

Patterns of play and consumer vulnerability

Summary of Interested Parties

Updated: 30 July 2018

1. Behavioural Insights Team

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Q1 Key areas of expertise/interest for Phase 1: Online patterns of play

- Complex data analysis
- Data science
- Survey design and development
- Report write-ups
- Working in multi-disciplinary teams
- Simplifying key concepts
- Gambling related research (National and/or International)

Q2 Key sectors/areas of interest for Phase 2: Additional research lots

Respondent skipped this question

Q3 Summary of expertise

The Behavioural Insights Team was the world's first government institution dedicated to the application of behavioural sciences. We aim to improve outcomes by introducing a more realistic model of human behaviour to policy, often by enabling people to make 'better choices for themselves'. We are also highly empirical; we test and trial our ideas before they are scaled up. This enables us to understand what works and (importantly) what does not work. Finally, we have a data science team that is applying new methods to existing datasets in order to improve public services and support decision making. BIT is currently undertaking Phase 3 of GambleAware's remote gambling research using a mixed methods approach including: data science, qualitative research with gamblers and operators, reviewing the relevant behavioural insights literature and testing behavioural approaches with operators. We are interested in building on this work by improving understanding of the behavioural aspects of gambling harm. This means understanding that people are often not processing all the available information and carefully weighing up the costs and benefits of each action. Often we use rules of thumb to decide a course of action, and while in many instances these work well, sometimes they can lead to actions that are not in people's long term interests. We believe these types of mental short cut are playing an important role in gambling related harm, especially online, and therefore think behavioural insights is part of the solution. We would be very interested in partnering with organisations with specialisms in gambling, such as academic institutions, and potentially also organisations which specialise in project management.

Q4 Are you happy for the information you have supplied to be shared with all interested parties?

- Yes

2. Focal Research Consultants Limited

Name: Tracy Schrans

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Q1 Key areas of expertise/interest for Phase 1: Online patterns of play

- Complex data analysis
- Data science
- Survey design and development
- Data management
- Project management
- Report write-ups
- Working in multi-disciplinary teams
- Simplifying key concepts
- Gambling related research (National and/or International)
- Communicating with different audiences
- Outreach to a range of stakeholders

Q2 Key sectors/areas of interest for Phase 2: Additional research lots

- Lot 1: Non-remote betting
- Lot 3: Gaming machines
- Lot 4: Casino table games

Q3 Summary of expertise

Focal Research Consultants Limited (Focal) is an independent social research and data analytics firm with expertise in the areas of gambling measurement, responsible gaming evaluation and behavioral analytics. Over the past 30 years, Focal Research have worked cooperatively with various gambling stakeholders around the world including gaming operators, gaming suppliers, manufacturers, regulators, public health organizations, NGO's and government bodies. This has given us a balanced and integrated understanding of the dynamics influencing gambling and responsible gaming in local and global markets. The principals of Focal conducted data analysis and algorithm development using big data starting in 1995 for major organisations in Canada. This was followed by analysis of gambling operator machine data in 2004. We developed the world's first operational risk identification algorithms into casinos in 2005. Consequently we have developed over 1,000 potential indicators of risk for land based casinos and over 2,500 for remote gambling operations. Many of these variables have been used in algorithms to classify players according to risk. The determinants of risky behaviour vary by product, by player segment, and by gambling environment. In developing algorithms for its clients Focal has created algorithms for different product classes (e.g., racing, gaming and casino play), algorithms for specific retail establishments or for retail segments (e.g., urban casinos), as well as segmenting their customers and creating algorithms suitable for classifying the full spectrum of players (e.g., the full range of expenditure and gambling preferences). Focal is familiar with the UK gambling environment and has conducted several successful online surveys to identify risk among selected samples of operator customers. Focal is also familiar with the data generated by both remote and land based UK operations and has been able to mine these data to create variables proven to help in the classification and profiling of at-risk and low-risk gamblers. Focal also brings a wealth of experience/expertise in research and survey design. We have conducted both qualitative and quantitative research for gambling providers for 30 years. We have also conducted basic research resulting in over 40 peer reviewed publications (<https://www.focalresearch.com/publications/>). We know how to design surveys to achieve high response rates. Recently we have been conducting online surveys to identify risk levels in players for nine operators internationally and have achieved excellent response rates ranging from 23% to 45%.

