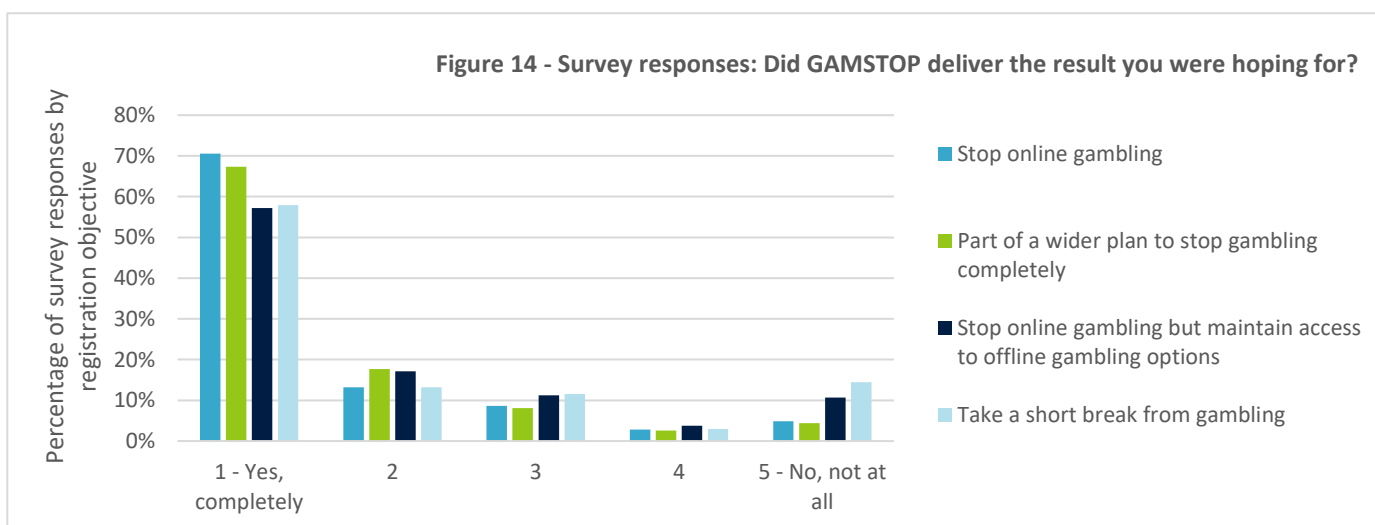
### Effectiveness and effects of the service

The overarching question being assessed in this evaluation is whether GAMSTOP is effective. To answer this, we have looked at whether users feel the scheme has delivered their intended outcomes, and consumers' perception of changes in their wellbeing after self-exclusion.

*GAMSTOP delivered the desired outcome effectively for the vast majority of consumers. It is particularly effective as a tool for stopping online gambling and as part of a broader plan to abstain from all forms of gambling.*

### Achievement of consumer objectives

The chart below scores GAMSTOP's achievement of consumers' intended outcomes from 1 (completely effective delivery) to 5 (outcome not delivered at all). This shows that GAMSTOP is most effective for users whose aim is to stop online gambling altogether (84% (n=1,075) intending that outcome report it to be



effective) and is least effective for those looking to take a short break from gambling (71% (n=216) intending that outcome report it to be effective), although that is still a clear majority of the group. This could be a result of having a minimum exclusion period of six months, which may be viewed as too long a period of time for a short break.

The charts below indicate that the service is, broadly speaking, equally effective for both males and females and across age groups. 55-64 year olds report finding the service most effective (72%, n=177 scored 1). 18-24 year olds have the smallest proportion (2%, n=1) expressing that GAMSTOP is not at all effective compared to 11% (n=5) of 65-74 year olds.

Figure 15 - Survey responses: Did GAMSTOP deliver the result you were hoping for?

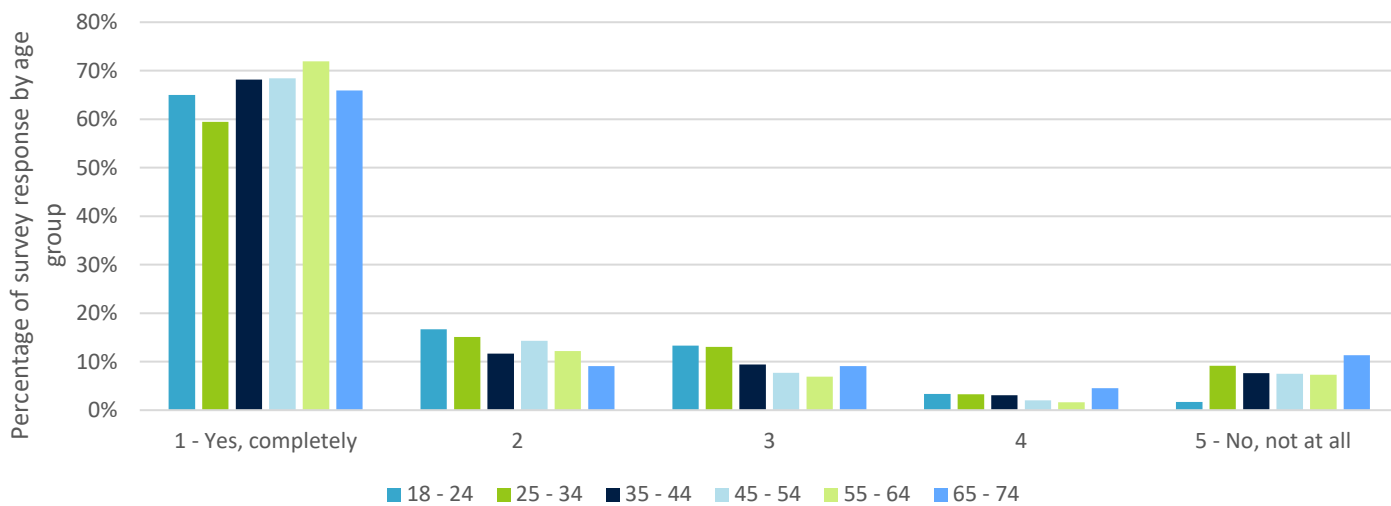
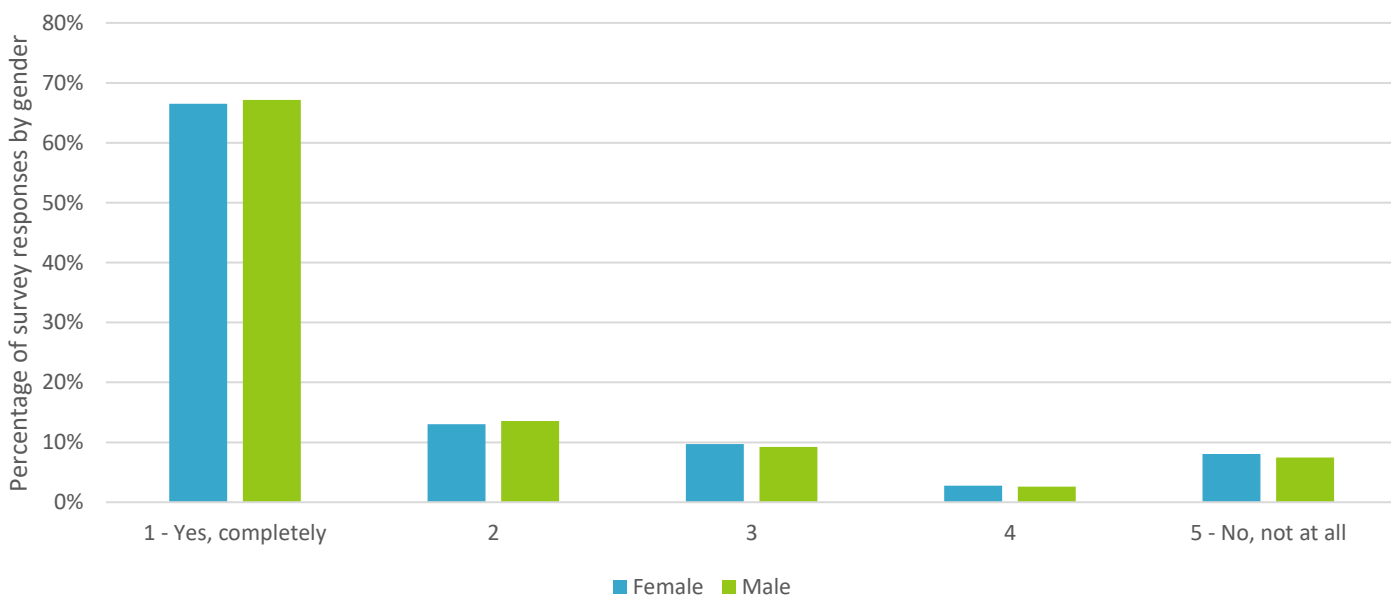


Figure 16 - Survey responses: Did GAMSTOP deliver the result you were hoping for?



Genders other than male and female and the under 18 and over 75 age groups have been excluded from these charts as the limited number of responses in these categories makes presentation challenging.

*GAMSTOP is reported as highly successful across age groups and genders and for all types of game*

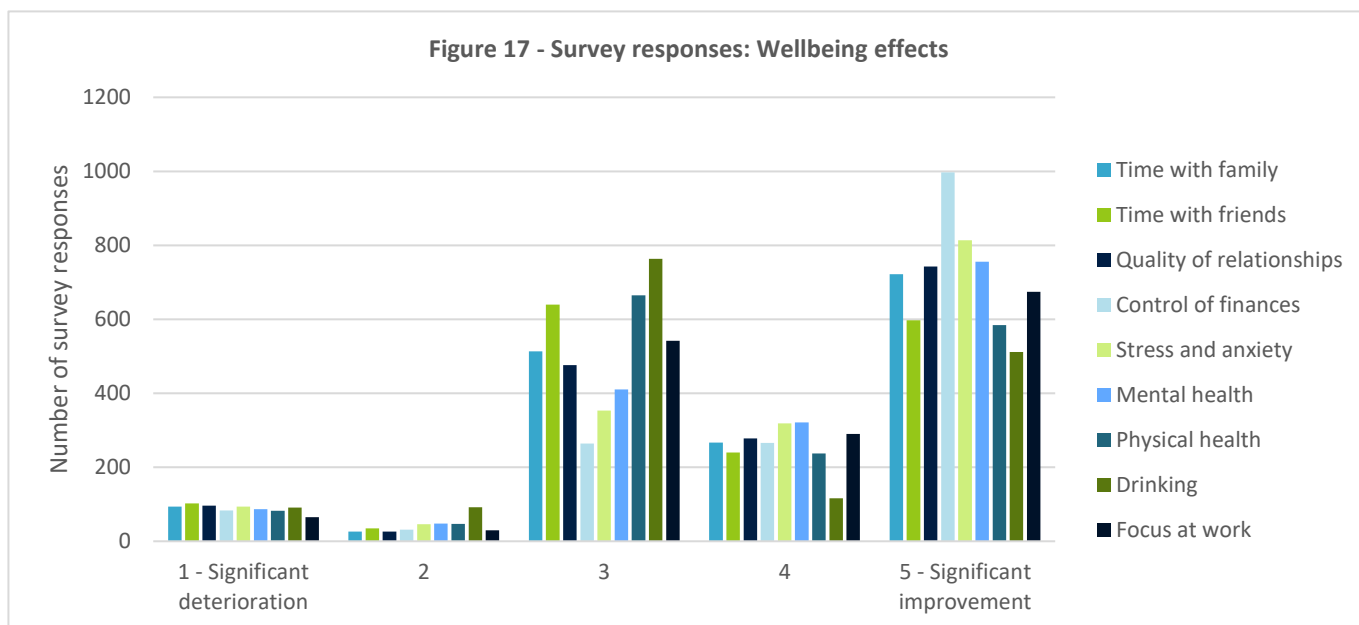
We analysed the responses above against types of game reported as regularly used prior to exclusion. In all categories of game, between 79% and 80% (n=3,107) of respondents reported that GAMSTOP was successful (giving a response of 1 or 2 on the given range). It is notable that there is not a particularly significant difference in responses to the effectiveness question by age group or gender.

### Wellbeing effects after self-exclusion

When looking at wider life changes as a result of signing up to GAMSTOP, the majority of responses were positive. The biggest thematic impact was linked to personal finances, with 77% (n=1,263) of survey respondents feeling more in control of their finances after registering with GAMSTOP.

Other key themes included notable improvements in stress and anxiety (70%, n=1,133 reported an improvement), quality of relationships (63%, n=1,021 reported an improvement) and ability to focus at work (60%, n=964 reported an improvement).

30% (n=497) of respondents had been registered for less than one year. Given that some of these issues may be expected to require time before improvements would be noticeable, it is striking to see such consistently high reports of positive effects following registration.



As we expected based on interview findings, there were lower improvements in relation to consumption of alcohol (40%, n=628 reported an improvement, with 48%, n=763 reporting a neutral effect), although we noted that 38% (n=184) of women reported drinking significantly less compared to 30% (n=314) of men. We expected this, given that excessive consumption of alcohol did not appear to be a significant risk factor for interviewees.

We noted, amongst other features, that there was relatively little difference in reported changes in mental wellbeing based on gender: 51% (n=535) of men and 50% (n=258) of women felt much less stressed and anxious, and 47% (n=496) of men and 46% (n=241) of women reported that their mental health was much better.

84% (n=1,352) of respondents reported feeling safer from the negative effects of gambling, with 67% (n=346) of female and 66% (n=690) of male respondents strongly agreeing on this point. Similarly, 84% (n=1,070) report feeling more in control of their gambling choices, with 70% (n=367) of female and 65% (n=678) of male respondents strongly agreeing on this point.

**On average, respondents each selected five positive changes out of the list of nine options provided in the question.**

Some indicators show more neutral results (notably time spent with friends, physical health and consumption of alcohol). In the case of physical health, 51% (n=821) of respondents reported an improvement, whilst 41% (n=665) reported neutral effects.

Few respondents reported negative changes in any wellbeing factor after self-exclusion. For example, only 7% (n=83) of respondents reported feeling less in control of their finances. That level of negative change in wellbeing is broadly consistent across all categories shown.

In free response text boxes seeking other feedback, and questions around the effectiveness of communications, users typically felt that GAMSTOP should advertise more to raise the profile of the scheme. This echoes findings from interviews, in which we regularly heard the view that GAMSTOP could do more to raise awareness. It will be interesting to see how the recently-launched 'Talk Ban Stop' campaign might address that suggestion.

*GAMSTOP has supported a significant improvement in consumers' financial and mental wellbeing. 84% of respondents report feeling safer from the negative effects of gambling.*

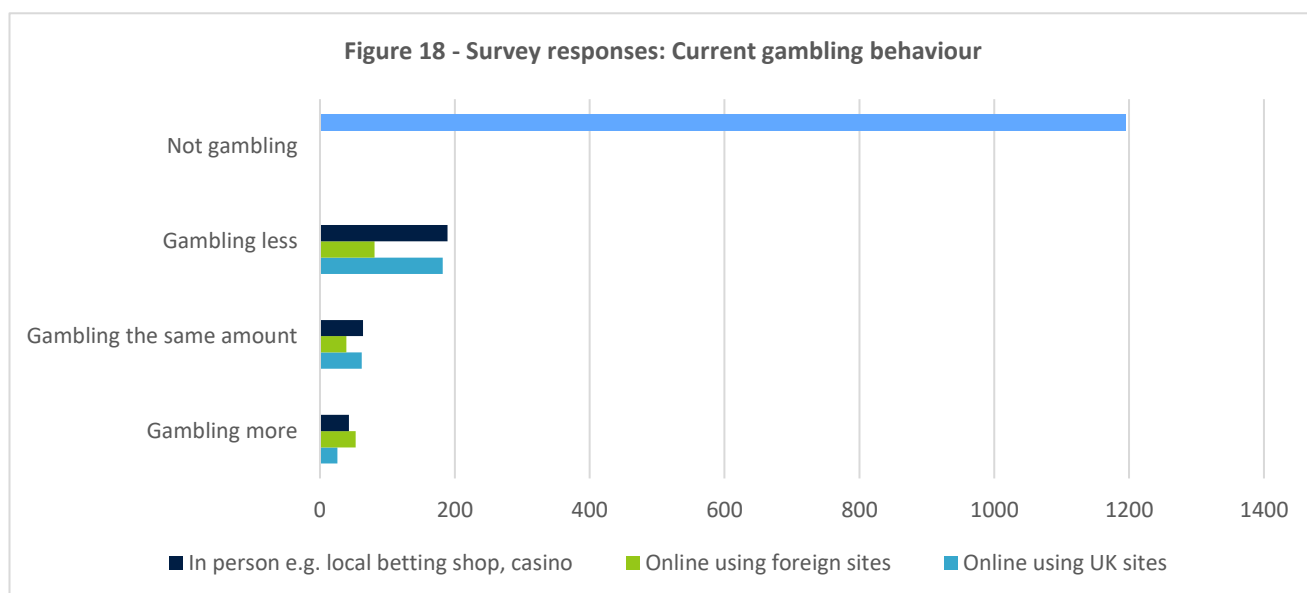
*These improvements are particularly striking given that 30% of respondents had been using GAMSTOP for less than one year: positive impacts appear to have been very quickly achieved.*

### Current gambling behaviour

The responses on current gambling highlight that the vast majority (82%, n=1,377) of consumers have stopped gambling or are gambling less than they were on UK websites. Very few of those who were continuing to gamble online using UK websites were doing so at the same level or more than prior to self-exclusion (5.2%, n=88 of respondents). We found only 32 respondents who reported gambling less on UK websites but increasing use of other gambling options that are beyond GAMSTOP's control. This suggests that there is relatively little evidence of displacement (i.e. closing off online gambling options but creating an increased problem on other platforms). Only 9 respondents reported increasing gambling across all platforms since choosing to self-exclude with GAMSTOP.

*82% of GAMSTOP consumers have stopped or reduced their gambling on UK operator sites.*

*65% of consumers who continue to access gambling options report that they feel safer from negative effects of gambling and 61% feel that they achieved what they wanted from using GAMSTOP.*



Respondents who continue to gamble had broadly the same pattern of intended outcomes as the broader data shown earlier. We note from our interviews that it is not a safe assumption that those who are continuing to gamble using UK-regulated websites are an indication that GAMSTOP's blocking system has failed. We are aware of approaches that some consumers have taken to work around GAMSTOP that could not be prevented by the self-exclusion scheme<sup>16</sup>.

