

THE RESPONSIBLE GAMBLING SUMMIT
JOHANNESBURG, SOUTH AFRICA 2025

Strengthening Responsible Gambling

Current Strategies and Emerging Approaches to
Prevent and Reduce Gambling-related Harm



What We Do

Generate Evidence

Contributing robust and rigorous insights from theory and practice to inform interventions

Facilitate Implementation

Developing, testing, and scaling evidence-based interventions fit for context(s)

Conduct Evaluation

Assessing and adapting the delivery, outcomes, and impacts of evidence-based interventions

Our Why

Gambling is expanding and diversifying rapidly, contributing to increasing normalization of gambling activity across populations

Increases in gambling exposure and availability are associated with increasing harms across populations

With increased gambling provision and consumption comes greater concerns about its impact on the health and wellbeing of communities

Our Fragmentation Challenge

- Systems meant to prevent and reduce harm are fragmented.
- Policy, regulation, research, and intervention operate on separate tracks, with limited data integration.
- **The result: slow learning cycles and reactive responses.**



Our Fragmentation Challenge

- Evidence sits in silos across governments, regulators, operators, researchers, communities, and health systems.
- Disconnected data make it difficult to know what is working, for whom, and under what conditions.



Our Fragmentation Challenge

- Without connected learning systems, harm reduction efforts remain reactive.
- This is not a data-management problem — it is a systems design problem.
- We need coherence between policy, prevention, regulation, and community delivery.



Gambling Finds You

Gambling environments have become seamless, pervasive, and personalized.

- Gambling no longer waits for participation — it comes to you.
- People encounter gambling cues passively, often outside traditional gambling contexts.
- Exposure to gambling has outpaced safeguards, creating visibility and accountability gaps.

Ubiquitous Play – The New “Reward Economy”

Engagement itself has become currency.

- Attention, loyalty, and status now monetize people’s behaviour.
- Point systems, VIP tiers, and variable-ratio incentives replicate gambling reinforcement schedules.
- These dynamics merge gambling with entertainment, finance, and social media.
- Continuous feedback loops amplify time-on-platform and spending.

Why Prevention & Safety Must Be Engineered In

The convergence of gambling, gaming, finance, sport, and media demands a new prevention model.

- Fragmented oversight cannot match the speed of digital expansion.
- System design needs to embed safety across the gambling ecosystem—regulation, operations, community prevention, and treatment.
- Effective prevention is designed into systems, not added as a feature, operating automatically where people play, pay, and interact.
- The goal is not restriction but resilience — maintaining enjoyment while minimizing avoidable harm.

Learning from Other Risk-Based Systems

Safety can coexist with participation.

- **Aviation and transport:** continuous monitoring and fail-safe engineering prevent fatalities while maintaining travel access.
- **Recreation and theme parks:** risk-assessed design keeps experiences thrilling but safe so people aren't injured.
- **Alcohol and tobacco:** product and placement standards measurably reduce harm without eliminating access and choice.

Evidence Base – Why Engineering for Safety Works

Prevention works when systems manage risk safely, not when people must do it alone.

- Across public health domains, early structural intervention consistently outperforms reactive treatment.
- System-level safeguards—standards, audits, and transparent data—reduce harm without eliminating enjoyment.
- In gambling, engineered safety shifts outcomes from individual self-control alone to **shared accountability**.

A Public Health Ledger

Accountability in gambling should mirror other population health systems.

- A public health ledger needs to be in place to track exposure, risk, and outcomes like other preventable harms.
- Integrating data from regulators, operators, and health agencies could show who is affected, by what, and with what consequence.
- Transparency would enable cumulative risk to be seen and mitigated early, minimizing public outcry and impacts on government resources.

Sightlines Across the Gambling Ecosystem

To make this shift, the system needs more interconnected sightlines.

- The traditional 'sightline' we focus on is between the regulator and the operator.
- We need sightlines to connect regulators, operators, treatment providers, community organizations, and lived experience networks.
- When each part of the ecosystem learns from the others, accountability becomes continuous improvement.

