

**Fixed Odds Betting Terminals,  
the Code of Practice,  
and problem gambling**

**A second report for the  
Association of British Bookmakers  
Limited**

**SUMMARY (SECTION 1) ONLY**

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# 1 SUMMARY

## 1.1 Aims and methods of the research

1.1.1 This report was commissioned in May 2005 by the Association of British Bookmakers Limited (ABB). It is the follow-up to a substantially similar report completed in pre-publication form in December 2004 and published in April 2005.

1.1.2 The basic aims of the research this year, as it was last year, were those which ABB had agreed in 2004 with the DCMS:

“To measure and explain levels of problem gambling amongst FOBT users, in the context of benchmarks of other gambling activities (particularly machines) both within and outside of the betting shop”.

“Assess the effectiveness of the FOBT Code of Practice, and the individual elements within it, in providing protection against problem gambling.”

1.1.3 We have measured levels of problem gambling among FOBT users in the context of other forms of gambling inside and outside the betting shop. We have been able to compare FOBT usage with usage of fruit machines and jackpot machines. We have been able to assess what FOBT users think about the effectiveness of the provisions of the Code, and to draw conclusions from their responses.

1.1.4 The research method used this year was in all major respects the same as we used last year, and the survey work was again conducted by MORI (now Ipsos MORI). It involved Omnibus surveys to provide a gambling context across Great Britain, followed by a survey of betting shop customers to provide more detailed evidence about FOBT usage and problem gambling.

1.1.5 More specifically:

- the problem gambling screen used was identical to that which we used last year (the DSM-IV test)
- the MORI Omnibus surveys were identical in scale and scope to those conducted last year

1.1.6 The differences were that:

- we did not re-run the qualitative research (focus groups) because there was no need. Focus groups were used in the 2004 research to guide us in designing the quantitative surveys, and it had already been agreed that the 2005 surveys would be as near-identical as possible to those of 2004.
- we used a larger sample for the survey of betting shop customers, to alleviate the risk that we would have sub-samples too small for some analyses.

- the wording of questions reflected the passage of 12 months since the first round of research
  - the FOBT Code of Practice had undergone minor changes.
- 1.1.7 None of these differences undermines comparability between the Round 1 and Round 2 research.
- 1.1.8 As regards the gambling landscape in Great Britain, no major new forms of gambling have emerged in the year between our Round 1 and Round 2 reports. The Omnibus survey results set out in Section 3 and Appendix 7 suggest that there has been some consumer switching between gambling forms, but not very much.
- 1.1.9 The Gambling Act 2005 is now on the statute books. However, many provisions of the Act do not become effective until 2006 or 2007, and at the time this report was being drafted, the impact of the new legislation had not been felt.

## **1.2 The Omnibus surveys**

1.2.1 MORI carried out six “waves” of Omnibus survey between June and September 2005, covering a total of approximately 12,000 adults in Great Britain – adults defined in this study as those aged 18 or more. Waves 1 and 2 covered all commercially available forms of gambling in Great Britain plus private wagering between individuals – 18 gambling forms in all. Waves 3 to 6 excluded lotteries, scratch cards, football pools and bingo, leaving 13 forms of gambling which might broadly be termed “betting and gaming”. Using 18 forms of betting in waves 1 and 2 gave us a usefully broad gambling context. In waves 3 to 6 our decision to leave out what can be broadly termed “mass gambling” (especially the National Lottery, which has very high rates of participation) enabled us to focus on a more specific sub-set which we refer to as “betting and gaming”. For analysis purposes it is useful to treat waves 1 and 2 separately from waves 3 to 6, rather than amalgamate all six.

### **Waves 1 and 2**

1.2.2 Of the 4,106 respondents (weighted)<sup>1</sup> in waves 1 and 2, 42 per cent spend their own money on one or more of 18 forms of gambling at least once per month (i.e. count as regular gamblers in this study). As in the previous study, we chose gambling once per month or more often as the benchmark for “regular gambling” because in our view, and that of ABB, and with the agreement of DCMS, it captured all but those people who gamble only very occasionally or only on big annual events such as the Derby or the Grand National. Forty five per cent of adult men and 39 per cent of adult women are regular gamblers by this definition.