Of the 471 respondents who are continuing to gamble, 274 reported feeling both safer and more in control of their gambling, with 308 reporting that they feel safer (whether or not they feel more in control). This is an important finding in light of GAMSTOP's aim to facilitate its consumers to make safer choices in relation to gambling. 291 of this group (61%) reported that GAMSTOP had achieved their intended outcome.

<sup>16</sup> As noted elsewhere in this report, we chose to exclude specific questions on work arounds in order to avoid divulging these approaches to consumers who were endeavouring to avoid finding out about them.

Interestingly, only 17 of the respondents who are continuing to gamble indicated that they had accessed support from other organisations, and 49 had asked a friend or family member for help. Hence, only 3.7% have sought help from specialist organisations. Some have used personally-imposed budgets, gambling venue exclusion schemes, bank account transaction blocks and similar practical (self-imposed) measures. 124 respondents who had continued to gamble indicated that they hadn't accessed support for reasons including that they weren't aware any support was available or that they didn't know how to access it. The 76% (n=358) of this group who had not accessed other forms of support contrasts with the wider data, which shows that 30% of all respondents had not accessed support of any kind before or after registration<sup>17</sup>. 30% (n=484) of respondents had accessed support from family and friends.

*Relatively low uptake of support services amongst those who have continued to gamble after self-exclusion highlights the importance of signposting and creating easy access to other organisations that can help. There is an opportunity to ensure that consumers are clearly and prominently signposted to various forms of support. Some may need reminders to emphasise the availability of help.*

Of those who are gambling less, we can see that they tend to be either gambling in-person (which we know from interviews tends to be viewed as more easily controllable) or on UK Gambling Commission-regulated websites (which we know from interviews may be a result of introducing supervised gambling in order to reduce rather than stop the activity). For those still accessing regulated sites, the majority are gambling less, indicating that GAMSTOP appears to be helping them to reduce their gambling<sup>18</sup>. It is possible that the reduction observed for in-person gambling may be influenced by lockdowns during 2020/2021 and the resulting closure of betting premises: this survey was first issued for responses at the beginning of April 2021.

Feedback in free response boxes seeking suggestions on how GAMSTOP might improve showed multiple calls for the scheme to widen its remit to integrate with operators that fall outside the regulatory ambit of the Gambling Commission. This feedback typically focused on websites hosted in other jurisdictions that are accessible from within the UK. These responses echo the views we found during interviews. The data shown above highlights that unlicensed gambling websites may pose a threat to recovery for some consumers. We know from interviews that they create temptation for those who have chosen to abstain.

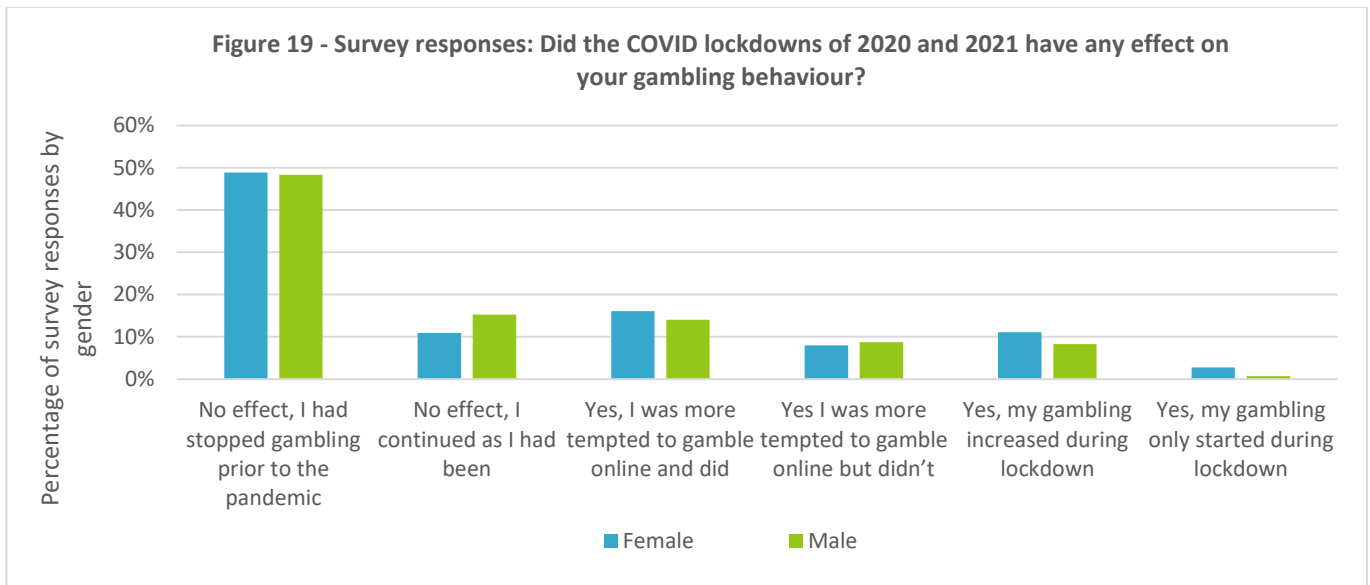
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<sup>17</sup> A number of respondents left options for support that was available blank, which we are inferring means that they did not access that type of support in this analysis. 290 respondents selected that they 'had not accessed any other form of support' (17% of the population as opposed to the 30% that either selected that option or left the question blank).

<sup>18</sup> As we noted earlier, we have fed back in detail to GAMSTOP on the methods that some users have put in place to circumvent self-exclusion, which we identified during some interviews. It is not, therefore, surprising to see that some consumers have continued to access websites that integrate with GAMSTOP.



## Impact of COVID

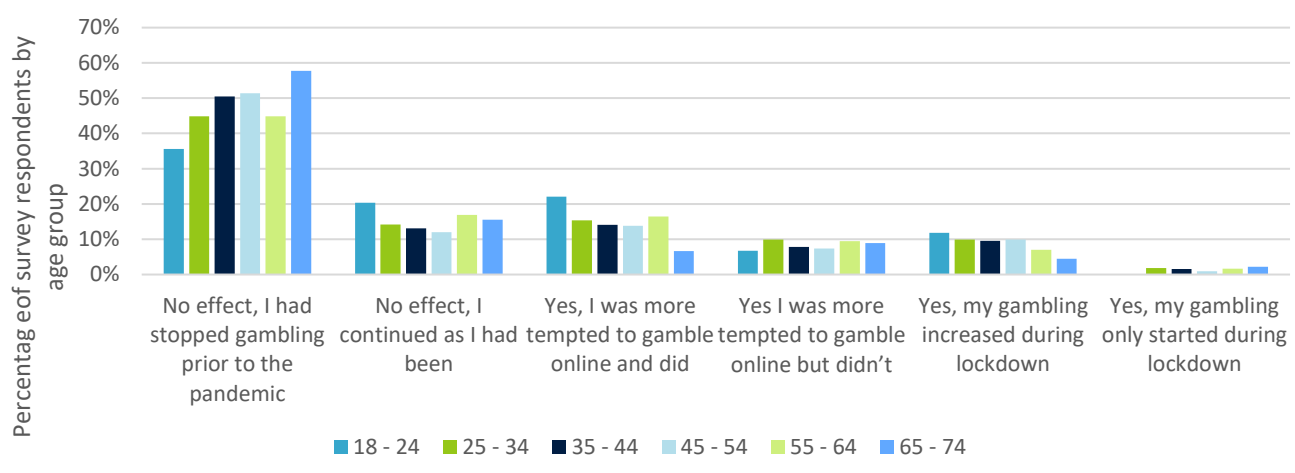


Our interviews revealed a broad range of views on whether COVID and lockdown had impacted gambling behaviour. Some expressed only starting gambling during lockdown, whilst others felt it had not had an effect as they had either addressed their gambling previously, or had less time to gamble during lockdown due to increased responsibilities at home, such as childcare. The chart shows that the largest group of respondents had stopped gambling prior to the pandemic, but that women were more affected by lockdown than men: they show a higher proportion of response of being more tempted to gambling and doing so, for gambling increasing in lockdown and for gambling only starting during lockdown. This is in line with wider Gambling Commission data from April 2020, which showed an increase in female participation in gambling.

*Although many consumers had self-excluded prior to March 2020, it is notable that some felt increased temptation to gamble, and succumbed to that, during lockdowns. Younger consumers were particularly likely to be affected.*

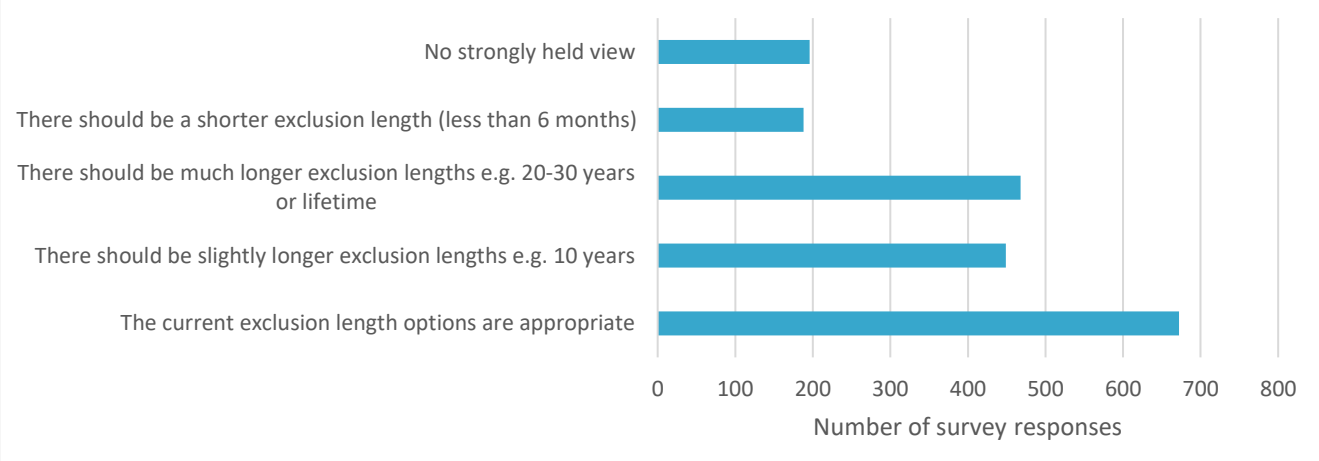
The data (Figure 20) also shows how the younger age-group, those aged between 18 and 24, were also more impacted by lockdown than other age groups. Responses from younger consumers show higher proportion stating that their gambling increased during lockdown or that they were more tempted to gambling during this period, and did so. They also show the lowest level of respondents stating that they had stopped gambling prior to the Covid-19 pandemic. Perhaps this is a reflection of their young age as it is likely that they may be relatively new to gambling and therefore may have had insufficient time to address the issue. It might also be an issue related to their potential exposure to larger numbers of advertisements on social media channels, which was a consistent theme from our interviews in respect of the issues arising during lockdown. In support of this assumption, we can see that the older age group, 65-74, show the highest proportion of responses asserting that lockdown had no effect on their gambling as they had stopped prior to the pandemic.

**Figure 20 - Survey responses: Did the COVID lockdowns of 2020 and 2021 have any effect on your gambling behaviour?**



### Exclusion lengths and other feedback

**GAMSTOP currently offers three exclusion lengths – 6 months, 1 year, 5 years. What is your opinion on the exclusion lengths that are available? (select all that apply)**



The largest group of users felt that the current exclusion length options were appropriate. Overall, the survey responses reflect the range of views heard in the interviews. A few felt that shorter options were needed and stated that they would not have signed up if a six month exclusion was not available. A significant proportion of interviewees indicated that they would have wanted a lifetime ban: the survey responses show a broader range of views, however we note that 46% (n=917) indicated a preference for slightly or much longer periods to be made available (compared to 34% (n=672) of responses stating that the current exclusion lengths are appropriate).

*GAMSTOP consumers see the value of both long and short-term exclusions, which aligns to the range of intended outcomes we identified. There is a clear call for more exclusion length options to be offered.*

The survey gave users the option of free responses for some questions. This included feedback on GAMSTOP and an opportunity to share any further information as part of this research. Some users took this opportunity to vent their frustration that their self-exclusion was still in place and there was nothing they could do about it. These users suggested that there should be an option to remove the ban at the users request or a 'cooling-off' period after the sign-up during which the ban could be lifted if the decision to self-exclude was made in haste or state of inebriation (amongst other factors). Others suggested having more flexibility on the exclusion so that it only applied to certain types of online gambling (e.g. blocking slots but allowing sports betting), although the technical challenges of this proposal cannot be overestimated.

### What does this tell us about GAMSTOP's effectiveness?

The second survey was carefully planned, taking findings from interviews, to address three key aspects of our research brief (see Section 1):

- 1) Consumer motivation to register with GAMSTOP;
- 2) Consumer experience of GAMSTOP provision; and
- 3) Consumer perception of the impact of GAMSTOP's provision.

Findings from interviews were essential in planning this survey: for example, we were able to broaden the range of potential motivating factors beyond financial losses to a much broader range of issues, and we were able to make more specific enquiry into a range of potential impacts noted consistently by interviewees, amongst others.

Drawing our key findings together into the three headings:

#### Consumer motivation to register

Consumers had a **broad range of motivating factors and desired outcomes** at the point of registration. Many wished to stop online gambling altogether, and this is consistent with the findings of our demographic survey that over 70% chose the longest available exclusion period. Given our interview findings, we were careful to distinguish between a desire to stop *online* gambling whilst keeping other options open from those that wished to abstain fully from all forms of gambling. It is interesting that **a higher proportion of male than female respondents were seeking full abstinence** at the time of registration, and that **more female respondents were seeking to put a stop to *online* gambling activity, whilst keeping other options open**. We note earlier in our interview analysis the social aspect of in-person gambling, which may be of particular significance for certain types of game (e.g. Bingo).

*Consumers have a wide range of motivating factors including financial losses and broader wellbeing concerns. Their intended outcomes range from taking a short break, to enabling safer choices for ongoing gambling activity to abstinence from all forms of gambling.*

During the course of our interviews, we noted that certain types of gambling were consistently cited as high risk by particular demographic groups. Our analysis highlights some striking trends around groups particularly at risk from problematic gambling and the types of game from which they appear to be at greatest risk, notably:

- A significantly higher proportion of **female consumers report regular use of slot machines and Bingo games** than male users, who tend to have more consistent reports of issues across all types of gambling. However, we note that **male consumers are much more likely to have issues relating to Casino games, sports betting and Poker** than female consumers;
- **Slot machine games are the most frequently cited type of gambling in the background of consumers who have gone on to self-exclude** through GAMSTOP. This aligns strongly to interview findings, which highlighted that there are virtually no barriers to participation in this type of game (unlike sports betting and poker, for example, where consumers feel that a lack of specialist knowledge would put them at a disadvantage). Indeed, reports from some interviewees of time-limited offers and **timer systems applying pressure to 'have another go' on slot games appear to make them particularly dangerous** for people susceptible to addictive behaviours;
- **Older consumers are much more likely to report slot machines and Bingo as part of their pattern of gambling** prior to self-exclusion. This aligns well to earlier findings in our demographic survey that female GAMSTOP consumers tend to be older than male consumers, as it is these categories of game that are also more prevalent amongst female consumers (see above).
- **Younger consumers are more likely to report casino games, sports betting and poker as part of their behaviour pattern prior to exclusion.** Again, this aligns well with the demographic survey data that shows a pattern of male consumers typically being younger than females: these categories of game are far more frequently reported by male consumers than female consumers.

*Our findings highlight particular risk factors that relate to consumers. We can see that younger male gamblers tend to make more use of casino and sports betting, whilst older female consumers tend to use slot machine games and Bingo. GAMSTOP may be able to use these learning points to target or focus its activity at high risk groups in future.*

This level of analysis might be useful to inform steps that could be taken to prevent harm in future and particularly may **enable GAMSTOP to target its outreach activity towards groups and types of gambling likely to pose greater risk.**

It is important for GAMSTOP to recognise that its **consumers may well wish to continue to gamble**, but not online. The solitary nature of online gambling was a theme in interviews, and the dangers of isolating oneself in an environment without social 'checks and balances' whilst exposed to risks of financial loss and stress, combined with the pressure of time limits that are included within some games may make online gambling higher risk for some people.

Equally, GAMSTOP can recognise that **a significant minority of its consumers don't wish to exclude themselves for long periods of time**: again, this particularly applies for some female consumers who wish to have a short break from online gambling, but to do so simply by registering in a single place.

Our findings on current gambling behaviours show that **the vast majority (82%) of GAMSTOP consumers have stopped or reduced their gambling activity.** The few that had increased their gambling activity tended to have done so using either operators outside the regulatory ambit of the Gambling Commission or by gambling in-person. Those that had reduced their gambling tended to be using websites that integrate with GAMSTOP or in-person gambling venues, which we know from

*82% of GAMSTOP consumers have stopped or reduced their gambling on UK-regulated websites since they self-excluded. 79% of consumers report feeling safer. The very small number who have not reduced their gambling have typically been using gambling options outside of GAMSTOP's control.*

interviews may be part of a plan to reduce their activity through supervised gambling with informal support from family and friends<sup>19</sup>.

Our enquiry into broader reasons for seeking self-exclusion supports the interview findings that it is not safe to assume that consumers' motivation relates solely to financial losses, although this is clearly an important feature of the background to decisions to self-exclude. There is more nuance to it, with a realisation of the amount of time spent on gambling websites and perceived damage to interpersonal relationships being prominent alongside financial losses.

Financial losses were found more likely to be a trigger as part of a longer-term pattern rather than a single major loss. This aligns to findings from our interviews, which highlighted that stress may actually relate to a loss of control over which 'cover story' has been shared with each friend or family member in addition to financial stress and a fear of being 'found out' and feelings of shame. These stress factors may also escalate into mental health issues and, potentially create barriers to seeking help. Relatively few consumers had registered as part of support from another organisation, but that aligns well with the earlier findings from our demographic survey that most consumers find GAMSTOP through their own internet searches or via the gambling company websites.

It is important to note that, on average, respondents selected 2.6 factors from the list, suggesting that the **motivations for self-exclusion may well include combinations of financial and non-financial reasons for most consumers as part of a complex web of gambling-related harm.**

GAMSTOP can build upon the lessons emerging from this analysis to ensure that it reaches out to people for a broad range of reasons in addition to responding to financial pressures. It might also benefit from taking steps specifically to target people seeking a short break, encouraging them to use a more comprehensive and effective blocking tool than the gambling companies own 'short break' systems. GAMSTOP should also consider taking steps to request as much prominence as possible on gambling company website pages that offer help to people who feel that they are developing a gambling problem.

