

Evaluation of Gambling Research Australia 2017-2023

Final report

18 December 2023



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Verian Evaluation Team

Dr Kizzy Gandy, Will Hoare, and Thi Hoa (Hannah) Nguyen

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Email: gra.secretariat@liquorandgaming.nsw.gov.au

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Executive Summary

Verian conducted a mixed methods evaluation of Gambling Research Australia's (GRA's) appropriateness and outcomes for the period 2017-2023. The extent to which GRA achieved its objectives varied according to stakeholder expectations but given GRA's network structure, complex operating environment, and low-cost infrastructure it achieved the most it could. Stakeholder expectations of GRA could be better managed through more strategic engagement, clearer articulation of what success looks like, and a comprehensive Theory of Change that explains how and why success will be achieved so that enabling structures and processes can be put in place. What all stakeholders agreed on is that interjurisdictional collaboration on research to inform gambling harm minimisation is useful. The evaluation provides evidence-based options for a more ambitious future gambling research model.

1.1 Methodology

Verian conducted a survey of public servants, researchers, gambling industry, and community sector stakeholders (n=56), interviews with GRA members and public servants involved in gambling harm minimisation (n=15), a review of governance documents (n=31), and a review of GRA research reports (n=5). The findings were triangulated to answer seven Key Evaluation Questions.

1.2 Key findings

Key Evaluation Questions	Summary of findings
1. Has the current GRA program achieved its purpose?	<p>A key evaluation finding is that GRA's purpose is not clearly documented or understood by stakeholders. This has contributed to mixed expectations and varying levels of satisfaction with GRA among stakeholders.</p> <p>While GRA has five objectives (covered by KEQ 2), GRA's purpose is not explicitly articulated in all its governance documents such as the Memorandum of Understanding and Research Framework. GRA's Terms of Reference state that the "the policy objective for establishing the GRA Program is to deliver a high-quality national gambling research program which focuses on areas of national significance and supports the development and continuous improvement of an effective regulatory and consumer protection gambling framework."</p> <p>When interviewees were asked what GRA's purpose is, responses included:</p> <ul style="list-style-type: none">• Delivering a national research agenda to reduce gambling harm.• Collaboration/partnership/coordination on gambling research• Commissioning non-industry research on gambling <p>As these responses reflect GRA's objectives, the evaluation interprets GRA's purpose as the sum of its objectives. Refer to findings for KEQ 2</p>
2. Were the key objectives of the GRA useful and were they met?	<p>GRA's five objectives relate to delivering relevant, timely and cost-effective research that can inform policy, regulation and programs.</p> <ol style="list-style-type: none">1. Inform gambling-related regulation, policy and program development across Australian jurisdictions.2. Build and strengthen the evidence base for the effective regulation of gambling in Australia.3. Support the development of effective harm minimisation policy, regulation and programs.

Key Evaluation Questions	Summary of findings
	<p data-bbox="536 277 1382 344">4. Be cost effective and deliver timely outcomes for policy development.</p> <p data-bbox="536 344 1382 412">5. Consider state, national and international research and policy context developments.</p> <p data-bbox="488 456 1382 591">The literature points to three key ways research is used in policymaking: instrumental (direct application), conceptual (combined with other information to discuss approaches), and strategic (legitimise/affirm existing approaches).</p> <p data-bbox="488 636 1382 748">Based on the literature, GRA's structure and processes support conceptual and strategic uses of research, and from this perspective it was successful in achieving its objectives.</p> <p data-bbox="488 792 1414 949">The majority of public servant stakeholders surveyed agreed that GRA's objectives were useful and met. However, there was an approximately 50:50 split in opinion about GRA's success among interviewees which related to their preferences for how research is used in policymaking.</p> <p data-bbox="488 994 1398 1308">Around half of interviewees interpreted GRA's objectives as supporting conceptual and strategic uses of research in policymaking. Because these interviewees had a realistic expectation of what GRA could achieve, they believed GRA was successful. The other half of interviewees expected GRA's research to be used instrumentally which is a much higher expectation that GRA was not set up to support. As such, these interviewees believed GRA only partly achieved objectives 1, 2, 3 and 5 and failed to achieve objective 4.</p> <p data-bbox="488 1352 1414 1666">72% of survey respondents said GRA research had informed at least one regulation, policy or program. On average, survey respondents said GRA research had informed 2.2 policies, 1.4 programs, and 1.8 regulations. The study that was consistently rated most useful was "The second national study of interactive gambling in Australia" which was a prevalence study. A majority of interviewees said that prevalence studies could be used in multiple ways because all regulations, policies and programs are based on an understanding of the size of problem.</p> <p data-bbox="488 1711 1414 1957">GRA was low cost to run according to most interviewees because of its slim operation as a network of jurisdiction representatives. The costs of GRA's research outputs were similar to comparable publications and considered rigorous by 76% (n=29) of survey respondents, but half the interviewees did not see full value in the findings of some publications, particularly the behavioural messaging report.</p>