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<sup>1</sup> For the details of the weighting please see MORI’s Technical Note, Appendix 2.

- 1.2.3 The National Lottery is overwhelmingly the most popular form of gambling among regular gamblers and adults generally. Eighty nine per cent of regular gamblers and 37 per cent of adults spend their own money on the National Lottery at least once per month.
- 1.2.4 Among regular gamblers other more popular forms of gambling then rank a long way behind:
- 12 per cent buy scratch cards
  - 8 per cent buy tickets for other lotteries
  - 8 per cent play bingo
  - 7 per cent bet at betting shops
  - 6 per cent do football pools
  - 5 per cent play fruit machines
- 1.2.5 The average number of forms of gambling used by regular gamblers in waves 1 and 2 is 1.47.
- 1.2.6 Among regular gamblers, 68 per cent spend under £5 per week, 16 per cent spend from £5 to £9.99, and 10 per cent spend from £10 to £20.99 per week. The average spend per week is £5.46, up slightly from £5.27 in 2004. (In this round of research, as in last year's, "spend" was defined as amounts staked. In the gambling context there is no single, universally accepted definition of spend; furthermore, we acknowledge that there is some risk in relying on the memories of respondents who are confronted with questions about what they spend.)
- 1.2.7 Even among regular gamblers, awareness of FOBTs is low. Seventy eight per cent say they had never heard of or seen one. Two per cent said they did not know if they had or had not, leaving 20 per cent who had heard of or come across one. Of regular gamblers who had seen or heard of FOBTs, 81 per cent said they had never used one, 3 per cent said they had tried them but did not use them any more, and a further 17 per cent said they were users.
- 1.2.8 Only 7 per cent of those who are aware of FOBTs say they are regular users, i.e. use them at least once per month. This suggests that regular FOBT users are a very small fraction (1.4 per cent) of regular gamblers and an even smaller fraction (0.6 per cent) of the adult population, although we caution that this analysis is based on very small numbers.

1.2.9 Omnibus waves 1 and 2 indicate a (central) problem gambling rate of 0.4 per cent.<sup>2</sup> We estimate that the 95 per cent confidence interval is 0.2 to 0.6 per cent. In 2004 the central rate was 0.5 per cent, with a 95 per cent confidence interval of 0.3 to 0.7 per cent. We conclude that the problem gambling rate across the adult population has probably not increased, and may have decreased.

### **Waves 3 to 6**

1.2.10 Of 7,705 respondents (weighted), 7 per cent were regular gamblers (i.e. use at least one of the forms of gambling specified at least once per month). Among regular gamblers:

- 37 per cent bet at betting shops
- 32 per cent play fruit machines
- 16 per cent are involved in private betting or playing games for money with friends or colleagues
- 10 per cent play jackpot machines
- 8 per cent bet on-course
- 7 per cent use FOBTs
- 6 per cent participate in on-line betting (as distinct from on-line poker and on-line casinos).

1.2.11 As regards spend:

- 48 per cent say they spend no more than £4.99 per week
- 18 per cent say they spend between £5 and £9.99 per week
- 20 per cent say they spend between £10 and £20.99.

1.2.12 The average spend in waves 3 to 6 is £12.18 (compared with £20.74 in 2004 and with £5.46 in waves 1 and 2).

1.2.13 Almost half of regular gamblers (47 per cent) said they had never seen or heard of a FOBT and 2 per cent said they did not know. Even among regular betting shop customers, 19 per cent said they were unaware of FOBTs.

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<sup>2</sup> Problem gamblers, and therefore problem gambling rates, are defined solely by respondents who reply positively to three or more questions in the DSM-IV screen.