The industry as a whole can learn from this that the risk flags to show that a consumer might be at risk are not purely linked to the value of their losses, but rather the frequency of their visits and the amount of time they spend on games.

*GAMSTOP may wish to consider how it targets its outreach strategy to cover motivations beyond financial losses and also to target people who are seeking short breaks.*

*It can also endeavour to be given more prominence as a source of help on gambling operator websites.*

<sup>19</sup> As noted earlier, we have reported on the nature of strategies used based on our interview findings. It was deemed to pose a safeguarding risk to include detailed questions that might have disclosed these approaches to others who were seeking to avoid finding out how to circumvent the exclusion.

*“Online slots have too high a single spin value at £5+ per spin - easy to spend 2-5k in an hour”*

### **Illustrative case study 6**

Dave is in his fifties and works on and off as a builder. He has been living with his current partner for one year. She is unaware of his gambling history, but has been concerned for his wellbeing, as she has noticed changes in his mood. He has always gambled as a social activity, particularly focusing on sports betting. He regularly watches football and horse racing with friends and the group will often place bets on the outcome of events. Since online gambling became possible, his activity increased from placing single bets with a bookmaker before joining his friends in a pub to watch the event to placing multiple bets before and during the game using a mobile app. As his use of online gambling sites increased he also became aware of online slot machines, and started to use those at times when he was not betting on sports. He would gamble online late at night when he was alone. He thinks gambling runs in his family – his uncle had a serious gambling problem. With online gambling, he felt that his gambling really spiraled out of control after he found online slot machines.

Dave always thought of his gambling as part of a social activity, but realised that he had a serious problem after he had lost £50,000 on online slot machines in a three month period. This eliminated his savings and left him struggling with household bills. He began to feel anxious and was withdrawn and, at times, depressed. His partner started to ask what was going on, and he realised that the relationship was at risk. He went online to search for help and read about GAMSTOP on a Gamblers Anonymous social media group.

Dave opted for a six month exclusion through GAMSTOP which ended last year. He feels he should renew for another formal exclusion period, but is not ready to rejoin the scheme yet for that length of time. He says that GAMSTOP was effective in stopping his gambling, and gave him the space he needed to take action. He still sees sports betting as a social activity that he doesn't want to eliminate fully. He feels that a shorter exclusion option might prompt him to renew his exclusion.



## Consumer experience of using GAMSTOP

There are three particular areas of focus around consumer experiences:

- The process of initial registration for the self-exclusion scheme;
- The experience of any subsequent contact consumers had with GAMSTOP (primarily relating to the helpline); and
- The consumer perception of GAMSTOP's website overall.

*At least 79% of GAMSTOP consumers found it easy or very easy to use the service. Those that have contacted GAMSTOP after registration were typically pleased with their experience of the helpline.*

In relation to the registration process, we note that the majority of respondents had a positive view of the registration process and website, with **at least 79% reporting that all stages of registration up to the creation of a user account were 'easy' or 'very easy'**. The largest positive response related to verification of the consumer's email address (91%), and the lowest positive response (79%) related to the identity verification point. This aligns with a number of the interviews we completed, as we noted that if there had been a stage of the process that had been more difficult for users it tended to be the identity confirmation stage. GAMSTOP has, relatively recently, introduced a new system for this part of the process, and as such it is possible that some consumers had struggled with the older system. It is clear that the identity confirmation check is a critical part of the registration process for ongoing monitoring, and we note from interviews that consumers who may be at a time of chaos or crisis may not be able to recall detailed personal information: GAMSTOP can help be ensuring that this part of the process is as clear and supportive as possible.

After user accounts are set up, we noted that a significantly lower proportion of respondents reported having found it easy to access further support from other organisations (63% found this 'easy' or 'very easy') and a relatively large number of 'not applicable' responses emerged. This might be because people weren't looking for support elsewhere, which aligns with responses to questions relating to the use of other support organisations/services (shown in Appendix 4). This highlights that a significant number of GAMSTOP consumers do not feel that they require additional support beyond self-exclusion. Equally, this might indicate that some users had either not seen or not been adequately shown links to access other forms of support. GAMSTOP may wish to review the prominence of links to other support organisations in light of this, although clearly the majority gave a positive view of that part of the process. **It is particularly notable that consumers who have continued to gamble tend to have much lower rates of uptake on formal support services.**

*GAMSTOP is a potentially valuable source of information and signposting to other support services, particularly knowing that some consumers may have chosen not to seek support from other organisations. Ensuring that such signposting is clear and gives a broad range of options is important.*

21% of respondents had used the contact centre. Those that had done so typically felt that staff had been knowledgeable and had dealt with enquiries effectively. We know from our conversations with GAMSTOP staff that some users contact the helpline in a state of heightened emotion, regretting the decision to self-exclude and wishing to end their exclusion period early. From free text responses to our survey it appears likely that some people who may fall into this group were included in the survey responses, but we note the risk that some of this group may have chosen not to respond. However, it is interesting to assess this in light of some interviews which showed that some who call to request the end to and exclusion period may subsequently be grateful that the exclusion was not lifted as they realised that the call was made whilst they were feeling particularly tempted to gamble again.

Again, with the contact centre questions, we noted that only 41% of respondents indicated that they had been signposted to other sources of help and support, and 23% indicated that they had not been directed to other organisations. It may be that some of these instances relate to more emotionally charged conversations in which the helpdesk team found it difficult to make such suggestions. **GAMSTOP may wish to review its processes for ending calls and signposting to other sources of support** in light of this finding together with the knowledge that those most likely to be continuing to gamble tend not to be obtaining help.

Beyond these two key aspects of consumer experience, our review highlights that there is generally a **positive impression of the GAMSTOP website**, with at least 69% of respondents having a strongly positive impression of most aspects of the website, including content, ease of understanding, ease of finding information, amount of information and clarity on where to find other support. However, whilst perceptions of the appearance of the website were generally positive, this was noticeably less strongly felt than for other aspects. GAMSTOP may wish to undertake further review to consider ways to enhance the appearance of its website, whilst preserving the very good features of the existing content. The strongly positive response on ease of finding information about other support services is useful to note, given that this was highlighted as a point to consider for improvement from the registration process and helpdesk questions. GAMSTOP's theory of change includes emphasis on increasing knowledge and engagement. The website is a key tool for achievement of these outcomes. Overall, our findings show that **GAMSTOP's website contributes well towards these intended outcomes**.

*Feedback from interviews and the survey shows that there is scope for GAMSTOP to consider adjusting the appearance of its website to be as warm and supportive in tone and presentation as possible. Some consumers may be in a heightened emotional state when they access the website, so reassuring and encouraging content is important.*

### Consumer perception of the impact of GAMSTOP's provision

There are three key issues that are covered by our survey data:

- The achievement of the consumer's intended outcome;
- The flexibility of GAMSTOP's exclusion options to meet consumer needs; and
- Broader impacts and wellbeing impacts following self-exclusion.

*80% of consumers reported that GAMSTOP had achieved their intended outcome, and 79% reported that they now feel safer from gambling-related harm.*

First, we note that **the vast majority of respondents reported that GAMSTOP had delivered the result that they were hoping for** (which strongly aligns to the 82% reported as having stopped or reduced their gambling). Responses were particularly positive from those seeking to stop online gambling altogether and those wishing to achieve abstinence from all forms of gambling. A significant minority of those seeking to take a short break reported that self-exclusion had not been at all effective, and it would be interesting for GAMSTOP to undertake further analysis to explore how the scheme could be improved for this specific purpose.

*82% of consumers have stopped or reduced their gambling since registering with GAMSTOP.*

79% of respondents reported feeling safer after self-exclusion, with only 5.1% reporting that they felt less safe.

**The survey results show that GAMSTOP is equally effective for all genders and age groups.**

In light of GAMSTOP's emphasis on enabling choice within its theory of change, these findings show that **the service has sufficient flexibility to enable a broad range of consumer objectives to be achieved** towards safer gambling and the reduction of gambling-related harm.

GAMSTOP offers a range of exclusion lengths (during which it is not possible to terminate self-exclusion). Currently these are: six months, one year and five years.

Approximately 40% of respondents felt that the current options are appropriate, whilst nearly 12% did not hold a strong view on this point. Respondents to the survey who suggested changes to the exclusion periods typically felt that longer options should be available, although a significant minority (approximately 11.5%) felt that shorter periods should be offered. This adds an interesting contrast to the findings from interviews, in which many people expressed a strong view in favour of lifetime exclusions being made available, and some questioned the usefulness of shorter periods. However, a small number of interviewees did suggest that shorter period being offered encouraged them to 'try' the service when they might not have wanted to commit to a longer exclusion immediately. Our survey highlights that views are somewhat more complicated, in that a significant body of opinion would wish to see longer periods short of the 'lifetime' exclusion that many interviewees wished to see. **GAMSTOP might want to consider the feasibility of introducing longer exclusion periods as options beyond five years, but must not overlook the importance of shorter term exclusions for people who are not ready to commit to (or do not need) a longer timescale.**

*GAMSTOP has an important focus on facilitating safer gambling choices. Not all consumers wish to stop gambling altogether. More exclusion length options could be offered to broaden GAMSTOP's ability to support people who want short breaks, as well as giving longer term options for those who wish to stop.*

We also note that there were 4 responses requesting a 'cooling off' period after registration in which the exclusion could be cancelled, although this might have some dangers in light of interview findings that people who have suffered from gambling as an addiction may go through phases in which they could relapse, and they find the irrevocability of GAMSTOP a comfort.

Again, this has an important connection to GAMSTOP's theory of change in relation to enabling safer choices: for some consumers there is a strong desire to instigate a life-long exclusion and to abstain from all gambling, whilst others want a more flexible approach to enable them to reduce their gambling. There is something of a tension in the theory of change in this regard in that a significant number of consumers wish to use GAMSTOP to take away the potential to make a choice to gamble, whilst others wish to have a broader range of options including to continue gambling but with controls in place to improve their safety. On balance, the majority view seems to be that **GAMSTOP is delivering effectively in facilitating safer choices by its consumers.**

The final aspect of impact we considered relates to broader wellbeing of consumers. Our survey found that **consumers consistently report that they feel safer from the negative effects of gambling.**

This includes improved quality of relationships with friends and family (reported by 63%), being better able to focus at work (reported by 60%), having reduced stress and anxiety (reported by 70%) and having better control over their finances (reported by 77%).

Very interestingly, there were particularly strong responses in relation to improvements in:

- Mental wellbeing amongst older people;
- Improved ability to focus at work amongst 25 to 34 year olds;

- 55-64 year olds reporting that they felt more in control of their gambling and that they felt safer from negative effects of gambling; and
- Female respondents reporting that they were drinking significantly less alcohol.

Overall, these findings strongly align to other research that has highlighted these factors as potential harms of gambling. They also align strongly to the views emerging from interviews we undertook during this research.

GAMSTOP's theory of change places particular emphasis on reducing gambling related harm as one of its two key overarching impact targets. This study shows very strongly that **GAMSTOP is successfully achieving a reduction in gambling-related harm** with far-reaching positive impacts for consumers being clearly shown in our interviews and survey.

*“No access helped me go cold turkey, although I had no real issue I knew this was something I was starting to develop a habit for and stopped it from going further.”*

### **Illustrative case study 7**

Tom is in his early 30s. He works in a consultancy firm in London. He is married and has a toddler. He used to see his gambling as a relatively minor vice. He played a bit on fruit machines in pubs when he was at university and enjoyed poker online in his twenties. After losing around £5k in one month in his late 20s, he blocked himself from poker sites and stopped gambling.

When his dad was severely ill two years ago, the urge to gamble returned. Tom felt that he was seeking an activity to bring a thrill and enjoyment to his life. This time he mainly placed bets on football. Gambling became obsessive for Tom, and he started betting on teams he didn't support in leagues he didn't know, sometimes in other countries. He started to feel that he was missing out unless he had a bet placed on a match somewhere. Having placed bets, he began to stay awake at all hours to watch the matches.

He has a high-paying job and works long hours so already struggles with work-life balance. He started to feel tired at work and was struggling to concentrate. His losses were within his means, but he knew he needed to take action on his gambling when he realised how much time he was spending on keeping track of scores and the outcome of his bets. It was more the frequency of betting rather than the amounts being bet that raised the alarm for him. One day he realised that he had taken his child to the park to play but had spent all of the time placing bets and checking results. He realised that he was missing out on seeing his child grow up. He decided to seek help and found an online gambling support forum after an internet search. One of the members told him about GAMSTOP. He registered that same day for a one year exclusion period, which he felt was long enough to break his habit.

During the first few weeks after registering, he missed access to the sites but has been able to make a clean break from gambling since. He has been able to spend more time with his family and now enjoys watching football as a supporter.

## 6. Conclusions and recommendations

### *Concluding on our research brief:*

The foregoing sections show the conclusions emerging from each phase of our work. In this section we draw together the key findings and specific recommendations in relation to the four areas of our brief.

### *The demographic profile of registered consumers*

Our initial survey highlighted that **GAMSTOP is reaching a broad range of consumers, well-aligned to the broader population in terms of age, ethnicity and socio-economic status and with no apparent gaps**. There may be an opportunity to target certain groups likely to be at higher risk as part of a future engagement strategy. There are some notable features that take on particular significance in light of our later findings that GAMSTOP may wish to consider as part of its broader outreach strategy:

1. The majority of survey respondents were male, which is in line with GAMSTOP's existing user profile and the profile of self-exclusion schemes and data on gambling trends more generally. However, we note that our subsequent research highlights the particular risk for women in older age groups from slot machine games and Bingo in particular. GAMSTOP might use this knowledge to target female consumers who may be at risk of problematic gambling, and may wish to build this into its strategy for profile raising; and
2. GAMSTOP's existing data shows a large proportion of younger consumers, where our survey respondents tended to be more evenly distributed across age bands. Our data shows that younger consumers tend to be at greater risk from casino games, sports betting and poker games, which correlates to risk areas for male gamblers.

### *Consumer motivations to register with GAMSTOP*

Consumers report a wide range of motivations, with financial pressure or **losses from gambling being listed alongside a complex picture of other factors that link to gambling-related harm and impacts on affected others**.

There are a **variety of intended outcomes at the point of registration**, ranging from consumers who wish to abstain fully from all forms of gambling for the remainder of their lives to those who wish to take a short break.

Again, GAMSTOP may be able to use this knowledge to target its outreach strategy specifically towards these issues and particular needs. For example, **GAMSTOP needs to be prominent both for those searching for help to stop gambling as much as it needs to be for those wishing to have a break from gambling**. The organisation may wish to check and refine its marketing strategy to take account of this.

It is important to note that the majority of consumers find GAMSTOP on their own (i.e. without signposting from another source). For many, this involves an internet search, whilst others have been signposted by gambling company websites. GAMSTOP should consider whether it is possible to ensure that it has a prominent position on gambling-related internet searches, but also to **seek the most prominent position possible on gambling company websites as a source of help**. Indeed, the online gambling industry may wish to consider signposting consumers seeking a 'short break' to GAMSTOP rather than using their own systems, which we have identified in this study, particularly from interview evidence, as being a relatively ineffective solution to that need.



### ***Consumer experience of GAMSTOP provision***

The overwhelming majority of consumers report a positive experience from visiting GAMSTOP's website, to registration for self-exclusion and then on to contact with GAMSTOP's helpdesk team. There appears to be potential to focus any work to improve consumer experience further upon two aspects:

1. Appearance of the website: whilst survey responses were positive, they were less significantly so in relation to website appearance. Interviews highlighted that some people find the website to be somewhat 'clinical'. GAMSTOP should consider revising this to achieve a warmer, more welcoming feel. Further testing with consumers might be a helpful part of this process.
2. Provision of signposting to other support services: generally, this was felt to be a strength of the website overall, but was a less positively reported feature of the registration process and from contact with the helpdesk. GAMSTOP should consider ways to increase the clarity and prominence of signposting to other services at the end of registration and during helpdesk calls.

The majority either feel that the existing exclusion options are appropriate or held no strong view, suggesting that **in most cases, the time periods offered for exclusion are meeting consumer needs**. GAMSTOP may wish to consider the feasibility of offering a broader range of exclusion periods (particularly longer periods) in light of demand we have seen during interviews and in survey data. The organisation may also wish to consider the merits of offering shorter exclusions (perhaps a three month 'trial' period) which might support those consumers who are unsure of their readiness to commit to longer exclusions to obtain help.

### ***Consumer perception of the impact of GAMSTOP provision***

The vast majority of consumers reported that GAMSTOP fully effectively met their intended objectives after registration, and that effectiveness was reported across a range of potential objectives from 'full abstinence' to 'short breaks'. This held true across all age groups and reported genders.

**Consumers also consistently reported improvements to their wellbeing**, across a range of different aspects of their lives including:

- 84% feel safer from negative effects of gambling;
- 84% feel more in control of their gambling choices;
- 77% feel more in control of their finances;
- 70% feel that their stress and anxiety has improved;
- 63% feel that the quality of their family relationships has improved; and
- 60% report feeling more able to focus at work.

We have not identified any specific aspects of impact in which GAMSTOP could make improvements or where there is evidence of significant harm to consumers' wellbeing resulting from the scheme.

Whilst it is encouraging for GAMSTOP to see that, for some, self-exclusion has in itself been an effective approach, we note that very few of the group that continued to gamble had accessed formal support. **It is important that signposting to support services is clear and effective.**

But we emphasise that the findings of this report may be used in future to:

- 1) Refine the Theory of Change, including developing a more detailed analysis of impact (see below) and re-assessing the mechanisms of change. This should ensure that the theory of change aligns to the types of

harm consumers report they are avoiding, and also that it matches to their objectives for using the scheme; and

- 2) Review the organisation's outreach strategy to target groups likely to be at risk of gambling-related harm more specifically, which may link back to our earlier recommendations relating to profile raising activity and updates to the appearance of the website. For example, this might include targeting: older females making regular use of slot machine and Bingo games, and younger male users of casino and sports games. It is also important to recognise that friends and family are an important, but perhaps under-resourced, source of support for consumers: GAMSTOP should consider providing more content and signposting to help this group to support those experiencing problematic gambling.

