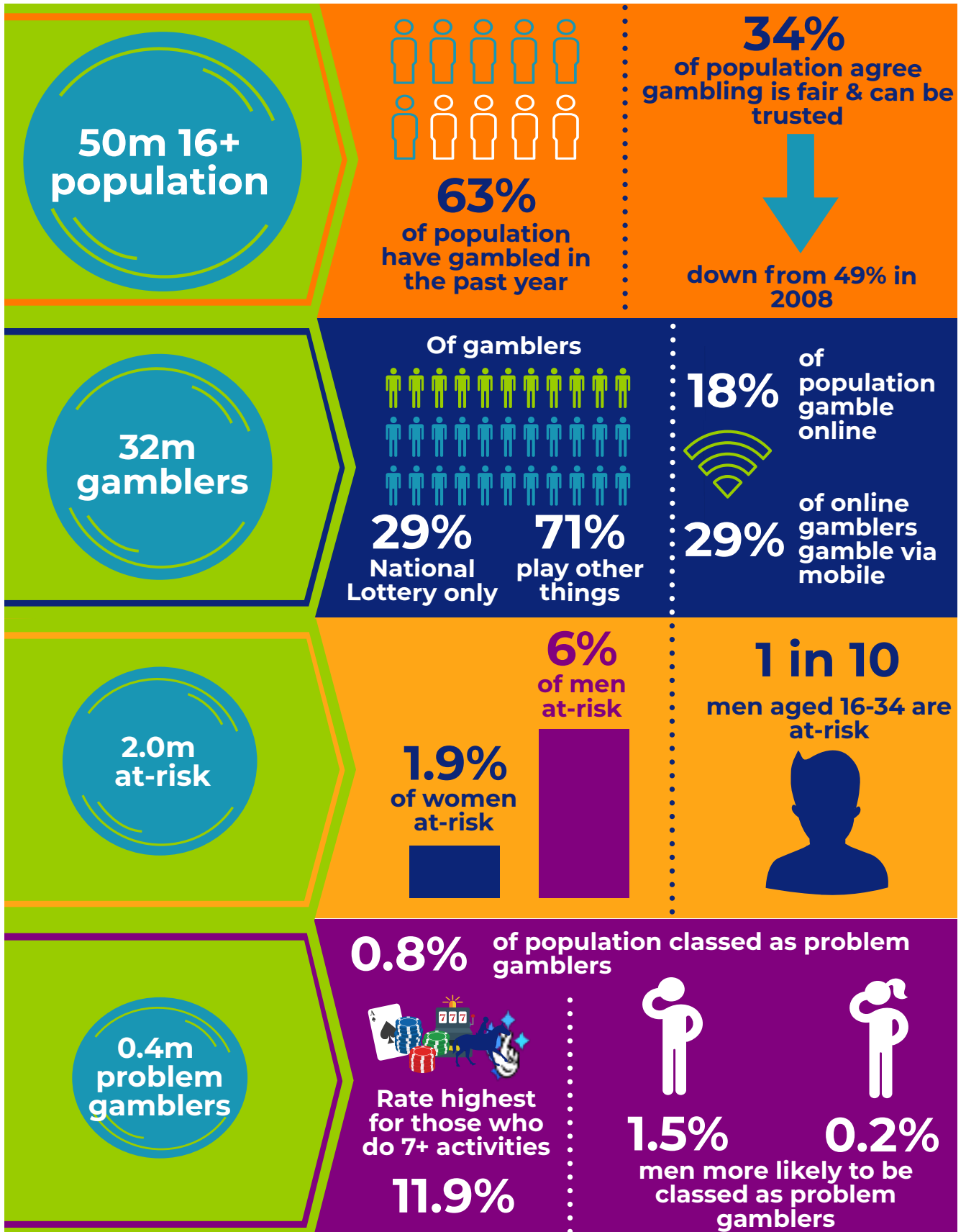


**GAMBLING
COMMISSION**

Strategy 2018-2021

Making gambling fairer and safer

Consumers and gambling



Strategy 2018-2021

Making gambling fairer and safer

Our strategic priorities

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Foreword

We exist to safeguard consumers and the wider public by ensuring that gambling is fair and safe.