Focal has considerable expertise in conducting large scale research/surveys. We have conducted six longitudinal studies for industry and government partners in the area of gambling. Focal also has expertise in creating measures to identify characteristics of gamblers. Because of the severe limitation of the PGSI in identifying risk, Focal has created two multi-construct screens: the Focal Adult Gambling Screen (FLAGS) and the Focal Youth Gambling Risk Screen (FYGRS) (<https://www.focalresearch.com/publications/>). Focal has a reputation for conducting quality sophisticated actionable research delivered on time and on budget which provides the information and insight required by policy designers and decision makers. We can complement other partners as consultants in research design and methodology, measurement, survey design, and analysis (statistical and data analytics).

Q4 Are you happy for the information you have supplied to be shared with all interested parties?

- Yes

3. YouthSight

Name: Josephine Hansom

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Q1 Key areas of expertise/interest for Phase 1: Online patterns of play

- Survey design and development
- Project management
- Report write-ups
- Working in multi-disciplinary teams
- Gambling related research (National and/or International)
- Communicating with different audiences

Q2 Key sectors/areas of interest for Phase 2: Additional research lots

Respondent skipped this question

Q3 Summary of expertise

YouthSight have 14 years' experience in Millennial and Gen Z market research; we are well known in the sector and our research techniques have won awards within the market research world. We are experts in young people and their lives, allowing us to provide insight into their habits and characteristics. We have access to our panel of over 140,000 16-30 year olds which will allow us to quickly and accurately target the necessary sample. We have previously looked at the gambling habits of young people in our State of the Youth Nation product. One of our most shocking findings is that 16-24 year olds gamble online almost 3 times the national average for adults (according to The Gambling Commission). Gambling is clearly something that young people are spending their disposable income on. They are exposed to gambling-style games and other less obvious forms of gambling that can develop into a seriously addictive habit. We know that skin betting is increasingly prevalent among young gamers. Skin betting sites are unregulated and therefore affects young teenagers who would otherwise be innocently playing an online game. Being such a high-risk group, we believe there is opportunity for research to be conducted specifically on young people. We have conducted work previously with The Gambling Commission, investigating what types of gambling young people are taking part in, their gambling habits and the reasons why they gamble. Having worked with The Gambling Commission before, we are well placed to conduct further research and have confidence in our approach to deliver on the project objectives. Our areas of expertise fall into Phase 1, looking at online patterns of play. We believe we would be able to fill in some of the data gaps that you have when it comes to young people and gambling. In our team we have a wealth of survey design expertise and could confidently develop a methodology for this project. From this we would also be able to find out even more about young people's gaming habits and characteristics, and any significant differences amongst key demographics.

Q4 Are you happy for the information you have supplied to be shared with all interested parties?

- Yes

4. Coffey International

Name: Jamie Fotheringham

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Q1 Key areas of expertise/interest for Phase 1: Online patterns of play

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Q2 Key sectors/areas of interest for Phase 2: Additional research lots

- Lot 1: Non-remote betting
- Lot 2: Electronic bingo terminals
- Lot 3: Gaming machines
- Lot 4: Casino table games
- Lot 5: Scratchcards
- Lot 6: National Lottery draw based games

Q3 Summary of expertise

Coffey is an experienced manager of large and complex research programmes, and also has an in-house team of quantitative and qualitative research expertise. Given the need for oversight, management and quality assurance of the research programme we could perform that function to support others who may be better suited to the technical research components required.

Q4 Are you happy for the information you have supplied to be shared with all interested parties?