### Re-visiting theory of change

Although it was not an explicit part of our brief, a by-product of this work has been an ability to deepen the evidence to support GAMSTOP's theory of change, but also to expand the level of detail in certain aspects of it. Key findings are noted below:

- *Defining 'harm' and impact:* in the course of this study, we have been able to gather evidence to demonstrate the broad range of harms that GAMSTOP has helped to address. This includes an evidence base to prove the number of consumers reporting improvements in various aspects of their wellbeing. That evidence can be built into the theory of change, and it lays the foundations upon which impact evaluation might be built to demonstrate the social value of the organisation.
- *Proving and improving the prevention and reduction of harm:* we have seen strong evidence emerging to show the reduction of harm, and we have seen clear evidence (particularly from interviews) to show that people at a relatively early stage of problematic gambling have been able to use GAMSTOP to prevent further harm from occurring. The findings of this study on the patterns of behaviour prior to registration give GAMSTOP useful information upon which to base a strategy to target groups likely to be at risk of gambling-related harm at an earlier stage in their journey, and, perhaps, to work with other organisations and gambling companies themselves to support people before their problems become severe. It may also enable GAMSTOP to work with other support organisations to understand in more depth why consumers are tending not to seek other treatment pathways, or feel that they don't need additional support. Reaching people at risk of problematic gambling to offer support at an earlier stage would align well with the focus on *preventing* as well as reducing harm;
- *Demonstrating effective consumer choice and control:* there is implicit tension in this targeted outcome, in that some consumers seek to use GAMSTOP precisely because they want the choice to gamble to be taken away from them, whilst others want greater flexibility. Our work shows that GAMSTOP is achieving a helpful balance for most users in delivering safer choices to stop or reduce their gambling, but it can consider ways to improve further;
- *Increasing awareness and engagement:* this is an area for further consideration. We have noted above several opportunities to improve GAMSTOP's outreach and visibility for groups at high risk of gambling-related harm. Interviewees consistently reported a strong desire to see GAMSTOP being advertised just as much as the gambling companies (the prevalence of which is a cause of significant anger for many of the people to whom we spoke). Whilst that may not be feasible with limited advertising budget, there is a clear desire from GAMSTOP consumers for the organisation to do more to raise its profile in order to help

others. There is also an important opportunity to engage with family and friends, with 30% of consumers seeking support from those around them;

- *Refining our understanding of the network of support:* the theory of change can now be adapted to reflect the evidence that some users do not require any additional support to achieve a positive outcome, whilst noting that those who are continuing to gamble tend to be less likely to have sought additional formal support.

## Recommendations

GAMSTOP is working effectively, and we would encourage it to continue and grow, we would also encourage the gambling industry and other support organisations to continue to fund, support and partner with it. We also recommend that:

- **GAMSTOP should introduce a broader range of exclusion periods:** 12% of consumers would like to see shorter exclusion periods available, and over 40% would like longer exclusion periods. We further recommend that other organisations, including gambling website operators should refer consumers to the scheme for short breaks as well as for longer exclusion periods.
- **GAMSTOP should use the findings from this report to develop a targeted engagement strategy** to reach those who exhibit a broader range of motivations and risk factors (e.g. 53% of female consumers are over 44 years old, whilst 64% of male consumers are 44 or younger). We can also see that certain game types seem to pose a greater risk for some groups, and that motivations such as the amount of time spent on gambling websites or a feeling of having lost control may help to target those at risk of gambling-related harm.
- **GAMSTOP's website should be reviewed to make content as accessible as possible:** although the website appearance is extremely positively regarded by 49% of consumers, this was lower than other website features. Some interviewees suggested improvements could be made to make it feel more encouraging and less "clinical".
- **GAMSTOP should seek the most prominent position possible on operator websites:** 50% of consumers want to see more prominent links to GAMSTOP on operator websites, and particularly to emphasise its value as a more effective provider of short breaks;
- **GAMSTOP should seek opportunities to engage with consumers who have never accessed specialist gambling-related support:** For the 53% of consumer who have not accessed any kind of support, GAMSTOP has an opportunity to add value to the work of other organisations by seeking to understand the reasons that they have chosen not to seek other support. **Support organisations should work together as closely as possible to ensure that consumers benefit from the most integrated journey possible.**
- **GAMSTOP should actively seek to reach out to and engage with family and friends of consumers** who have experienced gambling-related harm. Friends and family were involved in supporting 28% of consumers. There is an opportunity to raise awareness amongst friends and family to enable them to offer support, but also to encourage those at risk of problematic gambling to seek support from them.

- **More can be done to understand the specific issues relating to unlicensed gambling websites:** we heard from interviews that these can be an unhelpful source of temptation for consumers, and 10% of consumers have reported accessing unlicensed gambling operator websites in our survey.
- **More research into the harmful effects of advertising is needed:** whilst this was not a specific part of our review, consumers have been keen to tell us in interviews and survey 'free response' sections about their frustrations relating to advertising, which is an unhelpful and dangerous reminder of their challenges.

### *Final thought*

When we set out to deliver research into the effectiveness of GAMSTOP, we put hearing consumer voices at the heart of our plan. We should do the same for our final conclusion. In the words of one of the interviewees:

“GAMSTOP saved my life”.

*“I was on a path to suicide having lost everything I owned and became homeless for a spell.”*

### **Illustrative case study 8**

Jeremy is in his 50s and lives alone. He has two grandchildren from a previous relationship. He was self-employed and worked as a plumber. Work was irregular and he was often paid in cash. Having lots of spare time and sudden influxes of cash made gambling easy for him as he visited bookmakers on his way home from work. He was able to disguise his habit from several partners by keeping some of the cash back rather than banking it. He rarely gambled more than he could afford.

After suffering an accident that affected his mobility, Jeremy had to give up his job. He now relies on income from benefits. He missed the thrill of gambling, and started to use online gambling websites and apps. In no time his habit was completely out of control. He was bored and frustrated and had no other way to fill his time. He was spending every penny and getting further and further into debt. His losses mounted up such that he couldn't pay his bills and had to use foodbanks. He felt that his life was out of control and at the darkest point was periodically contemplating suicide. Looking back, Jeremy thinks he may have lost around £250k over the years. He believes that gambling ruined every relationship he ever had.

Jeremy found it very difficult to sign up to GAMSTOP. He had recurring issues sending in the right photos and documentation as his identity documents had expired: he had forgotten to renew them in the midst of a chaotic life. He carried on gambling after his failed sign up attempt. He started seeing a counsellor, who told him about a local gambling support service. He joined an eight week course and a support worker at the centre helped him to complete the GAMSTOP registration process.

After successfully excluding himself from online gambling, he has been able to spend more time with his grandchildren. He has taken up new hobbies that have diverted his attention away from gambling. He has been able to live within his means and he feels much less anxious. His sense of self-worth has returned and he no longer feels that his life is out of control. He describes stopping gambling like 'losing a friend', but he feels that GAMSTOP has helped him to overcome his addiction. He plans to renew his exclusion for the longest available period when the time comes.

## Appendix 1: Approach, definitions and methodology

In this section, we cover:

1. An overview of the research brief from GAMSTOP;
2. An explanation of our approach to the project and the research methodologies we used to deliver it;
3. The steps we took to managing safeguarding risks or concerns to consumers during the course of this research; and
4. The actions we took to minimise the risk of bias in our findings.

### *The research brief*

GAMSTOP set a brief aimed at developing a clear understanding of four key issues. We explain these four areas below together with an explanation of how we interpreted and built upon the core brief in planning this work:

- The **demographic profile** of registered consumers: building a clear picture of who is making use of the service and assessing that profile against other research on problematic gambling and the broader population as a whole to identify trends and patterns. The objective is to understand whether GAMSTOP can improve its awareness raising activity in order to reach particular groups likely to be at higher risk, or, equally importantly, to identify groups expected to be at risk who are not using the service where GAMSTOP has an opportunity to target profile-raising activity in future;
- **Consumers' motivation to register** with GAMSTOP: if GAMSTOP has a clear understanding of why people choose to register (Are there common 'trigger' events? Are there particular desired outcomes?), it may be better able to target and refine its service to enhance its impact further;
- **Consumers' experience** of GAMSTOP provision: the service needs to be accessible and easy to use. It is important to understand in detail what the consumer journey through GAMSTOP's service is in reality, and to understand what works well and supports positive outcomes. We also sought to identify opportunities to change or refine the service. This covers the consumer journey from registration, to updating their details, and on to renewal or decision to end their exclusion; and
- Consumers' **perception of the impact** of GAMSTOP provision: the interpretation of effectiveness needs to go beyond the 'customer service' aspect of effectiveness. We planned our work to consider the broader changes achieved by consumers following their choice to use the self-exclusion scheme. This will help GAMSTOP to deepen its understanding of the harm that it is preventing or reducing and to understand any issues with which it is not helping as effectively as it would like. This, in turn, will help them to plan for future service enhancement. This particular aspect of the brief is essential for the validation or refinement of GAMSTOP's Theory of Change.

We believe it will be particularly useful to assess GAMSTOP's effectiveness around the one year anniversary of compulsory integration with online gambling operator websites. In addition, the scheme has reached an age (3 years) when one would expect a large number of consumers to be able to report in detail on the broader effects they have observed in their lives beyond the mechanical aspects of blocking their access to gambling sites. It also allows long enough for many consumers to have experienced a full cycle of interactions with GAMSTOP and so to comment meaningfully on its effectiveness.

## Definitions of key terms

In undertaking this work, we have used and identified a series of key terms that appear frequently in this report, for which we offer suggested definitions below to help readers in understanding the work we have undertaken:

- **Online Gambling:** any gambling activity that is undertaken via an internet-connected consumer-owned (typically portable) electronic device such as a computer, smartphone, or tablet using a website or mobile Application (“App”) to access gambling services via a user’s personal account. For the avoidance of doubt, this does not include Fixed Odds Betting Terminals, which may have an internet connection but are ‘tied’ to a specific physical location and do not require a user to login prior to use (hence we would include these as a form of gambling ‘in-person’);
- **Gambling ‘in-person’:** any gambling that takes place at a specific venue such as a Casino or Bookmakers shop. This may involve an interaction with another person in the process of placing the bet, but may also relate to non-portable devices such as Fixed Odds Betting Terminals (“FOBTs”) that may be found in Bookmakers shops as well as in other venues, and which are ‘tied’ to that location. FOBTs offer a particularly interesting point, on which we do not comment in this report, in that the games offered on these devices are likely to have a strong similarity to those offered online;
- **Impact:** the measurable positive and negative effect of an organisation’s activities: the extent to which the outcomes arising are attributable to the organisation’s work, understanding that that work may be in direct delivery, sector leadership, or influence for systems and other changes in the wider environment.
- **Outcome:** the change arising (positive or negative; short-term or long-term) in the lives of the intended beneficiaries and others.
- **Activity:** what an organisation does as part of its operation.
- **Mechanism of Change:** the nature of the response from a service user or beneficiary needed in order to achieve the desired outcomes (e.g. a typical mechanism of change would include choosing to access a service);
- **Output:** the point of engagement between the activity and person intended to benefit from it.
- **Effectiveness:** We define effectiveness as the ability of the service to contribute to or achieve a range of outcomes that are of importance to consumers based on their stories and hopes/aspirations at the point of registration with GAMSTOP. A key element of our work was to define targeted primary and secondary outcomes in order to expand the view of ‘gambling-related harm’ by showing more precisely the nature of the harms that consumers are seeking to avoid through self-exclusion. We include the quality of customer experience and service user journey within effectiveness.

## Methodology

Our proposed methodology drew on key principles from:

- Principles of Good Practice in Evaluation in line with the UK Evaluation Society’s guidance;
- The Evaluation Protocol from the Responsible Gambling Strategy Board; and
- The GECES standards for impact measurement introduced into EU Law following the work of the pan-European committee, of which Sonnet CEO Jim Clifford was Chair.



Our work was structured in stages, each building upon the last, enabling us to develop and plan the subsequent stages of delivery based upon lessons learned. This was particularly important, given the broad definition of effectiveness needed to address GAMSTOP's research question on the perceived impact of its service, as reported by users. Our view was that an unduly quick move to surveying the population would carry with it several risks:

- We needed to assess the risk of sampling bias within the part of the user base who had given consent to be contacted for research purposes (at the time our research commenced, GAMSTOP had registered 170,000 consumers, of whom 51,833 had consented to be contacted);
- Other research into problematic gambling had been undertaken, but few studies had considered online gambling as a standalone issue. We needed to hear more about users' stories before a meaningful survey could be designed. Whilst GAMSTOP held consent from a large user base to be contacted for research purposes, we felt that there needed to be more informed and explicit consent before contact requesting an interview could be initiated, given the safeguarding implications of discussions relating to potentially traumatic personal historical experiences (see notes on safeguarding later in this section); and
- The research brief involved some relatively simple questions (demographic data) and some more personal/intrusive questions (around perceived outcomes and, therefore, implicitly enquiring into their personal history and challenges they may have faced as a result of gambling).

Our approach, which we discuss below in more detail, enabled us to:

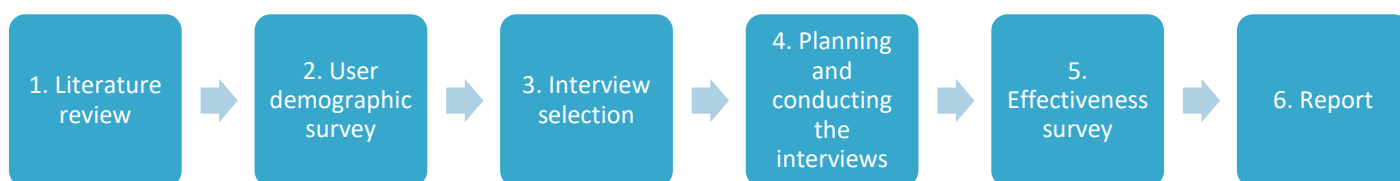
- Build quickly a detailed demographic analysis of the user base, enabling us to identify groups (we call these archetypes) that represent large parts of the population, but also to identify groups that are less well-represented to ensure that their voices, too, would be heard in this research;
- Obtain informed consent from part of the user base to be contacted for interview by our research team, and to plan and target interviews to ensure they covered a representative demographic sample, as well as key minority groups; and
- Manage the risk of safeguarding issues and concerns arising from asking consumers about traumatic events.

### *Working with a steering group*

The Sonnet research team worked with a Steering Group throughout the research project. This group included both GAMSTOP staff and a member of GamCare's Management team. The Steering Group was used as a reference point throughout the project to ensure that each step of the project matched GAMSTOP's objectives for the evaluation, and that the research was undertaken safely and appropriately, recognising the potential vulnerabilities of GAMSTOP's consumers. Key findings and conclusions from surveys and interviews were presented to the steering group for comment.

## Our six step approach

Our research approach was structured in six phases. We explain our work at each phase below, noting how each stage built upon the last as part of this:



### 1. Literature review

To develop a broader understanding of other exclusion schemes, and the evidence to show the impact of problem gambling on consumers and their families/communities. This included a review of existing publications and ‘grey literature’ published online. We focused our research on reports from the past five years, noting that the prevalence and availability of online gambling has changed substantially over this time period. Our research was targeted, to the greatest possible extent, towards understanding the effects of online gambling and self-exclusion, although we found useful evidence to show a broader perspective on gambling and problematic gambling through any channel. A detailed Bibliography can be found in Appendix 5.

### 2. User demographic survey design

GAMSTOP shared details of the 51,833 users who had consented to be contacted for research purposes, with appropriate data protection safeguards agreed between Sonnet and GAMSTOP. Having discussed high priority information needs with the steering group, we planned the survey to obtain a range of information, including: age, gender, location and household income. The survey was designed to be quick and simple to complete to maximise response rates. Findings from this survey are discussed in Section 3 of this report. Details of the full survey questions are included in Appendix 3. We received 3,272 responses to the survey, some 6.3% of the total sample size, providing a statistically significant representation of the total userbase at a 95% confidence level with a 1.68% margin of error<sup>20</sup> for the total population of 170,000 GAMSTOP consumers. We included some data points (including age) within the survey in order to enable comparison with GAMSTOP’s own data covering its entire user base as a further test of data validity. The survey included a free text response box inviting respondents to input an email address by way of consent to be contacted for an interview. We chose this approach in order to ensure that the risk of a respondent ticking a box by mistake was minimised, and the question included an indication of the expected subject matter of the interview.

### 3. Interview selection

Of the 3,272 responses we received to the survey, 1,172 users provided their email addresses so they could be contacted to take part in an interview. In order to select groups for interview, we developed five ‘archetypes’ reflecting demographic profiles of users to represent the majority of survey respondents. We then identified six further categories representing minority groups, with the aim of ensuring that their stories would be heard as part of our research. The full list of archetypes and outlier categories are

<sup>20</sup> This equates to a 99% confidence level with a 2.2% error margin.

detailed in Section 4. The interview plan and archetypes were presented to and discussed with the steering group prior to invitations being issued.

We compiled lists of interviewees who matched the criteria for each of these archetypes and outlier categories and used a random number generator to select a sample of respondents to be contacted within each archetype. A target of 40 interviews was set, to comprise 30 from the 'majority' archetypes and 10 from the 'minority' archetypes. 160 consumers were contacted, and we completed interviews with 41 people from that group.

#### 4. Planning and conducting the interviews

The interviews formed a critical part of our research plan. Relatively few studies have previously been undertaken including interviews with individuals who have experienced gambling problems, and none within the UK in the recent past focusing upon online gambling in particular. Our approach was first to listen to the stories of real service users before setting survey questions to assess effectiveness: we needed first to confirm that themes identified from studies of gambling as a whole did, indeed, apply to online gambling, or to understand where there might be differences.

Interviewees were contacted by email to confirm their willingness to participate and to schedule a suitable time for our conversation. They were also given advanced notice of the topics for discussion, partly to enable them to reflect ahead of the interview, but also in order to ensure that they had a final opportunity to decline the conversation if they felt it might be traumatic to re-visit historical issues. The majority of interviews were conducted using audio or video calls via Microsoft Teams, with interviewees being given the option to use audio-only or video at the outset. Some were held over telephone due to technical difficulties or the preference of the interviewee. Upon commencement of the call, interviewees were informed of the confidentiality of the interview and that answering each or any questions was optional, we also took the opportunity to confirm that they felt comfortable to have a conversation for 30 minutes in their location at the time. The interviews were carried out as semi-structured focus interviews, which allows for open discourse based on particular subjects. The rationale for this was that we planned the interviews to obtain information about consumer stories, without preconception of what those stories might involve: the more open discursive questioning approach of an SSFI lends itself to this type of research. We left time and opportunity at the end of the calls for participants to share any wider views on any gambling related subject or to raise other subjects they felt to be of importance in the context of our review work with GAMSTOP.