To do this we need to balance consumer choice and enjoyment against the risks gambling can create and its impact on wider society. We need to be able to explain how we will work with industry and our partners in other regulators, consumer representatives and government, to tackle these risks and how we plan to make the most of our resources and our powers.

The risks are changing and evolving and the industry needs to move farther and faster to address them.

A well-regulated gambling market, one in which consumers can have confidence can also contribute to sustainable business and growth over the longer term.

This strategy presents a vision for the kind of gambling market we want to see: one that is fairer and safer for consumers.

This strategy sets the direction of travel and our priorities over the next three years. It explains how we, working with others, will deliver this vision.

It has been developed in the context of our statutory duties and is consistent with our statutory role to provide advice to government on gambling, including its effects and regulation.

Gambling legislation and public policy recognises gambling as a legitimate and mainstream leisure activity, but one which must be licensed and regulated.

Here our duties are to:

Permit gambling, provided we are satisfied we can:

- ▶ Prevent gambling from being a source of crime or disorder
- ▶ Protect consumers by ensuring that gambling is fair and open
- ▶ Protect children and vulnerable persons from being harmed by gambling.

Ensure the National Lottery is run in a way that ensures:

- ▶ Propriety
- ▶ Participants' interests are protected (and subject to those two duties)
- ▶ Proceeds from the Lottery are as great as possible.

The strategy has also been shaped against the background of our assessment of current risks to consumer confidence and market integrity.

Gambling is a popular pastime in Britain. More than **46%** of people play the National Lottery, resulting in significant contributions to good causes. **45%** of people gamble on other products and the gambling market continues to grow, a trend driven in particular by the growth in online gambling and mobile use. This has created a highly competitive market which relies heavily on advertising, which has a broad public reach. Consumers are also turning to new gambling and gambling-style products, and new ways to pay for and monetise gambling are developing all the time.

Foreword continued

Balancing consumer choice and behaviour against the risks gambling can create to consumers and wider society, presents a number of challenges:

- ▶ There are signs that public **trust and confidence** in gambling is declining. For example, our most recent research published in 2017 showed that **78%** of people believe that there are too many opportunities to gamble; **69%** of people feel that gambling is dangerous for family life; and only **34%** believe that gambling is fair and can be trusted, down from **49%** in 2008. There are also significant public concerns about the volume, nature and scheduling of gambling **advertising** and the impact this could have on future generations.
- ▶ Gambling businesses need to offer **fair choices** to consumers. The failure of licensees to react promptly to concerns and complaints about the fairness of their terms of conditions has already led us and the Competition and Markets Authority (CMA) to take action. We expect all licensees to treat customers fairly at every stage of the customer's journey.
- ▶ The rates of problem gambling in Britain are not reducing and the impact of **gambling-related harm** is wide ranging. Greater focus is needed, not just on problem gamblers but also problem gambling – and on the impact of problem gambling on family life, access to public services and costs to the community and the economy. Similarly, a different and more dynamic approach to **vulnerability** is required which means placing a greater focus on vulnerable people, who due to their personal circumstances are especially susceptible to detriment, particularly where a business is not acting with appropriate levels of care.
- ▶ Ensuring **market integrity** remains a challenge. The risk of match-fixing means operators must continue to pay close attention to reporting and collaborating with sports bodies. To safeguard against **crime and money laundering**, operators need to step up their customer checks, track play, and intervene to prevent crime, including money-laundering. Progress has been made in this area, but more needs to be done.
- ▶ **Tackling illegal gambling** will also remain an important part of what we do, as the potential harm to consumers from illegal gambling is significant. Similarly, we will remain focused on tackling the provision of age restricted products and facilities to **children** and helping to inform parents and guardians about how to protect their children from the risk of harm from gambling.