- 1.2.14 Of the 51 per cent of regular gamblers who said they were aware of and/or had seen a FOBT, only 13 per cent said they were regular FOBT users, i.e. used them at least once per month. Seventy three per cent said they never used them.
- 1.2.15 Regular FOBT users are a small percentage of regular gamblers (7 per cent) and a very small fraction of adults (0.5 per cent).
- 1.2.16 Among those who use FOBTs at least once per month, only 6 per cent played four times per week or more. The biggest group of users was those who played once per week, at 35 per cent.
- 1.2.17 Waves 3 to 6 revealed a rate of problem gambling of 0.23 (0.2) per cent, lower than the figure of 0.37 (0.4) per cent identified in the Round 1 research. However, given the limitations inherent in sampling, we can say no more than that the prevalence of problem gambling has probably not increased and may have decreased.
- 1.2.18 The rate of non-completion of the problem gambling questionnaire in the Omnibus surveys varied a little from last year. In waves 1 and 2 the non-completion rate fell from 26 per cent last year to 23 per cent this year. In waves 3 to 6 the rate rose from 17 per cent last year to 20 per cent this.

### **1.3 Betting shop interviews**

- 1.3.1 MORI conducted 130 interviewing shifts in a representative sample of 65 betting shops between August and October 2005. The interviewing yielded 1,545 interviews, a 63 per cent increase on Round 1.

#### **Betting shop customers**

- 1.3.2 Betting shop customers are predominantly male (86 per cent), predominantly aged over 35 (72 per cent, with 37 per cent over 55), and predominantly in lower socio-economic groups, with 67 per cent in C2DE, compared with 22 per cent in C1 and 8 per cent in AB. Sixty two per cent began gambling regularly, with their own money, though not necessarily in betting shops, before they were 21 (26 per cent before they were 18). Seventy three per cent have been visiting betting shops for at least five years and 62 per cent for at least ten years.
- 1.3.3 Because research in betting shops was carried out on the busiest days of the week, so that sufficient customers would be available for interview, the frequency of betting shop visits was weighted to the pattern identified by the Omnibus waves in order to provide a representative distribution of frequency of visits. On this basis 65 per cent of betting shop customers visit once, twice or three times per week, 26 per cent visit between less than once per week but at least once per month, and 9 per cent visit four times per week or more. Sixty nine per cent of betting shop customers spend under 30 minutes in the shop at each visit.

- 1.3.4 In summary, a typical betting shop customer is a mature male, from one of the lower socio-economic groups, who started betting early in life and has been visiting betting shops for over ten years. He is likely to visit a betting shop about twice per week, and to spend about half an hour there on each visit.
- 1.3.5 The gambling preferences of betting shop customers are that 73 per cent bet regularly (at least once per month) on horses, 50 per cent buy National Lottery tickets, 39 per cent bet on-course, 37 per cent bet on football matches, 27 per cent do football pools, and 25 per cent bet on dogs. Other forms of gambling then follow some way behind: 14 per cent of betting shop customers buy other lottery tickets, 14 per cent do numbers betting, and 9 per cent use FOBTs, i.e. have not merely tried them once or twice. FOBTs thus rank ninth overall.
- 1.3.6 The average weekly spend of a betting shop customer, on all forms of gambling, inside and outside the betting shop, is £39.70, up by 7 per cent from £36.95 last year. The distribution of spend is that 33 per cent of customers spend under £10 per week, 51 per cent spend between £10 and £49.99 per week, and 16 per cent spend £50 or more per week.

## **FOBT users**

### *Patterns of usage*

- 1.3.7 FOBT users are a small subset of all betting shop customers – 6 per cent use a FOBT “always/every time” when they visit a betting shop, 3 per cent use them “usually or most times”, and 5 per cent use them “sometimes”, and 6 per cent use them “rarely”. Over three quarters of betting shop customers have either never used a FOBT or no longer use one.
- 1.3.8 Regular FOBT users, defined as those who use a FOBT “always/every time” or “usually or most times”, are overwhelmingly likely to be male (93 per cent), are predominantly younger (58 per cent under 35, including 28 per cent under 25) and are predominantly in lower socio-economic groups (60 per cent C2/D/E).
- 1.3.9 One in six regular FOBT users (17 per cent) said they had begun visiting betting shops because of FOBTs, and one in five (22 per cent) said they now visited betting shops more often because of FOBTs. Fifty five per cent said that FOBTs had made no difference to the frequency with which they visit betting shops.
- 1.3.10 Among the “always/every time” respondents, 58 per cent play one session per betting shop visit, 24 per cent play two sessions, and 7 per cent play three. Among those who use FOBTs “usually” or “most times”, 42 per cent play one session, 33 per cent play two, and 11 per cent play three. Thus, under one in ten regular FOBT users play more than three sessions per visit.

