APPENDIX 3

GAMBLING ACT 2005

Local Area Profile Draft

2018 figures

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1. Introduction

Nationally, gambling policy and the regulatory environment overall has an increasing focus on risk. Whilst not compulsory, it is now recommended that a licensing authority creates a 'local area profile' to inform its understanding of risk and to allow appropriate decisions to be made and steps taken to mitigate these risks.

From April 2016, gambling establishment operators must undertake 'local area risk assessments' for all their premises and will be expected to give due consideration to the information available in the Council's 'local area profile'.

Although not a compulsory requirement, we have included a local area profile in the proposed Gambling Act Statement of Policy in order to increase awareness of local risks and improve information sharing with gambling operators. This will facilitate constructive engagement with licensees and a more coordinated response to local risks.

The local area profile will help to inform the local risk assessment process. For example, if a gambling outlet is to be located within close proximity to a school we would expect licensees to have sufficient controls in place to mitigate associated risks, e.g. implementing a robust Think 21 policy and ensuring that the premises is so designed that children cannot see gambling taking place. The Council believe that contribution to premises risk assessments and being knowledgeable and informed on the 'local area' and risks is necessary in order to provide sufficient detail within the assessment. This means that any assessments undertaken do need to have an involvement of and an understanding of the local area in which they operate and are licensed.

It is wholly anticipated that the Council's 'local area profile' will develop over time and will be influenced by information and intelligence from researchers, key partners and other stakeholders. This includes updates once we become a single council on 1 April 2019.

It is our view that the inclusion of a Local Area Profile within the Policy will bring the following benefits:

- enable us to better serve our local community, by better reflecting the community and the risks within it,
- enable us to make robust decisions, based on a clear, published set of factors and risks, which are therefore less susceptible to challenge; and
- encourage operators and applicants to take a proactive approach to risk that is likely to result in reduced compliance and enforcement action.

2. Background

The last decade has seen many changes in the British gambling landscape. The most notable changes during this period include growth in the availability of remote gambling (particularly via the internet), the introduction of fixed odds betting terminals into most bookmakers, an increase in the number of casinos, an increase in the prominence of poker (both online and offline), and the introduction of online betting exchanges.

The most severe form of gambling, pathological (or problem gambling) is recognized as a mental health disorder. Pathological gambling is currently classified as an impulse control disorder but it shares many important features with substance use disorders, especially in terms of diagnostic criteria, clinical course, and treatment.

All major current research has been undertaken at national level.

- 56.2% of the adult population (16+) have participated in some form of gambling in the last 12 months (2017). This is compared to 48% in 2010.
- The most popular gambling activity remains the national lottery. Excluding this the rate is 45% of adults.
- 9.4% of adults had used the internet to gamble in the past 12 months.
- Problem gamblers are most likely to be young, male, have parents who gambled regularly and smoke. Identified at 0.8% of the overall population.
- Other risk factors include unemployment, poor health, those from Black Asian and Black British backgrounds and other substance misuse.

British Gambling Prevalence Survey (BGPS) 2010

The BGPS 2010 is the third nationally representative survey of participation in gambling and the prevalence of problem gambling in Great Britain. It builds on the two previous surveys conducted in 1999 and 2007. The BGPS 2010 is the first survey to have been carried out since the implementation of the Gambling Act 2005 on 1 September 2007. The aims of the BGPS 2010 were to provide data on participation in all forms of gambling in Great Britain, the prevalence of problem gambling, attitudes to gambling and to explore a range of associations with gambling behaviour.

Participation in Gambling Activities

- Overall, 56% of the adult population (aged 16 and over) participated in some form of gambling in the past year. This equates to around 29.8 million adults in the UK. Applied to the estimated adult population of West Suffolk (177,385) in 2017 (Office of National Statistics Population Estimates), this would amount to around 99,335 people in the authority.