Key Evaluation Questions	Summary of findings
	<p>All six GRA publications (including one still in progress) ran significantly behind schedule according to GRA project documents. Most interviewees believed this was a function of GRA's structure, including the consensus model of decision-making (see KEQ 4), and some representatives that attend meetings not having decision-making authority for their jurisdiction. They also said it was a function of GRA members having overly optimistic timelines for academic research.</p>
<p>3. Has GRA met key research needs of jurisdictions and avoided overlaps?</p>	<p>Research by its nature is overlapping as one piece of research builds on findings from another. The evaluation found that while GRA's research did not avoid overlaps, it did avoid duplication. 61% of public servant survey respondents said GRA meets their needs well, 23% were neutral, and 15% said it did not meet their needs well. The interviews found that the extent to which GRA met stakeholder needs was related to their expectations for how research would be used.</p> <p>Interviewees who prioritised the instrumental use of research (around half) did not believe their needs were fully met, whereas those who prioritised conceptual and strategic uses of research (around half) agreed their needs were fully met.</p> <p>Stakeholder suggestions for better meeting their needs included:</p> <ul style="list-style-type: none"> • Developing clearer project briefs that articulate the tangible implementation outcome the research will inform and being realistic about the timeline. • Commissioning market research agencies to conduct applied research and commissioning academics for prevalence studies. • Evaluating implemented harm minimisation initiatives or interventions. • Commissioning "systems thinking" research. • Broadening the scope of GRA's research offer to include state-based research, as described under KEQ 5. • Ensuring the end users of the research (the GRA committee and co-funding bodies such as Sport Integrity Australia) make timely decisions about adapting the research delivery when there are inevitable challenges (e.g., sample recruitment) so that the focus stays on policy outcomes, not process or academic interests.
<p>4. Is the GRA structure and composition appropriate?</p>	<p>GRA is composed of representatives from all jurisdictions but not all jurisdictions are equally engaged due to smaller states having less resources. Only 63% of public servant survey respondents said GRA represents the interests of all jurisdictions equally which may be because larger states contribute more in-kind resources</p>

Key Evaluation Questions	Summary of findings
	<p>(such as project management) and therefore have more influence.</p> <p>GRA's structure and processes are appropriate for producing research for conceptual and strategic purposes but not for instrumental purposes. Agreement by survey respondents that GRA's structures and processes are effective for achieving its objectives was highest for "Funding" (55%) and lowest for "Stakeholder consultation" (29%). Public servants were much more likely to rate GRA's structures and processes effective compared to researchers.</p> <p>Some researcher respondents may not have worked with GRA directly so any negative perspectives they have about GRA's structures and processes may be impressionistic, but this cannot be determined from the data (refer to limitations in chapter 3). Nevertheless, as several GRA members want to expand the pool of researchers responding to GRA tenders (see KEQ 1), it will be important to address any impressionistic perspectives of these indirect stakeholders.</p> <p>Almost all interviewees said the timeliness of GRA's outputs was constrained by the consensus model of decision-making and jurisdictions having high staff turnover. A majority of interviewees felt resigned to the consensus model because of the benefits of interjurisdictional collaboration, but two interviewees were supportive of moving away from the consensus model.</p>
<p>5. What should GRA look like in the context of an implemented National Framework?</p>	<p>Stakeholders shared the view that GRA should continue to focus on issues of national significance. A minority of interviewees wanted GRA to only commission research on topics that states/territories would be less likely to commission on their own, such as online gambling.</p> <p>Most interviewees wanted to operationalise national significance in a broader way, such as (1) commissioning research based on gap analysis, including gaps in knowledge about issues that occur within state/territory borders (2) developing a centralised repository of gap analysis and research outputs about issues that occur within state/territory borders (3) sharing and discussing the application of research to policy that occurs within state/territory borders, and (4) regular national prevalence studies to improve the efficiency of prevalence studies that occur within state/territory borders.</p> <p>Two interviewees noted that the current GRA (2017-2023) was focused on the National Consumer Protection Framework (NCPF), but the previous GRA considered research that</p>

Key Evaluation Questions	Summary of findings
	<p>occurred within state/territory borders to be in scope, and it would be valuable to return to that approach in the future.</p> <p>When asked about an ideal national research model, we found mixed views, consistent with other evaluation findings. However, almost all stakeholders agreed there should be better stakeholder engagement to inform a future model and research priorities.</p> <p>As stakeholders who prioritised the conceptual and strategic uses of research were more satisfied with the current GRA model than those that prioritised the instrumental use of research, we have summarised stakeholder preferences for a future model that the literature suggests would support the instrumental use of research (see Appendix A for a literature scan). These stakeholders suggested having an independent board, stronger collaboration with industry and researchers, and strategic dissemination of the research.</p>
6. To what extent does GRA duplicate other government funded gambling research mechanisms such as AGRC, VRGF, NSW RGF and other State and Territory funded research?	<p>74% of survey respondents agreed that GRA is not duplicating other gambling research. GRA is also valued more than other national research organisations but not as much as the Victorian Responsible Gambling Foundation (VRGF) and the NSW Office of Responsible Gambling (ORG). The majority of survey respondents felt that GRA research was more credible (85%), relevant (83%), and usable (69%) than other Australian sources of gambling research, although fewer agreed it was more ambitious (43%), unique (52%), and timely (52%).</p> <p>A third of interviewees said they did not know what GRA's point of difference was in relation to other gambling research organisations and this contributed to dissatisfaction with GRA outputs. Three interviewees said the gambling research landscape is more crowded and less coordinated compared to the time of the first GRA which made it harder for the current GRA to have clarity of purpose.</p> <p>One interviewee believed that the proliferation of gambling forums contributed to jurisdictions sending more junior staff to GRA meetings. These personnel did always not have sufficient decision-making authority to fully engage or were in roles with high turnover and therefore weren't able to build relationships which is the main value of interjurisdictional organisations like GRA. This created a negative feedback loop whereby low engagement reduced the perceived value of GRA and this further reduced engagement.</p>