We used trauma-informed practices in planning and conducting the interviews, which were agreed by the Steering Group as part of its safeguarding oversight for the project. Sonnet's interviewers were trained in trauma-informed practice, including identifying early warnings signs of distress, and strategies to take prompt action to de-escalate potential trauma reactions. Given the potentially emotive and traumatic content of interviews, our team had regular supervision meetings with a trauma-trained supervisor throughout the interview delivery stage. Further information on safeguarding measures taken is detailed at the end of this chapter, but we note that there were no safeguarding incidents during the interview process.

Interview topics were prepared with input from the Steering Group to ensure that the questions adequately met the project objectives. Alongside these core topics, which focused on the user's life before registering with GAMSTOP and their experience using the service, we also prepared some non-

emotive, factual questions to use if any interviewees exhibited signs of distress. The list of interview topics can be found in Section 4.

We regularly checked progress towards building our understanding of consumer stories throughout the interview process using a form of discourse analysis to ensure that questions remained useful, and to identify any areas of particular interest emerging from earlier interviews that might be brought into later interviews as a specific follow-up question during discussion. Discourse analysis was undertaken by discussion of emerging themes at several stages of the interview process: the research team presented the findings and trends/common issues arising from recent interviews to the wider team and the project supervisor. Points of focus for subsequent interviews were identified for use as follow-up discussion topics linked to the core topics shown in Section 4. This also enabled us to begin to look for key issues relating to effectiveness for inclusion in the second survey.

Following completion of the interviews, we drew together the commonly occurring themes, views and background stories of the interviewees to create a series of 'pseudonymised' case studies, which are included in this report. The case studies reflect real aspects of the user experiences, but by combining these together we seek to maintain the confidentiality of the individual life stories of the interviewees who participated.

## 5. Effectiveness survey

The discourse analysis from our interviews led us to some emerging themes in consumers' use of GAMSTOP, their reasons for registering with the service, their experience of using it and their perceived outcomes from it. This insight along with GAMSTOP's wider objectives for this evaluation and their existing Theory of Change enabled us to develop a survey to test a more detailed series of themes around effectiveness and consumer journeys. This also enables us to plan questions to assess the extent to which certain issues what we had heard from the interviews reflected the views of the wider population. The questions, survey format and accompanying email were tested and reviewed by the Steering Group, particularly in respect of ensuring that the questions minimised the risk of safeguarding issues arising from triggering a recollection of traumatic historical events. Two questions on age and gender from the initial demographic survey were repeated to test whether certain groups found the service to be more effective than others. Details of the full survey questions are included in Appendix 4. 1,703 people responded to the second, more detailed survey: a response rate of 3.1%, giving 95% confidence as to the accuracy of results with a margin for error of 2.35%.

## 6. Reporting

Following on from the completion of the final effectiveness survey, this report summarises our findings, conclusions and recommendations to GAMSTOP. Whilst we endeavour to present as detailed a picture here as we can, we note that:

- Our analysis of survey results focuses on key issues identified by us during the review of results. Typically, we restrict comparisons to one or two variables or questions in order to maintain an accessible presentation of the data. A review of the responses to all questions can be found in Appendices 3 and 4; and
- Some recommendations emerging from our work relate to matters that might put consumers at risk, if they were to be published (notably techniques people have used to work around the system). We know from our interviews that some consumers have actively sought to avoid sources that disclose

potential weaknesses in the system, and out of respect for these people we have reported these confidentially to GAMSTOP. We note issues identified in this report without going into sufficient detail to create a safeguarding risk.

## Safeguarding measures

Safeguarding measures were implemented to address the risk of triggering a trauma response in people who may still have been on a recovery journey. Specifically, we planned our interview approach to enable us to identify current risk or safeguarding concerns that might need specialist intervention. We identified that any communication with GAMSTOP users could pose the risk of reminding them of gambling and so triggering either a relapse from abstinence or an escalation of currently managed gambling. The users emailed to partake in the surveys, however, had agreed to be contacted for research purposes when they registered for their GAMSTOP account. Asking further questions on past or present gambling behaviour through both surveys and interviews again risked triggering trauma or highlighting areas of concern. Below we outline the steps taken to address these risks at several key stages.

### Survey questions

Survey questions were reviewed by the GAMSTOP team and a representative from GamCare to check for any potential trauma triggers. The first survey contained more demographic, census-style questions so posed a lower risk of causing distress. The second survey went into more detail about users' experiences of gambling. The covering email accompanying this survey warned users of this and advised them against taking part in the survey if they felt it could remind them of historical issues in a way that might put their recovery at risk. It also included signposting to appropriate sources of support. In response to the email invitations to participate in the survey, we received three responses from users who felt it was inappropriate to contact them as it reminded them of gambling. These messages were passed on to GAMSTOP for appropriate follow-up support or action to be taken, if necessary.

### Interviews

Interviewers from the Sonnet Team were trained in conducting trauma-informed interviews and were prepared to detect and manage any signs of distress, and to identify any other risk or safeguarding concern. An additional list of non-emotive, fact based questions was developed to be used in circumstances where a risk were identified. Practice interviews were also held with the GAMSTOP team and a GAMSTOP 'Expert by Experience', an individual who had previously experienced harmful gambling, to test the questions and confirm that the risks in relation to safeguarding matters were acceptable.

All written communication with GAMSTOP consumers contained information on the National Gambling Helpline and GamCare. Reminders of support options were also given during and at the end of interviews.

## Addressing the risk of bias in results

It is important to acknowledge the risk of bias in any piece of research. In this particular case, there are two forms of bias that were actively monitored:

### Managing the risk of sampling bias

This is the risk that responses may have been affected by the process of sampling a population. In ideal circumstances, research will use a randomly selected group from an entire population. Here, the key issue was that we were able to target only those consumers who had consented to take part in research (i.e. 51,833 out of 170,000 registered consumers). Whilst there may be a risk that this group was 'self-selecting', we note that their decision to give consent to take part in research was made upon registration and before they could have formed

an opinion on the effectiveness of GAMSTOP's service. Hence, we felt comfortable that the 51,833 consenting consumers represented a low risk of sampling bias for both of the surveys.

The sample chosen for interview were drawn from a group that had first chosen to participate in a survey and had then given further consent for contact. There was a risk that this group might have particularly polarised views (whether favourable towards GAMSTOP or not). We did receive some emails from survey respondents specifically offering to give an interview, typically in the context of very positive views on the service. Whilst we are very grateful for their offers, our approach was to use a random number generator to select a sample to be invited for interviews in order to minimise the risk of sampling bias at that stage. We also note that there is a risk that an individual who is in the early stages of recovery after experiencing gambling problems may be less likely to want to or to be able to speak on the subject and might, therefore, not offer to join in an interview. As such, there is a risk that interviews tended to capture people who had been registered with GAMSTOP for longer. Given the nature of our interviews, this has a positive impact on our research data, in that our aim was to hear about the longer-term story of how GAMSTOP (and other organisations in a support network) had helped consumers to achieve their intended outcomes after registration (or not). Whilst the sample size for interviews is relatively small, we note that it gives 95% confidence with a 15% error margin given the total population of 170,000.

The second survey actively targeted testing the wider validity of views and themes emerging from interviews. Our analysis shows the significant extent to which the effectiveness survey confirmed interview findings, with a much larger sample size. On balance, given the clear views emerging from the interviews (analysed in Section 4 of this report), our feeling is that the risk of sampling bias is low.

### **Managing the risk of response bias**

This is the risk that questions inherently pre-set (or bias) a respondent towards a particular answer. Examples of this issue might include questions that include statements such as "I find the service to be highly effective" with a 'yes/no' scale showing 'strongly agree' to 'strongly disagree'. We managed this risk by avoiding leading questions and by giving more detail in the answer options, amongst other techniques. When designing the surveys and interview questions we took steps to ensure that the structure and phrasing of questions minimised the risk of pre-setting an answer in a respondent's mind.

There is a need to balance user-friendliness with minimising response bias risk, and we piloted versions of the survey internally and with members of the steering group to arrive at an appropriate balance. A particular example of this was in the use of questions with ranges (typically 1 to 5) in the response field. The ultimate way to avoid response bias may have been to randomise ranges such that the favourable/adverse ends of a range were not always aligned. However, our piloting of the questionnaires found that this created unnecessary confusion and resulted in an increased risk of respondents giving an unintended answer.

Our interview structure was set to avoid asking leading questions, and, rather, to introduce broader discussion topics in an open way.

Our survey was specifically reviewed internally by a social research expert to confirm that the risk of response bias was minimised. The survey questions (together with a summary of the response data) can be found at Appendices 3 and 4.



## Appendix 2 : Summary of key findings from literature review

### Introduction

The research for this report was undertaken between January and April 2021 when the UK was in lockdown and in-person gambling premises were closed. At present, evidence on the impact of lockdown is limited and it is expected that the full picture will only emerge once restrictions are fully eased. Our research questions included enquiry into this matter, given that some consumers may have chosen to register with GAMSTOP as a result of challenges arising during lockdowns. At the time of writing, no specific research had been published showing the nature or extent of the effects of lockdowns during the Covid-19 pandemic on gambling behaviours as a whole or problematic gambling in particular.

We targeted our research to understand the evidence to show the effectiveness (and the nature of the impact of) other self-exclusion schemes, data to show the scale of online gambling in the UK and the nature and extent of the effects of problem gambling for individuals and those around them. As the online gambling offering has grown substantially in recent years, particularly with the introduction of mobile gambling, we chose to focus our research on publications and data from the past 5 years.

Our summary in this section is structured in the form of answers to particular questions and themes that took on particular significance during the course of the project.

### Defining key terms

GAMSTOP's primary impact is to reduce or prevent gambling-related harm. This is defined as "any initial or exacerbated adverse consequence due to an engagement with gambling that leads to a decrement to the health or wellbeing of an individual, family unit, community or population"<sup>21</sup>. This connection to wellbeing is of great significance. Our interview and survey questions were designed to capture a range of aspects of wellbeing in order to test for gambling-related harm. We used conceptual models including the Five Pillars of Wellbeing in our planning to inform our definition of 'wellbeing'.

### Who participates in online gambling?

Examining data from the Gambling Commission on gambling participation from December 2019<sup>22</sup> (this has been chosen over more recent data to eliminate any lockdown effects to the data), shows how participation in online across the general public has increased from 15% in 2015 to 21% in 2019. This increase has been seen across genders and age groups with the highest levels of growth being seen in the 25-34 year old age group. Overall, 25% of men gamble online compared to 17% of women. The largest proportion of online gamblers is seen in the 35-44 year age group, in which 28% gamble online. It is important to note, however, that this data includes playing the National Lottery online.

<sup>21</sup> Banks, J, Andersson, C, Best, D, Edwards, M and Waters, J. 2018. Families Living with Problem Gambling: Impacts, Coping Strategies and Help Seeking. Available at: <https://about.gambleaware.org/media/1845/families-living-with-problem-gambling.pdf>

<sup>22</sup> Gambling Commission. 2020. Gambling participation in 2019: behaviour, awareness and attitudes. Annual report. Available at: <https://www.gamblingcommission.gov.uk/PDF/survey-data/Gambling-participation-in-2019-behaviour-awareness-and-attitudes.pdf>

## What is the impact of problem gambling on individuals and society?

Examples of gambling-related harms include mounting debts, not being able to afford essential items, relationship and family breakdowns and mental distress. Research on gambling-related harms<sup>23</sup> details the prevalence of these harms across a survey of gamblers - 65% had lost over £10,000, 76% had built up debt as a result of gambling, 91% experienced emotional distress and 62% experienced relationship problems. These harms affect both gamblers and those close to them – between 6 and 10 additional others are negatively affected by a gambler's behaviour. 86% of gamblers surveyed felt their gambling affected at least one other person. 52% of affected others were spouses or partners, 20% parents and 11% children of the person experiencing a gambling problem.

## What have been the effects of national lockdowns during 2020/2021?

The latest data on gambling participation from March 2021 shows that online gambling (excluding National Lottery draws) has risen overall by 2% since March 2020<sup>24</sup>. This increase has not been evenly spread across demographics. The past year has seen online gambling participation amongst women increase by 9% and over 65s by 36%. Increases in online gambling were seen across age groups aged 45 and over compared to decreases for all other age groups (ages 16 to 44) and for males overall. In our final survey (section 6), we show an analysis of patterns of gambling by age and gender. This highlights that some forms of gambling are more likely to attract the age groups for which participation has increased. GAMSTOP's userbase currently stands at 216,000, having seen an increase in registrations of 69% since February 2020.

## How effective is self-exclusion and who uses it?

Self-exclusion can be an effective tool to in combatting gambling-related harm by addressing problem gambling. Research from Ipsos Mori<sup>25</sup> found that self-exclusion was most effective when users had faith that the system was fool proof, were psychologically able to draw a line under their behaviour by registering or found that the ban made gambling less convenient<sup>26</sup>.

Self-exclusion schemes exist for both in-person and online gambling. Examining its effects on online gambling is particularly relevant at this point in time, as the UK emerges from a lockdown during which in-person betting premises were closed.

It is important to state that not all gambling is problem gambling but research has shown that 'proliferation and diversification of gambling products and services coincide with increased rates of problem gambling'<sup>3</sup>. Of the 4,009 people surveyed in the Gambling Commission's research in March 2021, 0.4%<sup>6</sup> of survey participants (representing the population as a whole) were classed as experiencing gambling problems. If this is an accurate representation of the UK population, one could estimate that there are over 250,000 individuals experiencing gambling problems in the UK. Other Gambling Commission research suggests that numbers of both problem and 'at-risk' gamblers may be higher than this, with an estimated 0.7% of the population experiencing gambling problems and with 1.1% of the population found to be at moderate risk.

<sup>23</sup> Nash et al., 2018, Out of luck - An exploration of the causes and impacts of problem gambling, London, Citizens Advice

<sup>24</sup> Gambling Commission. Gambling participation: activities and mode of access. April 2021.

<sup>25</sup> Ipsos Mori. Process and Impact Evaluation of the Multi-Operator Self-Exclusion Schemes. July 2020

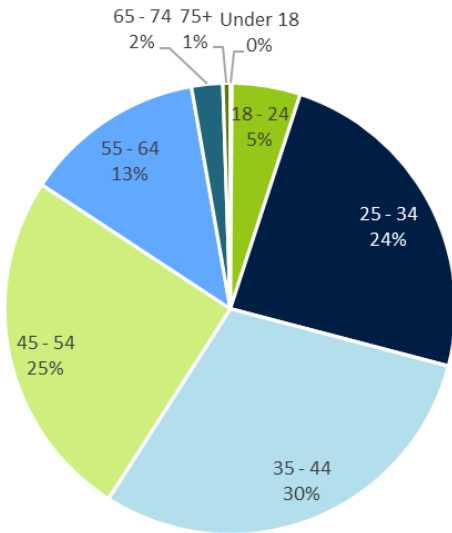
<sup>26</sup> Whilst useful for context, we note that some of the research summarised in this analysis is based upon relatively small sample sizes and may not reflect any particular nuances around behaviours in relation to online gambling. Hence, the surveys undertaken by Sonnet in the course of this project have tested similar questions and issues, rather than relying upon the work of others.

Research on exclusion schemes<sup>7</sup> identified barriers to users self-excluding which included: not believing they were experiencing gambling-related harm; not having faith in the self-exclusion schemes to work; and the length of exclusion periods. Exclusion is often the first gambling support tool used and this typically tends to be from a specific venue or site. 53% of gamblers are not aware of self-exclusion and only 5% of gamblers have ever self-excluded<sup>5</sup>. Whilst this is helpful context, we note that the IPSOS Mori report tends to focus on schemes aimed at gambling venues rather than online gambling, and as such it may not reflect patterns amongst online gambling consumers.

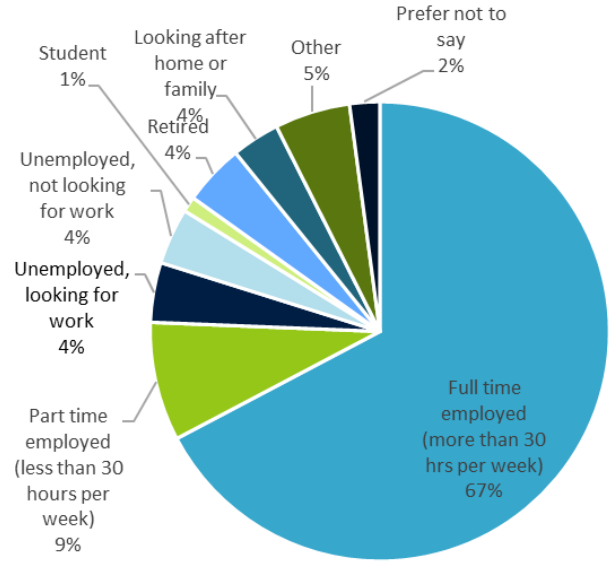
Data from the Gambling Commission<sup>5</sup> shows that a higher proportion of male gamblers (6%) have self-excluded, compared to 4% of female gamblers. When looking at age groups, we see 9% of gamblers aged between 25-34 have self-excluded, 8% of 18-24 year old and 35-44 year old gamblers, 3% of 45-64 year old gamblers and 1% of gamblers aged 65 and over.