Looking Ahead – From Standards to Safety by Design

Yesterday's safeguards can't contain today's risks:

- The standards guiding gambling were built for earlier products and slower systems.
- Emerging risks evolve faster than evidence and regulation can respond.
- Safety by design asks whether risks are being mitigated proactively — or simply tolerated until harm appears.

Toward Engineered Safety and Outcomes-Based Learning Systems

Oversight is evolving from static rules to adaptive, outcome-oriented frameworks.

- Jurisdictions are starting to link operator data, prevention activity, and consumer protection outcomes.
- Learning systems are starting to evaluate what works and consider adjustments as risks evolve.
- Shared metrics to assess impact are starting to replace “RG activity box-ticking”.
- These shifts lay the foundation for coherent gambling ecosystems that protect people and sustain market integrity.

Across the gambling ecosystem—from regulators and operators to researchers, treatment providers, and communities—safety is being designed in, data sightlines are strengthening, and prevention is becoming layered and measurement is outcomes-based. Let's look at how these designs are taking shape around the world. 🌍

North America – Integrating Data and Accountability

North American jurisdictions are beginning to embed harm prevention and outcome assessment in regulatory systems.

Ontario (Canada, 2024):

- The Alcohol and Gaming Commission of Ontario (AGCO) has introduced an **outcomes based regulatory framework**. The intent is to shift the focus from compliance with a specific set of prescriptive rules or processes towards the broader regulatory outcomes or objectives operators are expected to achieve.
- Operators must demonstrate how player protection measures produce measurable outcomes using data and through independent audits.

North America – Integrating Data and Accountability

North American jurisdictions are beginning to embed harm prevention and outcome assessment in regulatory systems.

Ohio (United States, 2024):

- Recently introduced **data sharing agreements** between the Ohio Casino Control Commission (OCCC) and the Department of Mental Health and Addiction Services (MHAS) to link gambling data with public health monitoring and identify risk patterns and improve prevention.

Europe – Accountability through System Reform

European regulators are advancing system-level accountability through coordinated reforms.

United Kingdom (2025):

- The government has introduced a new statutory levy replacing voluntary industry funding, **creating ring-fenced budgets** for prevention, treatment, and independent research.
- The UK Gambling Commission has introduced a **three-pronged monitoring framework** to link population, operator, and open-banking data; and, is working with Ofcom, the Financial Conduct Authority, and the Information Commissioner's Office to align advertising, financial, and digital design regulatory standards.

Europe – Accountability through System Reform

European regulators are advancing system-level accountability through coordinated reforms.

Ireland (2024):

- The Gambling Regulatory Authority of Ireland (GRAI) was established to **consolidate fragmented oversight** of land-based and online gambling.
- A partnership with the Advertising Standards Authority for Ireland (ASAI) is being formalized to coordinate on marketing compliance, youth exposure, and content standards (**youth marketing standards**).

Europe – Accountability through System Reform

European regulators are advancing system-level accountability through coordinated reforms.

Finland (2025):

- To support adaptive oversight during the licensing transition, the jurisdiction will implement **mandatory harm audits for digital gambling products** that are introduced.

Europe – Accountability through System Reform

European regulators are advancing system-level accountability through coordinated reforms.

Regional coordination:

- The European Union recently approved a set of ‘standard markers of harm’ — a core set of gambling harm indicators identified through a literature review and arrived at through expert consensus.
- This set will serve as a recommended standard for researchers and monitoring agencies.

Asia–Pacific – Integrating Safety into System Design

Asia–Pacific jurisdictions are strengthening prevention through regulatory levers.

Australia (2025):

- **National advertising restrictions** have expanded to cover public transport, digital platforms, and live sports broadcasts.
- New South Wales and Victoria now require **mandatory product design reviews for high risk gambling forms** such as electronic gaming machines, addressing intensity and reward structure.
- Victoria Casino Control Commission has introduced an **outcomes-based regulatory scheme** (shifting from rules-based); NSW considering to follow.