Key Evaluation Questions	Summary of findings
7. Is there an ongoing need for the function and role of the GRA?	<p>There is an ongoing need for an organisation like GRA. 75% survey respondents said they would like to see GRA continue. The lowest support was among researchers (65%), but this was still quite high. All interviewees said there are questions of national significance that a national research model could usefully answer, and inter-jurisdiction coordination and collaboration is highly valued.</p> <p>In the survey, participants were asked: <i>“What should GRA's priorities be if it continues?”</i></p> <p>The most common suggestion for a research focus was:</p> <ul style="list-style-type: none"> • Harm prevention/minimisation (n=7, 23%) such as focusing on emerging technologies <p>The most common suggestions for an operating model related to the instrumental use of research and better coordination of different gambling forums, including state-based research mechanisms:</p> <ul style="list-style-type: none"> • To commission relevant and useable research (n=7, 23%), for example, research that tackles hard issues • Engage with other research organisations/consultants more (n=3, 10%) to improve alignment and reduce the disconnect between federal, state, and territory approaches to research <p>Considerations for developing a future model are provided, including a decision tree to align the structure and objectives of a future national research model.</p>

1.3 Recommendations

Based on the findings of the evaluation which includes primary data collection, review of secondary data, and a literature scan, we recommend:

1. A future GRA should better articulate its purpose with a clear point of difference from other gambling research organisations.
2. A future GRA should develop a Theory of Change to inform its structure, composition, and processes so that they are logically linked to its purpose and measurable outcomes.
3. The Theory of Change model and success metrics for a future GRA should be developed through stakeholder consultation. It should also be transparently communicated or published to align decision-making and stakeholder expectations longer term.

02

Background

2.1 Gambling Research Australia

Gambling Research Australia (GRA) is a joint Commonwealth, State and Territory Government research partnership designed to inform programs, policies and regulations that aim to reduce gambling harm and respond to emerging gambling priorities.

According to GRA's Terms of Reference 2017-2020:

"The policy objective for establishing the GRA Program is to deliver a high-quality national gambling research program which focuses on areas of national significance and supports the development and continuous improvement of an effective regulatory and consumer protection gambling framework.

It is not intended to replace existing jurisdiction-based, community sector or industry research. The model will build on, and fill gaps in, the evidence relevant to the nature and impact of gambling activities and policy interventions in Australia, with a focus on informing government policies, programs and regulatory decisions."

Since 2017, GRA has commissioned six research publications, five of which have been published and one that is currently being finalised. This evaluation report is the seventh piece of research that has been commissioned by GRA. GRA publishes its research on <https://www.gamblingresearch.org.au/>

GRA Projects

1. Interactive Gambling in Australia (led by Victoria), Central Queensland University commissioned on 11 June 2019, Completion: 12 August 2021.
2. RCT to test Voluntary Opt-out Pre-commitment (led by the Commonwealth), Central Queensland University commissioned on 27 June 2019, Completion: 14 September 2021.
3. RCT to test Consistent Gambling Messaging (led by the Commonwealth), Central Queensland University commissioned on 13 February 2020, Completion: 30 September 2021.
4. Skill-based gaming in Australia (led by NSW), Central Queensland University commissioned on 14 July 2021, Completion: April 2023.
5. Australian sports data into foreign jurisdictions (led by the Commonwealth), KPMG commissioned on 4 May 2021, Completion: November 2022.
6. Direct and affiliate marketing of wagering services and gambling-related harm (led by NSW), Central Queensland University commissioned on 14 October 2022, in progress and expected to be completed by April 2024.
7. Evaluation of GRA, Kantar Public (now Verian) commissioned on 8 May 2023, Completion due December 2023.

GRA Funding

Funding contributions for the GRA are detailed in its Memorandum of Understanding (MoU). Funding contributions were \$1m per annum for each of the 3 years of the 2017-18 to 2019-20 MoU. The Commonwealth contributed half of this amount and jurisdictions' contributions were based on their proportion of total national gambling expenditure. An additional funding contribution was also made by Sport Integrity Australia to assist with funding for one report. It was agreed that NSW would charge \$25,000 (indexed) per annum to provide Secretariat services.