- Yes

5. Frontier Economics

Name: Andrew Leicester

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Q3 Summary of expertise

We offer expertise in complex statistical and econometric data analysis, and communication of complex results to a diverse range of audiences (policy, industry and academic). We have worked on a range of gambling-related projects, including requesting and handling data from gambling companies, in recent years. We also work with market research partners to design bespoke primary surveys and analyse survey data, and have capacity to deliver limited qualitative research.

Q4 Are you happy for the information you have supplied to be shared with all interested parties?

- Yes

6. Social Care Workforce Research Unit, King's College London

Name: Dr Stephanie Bramley

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Q1 Key areas of expertise/interest for Phase 1: Online patterns of play

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Q3 Summary of expertise

Myself and colleagues at the Social Care Workforce Research Unit at the Policy Institute at King's College London are currently conducting research about understanding how gambling impact vulnerable populations (e.g. adults with health, care and support needs; migrant communities). We have expertise in conducting scoping/literature reviews, surveys, interviews and focus groups with vulnerable people and stakeholders. Therefore we could contribute to the qualitative research components of this project. For more information about our research please see: <https://www.kcl.ac.uk/sspp/policy-institute/scwru/res/capacity/adults-at-risk-and-gambling.aspx> and <https://www.kcl.ac.uk/sspp/policy-institute/scwru/res/knowledge/gambling-and-migrants.aspx>.

Q4 Are you happy for the information you have supplied to be shared with all interested parties?

- Yes

7. Ecorys

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Q1 Key areas of expertise/interest for Phase 1: Online patterns of play

- Project management
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Q2 Key sectors/areas of interest for Phase 2: Additional research lots

Respondent skipped this question

Q3 Summary of expertise

Ecorys UK is a large independent research organisation with 30 years of experience providing research, consultancy and programme management services. Ecorys' Policy and Research team (P&R) employs a 45-strong team of multi-disciplinary researchers and evaluators based in Birmingham, London and Leeds. Having reviewed the Patterns of Play study brief we would highlight our key strengths to be: 1) • Project management experience: We have significant experience of managing large and complex evaluation and research contracts frequently involving partnerships and consortia. We hold IS 9001 accreditation for our project management processes. 2) • Qualitative research with vulnerable groups: In recent years Ecorys has developed a significant track record informing policy and services to support vulnerable groups. Our experience across a number of thematic areas means we have a significant understanding of the personal and situational vulnerability issues faced by many individuals and groups. We have experience of engaging with these groups and facilitating their participation in mainly qualitative research. 3) • In house digital, graphic design and communications teams: Ecorys has an in-house digital team with the capacity and capability to produce a range of dissemination and communication materials, and experience of working in close collaboration with research teams to ensure that materials are robust yet easily understandable and digestible. To complement this experience we would envisage the following to be useful: 1) Sector knowledge: While Ecorys has completed some work in this area (most recently a study on Young People, Gambling and Gambling related harm), potential partners with more specific sector knowledge would add value. 2) Additional survey expertise: While Ecorys has survey capabilities, potential partners with direct experience of this target groups would more than likely to be useful.

Q4 Are you happy for the information you have supplied to be shared with all interested parties?

- Yes

8. Playtech

Name: Simo Dragicevic

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Q1 Key areas of expertise/interest for Phase 1: Online patterns of play