**Appendix 3: Demographic questions and responses**  
*Survey 1*

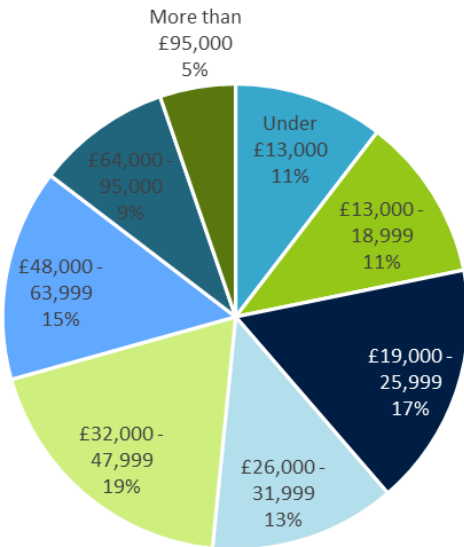
**Q1. How old are you?**



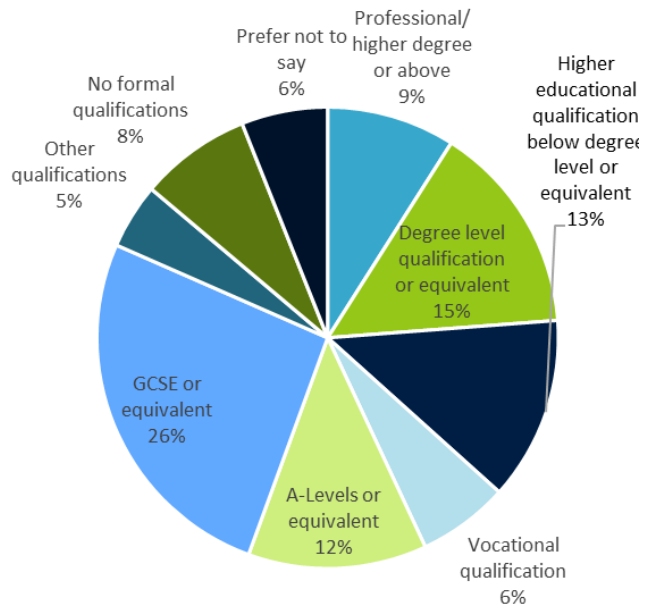
**Q2. What best described your employment status on 1 January 2021?**



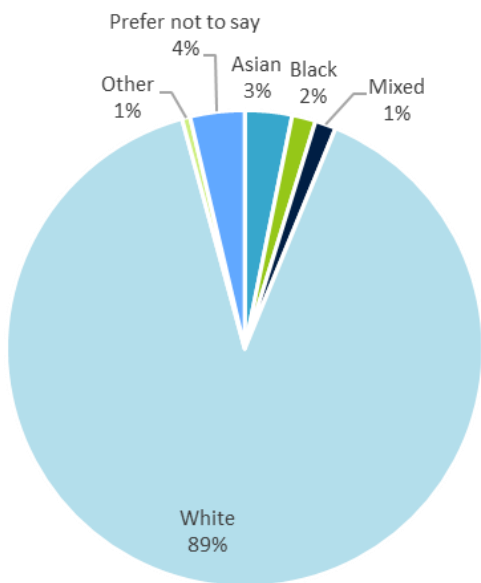
**Q3. What is the total pre-tax income for all members of your household for the 2019/20 tax year?**



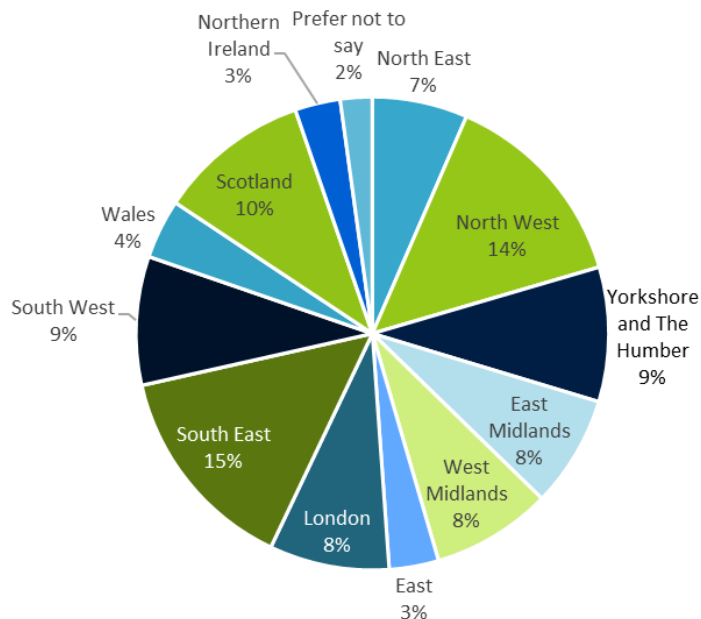
**Q4. What is the highest level of education you have completed?**



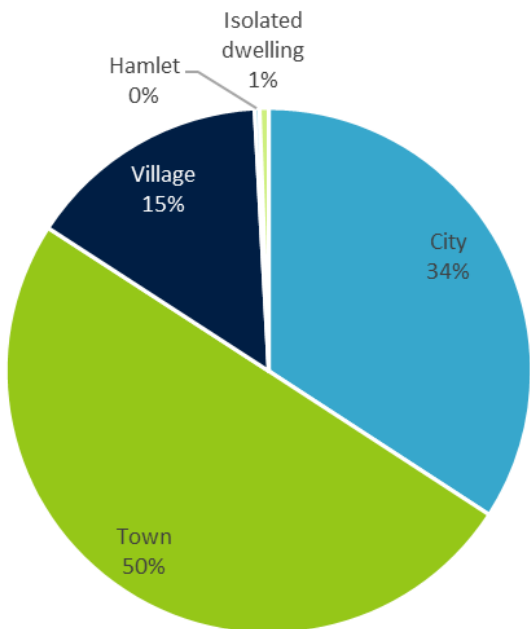
Q5. What is your ethnic group?



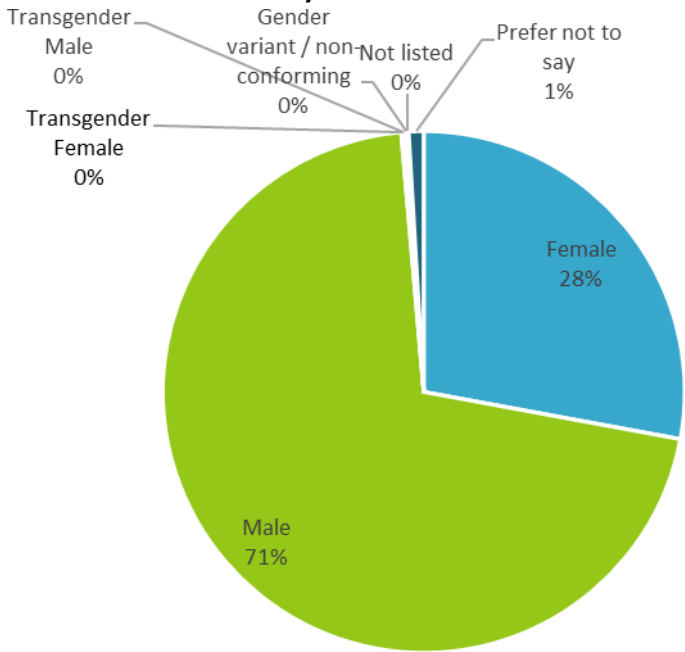
Q6. Where did you live on 1 January 2021?



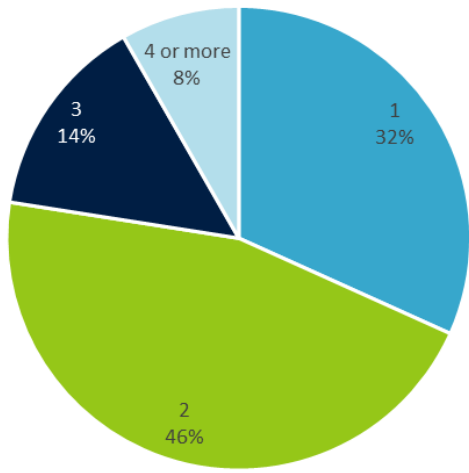
Q7. Did you live in a \_\_\_\_ ?



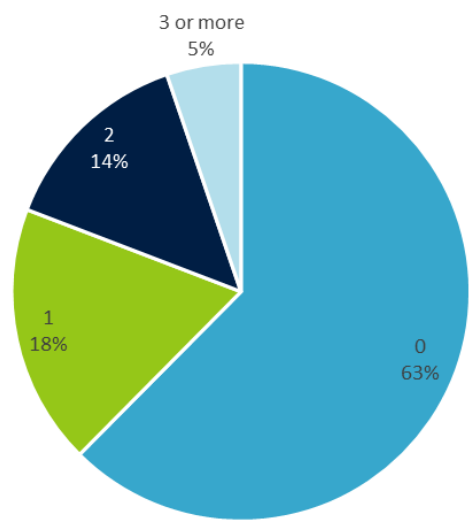
Q8. With which gender identity do you most identify?



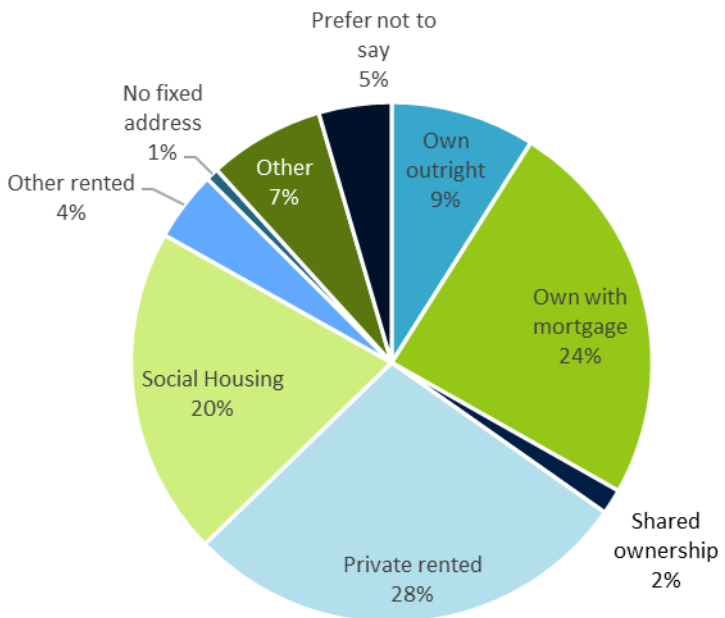
**Q9. How many adults were living in your household on 1 January 2021? (exclude any support bubbles)**



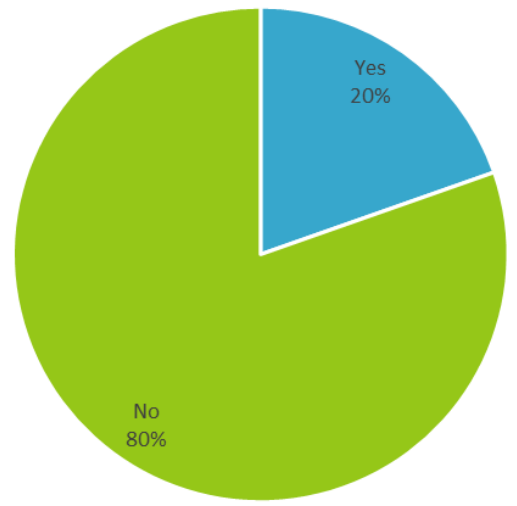
**Q10. How many children (under 18) were living in your household on 1 January 2021? (exclude any support bubbles)**



**Q11. What best described your housing status on 1 January 2021?**

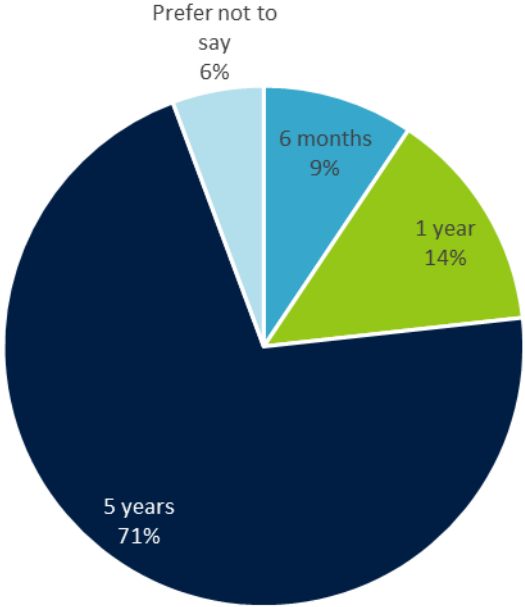


**Q12. Do you suffer from any long-term illness, disability or impairment which causes substantial difficulty in performing day to day activities? (This includes both medical and physical conditions)**



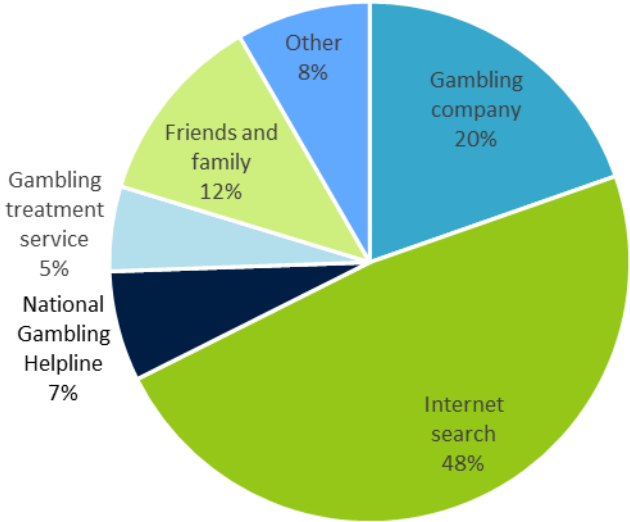
**Q13. Please provide your email address if you would be willing for one of the Sonnet research team, on behalf on GAMSTOP, to contact you for an interview (lasting around 30 minutes)**

**Q14. What length of self-exclusion have you opted for through GAMSTOP?**



**Q15. When did you sign up to Gamstop? (approximate month and year)**

**Q16. How did you hear about GAMSTOP?**

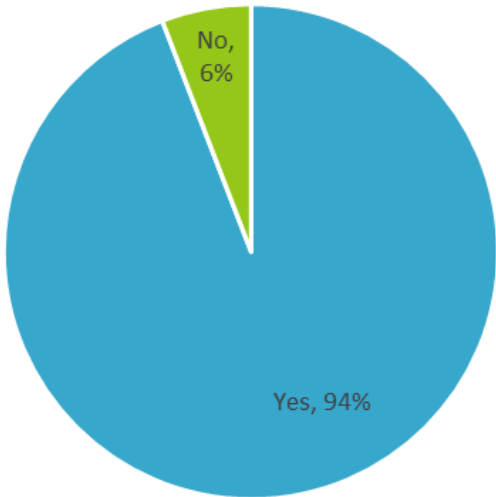




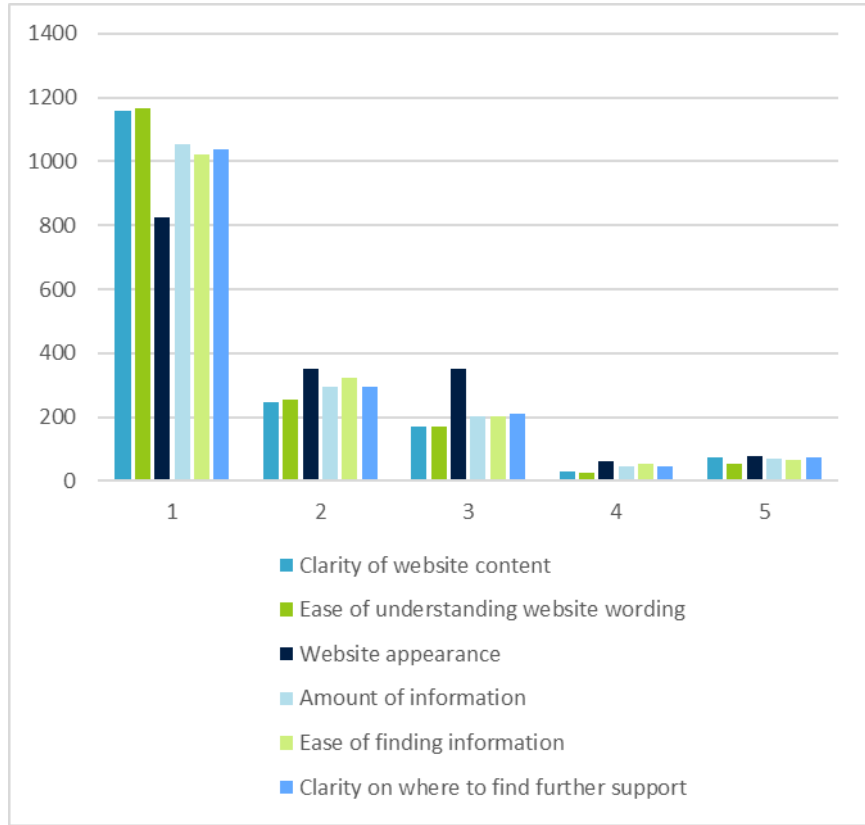
## Appendix 4 – Effectiveness and impact survey questions and responses

Survey 2

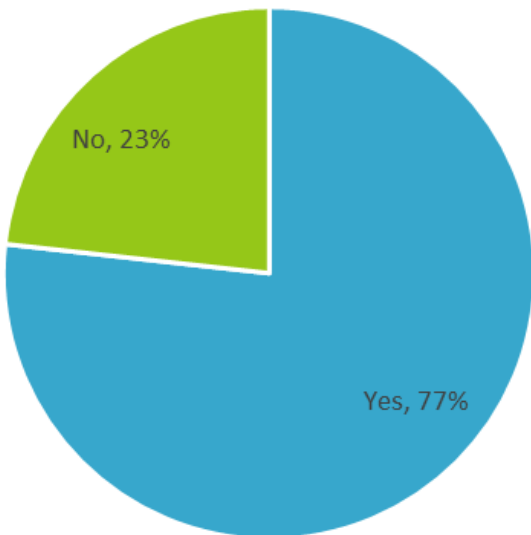
**Q1. Is your GAMSTOP exclusion currently in place?**



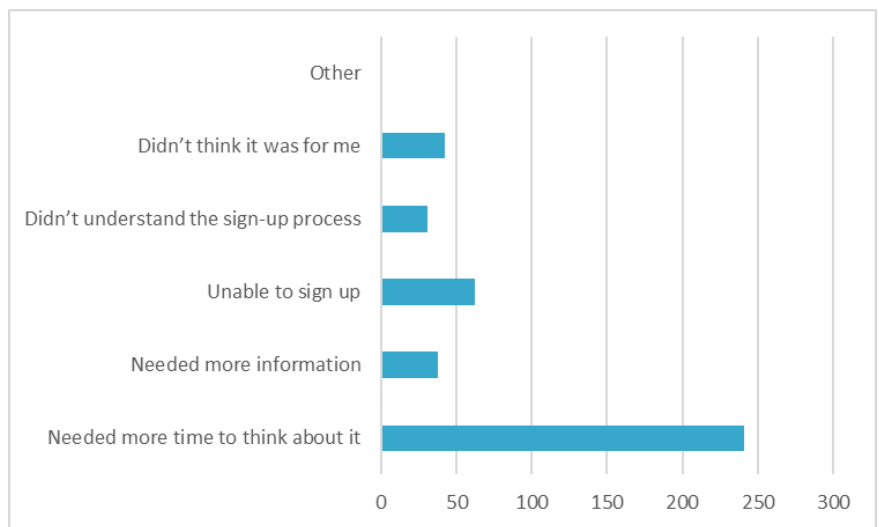
**Q2. What do you think of the GAMSTOP website? Please rate the following: (1 most positive response, 5 least positive)**