Financial Year	Jurisdictional Contribution	FY Balance (30 June)
Carry forward from previous GRA		\$ 434,381
2017/18	\$ 700,000	\$ 1,134,382
2018/19	\$1,000,000	\$ 2,104,241
2019/20	\$1,000,000	\$ 2,330,463
2020/21	Nil	\$ 1,748,422
2021/22	Nil	\$ 1,305,903
2022/23 ¹	Nil	\$ 801,587*

* This balance includes funds committed for future years through project contracts and other projected costs (peer reviews, secretariat fees, website). The forecast unspent GRA balance as at 30 June 2024 is \$203,115. This balance includes funds committed in 2023/2024 and invoices paid post 30 June 2023.

2.2 GRA stakeholders

The current GRA research program (2017/18 to 2022/23) was established through a Memorandum of Understanding (MoU). GRA has a number of direct and indirect stakeholders:

Direct stakeholders

- **The GRA Governance Committee (GC)** oversees GRA's work and meets at least twice a year. It identifies research priorities, develops the GRA research program, manages GRA funds, manages risks, and provides feedback and advice to the Secretariat, Project Manager, and contracted researchers as required. The committee is comprised of departmental officers of member jurisdictions who make decisions via consensus. NSW is the Chair.
- **The GRA Secretariat** oversees the day-to-day administration of the GRA program, including managing project contracts to ensure milestones are achieved in collaboration with the Project Manager and Project Working Group, releasing reports, and managing GRA's website. NSW is the Secretariat.
- **A Project Manager** is nominated for each individual project by jurisdiction members (on an in-kind basis) and approved by the Governance Committee. They monitor and manage the project from developing the project brief to finalisation of the report – they are the key conduit between the Governance Committee and the contracted researchers. Project Managers are departmental officers who support GRA in addition to performing their primary role.

¹ Estimate

- **A Project Working Group** supports the Project Manager and Secretariat of individual projects. The Project Working Group is led by the Project Manager and includes a Project Sponsor (who participates on an “as needed” basis) and nominated representative/s from one or more jurisdictions. A Project Working Group must meet a minimum of three times per year.
- **The National Consumer Protection Framework Implementation Governance Committee (IGC)** is an adjacent committee which facilitates inter-governmental collaboration on key policy and operational issues related to the National Consumer Protection Framework (NCPF) for online wagering. The NCPF is an agreement between the Commonwealth and States and Territories which aims to reduce the harm of online wagering. Some GC members are also IGC members.
- **Contracted Researchers** deliver GRA's research publications by responding to GRA's procurement activities and participating in GRA's peer review process. They are typically university academics who specialise in gambling research.

Indirect stakeholders

A range of other stakeholders have an interest in GRA. This includes all public servants working on gambling-related issues, community organisations that provide gambling-related support services or undertake gambling-related advocacy, universities and research agencies, and the gambling industry.

2.3 Evaluation overview and Key Evaluation Questions

The NSW Department of Enterprise, Investment and Trade (DEIT) – serving as the GRA Secretariat – contracted Verian to conduct an endpoint evaluation of the current GRA (2017 to 2023) on behalf of the GRA Governance Committee. The project brief was agreed by the GRA Governance Committee, and it was managed by the Commonwealth Department of Social Services. A midpoint review was previously conducted in November 2019.

Verian was asked to answer seven Key Evaluation Questions using a stakeholder survey, interviews, and a document review.

Key Evaluation Questions

Value of GRA

1. Has the current GRA program achieved its purpose?
2. Were the key objectives of the GRA useful and were they met?
 - a. To what extent has the GRA program informed gambling-related regulation, policy and program development across jurisdictions?
 - b. Does the research support the development of effective harm minimisation policy, regulation, and programs?
 - c. Has the GRA program built and strengthened the evidence base for effective regulation of gambling in Australia?
 - d. Is the GRA program cost effective, and has it delivered timely outcomes for policy development?
 - e. Has GRA considered state, national and international research, and policy context developments?

Structure, composition, and position of GRA

3. Has GRA met key research needs of jurisdictions and avoided overlaps?
4. Is the GRA structure and composition appropriate?

5. What should GRA look like in the context of an implemented National Framework?
6. To what extent does GRA duplicate other government funded gambling research mechanisms such as the Australian Gambling Research Centre (AGRC) within Australian Institute of Family Studies (AIFS), the Victorian Responsible Gambling Foundation (VRGF), the NSW Responsible Gambling Fund and other State and Territory funded research?
7. Is there an ongoing need for the function and role of the GRA?

The delivery and day-to-day project management of Verian's evaluation was supported by the Commonwealth Department of Social Services (DSS).

The findings of the evaluation will benefit all GRA members by identifying whether GRA has achieved its objectives and any lessons learned for a potential future national research model.