- The most popular gambling activity was the National Lottery. In 2017, 40.5% of adults had bought tickets for the National Lottery Draw.
- Excluding those who had only gambled on the National Lottery Draw, 41.7% of adults participated in some other form of gambling in the past year. This would amount to ~73,970 people in West Suffolk
- After the national lottery, the next most popular gambling activities are other lotteries (15%), scratch cards (20%), horserace betting (9%) and slot machines (7%).
- The survey has noted a significant decrease in betting on other events such as horse and dog racing (decreased from 9% in 2010 to 4% in 2017, scratch cards (down from 24% in 2010 from 20% in 2017) and a smaller increase in online poker/bingo/casino gambling from 5% in 2010 to 9% in 2017.
- In line with this trend, betting on football pools, slot machines and online bets has fallen slightly over the course of the survey.

Online and Offline Gambling

- Overall, 10% of adults had used the internet to gamble in the past year, including online lottery tickets, betting, casino games, bingo, online slot machines and football pools. This would estimate to ~17,300 people in West Suffolk. Increases in online gambling activity have been greater in women than men.
- Among respondents who had gambled in the past year, 71% reported that they gambled 'in person' only, 17% had gambled both online and in-person and only 2% had gambled 'online only'.
- The survey suggests that most gambling activities still occur 'offline'; however casino games and betting on other sports events reported relatively high proportions of online activity – 39% and 27% respectively.

Profile of Participants in Gambling Activity

- Men were more likely than women to gamble overall (60% for men and 52% for women). Women however had higher incidence participating in bingo and scratch cards.
- Gambling participation is associated with age – participation was lowest among the youngest and oldest age groups and highest among those aged 44-64.
- Gambling prevalence was highest among those who were;
  - Either married or had been married (75%)
  - White/white British (76%)
  - Those whose highest qualification was GCSE's or equivalent (76%)
  - Those in lower supervisory/technical households (79%)

- Those in paid work (78%)
- Those with the highest personal income

Gambling Frequency

As of 2016:

- 59% of people who participated in the National Lottery did so once a week or more often. Only football pools had a similar level of frequency (54% once a week or more often).
- There were five other activities which were undertaken at least once a month by half or more of all participants. These were bingo played in person (54%), casino games played on line (53%), spread betting (53%), fixed odd betting terminals (52%), and poker at a pub/club (50%).
- Taking participation in all gambling activities together, past year gamblers took part in gambling, on average, on 93.6 days per year. That is, they tended to gamble more than once a week, but not quite as often as twice a week.
- Those who gambled both online and in-person did so more than twice as often (163.3 days) as those who gambled 'online only' (61.5 days) or 'in- person' only (79.5 days).
- Overall, 6% of regular gamblers were classified as high-time/high-spend gamblers.
- The profile for high-time gamblers consists disproportionally of those with poorer socio-economic indicators, with National Lottery and Bingo being the most popular activities.
- The profile for high-spend gamblers had a higher proportion of graduates, those in paid employment and a preference for betting on horse racing, slot machines and casino games.
- When asked how their gambling involvement had changed in the past year, 4% reported an increase, 13% a decrease and 82% no change.

3. Problem Gambling

Problem gambling, or ludomania, is an urge to continuously gamble despite harmful negative consequences or a desire to stop. Problem gambling often is defined by whether harm is experienced by the gambler or others, rather than by the gambler's behaviour. Severe problem gambling may be diagnosed as clinical pathological gambling if the gambler meets certain criteria. Pathological gambling is a common disorder that is associated with both social and family costs. The condition is classified as an impulse control disorder, with sufferers exhibiting many similarities to those who have substance addictions.

- Problem gambling prevalence measures using DSM-IV (diagnostic and statistical manual of mental disorders) and PGSI (problem gambling severity index) estimate problem gambling at 0.7% of the adult population in 2016.
- 1.2% of those who had been identified as having gambled casually in the last year were identified as high risk of problem

gambling with an additional 3.6% rated as moderate to low risk representing 2,128 people and 6,385 people in the West Suffolk area respectively.

- Rates observed in Great Britain compared similarly to other European countries, particularly Germany, Norway and Switzerland, and lower than countries like the USA, Australia and South Africa.
- Problem gamblers were more likely to be male, younger, have parents who gambled regularly and had experienced problems with their gambling behaviour and be current cigarette smokers. Unemployment, poor health, alcohol consumption and those from Asian/Asian British and Black/Black British backgrounds were also associated risk factors.
- Current best estimates suggest that less than 1% of those in need of treatment actually embark on a treatment programme.
- It is estimated that every problem gambler represents an annual cost to society of c£8,000.
- The NHS website states that cognitive behavioural therapy usually has the best results in terms of treating problem gambling and outlines the key services available for supporting those affected by gambling.