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Q3 Summary of expertise

Playtech is the world's largest online gambling software and services supplier, which develops unified software platforms and content for the online and land-based gaming industry (including the licensed betting office, bingo and casino sectors). Playtech serves over 140 licensees, including the world's largest online gambling operators, has a library of over 600 leading games, including some of the most recognised and best performing games in the market, and provides marketing, operational support, advisory and CRM services with additional services. In addition to the above, Playtech provides specialist and dedicated compliance and responsible gambling solutions and services through its internal compliance and CSR team and its BetBuddy subsidiary. Our work covers areas in responsible gambling data analytics, customer communication and interaction, and game design. BetBuddy researchers have published their work in numerous journals, including ECAI (European Conference on Artificial Intelligence), NIPS (Neural Information Processing Systems), the Journal of Gambling Studies, and International Gambling Studies. The BetBuddy team also continually shares best practice in the world's leading responsible gambling conferences, including the Responsible Gambling Council, National Council on Responsible Gambling, and the European Association for the Study of Gambling. Playtech has extensive experience collaborating on multi-disciplinary projects with industry (e.g., gambling operators) and researchers. The BetBuddy team specifically has collaborated with some of the world's most experienced academics in various responsible gambling domains as well as with City, University of London on a project funded by Innovate UK, the EPSRC and the ESRC, as well as other industry funded academic projects. Playtech continues to have a research partnership with City's Research Centre for Machine Learning, where teams work on testing and developing novel and new techniques to understand player behaviours in the context of compliance and risk. Playtech is well experienced in working in multi-disciplinary teams that involve close collaboration between industry and academia. Playtech is committed to supporting research initiatives the help to achieve the RGSB's National Responsible Gambling Strategy. We believe our unique expertise and capabilities in all online and land-based product verticals, industry data access and expertise, combined with expertise in delivering data-driven responsible gambling solutions and services to help describe, understand, and interact with players, can assist this ambitious research project. We see an opportunity for Playtech to undertake an active support role on projects(s), working in collaboration with researchers and academics who would lead and oversee the projects. Specific areas where Playtech can support are in data access, cleansing, analysis, and ongoing management for both player data and product data to support researchers, as well as leveraging our

experience on research methodology design and delivery and on the use of advanced analytical techniques.

Q4 Are you happy for the information you have supplied to be shared with all interested parties?

- Yes

9. Sophro Ltd

Name: Jonathan Parke

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Q1 Key areas of expertise/interest for Phase 1: Online patterns of play

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- Survey design and development
- Data management
- Project management
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- Lot 1: Non-remote betting
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Q3 Summary of expertise

Our team are interested in using a combination of qualitative and quantitative approaches to describe and understand a broad range of gambling features, products and their environments, and their potential link with problem gambling behaviour. We are confident that we can manage and deliver a large-scale project as a self-confined team. However, we are also open to being part of a larger team depending on fit and relevance. As a team we offer broad and extensive experience of the following: • Project and data management as principal investigators of a number of grants and projects from a wide range of bodies including: Economic and Social Research Council, RCUK, Technology Strategy Board, GambleAware, Responsibility in Gambling Trust, Gambling Commission and various projects with gambling operators; • Large-scale data requests, data cleaning and data management with remote gambling industry partners; • Simplifying and communicating concepts to academics, lay audiences, regulators, service users and industry partners and; • Expertise in systematic critical reviews of existing evidence and academic literature; • We also have agreement in principle for data sharing and support from sections of the remote gambling industry.

Additionally, specific expertise of team members includes but is not limited to the following: Dr. Joanne Lloyd (University of Wolverhampton) Joanne.lloyd@wlv.ac.uk 07838193546 • Expertise in conducting large-scale quantitative survey work, including work on gambling and comorbid mood and substance-related disorders; • Experience of carrying out in-depth qualitative interviews with gamblers, and with people from vulnerable groups (people with schizophrenia and their carers), and in use of various qualitative methodologies (thematic analysis, grounded theory) and; • Background in cyberpsychology; gives insights into broader psychological theories around online behaviours, which can inform understanding of remote gambling in particular. Dr. Jonathan Parke (Sophro Ltd.) Jonathan@sophro.uk.com 07525857742 • Twenty years of expertise in research on product, features and environmental design and potential links with problem gambling and responsible play; • Authoritative up-to-date knowledge and understanding of various products, features and environments of current remote and retail gambling markets and; • Experience of innovative

research design including online qualitative analysis of big data from the remote gambling industry
Professor Peter Schofield (Sheffield Hallam University) p.schofield@shu.ac.uk 0114 225 2885 •
Research and consultancy interests/experience in consumer motivation, decision making, and
compulsive behaviour including disordered gambling and compulsive shopping; • Extensive
experience (academic and commercial) with research design including quantitative, qualitative,
mixed-methods survey design: questionnaire and sampling designs and; • Expertise in complex
quantitative data analysis/presentation including multivariate statistical analysis and structural
equation modelling.