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- ▶ Gambling operates in a **global market**. The ability to collect, analyse and share information and intelligence with other regulators and work collaboratively with other jurisdictions is key to safeguarding British consumers' interests. During the life of this strategy Britain will leave the EU and we will need to maintain the effective collaboration established at European level, whilst also building links with other regulated markets.
 - ▶ The gambling market is seeing growing influence from a significant **digital and data revolution**. Online gambling has grown at a rapid rate, now representing around a third of gambling spend. Our current work and government interest is focused on the issues this raises for consumers and regulation. We need to be prepared for the consumer risks and regulatory challenges that further market and technology changes bring, whilst also being ready to seize the opportunities. We want licensees to be just as focused on how they can exploit new technologies to manage risks and protect consumers, as they are on how to use them to achieve their commercial ambitions. Greater convergence in product and play across the commercial gambling, lotteries and National Lottery market will also have an impact on our market view and approach to risk-based regulation.
 - ▶ The changing relationship between good causes and gambling through the **returns from lotteries** also presents a challenge. Securing future revenues and maintaining integrity under the current National Lottery licence, while preparing to run the competition for the next licence, will be key priorities for the Commission. We also recognise that society lotteries are becoming an increasingly important fundraising tool for charities and local public services.

These are just some of the challenges facing gambling policy and regulation and these cannot be overcome by us alone. It needs continued strong partnerships with other regulators, consumer representatives and government. It needs consumers, and organisations who represent their interests, to make their voices heard and to play an active role in improving consumers' experiences.

Most importantly of all, it requires all gambling operators to treat their customers fairly and to work to **make gambling safer**. Holding a licence from the Gambling Commission gives operators and individuals the right to deliver gambling products and services to consumers. With those rights come significant responsibilities, consistent with the impact which gambling can have on society.

This strategy sets out our high level plans and priorities to make those ambitions a reality.

Our aspirations for a fairer and safer gambling market

We want consumers to be:

- ▶ empowered to make informed choices about gambling
- ▶ fully informed of, and able to make use of, their rights
- ▶ free to enjoy gambling and to feel confident that they will be treated fairly
- ▶ aware of the risks and clear about when and how to seek help or redress
- ▶ able to differentiate between operators in a competitive market on the basis of customer care and values.

We want the wider public to:

- ▶ have a well-informed view of how gambling (including lotteries) can entertain and contribute to society, but also have the potential to cause harm to individuals, families and the wider public.

We want gambling businesses, those who lead them and who hold personal licences to:

- ▶ set the tone from the top and lead a culture of compliance and commitment to doing the right thing for consumers that resonates with staff
- ▶ strive to continuously raise their standards and at all times treat customers fairly
- ▶ resolutely work to reduce the risk of harm from gambling
- ▶ invest in and use data, technology and measures to identify harmful play, design in protections and intervene early to guard against consumer harm and prevent crime
- ▶ innovate to protect, as much as for profit
- ▶ actively identify and manage risk, and evidence this at every stage.

We will:

- ▶ continue to be independent and evidence-led
- ▶ take a targeted and innovative approach to regulating in a way which is consistent with our statutory objectives
- ▶ use our knowledge and experience to influence and inform public debate
- ▶ intervene, taking precautionary action where this is necessary
- ▶ give leadership on cross-cutting issues within our remit, such as tackling gambling-related harm
- ▶ set minimum standards and codify best practice
- ▶ use our powers to the full, reflecting Parliament's intentions
- ▶ look outwards to build effective partnerships internationally, as well as locally, with key regulators and stakeholders.

Our five strategic priorities to deliver this vision are to:

protect the interests of consumers

prevent harm to consumers and the public

raise standards in the gambling market

optimise returns to good causes from lotteries

improve the way we regulate

The sections which follow outline our approach to each of these strategic priorities. Our annual business plans will set out in more detail our actions to achieve the ambitions set out in this strategy, and will include information on how well we have performed against our yearly objectives.

Our strategic priorities

Protect the interests of consumers

Information currently available to help consumers understand the products and services they use, apply their rights and how to access help is difficult to find, and generic in nature. Technology has not been applied to tailor information, processes and systems to an individual's circumstances and needs. There is an imbalance between businesses and consumers as a result. Too often, the consumer bears a disproportionate share of the risk.


We want to make information and controls accessible and more meaningful for consumers to help them understand their gambling choices at an individual level, and have easy to use, reliable tools to control it. Over the next three years we want to see operators make a step change in the way consumers are equipped to understand and manage their gambling and we will regulate to enhance minimum requirements.