Asia–Pacific – Integrating Safety into System Design

Asia–Pacific jurisdictions are strengthening prevention through regulatory levers.

Singapore (2024):

- The Gambling Regulatory Authority (GRA) introduced **requirements for algorithmic transparency and harm tracking indicators**.
- Operators must report how data systems monitor play intensity and identify potential harm, **linking digital governance to consumer protection**.

Asia–Pacific – Integrating Safety into System Design

Asia–Pacific jurisdictions are strengthening prevention through regulatory levers.

New Zealand (2025):

- A recent government review recommended stronger transparency for the national gambling levy and **improved public reporting on harm reduction investments**, emphasizing accountability for prevention and treatment outcomes.

Africa – Building System Capacity & Cross-Regulatory Cooperation

African jurisdictions are developing coordinated approaches to strengthen responsible gambling oversight and enforcement.

South Africa:

- The National Gambling Board (NGB) oversees national standards for responsible gambling messaging, self-exclusion, and advertising controls, coordinating with provincial boards through a **unified compliance framework**.

Africa – Building System Capacity & Cross-Regulatory Cooperation

African jurisdictions are developing coordinated approaches to strengthen responsible gambling oversight, capacity, and enforcement.

Nigeria (2024):

- The Lagos State Lotteries & Gaming Authority (LSLGA) signed a memorandum of understanding (MoU) with the UK GC to bolster the gaming regulatory framework and enhance consumer protections within Lagos State.

Africa – Building System Capacity & Cross-Regulatory Cooperation

African jurisdictions are developing coordinated approaches to strengthen responsible gambling oversight, capacity, and enforcement.

Gaming Regulators Africa Forum (GRAF):

- Continues efforts to harmonise licensing and consumer protection standards across member jurisdictions, supporting joint audits and regulatory exchange with global partners.

Africa – Building System Capacity & Cross-Regulatory Cooperation

African jurisdictions are developing coordinated approaches to strengthen responsible gambling oversight, capacity, and enforcement.

Africa – UK researcher collaboration:

Researchers from Kenya, Ghana, Nigeria, South Africa, and Malawi, in partnership with the University of Bristol (UK), are **advancing a regional evidence base on gambling harms**, focusing on online sports betting, youth risk, and regulatory responses.

Latin America & Caribbean – Building Oversight Systems

Several countries in Latin America are embedding harm reduction into systems while gambling is expanding in the region.

Brazil (2024):

- Federal legislation introduced licensing for online gambling and sports betting, with requirements for responsible gambling controls and advertising standards.

Latin America & Caribbean – Building Oversight Systems

Several countries in Latin America are embedding harm reduction into systems while gambling is expanding in the region.

Colombia (2025):

- The Coljuegos Authority continues to develop **risk monitoring protocols and cross border data exchange** with financial regulators to detect harm and illegal operations.

Latin America & Caribbean – Building Oversight Systems

Several countries in Latin America are exploring joint efforts while gambling is expanding in the region.

Jamaica (2025):

- Jamaica is developing cross-regulatory cooperation between global gambling and local financial regulators via MoUs to improve oversight of payments and consumer protections.

Latin America & Caribbean – Building Oversight Systems

Several countries in Latin America are exploring joint efforts while gambling is expanding in the region.

Regional cooperation:

- CARICOM and the Caribbean Regulators Forum are exploring joint regulatory principles and public health frameworks for gambling harm prevention.
- Regional networks and Ibero-American policy exchanges are encouraging greater regulatory convergence and capacity building.

Global Insights – System Design and Accountability

Across jurisdictions, a pattern of convergence is emerging.

- Multi-agency and cross border collaboration is expanding oversight capacity and enforcement reach.
- Data integration and shared standards and frameworks are aligning regulation with public health and digital safety.
- System design is shifting from reactive compliance to proactive prevention.
- Accountability is shifting towards assessing outcomes (rather than rules)—focusing on transparency, equity, and consumer protection.