Q4 Are you happy for the information you have supplied to be shared with all interested parties?

- Yes

10. Decision Technology

Name: Claire Nolan

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Q1 Key areas of expertise/interest for Phase 1: Online patterns of play

- Complex data analysis
- Data science
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- Data management
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Q2 Key sectors/areas of interest for Phase 2: Additional research lots

- Lot 1: Non-remote betting
- Lot 3: Gaming machines
- Lot 5: Scratchcards
- Lot 6: National Lottery draw based games

Q3 Summary of expertise

Decision Technology (Dectech) specialises in helping businesses and policymakers understand and manage consumer behaviour. We provide strategic insight by combining a practical understanding of what drives human behaviour with the rigorous analysis of quantitative data. We are a behavioural agency, meaning that we prioritise data generated through real-world customer behaviour or experimental techniques, rather than the introspective surveying of consumers. We have extensive experience in the gambling industry, working with a number of relevant clients in recent years. We have developed advanced statistical models using data from experiments, field trials and real-world consumer play behaviour, which provided clear strategic recommendations. We have run research specifically on the topic of problem gambling and were recently involved in the Triennial Review process. To this project, Dectech would bring deep knowledge of the academic literature around problem gambling – its measurement, causes and treatment. We would bring our data management capabilities, having previously run analysis on large and complex data sets across a range of industries. Much of our work involves the collection of primary data, requiring survey design and sample management. We do not have regular experience working with other agencies in a multi-disciplinary team but would be very interested in working within this approach to provide the clear and valuable insight.

Q4 Are you happy for the information you have supplied to be shared with all interested parties?

- Yes

11. DJS Research Ltd

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Q1 Key areas of expertise/interest for Phase 1: Online patterns of play

- Complex data analysis
- Survey design and development
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- Project management
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Q2 Key sectors/areas of interest for Phase 2: Additional research lots

- Lot 1: Non-remote betting
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Q3 Summary of expertise

We are very well resourced for telephone and face-to-face surveys nationally and offer these services on a field and tab as well as full-service basis should another party require a partner to carry out, for example, a large scale survey of gambling audiences where behavioural data is not captured digitally. We also have an in-house recruitment team who are particularly adept at recruiting hard-to-reach audiences for qualitative research. We have an excellent statistician who can apply advanced statistical techniques and modelling to the data, and we can present this in a user friendly way. More generally we offer the full range of qualitative and quantitative approaches and a full-service offer; we believe that the quality of our deliverables sets us apart and we can produce a range of materials that are effective in conveying and disseminating complex research findings; this includes an in-house designer who can produce infographics and an in-house animation team that can produce animated films to convey findings.

Q4 Are you happy for the information you have supplied to be shared with all interested parties?

- Yes

12. University of East London

Name: Dr. Volker Thoma

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Phone Number: 02082234438

Q1 Key areas of expertise/interest for Phase 1: Online patterns of play

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- Data science
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Q3 Summary of expertise