Methodology

We used a mixed methods evaluation design to answer each Key Evaluation Question (KEQ) listed in section 2.3. These questions broadly covered three areas:

1. **Were GRA's objectives achieved:** To what extent, and how, did GRA 2017-2023 inform regulation, policy, and programs?
2. **Is the structure and composition of GRA appropriate:** How well does the representation, skill and level of membership serve GRA's purpose?
3. **What is the value proposition of a whole of government gambling research model:** Is GRA building on and filling gaps in research, and avoiding overlaps or duplication with other sources of research?

3.1 GRA's Evaluation Plan

At a high level, the three key data sources focused on different lines of enquiry, but findings were triangulated where multiple sources of data were relevant to the same KEQ.

Table 1. Key lines of enquiry for each data source		
Data source	Stakeholders targeted	Key lines of enquiry
Survey	All stakeholders	Impact, structure, and processes
Interviews	GC, IGC and other public servants involved in implementing gambling reforms	Barriers and enablers to impact
Documents	N/A	Appropriateness of GRA's design based on best practice

Sampling

DSS defined the evaluation sample. This included specifying which stakeholders should be invited to the survey and interviews and sending a warm-up email in advance of Verian contacting them. Refer to section 3.3 for the targeted and final sample sizes.

Ethics and Privacy Considerations

While gambling is a sensitive topic, the stakeholders in scope for this evaluation were not considered to be vulnerable and were likely to have an interest in participating in the evaluation. Participation was voluntary and on the basis of informed consent, all responses were recorded confidentially, and only aggregate and de-identified data have been included in this report. Therefore, no ethical risks were associated with this evaluation. Nevertheless, the evaluation followed the principles of ethical research described in the National Statement on Ethical Conduct in Human Research.

Verian's email invitations explained how participants' data would be used. By providing this information in advance, informed consent was implied if an individual started the survey or scheduled an interview. This information was repeated at the beginning of the survey and interview, and participants could stop participating at any time.

Verian sent only one reminder email to individuals who did not respond to the initial invitation, as per the principle of voluntary participation. However, after low take-up of the interview offer by GC and IGC members (n=5), DSS directly encouraged participation (n=11) which resulted in additional interviews being conducted (n=10).

To comply with data protection and privacy standards, DSS signed a privacy protection protocol. This confirmed they had the authority to provide the email addresses to Verian and that Verian would delete all personal information associated with the evaluation 12 months after the project completion date.

3.2 Evaluation Implementation

Survey

The survey collected data on stakeholders' opinions about GRA's research reports and policy impact, GRA's structure and composition, and ideas for a future national research model. Branching and skip logic were used to direct focused questions at specific stakeholder types.

Table 2. Focused survey questions for different types of stakeholders	
Stakeholder type	Focused questions
Public servants	Engagement with GRA
Researchers	Support provided by GRA
Community sector, gambling industry, other	None

The survey took approximately 10 minutes to complete and was implemented via Qualtrics after pre-testing was approved by DSS.

The survey was analysed using:

- Descriptive statistics
- Sub-group analyses
- Thematic analysis of open-ended question responses (emergent code and count)

Refer to Appendix B for the questionnaire.

Interviews

The interviews collected data on the barriers and enablers to GRA achieving its objectives. Interviews were conducted with members of GRA's Governance Committee (GC), members of the National Consumer Protection Framework (NCPF) Implementation Governance Committee (IGC), and other public servants involved in gambling harm minimisation. Four mini group interviews and three one-to-one interviews were conducted with a total of 15 participants. Representatives from all jurisdictions were interviewed apart from one.

Interviews were conducted on Microsoft Teams. Verian took notes and used video recording to review later and check our understanding.

Table 3. Breakdown of interviews		
Interview	Length of interview	Number of participants
1	1 hour	2
2	1 hour	1
3	1 hour	1
4	1 hour	1
5	1.5 hours	3
6	1.5 hours	4
7	1.5 hours	3