Young People and problem gambling

There are an estimated 127,500 people aged under 24 with a gambling problem in the UK. Factors linked with problem gambling in young people include; depression, anxiety, crime, suicide, alcohol and substance abuse and poor school performance.

Gambling and Debt

The first known UK research to focus exclusively on the relationship between problem gambling and over indebtedness, published in Autumn 2009, was jointly commissioned by GamCare and the Money Advice Trust from Manchester Metropolitan University. Key findings were;

- Debts of up to £60,000 might be common amongst problem gamblers.
- Understanding of problem gambling amongst money advice agencies and in the NHS is extremely low.
- Awareness of the help available to problem gamblers amongst these agencies and in the NHS, particularly GPs, is equally poor.
- There is an urgent need to improve education about gambling for young people, alongside or as part of work on financial literacy and understanding chance and risk.

4. Gambling Premises

Across West Suffolk Councils there are currently the following licensed premises: 26 Betting Shops

2 Adult Gaming Centres

20 Licensed Premises with Gaming Machine Permits

12 Premises with Club Machine Permits

1 Betting Race Track (Horse Racing)

1 Betting Race Track (Dog Racing)

144 Licensed Premises with Notices of Intent (2 gaming machines)

These premises pose potential risks to those who reside, work and visit West Suffolk in terms of associated crime and also in terms of 'problem gambling'.

5. West Suffolk Premises

Breakdown of Gambling Premises is detailed below:

Town	BREAKDOWN
Newmarket	1 Adult Gaming Centre (Wellington Street) 1 Horse Racing Betting Track (Rowley Mile) 11 Betting Shops (All Saints Road, The Rookery, High Street, Market Street, Valley Way, Wellington Street, the Guineas) 2 Club Machine Permits (Cheveley Rd, Kingston Passage) 2 Premises Licence Gaming Machine permits
Mildenhall	2 Betting Shops (Mildenhall Market Place) 1 Dog Race Track (Millennium Stadium) 1 Club Machine Permit (Mildenhall Social Club) 2 Licensed Premises Gaming Machine Permits
Brandon	2 Betting Shops (High Street and Market Hill) 3 Licensed Premises Gaming Machine Permits
Bury St Edmunds	6 Betting Shops (St Andrews Street South, Abbeygate Street, St Olaves Precinct, Hardwick Shopping Centre, Risbygate Street, Cornhill) 1 Family Entertainment Centre Gaming Permit (Western Way) 11 Licensed premises gaming machine permits

Haverhill	5 Betting Shops (High Street and Queen Street) 2 Premises Licence Gaming Machine permits

West Suffolk Councils have a number of licensed premises (2003 Act) which have 2 gambling machines (automatic entitlement) which are required to be registered and the appropriate fee paid. Whilst these are not separately licensed, they will be inspected accordingly and the Council expect these premises to consider an appropriate risk assessment and will review their activities within the guidance.

6. Compilation of the Local Profile

In line with updated guidance, the Council will use the Local Area Profile to support those using the Gambling Statement of Principles. The profile will be maintained separately from the Statement to enable it to be updated accordingly.

This profile will be developed further in 2019 and then reviewed on a regular basis. New versions will appear here on our website.

The following information is a brief summary and we expect to expand on this through our ongoing work on this profile.