We will use our powers to intervene on a precautionary basis if products, licensees or processes give rise to concerns, and we will take action against operators and personal licensees if there are persistent or systemic failures. We will use the full range of our powers to protect consumers.

We want consumers to have confidence that when they gamble, they are doing so with a business licensed by the Commission, which significantly reduces the risk that their gambling is connected to crime or rigged against them.

We act against illegal operators because the level of potential harm to consumers and society is significant. But markets move quickly and new business models, products and opportunities emerge, as we have seen with e-sports and skins betting. We see it as our role to advise government and alert the public if we see risks with new and evolving gambling or gambling style products.

When things go wrong, we expect the businesses we regulate to act promptly to put them right, including by explaining things clearly to customers and, where relevant, the wider public. Where businesses make mistakes to the detriment of the consumer, we expect those businesses to move quickly to correct the error and ensure, where appropriate, that the consumer is put back in the position they would have been in if the error had not occurred.



We recognise the challenges here – businesses may struggle to adapt to this more consumer-led approach and operators who seek to do so may fear that their less responsible competitors will exploit their reduced costs to undercut them. This is why our role as regulator in driving consistent improvements, raising the bar, and tackling underperformance is critical.

We will:


- ▶ improve consumer understanding about the gambling products they use, the associated risks, and when to seek help if things get out of control. In relation to children and vulnerable people, this will include improved support for parents, families and others to help them to understand the risks posed by gambling and the ways in which they can protect those in their care. This is particularly important when new products emerge that blur the line with other social, gaming or online activity.
- ▶ identify ways to give more power and control to consumers to manage their gambling in ways that work for them. Make sure that operators provide easy access to reliable information, tools and services which consumers can use to inform and control their gambling at every stage of the customer journey. This includes intervening early and signposting consumers to help with gambling-related problems. This may include information for families and others who might be well placed to spot signs of problem gambling. We will work with consumers and operators to ensure interventions and safeguards are well designed and targeted.
- ▶ promote greater transparency by putting independent and trusted information into the public domain. Consumer choice is heavily influenced by price and it can be difficult for consumers to work out what else matters. This might include information such as details of any proportion of the price which is paid to good causes; the risks posed by particular products; treatment of customer funds and accounts; or other protections that operators provide.
- ▶ review and strengthen rules to tackle unfair and misleading practices, including by working with other consumer protection regulators, and penalising companies who misrepresent information to consumers or fail to treat them fairly.
- ▶ make sure that consumers have access to effective dispute resolution and redress services, which are independent, swift, trusted, free of charge, transparent and fair. Over the life of this strategy we want to see more streamlined and simplified arrangements for dispute resolution and redress.
- ▶ improve our understanding of the level and risks of illegal gambling in Britain and work with partners to prevent and deter those risks that present greatest harm to consumers. We will also alert consumers to these risks to limit harm.

Prevent harm to consumers and the public

Gambling-related harm is when gambling causes damage to individuals, families, communities or society more generally. It is associated with a range of mental health and social problems (including crime), all of which can have profound impacts. This includes the costs associated with its impact on public health services, on families and communities, on employment and debt, and on justice and court services. Understanding the full impact of gambling will help the industry, the Commission and other key stakeholders to properly manage and minimise those impacts.

It is clear that gambling can cause detriment to some people in some circumstances, but the evidence available in relation to gambling-related harm is poor in many key respects. We want to encourage a focus on the prevention of gambling-related harm, as well as ensuring that effective support and treatment is available for those who have already experienced harm.

Historically, the Gambling Commission has called for industry to increase funding to prevent gambling-related harm and support education and treatment, yet the response overall by operators has been slow and insufficient, and we are yet to see if industry will meet the targets set for 2017. Continued failure in this would be unsustainable and unacceptable for the future. A levy, for which the government has powers, would be a fair and credible way of addressing some of these weaknesses should they continue and indeed has support within the industry, including among the largest operators. If there is insufficient support for the fundraising targets, or related concerns about the ability of the current system to deliver the National Responsible Gambling Strategy, the government has indicated that it will consider alternative options, including the introduction of a mandatory levy. However, to make the voluntary system effective, industry will need to provide for future funding in a more credible and resilient manner.