- 1.3.11 Among regular FOBT users, two thirds spend no more than 30 minutes on a session. Among all FOBT users, regardless of frequency of use, 82 per cent spend no more than 30 minutes per FOBT session.
- 1.3.12 The main reasons given by betting shop customers for not using FOBTs were “I don’t like machine games” (24 per cent) and “They’re too complicated” (21 per cent). Only 2 per cent said they thought FOBTs were addictive.

#### *Spend*

- 1.3.13 Fifty one per cent of all FOBT users said their overall gambling spend had stayed the same since they had begun using FOBTs. Thirty four per cent said it had increased and 14 per cent said it had decreased. More frequent FOBT usage is not correlated with higher spend on gambling: those who use FOBTs (in the words of the survey) “rarely” or “sometimes” when they visit a betting shop have an average weekly gambling spend almost twice that of FOBT users who play “always/every time”.
- 1.3.14 As regards spend on FOBTs, 53 per cent of all FOBT users said their spending had stayed the same, 29 per cent said it had increased and 17 per cent said it had decreased.
- 1.3.15 Among regular FOBT users, 20 per cent said their expenditure had increased a great deal and 20 per cent said it had increased a little. Just over 60 per cent said that it had stayed the same or had decreased.
- 1.3.16 Asked to think back to their last FOBT session, 24 per cent of all FOBT users said they had first staked under £5, 48 per cent under £10 and 71 per cent under £16. The average first stake in a FOBT session for those who played “usually or most times” was £16.13, and for those who played “always/every time” it was £22.72.
- 1.3.17 Among all FOBT users, 76 per cent had a win on their last session. Of these, 36 per cent kept all the winnings they had accumulated, 39 per cent kept some and re-staked the rest, and 24 per cent re-staked everything they had won.

#### *The FOBT Code of Practice*

- 1.3.18 General awareness of the provisions contained in the Code is still generally low, with under half of users aware of even one provision. Awareness of the provision of GamCare material has risen from last year, though only to modest levels.
- 1.3.19 Among regular FOBT users, opposition has intensified to the maximum payout and to the fact that, among casino games, only roulette is allowed. Support has strengthened for the limit on stakes, albeit only a little. For all other elements of which regular FOBT users were in favour last year, the net balance of support has decreased.
- 1.3.20 Among occasional FOBT users the picture is slightly different. There has been a slight swing away from support for limiting the payout to £500, and a stronger swing away from support for the idea that roulette should be the only casino game allowed.

- 1.3.21 As regards GamCare warnings, the extent of support has fallen among both groups, although there is still a substantial net balance of support.
- 1.3.22 It would appear, overall, that the provisions of the Code may have had an effect on occasional users, where the numbers who play less often or for shorter times or for less money outweigh the numbers who do the opposite. Among regular users, the numbers increasing their activity or spend outweighs those reducing it.
- 1.3.23 We cannot distinguish in this research between effects “since the Code came in” and effects “because of the Code”. When assessing effects we must also recognise that some features of the Code, for example the minimum time lapse of 20 seconds between bets and limits on stakes and payouts, are ineluctable. Furthermore, at least 45 per cent of users began using FOBTs after the Code became operational and are thus probably unaware of a pre-Code world – and the figure of 45 per cent could be an under-estimate because some bookmakers began implementing the Code before April 1 2004.
- 1.3.24 In responding to our brief – to assess the effectiveness of the FOBT Code of Practice – we can only say that the evidence of this round of research is that the Code is neither more nor less effective than was apparent in the first round. In the Round 1 research we concluded that the Code was, on balance, marginally beneficial, and we have no reason to conclude differently now.
- 1.3.25 We cannot estimate from this research what would happen if the Code were not there. We think it must be possible that the Code is beneficial in ways not obvious to FOBT users.