7. The Local Profile

Population

- The population of West Suffolk is currently 179,3248 (Office for National Statistics 2017) located within five main centres of population (Bury St Edmunds, Haverhill, Newmarket, Mildenhall and Brandon) and a number of smaller rural communities.
- Between 2017 and 2030, the population of West Suffolk is expected to grow by 8%, compared to 9% in England as whole
- West Suffolk has an ageing population. In 2016, 9.3 of the population were aged over 75, compared to an England average of 8.1% (Office for National Statistics mid year estimates 2016).
- The current area of Forest Heath is the most ethnically diverse district in Suffolk. In 2011 it had the smallest percentage of White (Eng/Welsh/Scot/NI) people - 77.2% compared to a Great Britain average of 80.5% (Census 2011). St Edmundsbury's percentage of White (Eng/Welsh/Scot/NI) people was 91.6% in 2011 (Census 2011). This diversity is in part attributable to the presence of the two largest US Air Force Bases in the UK in the district.
- In 2011, 35.6.1% of West Suffolk's population considered themselves to be in good health and 47.6% in very good health. (Census 2011).

- West Suffolk's households are spread across a large rural area, with 40% living in rural locations. In 2011 the distribution of the population was: villages and outlying areas 38%; Bury St Edmunds 25.5%; Haverhill 15%; Newmarket 10.5%; Brandon 6% and Mildenhall 5% (Census, 2011).

Economy and skills

- West Suffolk saw a large increase in the number of people in employment between 2015 to 2016, with a rise of 3.98% compared to 3.12% across the United Kingdom (Business Register and Employment Survey).
- As of 2011, 73.9% of West Suffolk's 16-64 year olds were economically active compared to 81% in Suffolk as a whole (ONS Annual Population Survey).
- As of April 2017, 4% of the 16-18 year old population in West Suffolk were not in education, employment or training (NEET), compared to 8.4% in England (Labour Force Survey).
- In 2016, 15.6% of West Suffolk employees worked in business and admin support services, 11.9% worked in manufacturing, 11.9% in health, 9.7% in retail and 7.4% in accommodation and food services (Business Register and Employment Survey).
- In 2016, the percentage of residents aged between 16-64 with NVQ4+ level qualifications or more was 33%, which is higher than the Suffolk average of 31.1% but lower than the national average of 37.1% (ONS Annual Population Survey).
- In 2017, the proportion of young people achieving grade 5 or above in England and Maths GCSE was 39.3%, which is below the national average of 42.2% (Department for Education).

Housing

- The average household size in West Suffolk is 2.3 people, slightly smaller than the England average of 2.4 people, (Census, 2011)
- The number of overcrowded households in West Suffolk is 3.2%, lower than the average across England of 4.6%.
- As of 2017, there were 78,010 properties in West Suffolk.
- By 2039, the number of households in West Suffolk is expected to increase by 20% compared to 2014 figures (Ministry for Housing, Communities and Local Government)).
- In 2016, the lower quartile house prices to ratio of lower quartile gross annual earnings was 9.48 in Forest Heath and 9.55 in St Edmundsbury. The East region average ratio was 9.29 and the average ratio for England was 7.26 (Office for National Statistics House price to residence based earnings ratio).
- In 2016, the average monthly cost of renting a home in Forest Heath was £923 and £725 in St Edmundsbury. The average for the East region was £729 per month and average for England was £650 per month (Valuation Office Agency 2016).
- In 2016/17 the number of people accepted as homeless increased significantly from 209 in 2015/16 to 242 in 2016/17 (Ministry for Housing, Communities and Local Government).

- The number of rough sleepers in West Suffolk increased from 11 to 29 between 2015 to 2017 (West Suffolk Councils figures).

Additional Information

Any operators preparing local risk assessments and wishing to find out more about the social and physical makeup of the immediate vicinity should access the following sources:

- Key population and health data broken down by local authority ward: Forest Heath and St Edmundsbury Ward reports: https://www.westsuffolk.gov.uk/Council/Data_and_information/wardreports.cfm

  (Please note that wards are subject to change once a single West Suffolk Council is created on 1 April 2018.)

- Geographical information that can be searched by postcode to find key features and facilities in the vicinity: the West Suffolk 'Find my Nearest' tool: http://maps.westsuffolk.gov.uk/

- Current local crime patterns (see www.police.uk)

- Suffolk-wide statistics that can also be broken down by ward, district or shared authority and focus on the following themes: https://www.suffolkobservatory.info/

    - Population
    - Crime and community safety
    - Children and young people
    - Deprivation
    - Health and social care
    - Economy and Employment
    - Housing
    - Environment