Our work to review the arrangements for Research, Education and Treatment is examining the current model for delivery – we may see the case to work towards change if, working across industry, regulator and agencies, we are to go farther and faster during the three years of this strategy.

While we play a full role in developing the evidence base, we will not hesitate to take precautionary action where risks of harm are indicated. The paucity of evidence cannot be an excuse for doing nothing in circumstances where there are indicators that consumers may be at risk of harm.

This strategic priority is linked very closely with the National Responsible Gambling Strategy – both the implementation of the existing priority actions and the shaping of a future strategy, and we will continue to work with our expert advisers, the Responsible Gambling Strategy Board, and with GambleAware within the current framework to deliver the priorities that support safer gambling.

During the life of this strategy, the government will conclude its Gambling Review, looking at stakes and prizes of gaming machines, machine allocations and social responsibility, including protections around gambling advertising. This review, and the public policy position it updates, will set an important context for further action on gambling harm and social responsibility.

Our strategic priorities continued

Prevent harm to consumers and the public

We will:

- ▶ regulate and take precautionary action where necessary to reduce gambling-related harm. We will focus, not just on gambling controls to help customers manage their gambling, but also on the products themselves, the provider, and the place or environment in which the gambling is taking place.
- ▶ expect operators to actively work and cooperate with each other to mitigate and minimise harm, collaborating to accelerate progress and evidence impact. We want a focus on ‘what works’ and we will drive and develop across the gambling landscape a culture of trialling and evaluating interventions. We expect operators to lead the way on identifying how innovation in products and services can support innovation in protecting and empowering the consumer.
- ▶ provide leadership to forge a sustained, world-leading approach to tackling gambling-related harm, and to influence and work with the industry, consumers, expert agencies, advisers and the public to do so. This does not mean directing the industry in a prescriptive way, but it does mean focusing the debate and driving progress.

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- ▶ work with partners to improve understanding of gambling-related harm and its impact on society as a whole, not least as a public health issue. Oversee and maintain work, including with others, to identify the costs of gambling-related harm in Britain.
 - ▶ shape a future national strategy for safer gambling. This must identify the scale of industry funding required to invest in preventative measures, in effective education, and in the evolution of treatment services which are accessible in the areas of greatest need and based on best practice models of treatment delivery and evaluation.
 - ▶ put in place a more effective approach to target funding, supervise progress, evaluate and report on the impact of a national strategy for safer gambling. Many initiatives and programmes are already underway. However, if there is to be step change over the next three years, the Commission sees the need for a new approach to better coordinate funding and evaluation, and to supervise delivery across the operators and agencies concerned with limiting and treating gambling-related harm.

Our strategic priorities continued

Raise standards in the gambling market


More needs to be done, and at a faster pace, by operators to improve ways to know their customers, to ensure fair and safe play, and to keep markets free from crime and money laundering.

Too often, consumer protections are designed separately to products and late in the process. The focus of those designing consumer protection measures is often on technical compliance, rather than on good consumer outcomes. We want to stimulate a culture of trialling and evaluation to identify what works for the consumer.

We are ambitious for the gambling sector, including lotteries and the National Lottery. We want consumers to have trust and confidence in the industry. For this to happen, consumers have to be central to the thinking across the market.

We expect to see evidence of operators (in particular their boards and senior individuals) leading a culture of accountability to the customer first, as well as to the regulator. This means showing a genuine commitment to providing a fair and safe 'offer' to customers. It means seeking and taking account of consumer views. In particular, it means innovating to identify effective ways to prevent and minimise gambling-related harm and maintain product and market integrity, and acting quickly to put things right if they go wrong.

We will continue to take a cross-sector view, focusing on every part of the supply chain from customer-facing (B2C) operators, to content providers, software testers, payment providers and all those who either have a direct regulatory responsibility, or who have a broader role to play to maintain integrity, ensure fair treatment and safeguard consumers.



Risks to the licensing objectives, and therefore consumers, will vary across sector, size of operator, nature and complexity of corporate structures and business models. Too little attention has been paid by operators to understanding their risks and evidencing the action that has been, and will be, taken to mitigate them. Over the life of this strategy, we expect to see a significant step up in operator action in this area, including in the way licensees are able to show us, not just tell us, what they have done in relation to risk and mitigation. Businesses that present greater risks will face higher hurdles, greater scrutiny and increased reporting requirements. The reverse is true for those businesses that present fewer risks.