### **Problem gambling among betting shop customers**

- 1.3.26 As in the Round 1 research, problem gambling was identified by means of a questionnaire derived directly from the DSM-IV screen. We emphasise that we are here dealing only with problem gambling among people who regularly visit betting shops, not among any wider section of the population.
- 1.3.27 The problem gambling questionnaire produced an overall non-response rate of 20 per cent. This was lower than the 25 per cent rate obtained in 2004.
- 1.3.28 The rate of problem gambling identified among betting shops customers this year was 5.31 per cent, compared with 8.25 per cent last year. The confidence interval around this year’s central rate of 5.31 per cent is 4.19 per cent to 6.43 per cent; the confidence interval round last year’s central rate of 8.25 per cent is 6.50 per cent to 10.01 percent. The highest value this year is not substantially different from last year’s lowest value, but there is a difference. The statistics do therefore suggest that the prevalence of problem gambling among betting shop customers has fallen. We can say with greater certainty that it has not increased.
- 1.3.29 Problem gamblers among betting shop customers have the following demographic characteristics:

- 92 per cent are male
- 14 per cent are aged 18 to 24, 22 per cent are aged 25 to 34, 43 per cent are 35 to 54, and 21 per cent are 55 or over
- 4 per cent are in socio-economic groups AB, 27 per cent in C1, 23 per cent in C2, and 41 per cent in DE
- sixty seven per cent have been visiting betting shops for 10 years or more and 72 per cent for 5 years or more (i.e. well before FOBTs became available).

1.3.30 Thirty per cent of problem gamblers said they had started gambling regularly, using their own money, below the age of 16 (i.e. possibly illegally). A further 17 per cent said they had started at age 16 or 17, also possibly illegally, depending on where the gambling took place and/or what form it took.<sup>3</sup> A further 39 per cent started while they were aged 18 to 20. Thus 85 per cent of problem gamblers began regular gambling while still no more than 20.

1.3.31 Almost sixty per cent of problem gamblers visit betting shops twice or more per week (35 per cent visit 2 or 3 times per week, and a further 24 per cent 4 times per week or more).

1.3.32 Eighty per cent of problem gamblers bet on horses, 50 per cent buy National Lottery tickets, 47 per cent bet on dogs, 42 per cent use FOBTs, 38 per cent bet on football matches, 37 per cent bet at racecourses or dog tracks, 32 per cent use fruit machines, and 22 per cent use jackpot machines.

1.3.33 The average number of betting shop activities in which problem gamblers participate is 2.5. Outside the betting shop, the average number is 2.4. There is some overlap in relation to fruit machines, which are accessible both inside and outside betting shops, so it is not possible simply to sum the two averages, but we are confident that the average number of forms of gambling practised by problem gamblers among betting shop customers is at least 4 and may be closer to 5.

1.3.34 Just under half of problem gamblers (45 per cent) say they use FOBTs, whether frequently or infrequently. Thirty three per cent say they have never used one, 6 per cent say they have used FOBTs but no longer do, and 13 per cent say they have used them only once or twice.

1.3.35 The gambling preferences of problem gamblers have changed somewhat as between this year and last. Horseracing is still overwhelmingly the favourite pursuit, though at 80 per cent this year compared with 87 per cent last. Greyhound racing still ranks second, though also down, at 47 per cent this year compared with 63 per cent last, and FOBT

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<sup>3</sup> Paragraph 1.3.30 refers to all forms of gambling, not just to those available in a betting shop.

usage ranks third at 45 per cent. FOBT usage is one of a group of three activities, along with betting on football, and fruit machines, which have all risen considerably in usage. FOBTs rank only third and form part of what one might think of as a “second rank cluster” of gambling pursuits which sit a long way behind the favourite betting pursuit, namely horseracing.