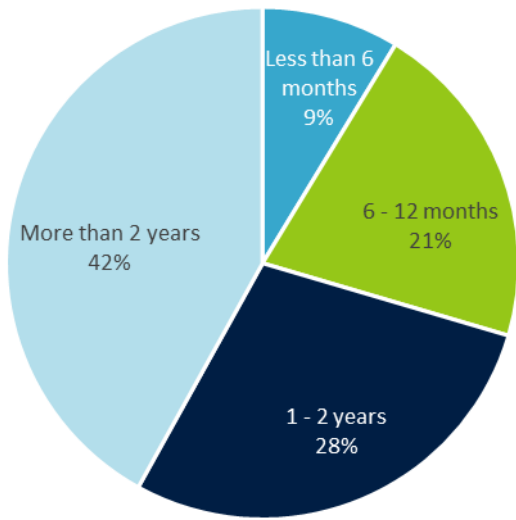
**Q3. Did you sign up to GAMSTOP the first time you were offered?**



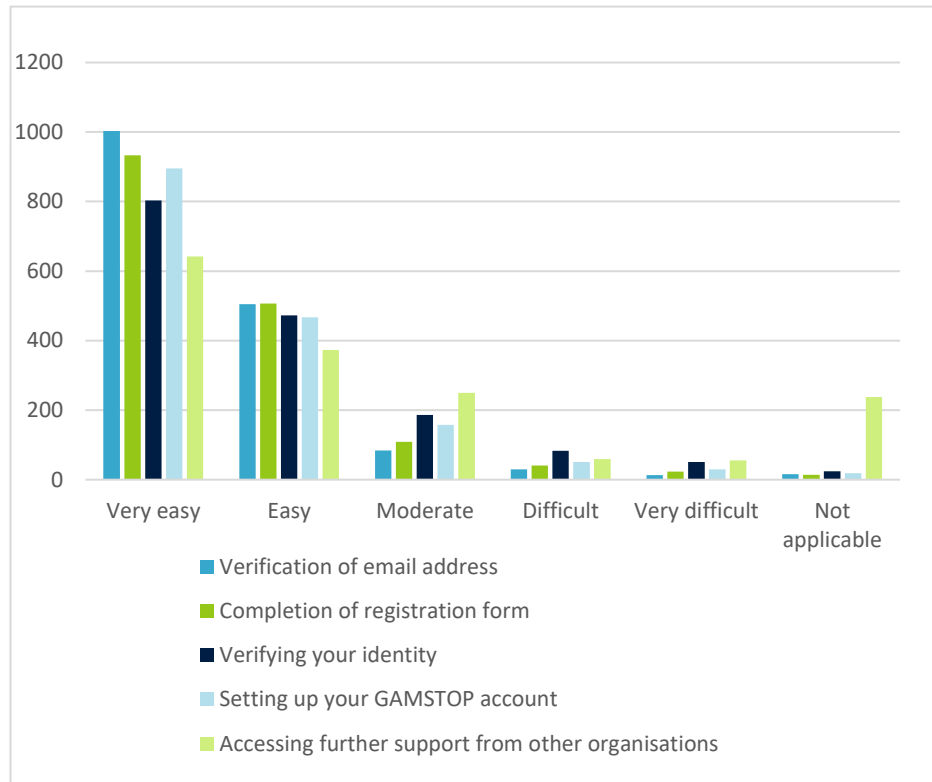
**Q4. If not, was there a reason you did not to register at that time? (select all that apply)**



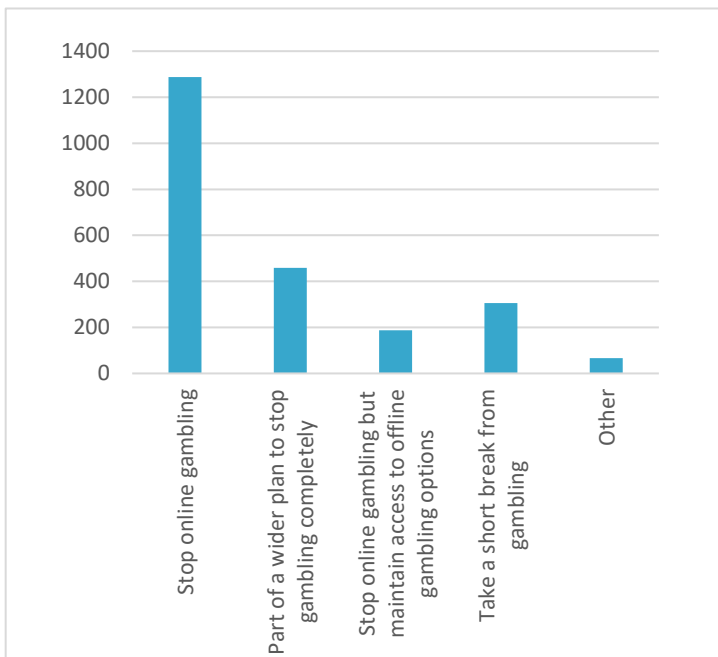
**Q5. How long ago did you sign up to GAMSTOP?**



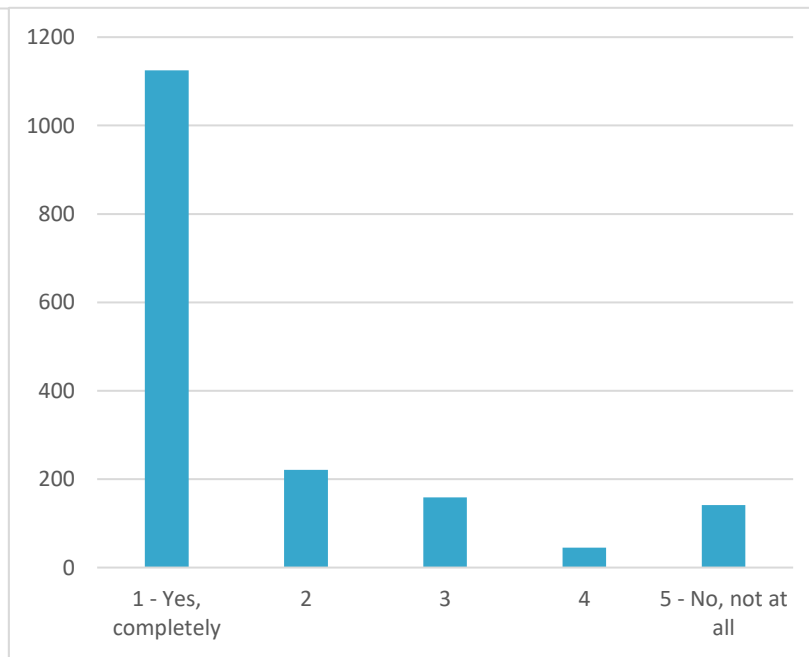
**Q6. How did you find the stages of the sign up process?**



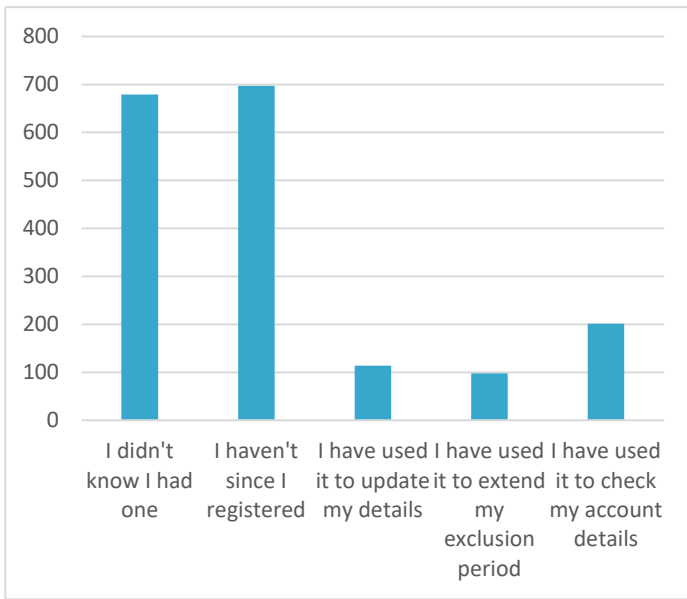
**Q7. What were you hoping to get from signing up to GAMSTOP? (select all that apply)**



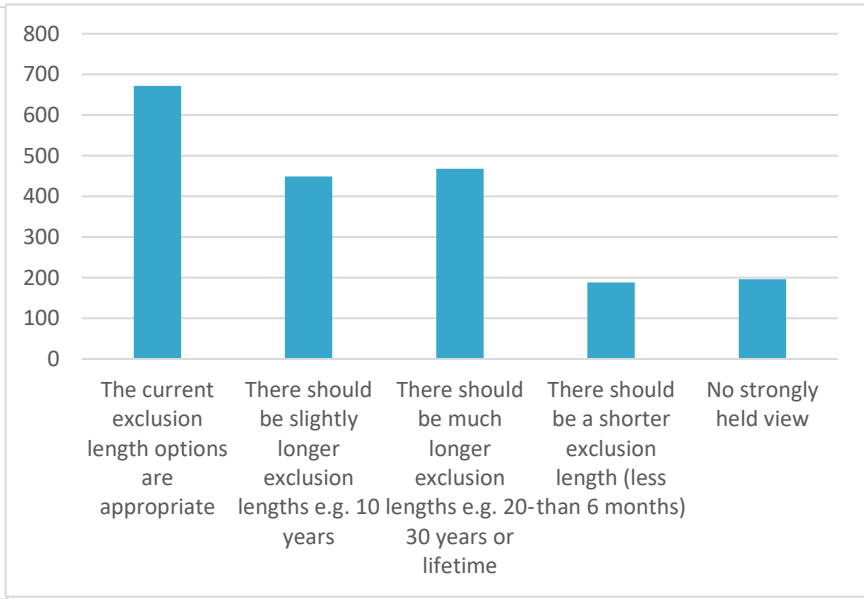
**Q8. Did GAMSTOP deliver the result you were hoping for?**



**Q9. Do you use your online GAMSTOP user account? (select all that apply)**



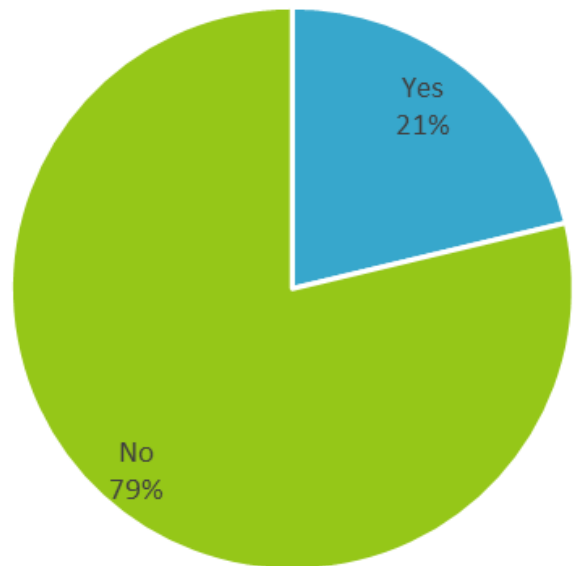
**Q10. GAMSTOP currently offers three exclusion lengths – 6 months, 1 year, 5 years. What is your opinion on the exclusion lengths that are available? (select all that apply)**



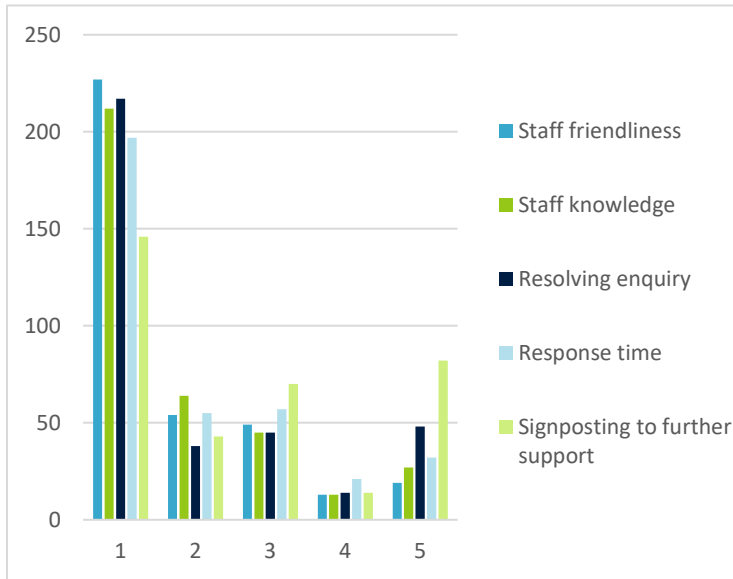
**Q11. What do you think you will do once your exclusion period ends?**



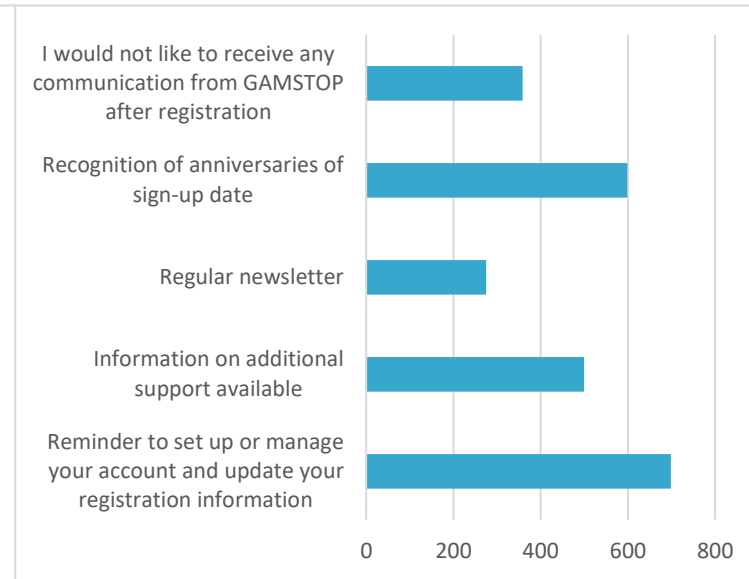
**Q12. Have you used the GAMSTOP contact centre?**



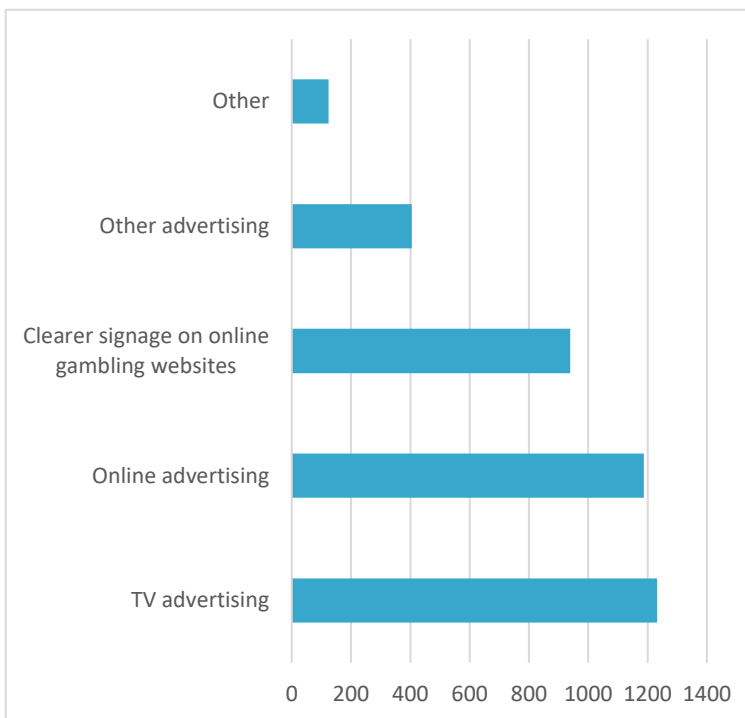
**Q13. If so, what are your views on the following? (1 most positive response, 5 least positive)**



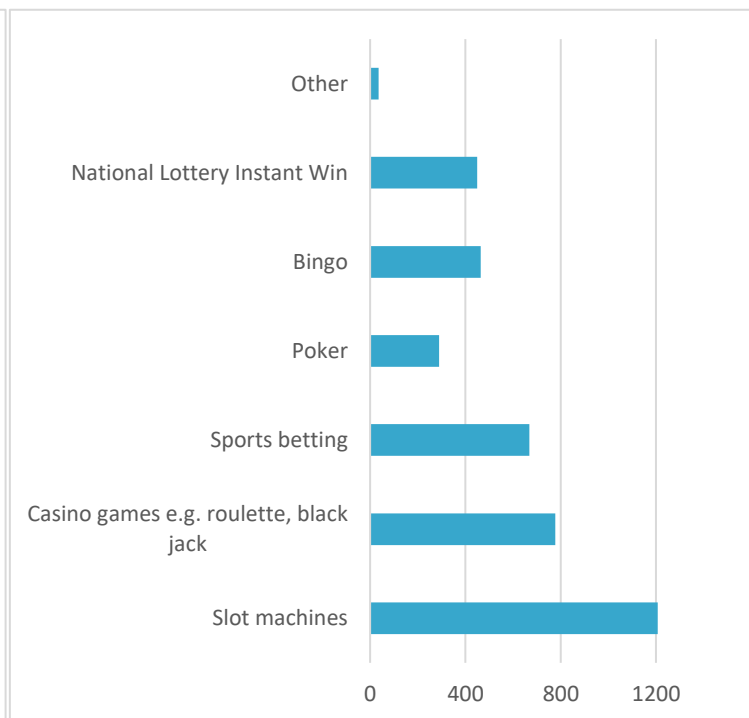
**Q14. GAMSTOP does not usually contact users following registration. If they did, what type of contact would be helpful? (select all that apply)**