We will work to help businesses comply: to ensure standards are understood; to facilitate sharing of best practice; to give guidance, and set minimum requirements. We will also take firm action against businesses which do not uphold the standards we expect and persistently or systemically fail their customers.

Our strategic priorities continued

Raise standards in the gambling market

We will:

- ▶ require operators to design in protections ‘up front’ to the products and services they offer, considering how data analytics, technology and other measures can be used to detect and prevent crime (including money laundering) and harmful gambling. We will also require operators to build on existing ‘backstop’ protections, such as self-exclusion, in ways that work for consumers and how they gamble, rather than benefitting the industry and how it organises itself.
- ▶ look carefully at the evidence brought to us by operators and consider whether we should make changes in the interests of consumers where our regulatory requirements prove to be barriers to the piloting or implementation of innovative approaches. Competitive, diverse and innovative businesses contribute to healthy and well-functioning markets for consumers. While welcoming innovation, we will apply the precautionary principle to new products, or to innovation in other areas, when there is good reason to believe they might cause harm disproportionate to any benefits they might bring. The burden of proof will sit with the operator to demonstrate otherwise.
- ▶ look to intervene to set minimum requirements beyond those already codified in our *Licence conditions and codes of practice*. For example, we will review the current requirements for gambling management tools and assess whether additional baseline requirements should be set to raise the bar on the level of protection available.
- ▶ support the industry to lead the way, collaborate and share what works and what has proven to be less effective for consumers, via processes like the annual assurance statement reporting. We will identify ways to facilitate the sharing of lessons learned and to support the industry to recognise and disseminate best practice and accelerate progress.

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- ▶ enable operators to benchmark performance in the market, and to ensure that trusted and independent information is provided to the wider market which customers can also use over time to differentiate between operators in areas related to customer care above and beyond minimum requirements.
 - ▶ develop and publish risk assessments, analysis and research, such as the assessment of money laundering and terrorist financing risk. We expect operators to draw on these to shape their own risk assessments and take pre-emptive action. We will also publish information for consumers to help operators explain the requirements they must meet, and build consumer understanding and confidence in a well-regulated and well-functioning market.
 - ▶ hold to account those who do not attempt to understand the risks of gambling or fail to put in place effective mitigations, are deliberately or negligently non-compliant and who do not take account of lessons learned. We will use the full range of our enforcement powers, and develop our use of sanctions, to ensure these are well targeted and provide credible deterrence.
 - ▶ continue to support and facilitate collaboration across operators in the market and other agencies concerned with raising standards in relation to sports betting integrity, and work to foster national and international standards where it is clearly in the interests of British consumers to do so.
 - ▶ learn from other regulated markets in relevant sectors of the economy, and other gambling markets internationally. We will share intelligence across borders with regulatory partners and work in collaboration to build understanding, identify what works, and drive up standards.

Optimise returns to good causes from lotteries

Lotteries, including most significantly the National Lottery, make important contributions to society. In particular, they are an important way of generating funds for good causes – sports, arts and culture, heritage, community projects and more.

We regulate the National Lottery, which, in the year ended September 2016, contributed around **£1.7bn** to good causes.

We also license more than **500** society lotteries, which, in the year ended September 2016, contributed over **£230m** to good causes.

The lotteries sector is, first and foremost, a form of fundraising for good causes to enhance and enrich aspects of British public life.

We want to build on this success, while ensuring that lotteries are run in a way which is fair and safe for consumers.

The lotteries sector, like every other part of the gambling industry, is evolving quickly, with more diverse channels and products. As with the National Lottery, many society lotteries are now successfully promoting instant-style products. This creates more convergence of products in the society lotteries sector, the National Lottery portfolio and the commercial gambling sector. It also changes the hierarchy of harm as lottery products move away from play that is lower risk (in relation to the licensing objectives) towards more mainstream gambling products.