From Systems to People – Who Plays & Why It Matters

- Safer systems depend on understanding who participates, how play is changing, and **where harm concentrates**.
- Participation patterns reveal where prevention and accountability must focus — across demographics, products, and levels of risk.
- These insights should inform how we engineer prevention into the gambling ecosystem.

Participation and Risk in the Evolving Ecosystem

Gambling participation is diversifying across age, gender, and product type:

Age: Play peaks among adults 18–34. Online and mobile gambling now accounts for roughly 70 % of participation in Canada and the UK.

Gender: Men remain more likely to gamble (60–65%), mostly in sports and racing; women’s participation is rising online through casino and chance-based games.

Income & equity: Lower-income groups and younger women report higher exposure to online gambling advertising and more frequent play.

Concentration: The most intensive 10–15 % of players account for over half of total gambling expenditure.

What and Where – Product and Regional Trends

Participation trends reflect rapid shifts in products and markets:

- **Sports betting** is the fastest-growing form of gambling across Africa, Europe, and Latin America, driven by mobile access and in-play wagering.
- **Online casinos and slots** show the largest growth in Canada, the UK, and Asia-Pacific, especially among younger adults.
- **Lotteries** remain the most common activity globally but generate relatively low spend per player.

A Public Health Framework for Gambling Harm Prevention

Prevention operates across three levels:

Level	Purpose	Examples
Universal	Reduce exposure and create safer products and environments	Advertising limits, credit-card bans, affordability checks, blocking illegal sites
Selective	Target higher-risk groups or products	Self-exclusion, deposit/time limits, personalized dashboards, targeted messaging
Indicated	Support people already experiencing harm	Referral to treatment, peer-support programs, integration with health services

Universal Measures – Designing Safer Products & Environments

Universal measures reduce exposure and embed protection across systems.

- **Product-design standards:**
 - Australia (2025) now requires electronic gaming machine design reviews and default spin-speed limits.
 - UK has tightened online slot stake limits (UK Government 2025).
- **Advertising controls:**
 - Spain (2023) restricts gambling ads during sport broadcasts.
 - Singapore (2024) enforces influencer and digital ad restrictions.

Universal Measures – Designing Safer Products & Environments

Universal measures reduce exposure and embed protection across systems:

- **Financial protections:** The UK and Ireland ban gambling with credit cards; Norway and Finland use payment blocking for unlicensed operators.
- **System-level blocking:** Denmark and Australia apply DNS blocking against illegal sites.
- **Cross-sector regulation:** Joint oversight among gambling, digital media, and finance regulators in the UK and Australia strengthens oversight of gambling.

Selective Measures – Responsible Gambling Tools

Selective measures target higher-risk play:

- **Deposit and spending limits:** Used in Sweden and Ontario's iGaming portal; voluntary uptake remains under 10%.
- **Session prompts and time reminders:** Required in the UK and Australia; effective only with reinforcement.
- **Self-exclusion systems:** National schemes such as GamStop (UK), Spelpaus (Sweden), BetStop (Australia), and OASIS (Germany) cover both online and land-based play.

Selective Measures – Responsible Gambling Tools

Selective measures target higher-risk play:

- **Personalised dashboards:** European operators are testing spend-tracking and risk-insight tools.
- **Behavioural-analytics monitoring:** Pilots in Finland and Ontario are linking player data to risk flags for proactive contact.

Indicated Measures – Personalised Support & Referral

Indicated measures link high-risk data to real-world support pathways:

- **Operator-initiated outreach:** Several pilots are underway to contact players showing sustained risky play.
- **Referral pathways:** Integration between operators and treatment networks such as NHS Gambling Clinics (UK, 2025) and CAMH Ontario (2024).