Mental processes related to disordered gambling and their relationship with harm are still poorly understood. Recently, Xu and Harvey (2014) analysed a large dataset from online sports betting, and demonstrated that gamblers expected their luck to reverse: those who won were more likely to win again by selecting safer odds, whereas those who lost were more likely to lose again by picking riskier odds. Results like these can be used to identify and anticipate potentially harmful patterns of playing in relation to specific gambling activities, as it becomes increasingly clear that cognitive biases impact gambling behaviour and risk taking. We will apply existing evidence (e.g., from a large NatCen dataset currently under analysis) to other large scale data, to understand thought patterns of problem and non-problem gamblers. Project Partners' Expertise: 1. University of East London: Professor John Turner has expertise in numerous areas relating to addiction and the application of addiction theory to behaviour. Recent relevant publications include pathological behaviours in gamblers, with colleagues at Lincoln, Queen Mary's and the National Problem Gambling Clinic, and work looking at patterns of gambling and pathway theory in problem gamblers in residential treatment in the UK. His expertise will guide the analysis of the data in terms of problematic play strategies and harm. Dr. Volker Thoma is a Reader in Psychology and has published on judgment and risk perception processes, including the cognitive processing in financial judgment tasks. He currently works on experimental as well as on large survey data sets regarding gambling (with GambleAware and NatCen). He has also secured (with Prof Turner) a PhD project on gambling treatment as well as an SSA (Society for Studies of Addiction) research project exploring gambling types and environments. He also has a strong background (applied and basic research) in human-computer interaction, including online and machine interfaces. Dr. Thoma and Dr. Turner have previously managed multidisciplinary research projects (including large EU, UK, and US funded projects) and have expertise in communicating with different stakeholders. 2. City University of London: Dr. Stian Reimers is a Senior Lecturer in judgment and decision-making and has widely published on analyses of large datasets. He has conducted academic research on decision making under risk, as well as commercial work on cognitive biases in sports betting. He will be performing

the data analyses of patterns of play, also utilising the excellent data analysis expertise in City's Research Centre for Machine Learning. Professor Peter Ayton has published widely in the field of judgment and decision-making, including papers on biases and fallacies in risky decisions and sport betting and a book on the psychology and economics of football. He has extensive experience of working on funded multi-disciplinary research projects - particularly on applied issues. His expertise in risk and betting behaviour will directly inform research hypotheses and analyses, and he will assist together with UEL the data analysis performed by Dr. Reimers. Professor Ayton is an internationally known communicator and presenter. He will also be the senior scientist on the project.

Q4 Are you happy for the information you have supplied to be shared with all interested parties?

- Yes

13. CAIS / The Living Room Cardiff

Name: Dr Dylan Evans

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Phone Number: 01492 863009

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- Data science
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Q2 Key sectors/areas of interest for Phase 2: Additional research lots

- Lot 1: Non-remote betting
- Lot 3: Gaming machines

Q3 Summary of expertise

CAIS, through one of our wholly owned subsidiaries, The Living Room Cardiff, have pioneered and is delivering Wales' largest ever problematic gambling initiative. Our 'Beat the Odds' program both highlights the extent of the issue in Wales, works closely with the Welsh Government, lobbies for change, and delivers psychosocial interventions to gambling addicts and their families. We have an in-house team of data manager and statisticians, are entirely data driven in all our work on addiction in all its forms, and have completed several dedicated research projects, as well as evaluation of the impact of the work of others. 'Beat the Odds' (<http://www.cais.co.uk/services/beat-the-odds/>), and our annual Excessive Gambling conference (<https://www.livingroom-cardiff.com/excessive-gambling-wales>) places us uniquely in the position of having unprecedented access to research and data in Wales and a high level and public governmental support. We would welcome a collaborative approach to working on any aspect of this initiative.

Q4 Are you happy for the information you have supplied to be shared with all interested parties?

- Yes

14. CooperGibson Research

Name: Sarah Gibson

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Q1 Key areas of expertise/interest for Phase 1: Online patterns of play