1.3.36 The econometric analysis we conducted – a calculation of marginal effects derived from a logit model – suggests that no one form of gambling is more associated with problem gambling than any other. The strongest associations are:

- the age at which regular gambling started (the lower the age at which gambling starts, the greater the chance of problem gambling)
- marital status (those who are married or living with a partner are less likely to be problem gamblers)
- frequency of betting shop visits (the more frequent, the greater the likelihood)

## 1.4 Conclusions

1.4.1 The evidence of this research is that problem gambling rates among adults in Great Britain have not increased and may have fallen. Problem gambling rates among betting shop customers have almost certainly fallen.

1.4.2 We begin by emphasising that the research method employed here defines, at best, association, not cause and effect, between problem gambling and any particular form of gambling.

1.4.3 FOBTs form part of a range of gambling pursuits inside and outside the betting shop that appeal to problem gamblers – and most of these same pursuits, notably the National Lottery, horserace betting, on-course betting, football pools, and betting on football matches appeal to non-problem gamblers too. The survey identified no forms of gambling that appeal only to non-problem gamblers.

1.4.4 FOBTs are not more associated with problem gambling than any other form or forms of gambling. Indeed, our econometric modelling suggests that no form of gambling considered in this research is significantly associated with problem gambling.

1.4.5 The FOBT Code of Practice is a highly specific form of regulation, in that it deals only with FOBTs and with certain features of their supply and use. (By way of contrast, the rule that no one under the age of 18 may enter a betting shop is unspecific in relation to any particular form of betting that takes place there.) We emphasise that we did not expect FOBT users to be familiar with the Code *by name*. We asked them about restrictions on usage which we had expected they would be aware of, if at all, only by virtue of using FOBTs.

- 1.4.6 FOBT users who happen also to be problem gamblers are a very small fraction of the adult population and of betting shop customers. We know from Omnibus waves 1 and 2 that of the 42 per cent of the adult (18+) population who gamble regularly, only 7 per cent visit betting shops. Of that 7 per cent, only about 5 per cent are problem gamblers. To put this another way, if we started with 1,000 adults, 420 would be regular gamblers, 29 would regularly visit betting shops and 1.5 would be problem gamblers. The problem gamblers participate, on average, in at least four forms of gambling.
- 1.4.7 From the survey of betting shop customers we know that a typical problem gambler (among betting shop customers) is overwhelmingly likely to be male, and likely to be in one of the older groups and in one of the lower socio-economic groups. He is highly likely to have started gambling before the age of 20, likely to have frequented betting shops for at least 10 years, and likely to visit a betting shop at least twice per week.
- 1.4.8 From the same survey we know that regular FOBT users are also overwhelmingly likely to be male and predominantly in lower socio-economic groups. But they are predominantly younger, are among the less frequent betting shop visitors, and have been visiting betting shops for fewer years. Except in gender and socio-economic grouping the two profiles are different.
- 1.4.9 The evidence of this research is that, after 16 to 18 months in operation, the provisions of the FOBT Code are not well known to FOBT users, regardless of how frequently they play. There could be at least two reasons for this:
- those betting shop customers who have used FOBTs only since the Code came into effect might be unaware of its provisions because they had never used FOBTs under any other régime. Almost half of FOBT users fall into this category, and the percentage is likely to increase as new users appear.
  - alternatively (or in addition) FOBT users might well play by choice within the regulations imposed by the Code and feel no constraint exerted by it. If this is so for a majority of users, the Code will bite only on the minority, so that its effects of could be considered marginal.
- 1.4.10 Overall, we regard the effects of the Code as probably marginal, but, at the margin, probably beneficial. We think the Code may be better viewed as part of a package of measures and promotions that bookmakers, gambling charities and the Government have taken to deter problem gambling. It is beyond the scope of this research to disentangle the effects of each element of the package, but among betting shop customers it has been effective.