Indicated Measures – Personalised Support & Referral

Indicated measures link high-risk data to real-world support pathways:

- **Integrated care models:** Finland's YAD Network and New Zealand's Safer Gambling Aotearoa blend digital self-help, peer support, and treatment.
- **Diversity in access:** New multilingual helplines emerging in Kenya and South Africa for youth and mobile bettors.

Evaluating Impact – What Works & What Does Not

Evidence of effectiveness remains uneven across prevention levels:

- **Universal measures:** Advertising limits, affordability checks, and credit bans lower exposure without reducing participation.
- **Selective measures:** Usage of voluntary “RG tools” has been in steady decline; prompt fatigue and habituation persist.
- **Indicated measures:** Early integration of gambling and health records shows potential for better triage and recovery outcomes.

Evaluating Impact – What Works & What Does Not

- **System learning:** Jurisdictions linking prevention data to regulatory audits (e.g., UK and Victoria Australia 2025) have the potential to improve transparency and policy iteration.
- **Global challenge:** Few systems yet measure prevention effectiveness at population scale.
- **Key lesson:** The next frontier is evaluating impact — knowing not just what is implemented, but what actually reduces harm.

Social and Commercial Determinants of Gambling Harm

Gambling harm is not evenly distributed:

- Social and commercial conditions shape who is most exposed and who is most affected.
- Together these forces deepen inequities and increase preventable harm across populations.

Social determinants:

Structural disadvantage — like financial stress, housing instability, and limited support — heightens vulnerability and concentrates harm.

Commercial determinants:

Product design, marketing, and digital distribution shape exposure and risk by embedding gambling seamlessly into everyday life.

Addressing Determinants of Harm in Practice

United Kingdom (2025):

The UK Gambling Commission's Young People's Advisory Group contributes to youth-focused prevention campaigns and marketing guidance (UKGC 2025).

Finland (2024):

During market liberalization, the Ministry of Social Affairs and Health launched a Social Impact Assessment Framework to monitor gambling's effects on health equity (EGBA 2025).

Addressing Determinants of Harm in Practice

Ontario, Canada:

Greo Evidence Insights manages a Community Investment Programme supporting at-risk communities across Ontario. (Greo 2022 - ongoing).

Great Britain:

As part of the Network to Reduce Gambling Harms, Greo manages a Community Investment Programme, providing funding and support to organisations serving at-risk and underserved populations experiencing health inequities (Greo 2023 - ongoing).

Addressing Determinants of Harm in Practice

New Zealand:

The Strategy to Prevent and Minimise Gambling Harm 2025–2030 incorporates Māori-led delivery and community co-design (RNZ 2025).

Ontario, Canada:

Greo Evidence Insights manages a Community Investment Programme for Indigenous-led gambling harm prevention, education, and support initiatives in First Nations, Inuit, and Métis communities (Greo 2024 - ongoing).

Fragmented Systems, Fragmented Outcomes

Gambling harms are emerging from connected systems — but prevention and accountability remain disconnected:

- Data and evaluation are siloed across regulators, operators, researchers, and service providers.
- Funding streams and mandates focus on activities rather than outcomes.
- Learning cycles are short, reactive, and rarely shared across jurisdictions.
- Fragmentation limits the system's ability to identify cumulative risk or demonstrate long-term impact.

Toward a More Coherent Gambling Ecosystem

- ★ **Engineer safety and prevention in** – build protection into products, platforms, data, and decision-making.
- ★ **Align regulatory and system oversight** – coordinate gambling, advertising, digital, financial, and health systems to close gaps exploited by rapid innovation.
- ★ **Create a system that learns** – integrate data sightlines linking the entire gambling ecosystem.
- ★ **Monitor gambling impact**– establish or look to common risk metrics /RG outcomes for earlier identification of risks and public accountability.
- ★ **Protect research independence** – fund and sustain evidence generation at an arm's length from industry and politics.
- ★ **Empower communities** – fund communities and lived experience networks to co-design prevention, care, and policy that impacts them.

Thank you!



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