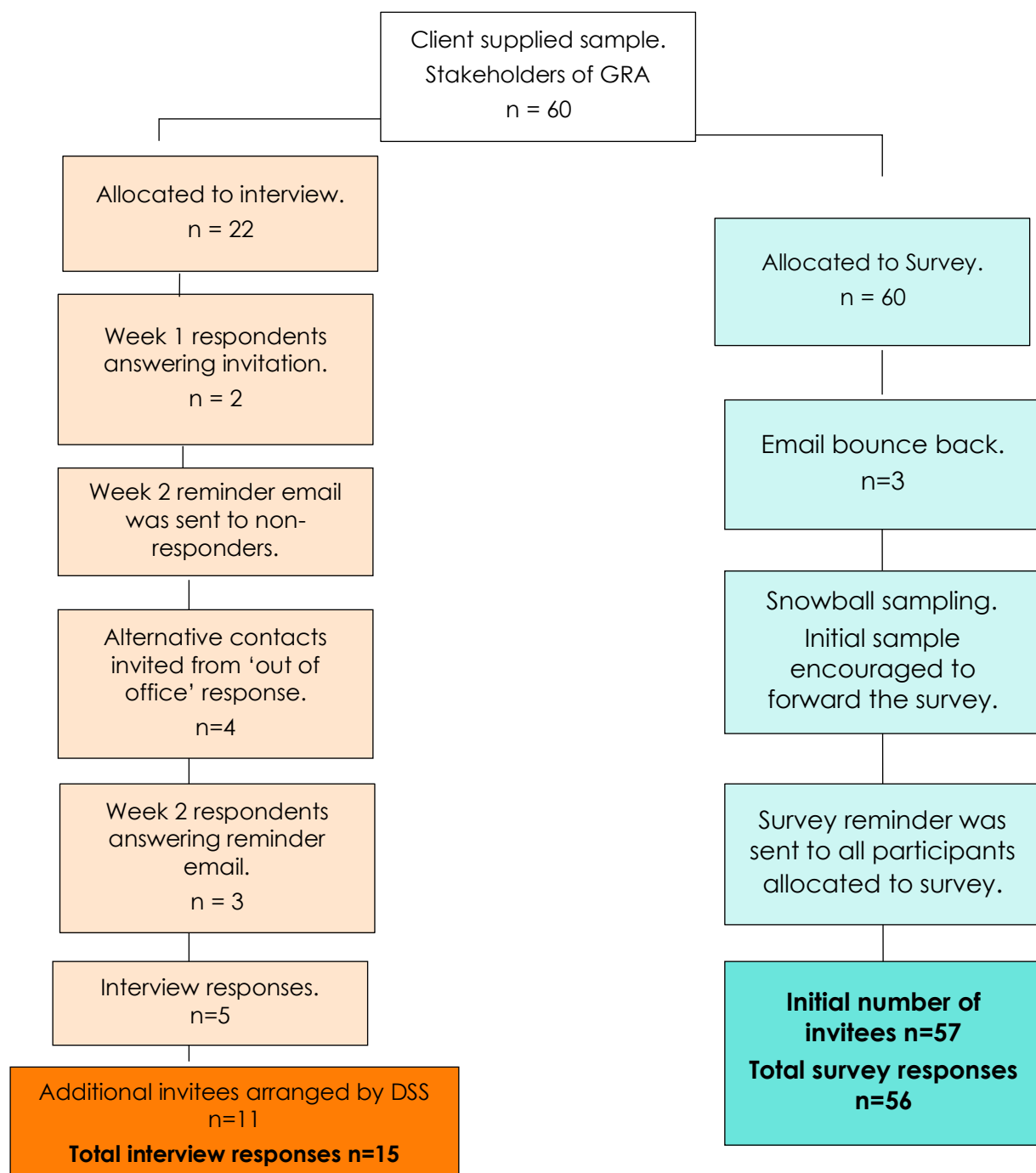
Document Review

The department provided 113 documents. This included governance and project documents, as well as meeting agendas, minutes, and attachments. After filtering for documents relevant to answering the Key Evaluation Questions, we analysed 31 documents. Verian also reviewed five of GRA's research publications. The sixth was not finalised and therefore not included in the evaluation.

3.3 Data Collection

As participation in the evaluation was voluntary, the final sample size for the survey and interviews was determined by the opt-in rate. This is described in Figure 1.

Figure 1. Consort Diagram

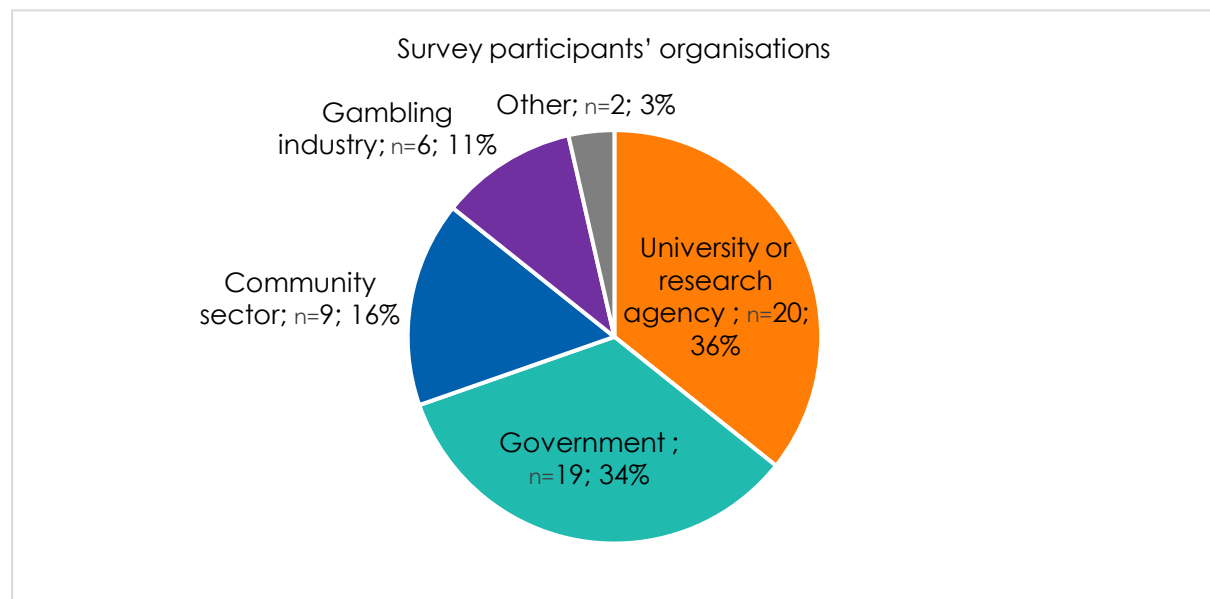


The targeted and final sample sizes for all data sources are provided below.