**Q15. How can GAMSTOP raise awareness of its service? (select all that apply) be helpful?**



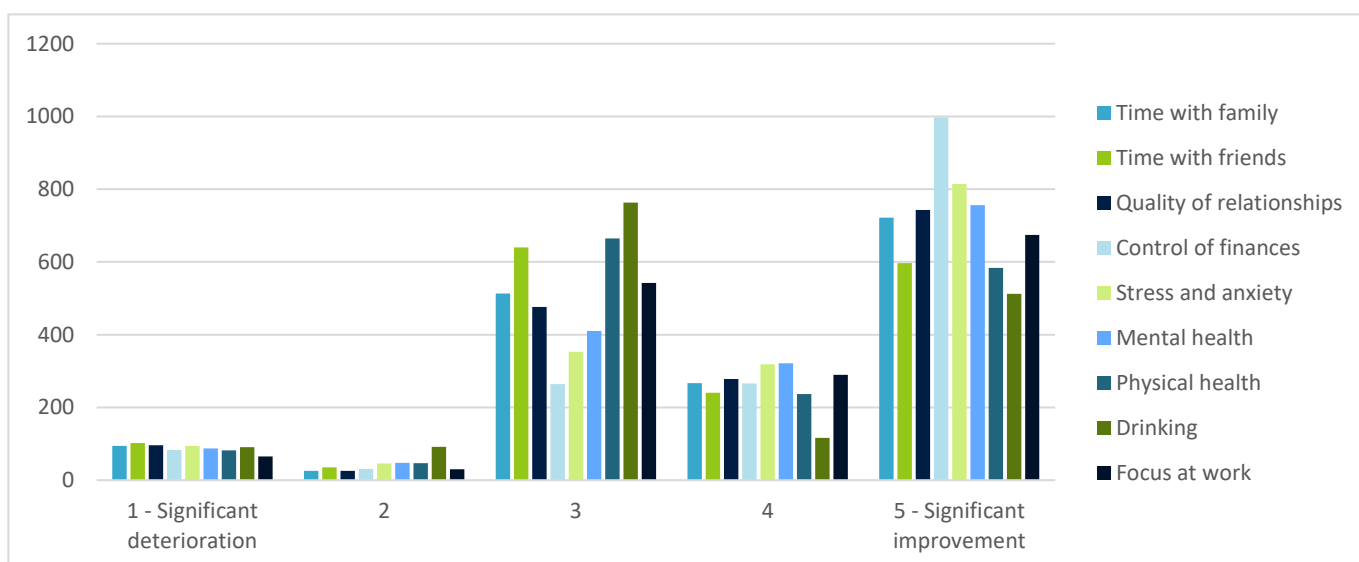
**Q17. Before registering on GAMSTOP, in what type(s) of online gambling did you mainly engage? (select all that apply)**



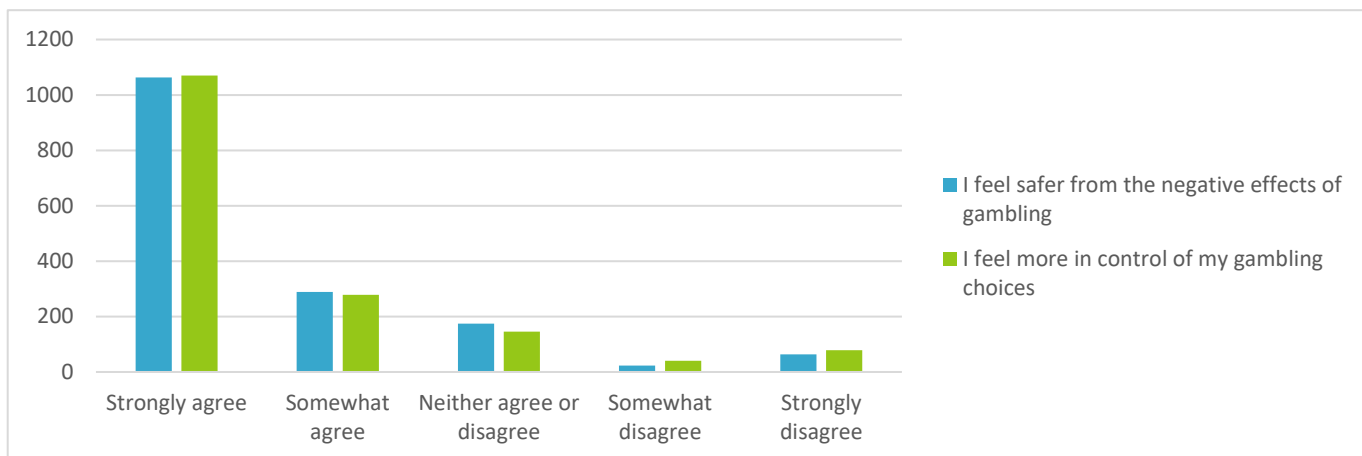
**Q18. What prompted you to sign up to GAMSTOP? (select all that apply)**



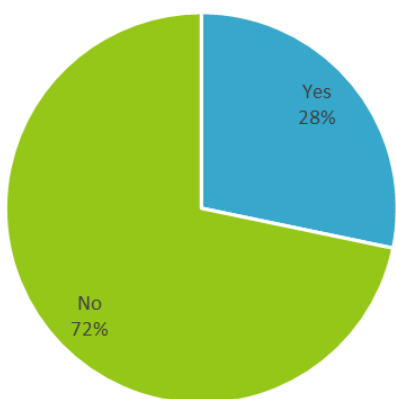
**Q19. Other GAMSTOP users have reported a number of wider effects of signing up. Since signing up to GAMSTOP, has any of the following changed as a result of changes to your gambling behaviour?**



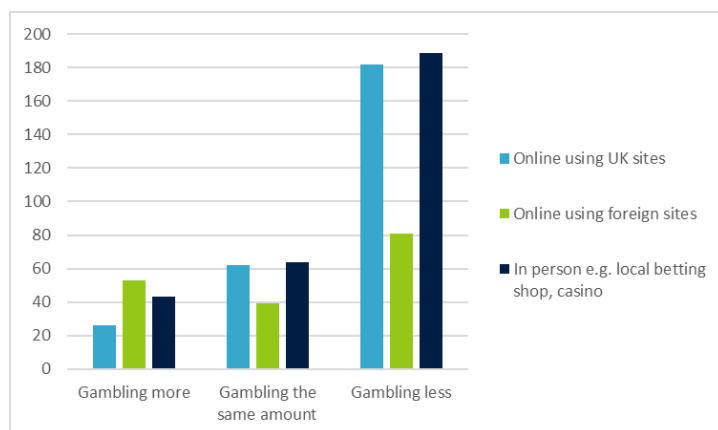
**Q20. How do you feel about your online gambling activity now compared to the time before your GAMSTOP registration?**



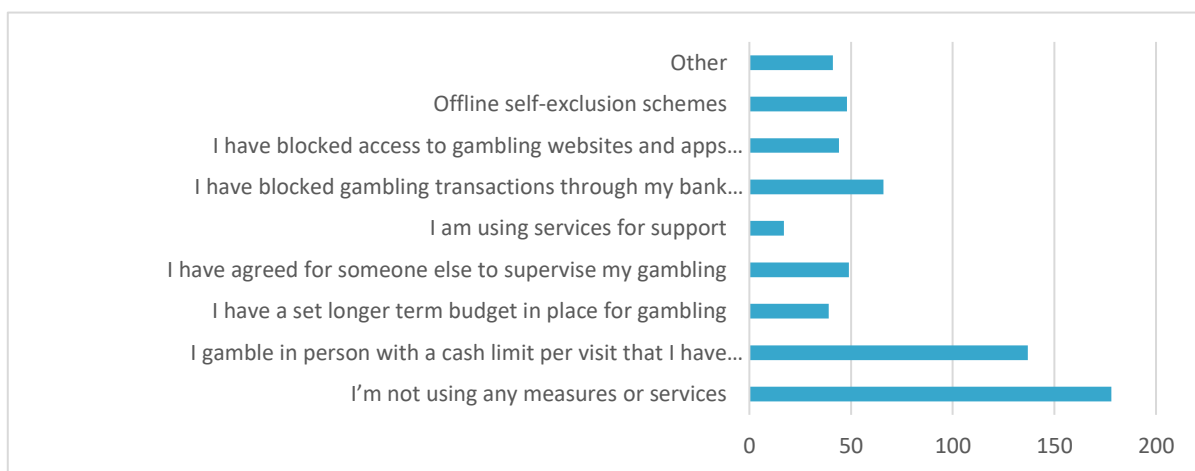
**Q21. Are you currently accessing any gambling activities?**



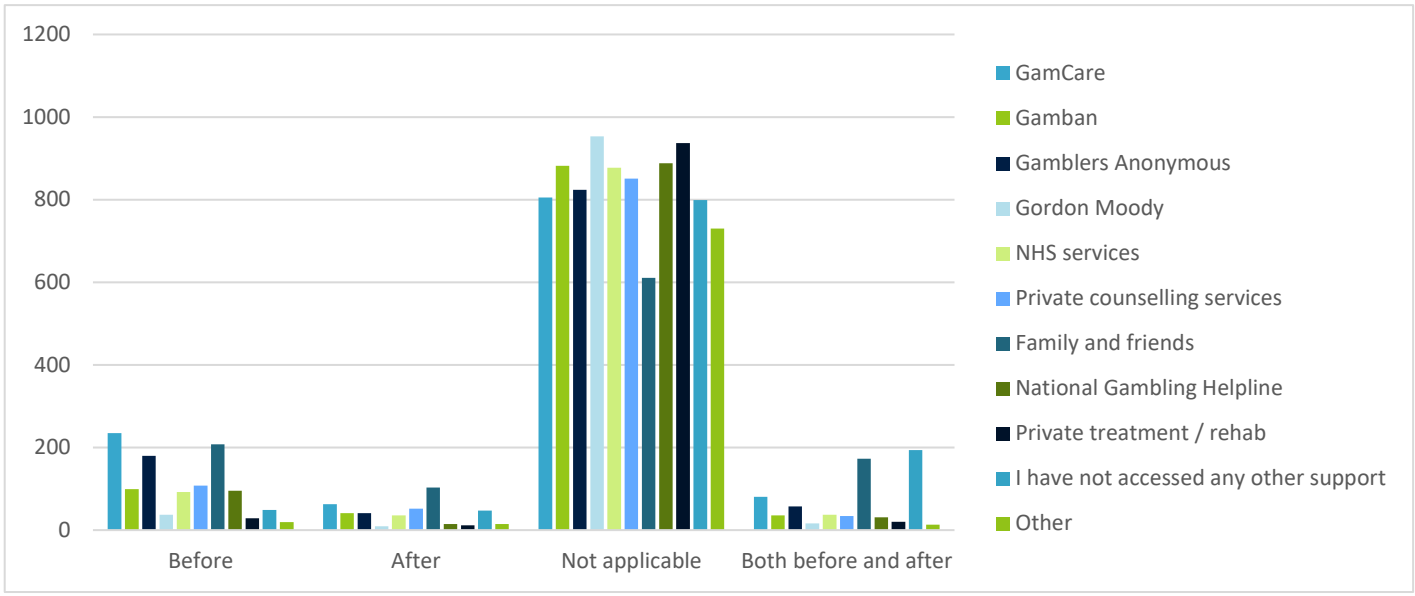
**Q22. How are you accessing these gambling activities? And are you accessing them more or less since registering with GAMSTOP?**



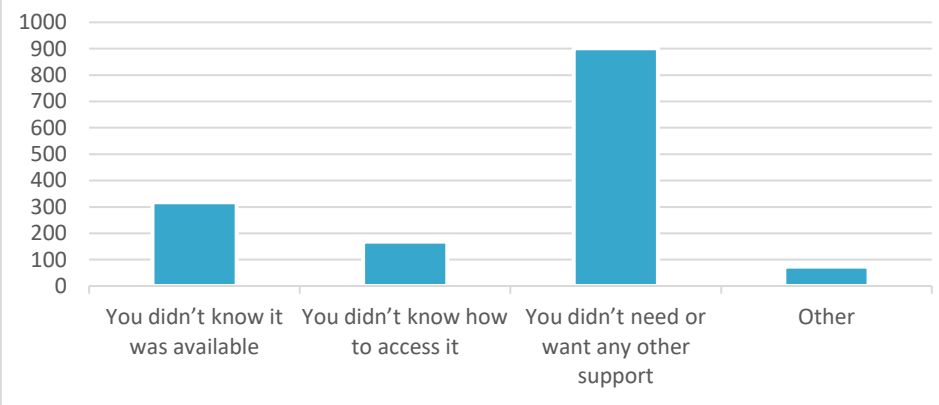
**Q23. If you are still gambling, are you using any other measures to control it? (select all that apply)**



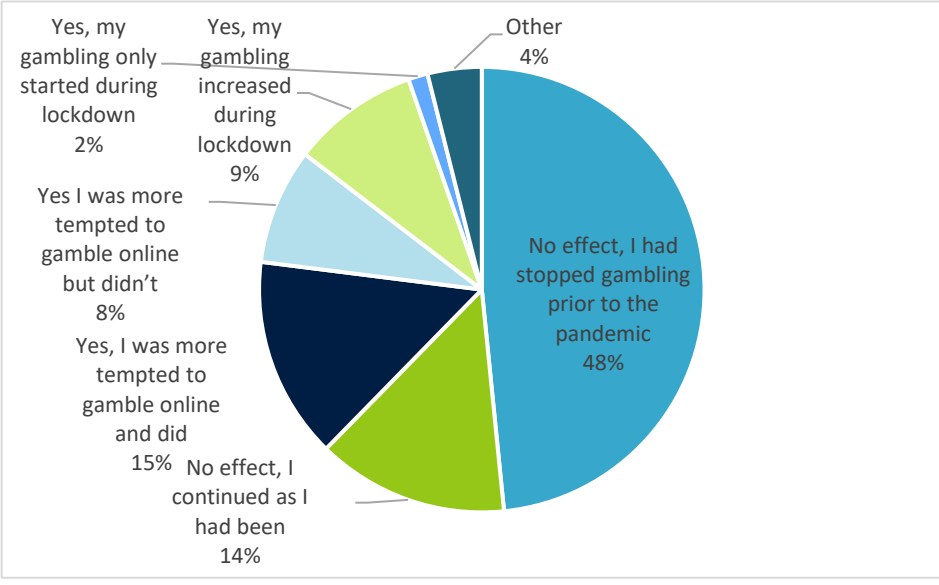
**Q24. Have you accessed any other support in relation to gambling? And was this before or after signing up to GAMSTOP?**



**Q25. If you didn't access any further support, was this because...?**

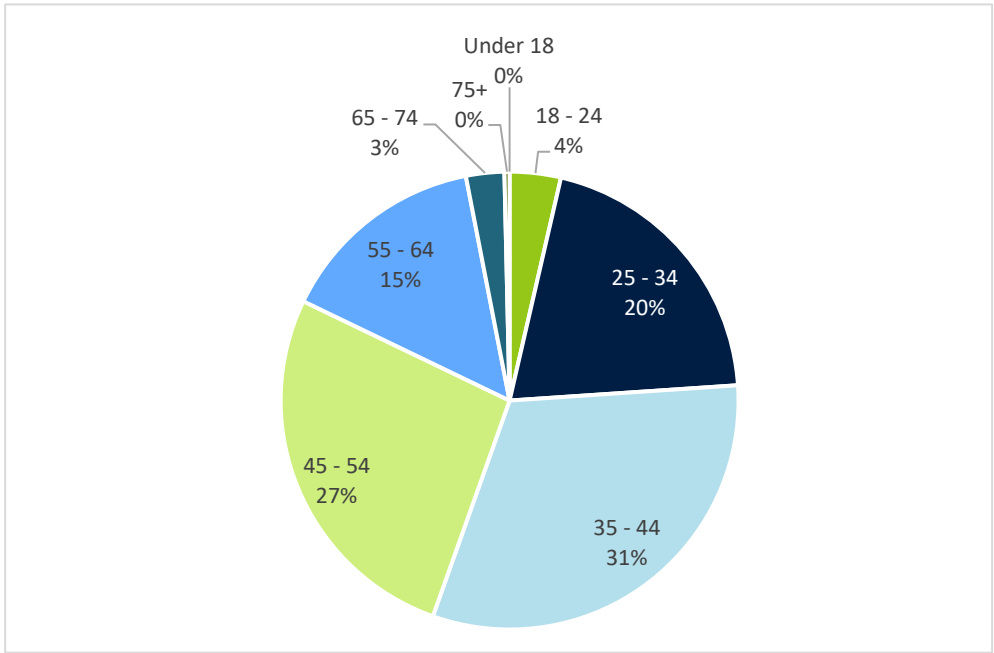


**Q26. Did the COVID lockdowns of 2020 and 2021 have any effect on your gambling behaviour?**

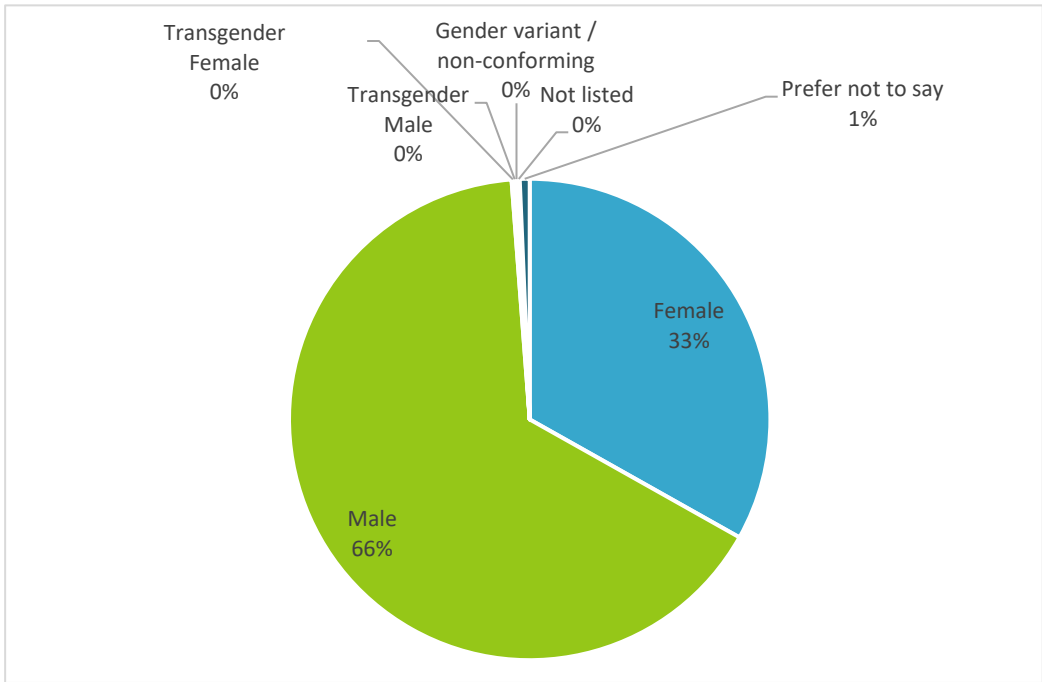




Q27. How old are you?



Q28. With which gender identity do you most identify?



## Appendix 5: Bibliography

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