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Q3 Summary of expertise

CooperGibson Research is an independent research consultancy providing research, consultancy and project management services. Our team works on an associate basis offering substantial capacity and tailored teams of research expertise matched to specific projects. We are research methodology trained and work as professional independent researchers with 15-20 and more years of experience in the social and policy-led research arenas. We bring the experience of multiple methodologies, research design, substantial experience of liaising with service users to engage them in research on sensitive subjects (of all ages and many different backgrounds, including hard to reach/vulnerable groups), service deliverers and managers, and related bodies, providing robust evidence that can inform improvements in practice and policy. We have several experienced project managers/principal investigators and have published widely, many reports on gov.uk, disseminating findings and communicating key concepts clearly and succinctly to a wide audience (policy makers, academics, service providers and users, and industries). Our research projects, evaluations and impact assessments are often commissioned by Government departments, local authorities, private organisations, universities and colleges and the voluntary sector. CooperGibson Research works across several related fields - education, social care, employment, skills and public service improvement. Our work includes evaluations and impact assessments, exploratory research, feasibility studies, service user feedback, service provider feedback, exploring models of provision and related experiences or behaviours, identifying what works and best practice. Our associates have both quantitative and qualitative experience:

- Desk-based and literature reviews, content and thematic analysis, systemic and critical review of academic and publicly available literature
- Qualitative approaches, including telephone and face-to-face interviewing and focus groups, observation techniques, cognitive interviews, case study research, action/practitioner-led research, analysis of qualitative data using thematic approaches, grounded theory and via specialist software
- Survey design, implementation and analysis using SNAP Professional software, including sampling,

collation of contact details, descriptive analysis, frequency distributions, crosstabulation and inferential statistics to explore variance and difference • Consultations via online methods, panels, surveys and by leading events/ workshops, and analysis of consultation feedback • Mapping provision and services using desk research, analysis of administrative datasets and surveying techniques We have previously collaborated successfully with other agencies and would welcome the opportunity to do so on this research programme. Whilst we have quantitative expertise, detailed, collaboration with an agency specialising in complex quantitative analysis, data and behavioural analytics would be valuable. We are strong on survey design and implementation, qualitative and ethnographic techniques.

Q4 Are you happy for the information you have supplied to be shared with all interested parties?

- Yes

15. Ridgeway Information

Name: Joanna Kidd

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- Lot 5: Scratchcards
- Lot 6: National Lottery draw based games

Q3 Summary of expertise

Ridgeway Information is a King's College London spin-out company with experience undertaking qualitative research in the gambling sector. We have worked for a number of operators on a range of projects, including research on customer play, harm mitigation, and vulnerable people. We are experienced in conducting and analysing interviews and focus group sessions, and producing comprehensive scoping reviews. We manage a number of large projects and have a track-record of producing regular high-quality reports to clients. We are accustomed to communicating with a diverse range of stakeholders and audiences. On this project, our work would very much be complemented by an organisation focusing on quantitative data analysis, and we would welcome contact from potential partners.

Q4 Are you happy for the information you have supplied to be shared with all interested parties?

- Yes

16. Personal Finance Research Centre, University of Bristol

Name: Professor Sharon Collard

Email Address: sharon.collard@bristol.ac.uk

Phone Number: 07769682205

Q1 Key areas of expertise/interest for Phase 1: Online patterns of play

- Survey design and development
- Report write-ups
- Working in multi-disciplinary teams
- Simplifying key concepts
- Communicating with different audiences
- Outreach to a range of stakeholders

Q2 Key sectors/areas of interest for Phase 2: Additional research lots

Respondent skipped this question

Q3 Summary of expertise

The Personal Finance Research Centre is an independent research centre at the University of Bristol which specialises in social research across all aspects of personal finance, mainly from a consumer perspective. Our interdisciplinary team combines both qualitative and quantitative research skills, with significant experience of survey design, data management and analysis, and communicating research findings to a range of stakeholders and audiences (for example, policymakers, charities, the financial services industry and academia). Much of our research, since PFRC was established in 1998, has focused on the issues surrounding consumer vulnerability and the way in which different vulnerable situations or consumer characteristics can exacerbate or interact with financial difficulties. The team has considerable experience of researching the impacts associated with a range of vulnerabilities, including addictions, mental health, suicide and serious physical illnesses, such as cancer, and is skilled at addressing these issues in our research in a sensitive way. We believe that the team's knowledge of consumer vulnerability would bring significant value to a partnership delivering this research and would complement the skills of other organisations that are able to manage the large-scale nature of this project but may lack expert knowledge in this area. In terms of gambling-specific research experience, the team at PFRC have worked on a range of projects related to this. Currently, we are running a study which looks at the experiences of debt advisers when dealing with clients in particularly vulnerable situations, with a heavy focus on issues related to gambling (as well as a number of other addictions). We have also previously examined the prevalence and difficulty with which debt collection staff encounter customers with addictions, which led to new industry guidance on working with such customers as well as a financial services industry workshop on this topic (encouraging several banks to take action to improve support or develop new tools to help customers at risk of problem gambling-related harm).