Table 4. Targeted and final sample sizes		
Data source	Targeted number	Final number
Stakeholder survey	60	56*
Interviews	22	15
Research publications 2017-23	6	5
GRA governance and project documents + other client supplied documents (includes meeting agendas, minutes and attachments)	20	31^

Note: * Snowball sampling was used where currently enrolled participants help to recruit new subjects. The 56 survey respondents were made up of n=19 from government, n=20 from a university or research agency, n=9 from the community sector, n=6 from the gambling industry, and n=2 were listed as other. See Figure 3. There are n=6 studies, but we did not have access to n=1 because it was not finalised; ^ We reviewed n=31 documents after filtering n=113.

Figure 2. Survey participants' organisations



Note: The total number of survey respondents is n=56. However, survey participants had the option to omit specific questions, sub-questions, or conclude the survey before completing all sections. As a result, the count of observations may fluctuate across individual questions and across sub-questions. Among the two 'other' respondents, one is an independent consultant, the other is from a law firm.

3.4 Limitations

The findings of this evaluation are indicative and should be interpreted with caution due to the following potential limitations:

- A key limitation of conducting an anonymous survey with snowball sampling is that some respondents without sufficient knowledge of GRA may unduly influenced the findings. This particularly relates to researcher respondents. In addition, public servant stakeholders could participate in both the survey and an interview so those that participated in both may have had more influence than others, although the survey was designed to quantify views whereas the interviews were designed to understand the rationale for views.
- Survey coverage: To protect anonymity, we did not ask survey respondents for their jurisdiction or place of work and therefore results cannot be compared between different jurisdictions or different organisations. For example, it is likely that some of the researchers that responded to the survey have never worked with GRA, but we cannot distinguish their responses from researchers that have worked with GRA. Likewise, some public servants may not have been forwarded the survey via snowball sampling and therefore any limitations associated with the original invitation list prepared by DSS may not have been resolved by the snowball method.
- Response bias: Self-reported data can be prone to different types of response bias such as social desirability bias (answering according to society's expectations), recall bias (inaccurate or incomplete recollection of past events), acquiescence bias (the tendency to agree, regardless of the question content), and satisficing (giving the same answer to a battery of similar questions).
- Sample bias: Sample bias occurs when survey and interview respondents are systematically different to those who do not respond. For example, stakeholders who had an extremely positive experience or an extremely negative experience may be more motivated to opt-in to the evaluation than those who had an average experience.
- Small sample size: The small sample size of respondents reduces the generalisability of the findings.

04

KEQ 1: Has the current
GRA program achieved
its purpose?

4.1 High-level findings against KEQ 1

A key evaluation finding is that GRA's purpose is not clearly documented or understood by stakeholders. This has contributed to mixed expectations and varying levels of satisfaction with GRA among stakeholders.

While GRA has five objectives (covered by KEQ 2), GRA's purpose is not explicitly articulated in all its governance documents such as the Memorandum of Understanding and Research Framework.

GRA's Terms of Reference state that the "the policy objective for establishing the GRA Program is to deliver a high-quality national gambling research program which focuses on areas of national significance and supports the development and continuous improvement of an effective regulatory and consumer protection gambling framework."

When interviewees were asked what GRA's purpose is, responses included:

- Delivering a national research agenda to reduce gambling harm.
- Collaboration/partnership/coordination on gambling research.
- Commissioning non-industry research on gambling.

As these responses reflect GRA's objectives, the evaluation interprets GRA's purpose as the sum of its objectives. Refer to findings for KEQ 2.

05

KEQ 2: Were the key objectives of the GRA useful and were they met?

5.1 High-level findings against KEQ 2

GRA's objectives were useful and largely met.

GRA's five objectives relate to delivering relevant, timely and cost-effective research that can inform policy, regulation and programs.

1. Inform gambling-related regulation, policy and program development across Australian jurisdictions.
2. Build and strengthen the evidence base for the effective regulation of gambling in Australia.
3. Support the development of effective harm minimisation policy, regulation and programs.
4. Be cost effective and deliver timely outcomes for policy development.
5. Consider state, national and international research and policy context developments.

The literature points to three key ways research is used in policymaking: instrumental (direct application), conceptual (combined with other information to discuss approaches), and strategic (legitimise/affirm existing approaches). Refer to Appendix A for a summary of the published literature on the influence of research on policy.

Based on the literature, GRA's structure and processes support conceptual and strategic uses of research and from this perspective it was successful in achieving its objectives.

A majority of public servant stakeholders surveyed agreed that GRA's objectives were useful and met. However, there was an approximately 50:50 split in opinion about GRA's success among interviewees which related to their preferences for how research is used in policymaking.