We will:

- ▶ make full use of all our tools during the remaining years of the Third National Lottery licence, which expires in 2023, to maintain the integrity of the National Lottery, protect consumers, and create incentives for the current National Lottery licensee, Camelot, to grow sales and contributions to good causes.
- ▶ shape a robust and effective competition for the National Lottery of the future. We will think creatively about how to grow the value of the National Lottery as a public asset and we will take a long-term view, recognising the very significant social, cultural and economic contribution of the lottery to the UK.
- ▶ look at the implications of market convergence as part of our planned future work in preparation for the next National Lottery licence. We also look to society lottery operators now to consider carefully the implications of product and channel development for compliance with the licence requirements, which are designed to keep play safe.
- ▶ engage with the range of stakeholders of the National Lottery, including consumers and the wider society and community, as well as the major lottery funding distribution bodies.
- ▶ consider whether any further changes are necessary to ensure that society lotteries can continue to make important contributions to society while being run in a way which is fair and safe for consumers.

In particular, we will consider how to improve the transparency of the contributions they make. This is important information for consumers to help them to understand which good causes are being supported and how much of their money goes to the good cause.


Our strategic priorities continued

Improve the way we regulate

Effective regulation provides a range of important protections for consumers and society. A well-regulated market protects society from the direct harm that can be caused by illegal gambling, and from the risks of money laundering and other serious crime. It also protects individual consumers from match-fixing, cheating and related crimes such as identity theft. This includes the risk of being treated unfairly without redress.

We aim to be a risk-based, evidence-led and outcomes-focused regulator. To further this we see a need for greater investment in our capabilities as a regulator, such as in relation to data – what we require, and how we manage and use it. We also see a need to evolve our approach and form of regulation, such as in expectations we set of how licensees will evidence action to identify and tackle gambling-related harm.

As we evolve our approach to regulation we will work to build **evidence**, drawing on data, research and analysis, and to **diagnose** problems, assessing the issues and prioritising these based on risk. From this we will determine the **remedies**, examining the options, and making a proportionate assessment of the circumstances, and work to **evaluate** the impact of what we do and adapt approaches over time.



We will work in a way that is legal, efficient, effective and fair;
and will live our values to be:

Fair – evidence-based and outcomes-focused, proportionate and consistent.

Accountable – visible and open about the way in which we work in the public interest, act with appropriate discretion, and be efficient with our resources.

Professional – listen and make effective decisions. We will be creative in our approach and willing to break new ground and take informed risks to deliver our objectives.

Constructive – consistent and work positively with all our stakeholders to ensure that their circumstances and views are taken fully into account.


It is only by working with and through others that we can make change. With the industry, regulators, government (including in Scotland and Wales), treatment providers, local authorities, law enforcement and other agencies, we will strive to continue to build consumer trust and confidence in the regulation of gambling, and in the way in which the market functions.

Our strategic priorities continued

Improve the way we regulate

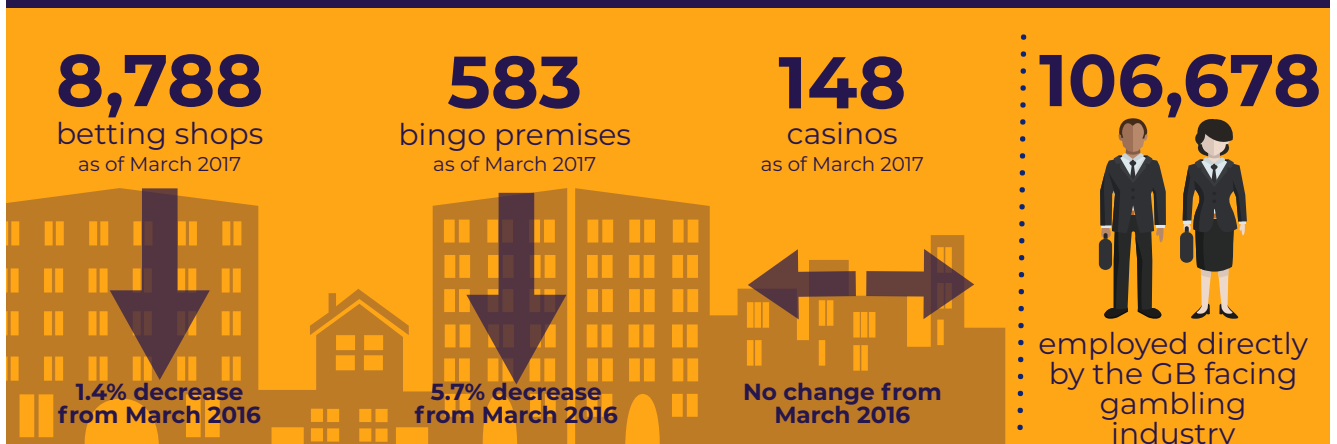
We will:

- ▶ consider the whole market in designing our regulation, and take a long-term view to deliver the best outcomes. We will adapt our approach in the light of emerging evidence, the results of evaluation and developments in the environment of gambling. In order to anticipate and react to changes most effectively, we will continue to scan the horizon for both risks and opportunities to help us to prioritise our resources to where we can have greatest impact in the public interest.
- ▶ deliver our services effectively and efficiently. In the same way that we challenge licensees to change, so we too need to develop our ways of working. We will invest in our people, our skills, our culture, and our systems and processes to ensure that this happens. We will work wherever possible to automate services for licensees and consumers so that we can invest resources in frontline work, and we will look for opportunities to improve these by jointly designing them with users.
- ▶ apply a risk-based approach, seeking to differentiate. As well as taking account of inherent risk and impact, we will react to the engagement by businesses themselves to tackle risk to consumers and will tailor our levels of intervention as a result. Pre-emptively, we will develop and publish market risk analysis and reports and we will look for evidence of how operators have taken action in response to these. We will work to get better information into the market on operator performance that can help inform ways to drive up standards across operators, and consumer choice.
- ▶ be interventionist where necessary, in particular where licensees or individuals do not uphold the standards we expect. Intervention may be at an industry, sector, business or individual level.

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- ▶ put a greater premium on the use of data and information. First, in terms of how we use information to seek assurance and inform targeted action. Second, while placing the minimum burden necessary on reporting, we will regulate and take action where necessary to ensure licensees provide us with timely and accurate information. Finally, we will also expect licensees, throughout the supply chain, to show how they are making greater use of data and technology to track play and guard against crime and gambling-related harm.
 - ▶ evolve the regulatory framework in response to emerging situations and circumstances, and anticipate and respond to change. We will consult widely and be open to challenge and alternatives, but not negotiation.
 - ▶ enhance our approach to engagement with operators, consumers and partners. Specifically, we will:
 - ▶ build on our partnerships with other regulators, consumer bodies, agencies and government, including in Scotland and Wales, and Northern Ireland for the National Lottery.
 - ▶ create the right tools (including our consumer contact function) to ensure we can tap in to prevailing consumer and public trends and issues and use these to shape our regulatory policy and decisions.
 - ▶ review our approach to engaging with operators, large and small and across the supply chain, to help licensees understand regulatory best practice, share learning and improve. This includes investing in skills, capabilities and resources in the Commission.

Industry statistics

£13.8 bn total net spend on British gambling industry



Data sources:

Overall participation rates, National Lottery/other activity participation, at-risk and problem gambling statistics:
[Gambling Behaviour in Great Britain 2015](#)

Whether gambling is fair and can be trusted, online participation, device use and in-play behaviour:
[Gambling participation in 2016: behaviour, awareness and attitudes](#)

Industry statistics:

[Industry statistics October 2015 to September 2016](#)

Definitions:

At-risk: at-risk gamblers are those who show some signs of problematic gambling but remain below the threshold for problem gambling. These gamblers may still experience a range of negative outcomes and be at-risk of developing problems in the future. Individuals were classified as at-risk if they scored 1-7 on the 9-item PGSI problem gambling screen (maximum score 27).

Problem gamblers: problem gambling is typically defined as gambling to a degree that compromises, disrupts or damages family, personal or recreational pursuits. Individuals were classified as problem gamblers if they scored 8+ on the 9-item PGSI problem gambling screen (maximum score 27) or 3+ on the DSM-IV problem gambling screen (maximum score 10).

Online: refers to all remote gambling activity.

Net spend: is used as shorthand for total Gross Gambling Yield (GGY), which is the size of the industry as calculated by deducting total winnings/prizes from total staked, plus any fees/commission paid to operators.



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