Q4 Are you happy for the information you have supplied to be shared with all interested parties?

- Yes

17. Chrysalis Research

Name: Tom Levesley

Email Address: tom.levesley@chrysalisresearch.co.uk

Phone Number: 01172309933

Q1 Key areas of expertise/interest for Phase 1: Online patterns of play

- Survey design and development
- Project management
- Report write-ups
- Working in multi-disciplinary teams
- Gambling related research (National and/or International)
- Communicating with different audiences
- Outreach to a range of stakeholders

Q2 Key sectors/areas of interest for Phase 2: Additional research lots

- Lot 1: Non-remote betting
- Lot 2: Electronic bingo terminals
- Lot 3: Gaming machines
- Lot 4: Casino table games
- Lot 5: Scratchcards
- Lot 6: National Lottery draw based games

Q3 Summary of expertise

We worked on projects for the Gambling Commission, GambleAware and others in the sector over the last two years, including evaluations of self-exclusion schemes, promoting responsible gambling and reducing gambling related harm. We specialise in qualitative research and have experienced, senior researchers involved in designing and delivering our research. We would welcome joining a team that included academics and quantitative specialists to complement our experience.

Q4 Are you happy for the information you have supplied to be shared with all interested parties?

- Yes

18. PwC

Name: Richard Berriman

Email Address: richard.berriman@pwc.com

Phone Number: 07841787432

Q1 Key areas of expertise/interest for Phase 1: Online patterns of play

- Complex data analysis
- Data science
- Survey design and development
- Data management
- Project management
- Report write-ups
- Working in multi-disciplinary teams
- Simplifying key concepts
- Gambling related research (National and/or International)
- Communicating with different audiences
- Outreach to a range of stakeholders

Q2 Key sectors/areas of interest for Phase 2: Additional research lots

- Lot 1: Non-remote betting
- Lot 2: Electronic bingo terminals
- Lot 3: Gaming machines
- Lot 4: Casino table games

Q3 Summary of expertise

PwC has been working closely with the gambling industry on this topic for the last few years. In 2015 Gamble Aware commissioned PwC to explore the potential usefulness of industry-held data and behavioural analytics in the remote gambling sector, primarily to indicate markers and patterns of harmful or risky behaviour, and then to recommend practical applications of harm minimisation. Phase 1 was published in April 2016 and comprised a literature review and consultation with seven UK-facing online gambling operators. Phase 2 was published in August 2017 and focused on whether industry-wide mechanisms of harm minimisation could be developed using behavioural markers of problem gambling with data available to all operators. PwC have also worked directly with an online UK gambling operator to test the markers and framework in an operational environment, and on their entire customer base. To date PwC have analysed data from operators that account for approximately 80% of the gross gambling yield of the online betting market in the UK. PwC also have strong connections with the industry and earlier in the year hosted a workshop with over 30 representatives from across the industry to discuss the implications of problem gambling detection, intervention and prevention. For the present project PwC is seeking to collaborate with organisations that have expertise in areas that can complement the existing work. In particular, to provide deeper insights in the following areas: psychological and experimental research, economic situation and affordability, within-day betting sequences, and knowledge of specific game characteristics.

Q4 Are you happy for the information you have supplied to be shared with all interested parties?

- Yes