Around half of interviewees interpreted GRA's objectives as supporting conceptual and strategic uses of research in policymaking. Because these interviewees had a realistic expectation of what GRA could achieve, they believed GRA was successful. The other half of interviewees expected GRA's research to be used instrumentally which is a much higher expectation that GRA was not set up to support. As such, these interviewees believed GRA only partly achieved objectives 1, 2, 3 and 5 and failed to achieve objective 4.

It is likely that this split in opinion occurred because GRA does not clearly operationalise its objectives. Indeed, several interviewees with high expectations of GRA's objectives commented that it's not clear what "inform", "build" or "timely" means in practice. For example, one interviewee said the objectives are very "generic" so GRA can achieve them "just by existing". Another said the objectives are not measurable and needed associated success metrics. A third interviewee noted that using the term "informing policy" means the objectives can be met without being impactful. A fourth interviewee said, "I personally don't know how long these research pieces are supposed to take."

Examples of realistic expectations:

"A lot of it comes down to... expectation management of what research question gets theorised and the time it takes to get to that, to procurement, to the time it takes gets published...One of the things that doesn't get credited to GRA enough or ever except by me, is that it's the enduring nature of the research... longer than a short 2–3-year life cycle... It's sometimes difficult to draw a direct line between a policy or program to a report." – Interviewee

"I think sometimes there has to be a bit of understanding that it [GRA research] may not be [useful] at that point in time and it's not necessarily going to suit everyone's focus or interest. But there could be wider potential application that's still worthy of a jurisdiction potentially collaborating and joining in." – Interviewee

"Don't try and achieve too much because you can't when you've got so many people inputting into the pie.... One jurisdiction may find value in a project and get something good out of it and another jurisdiction will say, well that that was just a waste of money." – Interviewee

"I mean part of it is managing the expectations of regulators who want everything done tomorrow. As a regulator, 18 months feels like a really, really, really long time." – Interviewee

Examples of high expectations:

"They are entirely appropriate objectives...subjectively they have been achieved...In achieving them have they been useful?" – Interviewee

"I don't think it's functioning as effectively as it could, and I do think it should have a closer link to the practicalities of implementation." – Interviewee

"In terms of the benefit that we're actually harvesting from it, I don't think that we're probably making the most of our investment." – Interviewee

"There are some concerns for the money that has been spent and the outcomes that are being delivered." – Interviewee

GRA's goal to inform rather than influence policy is appropriate because the literature finds that research has only a modest impact on policy, and this is rarely linear or unidirectional (see literature scan in Appendix A). High turnover of Governance Committee members likely contributed to a lack of historical perspective among some interviewees to recognise the impact GRA research was having in indirect ways over the longer term. For example, one longtime stakeholder could point to numerous indirect impacts of GRA research whereas two newer stakeholders could not point to a single example of influence.

Similarly, there was a gap between surveyed public servants (80%) and researchers (47%) agreeing GRA's objectives were achieved, which may be because public servants have a more practical understanding of policymaking. In addition, researchers have less visibility of policymaking.

72% of survey respondents said GRA research had informed at least one regulation, policy or program. On average, survey respondents said GRA research had informed 2.2 policies, 1.4 programs, and 1.8 regulations. The study that was consistently rated most useful was "The second national study of interactive gambling in Australia" which was a prevalence study. A majority of interviewees said that prevalence studies could be used in multiple ways because all regulations, policies and programs are based on an understanding of the size of problem.

GRA was low cost to run according to most interviewees because of its slim operation as a network of jurisdiction representatives. The costs of GRA's research outputs were similar to comparable publications and considered rigorous by 76% (n=29) of survey respondents, but half the interviewees did not see full value in the findings of some publications, particularly the behavioural messaging report.

All six GRA publications (including one still in progress) ran significantly behind schedule according to GRA project documents. Most interviewees believed this was a function of GRA's structure, including the consensus model of decision-making (see KEQ 4), and some representatives that attend meetings not having decision-making authority for their jurisdiction. They also said it was a function of GRA members having overly optimistic timelines for academic research.

5.2 Detailed results

5.2.1 Objective 1: Inform gambling-related regulation, policy and program development across Australian jurisdictions.

94% of survey respondents believed this objective was achievable but only 56% believed it was achieved. Public servants were far more positive than researchers (Figure 3).

72% of survey respondents said GRA research had informed at least one regulation, policy, or program (e.g., regulating gambling ad messages, the National Consumer Protection Framework, the Responsible Gambling Code of Conduct, Taglines, BetStop, the National Self-Exclusion Register, and QLD Gambling Harm Minimisation Action Plan).

On average, survey respondents said GRA research had informed 2.2 policies, 1.4 programs, and 1.8 regulations (Figure 4). Respondents from the gambling industry reported higher numbers compared to other respondents, reflecting the sentiment of two interviewees who said GRA research was often used to strengthen policy proposals because industry asks for more research to justify a position.

The interviews found mixed results on how relevant GRA research is to developing policy. For example, one interviewee said none of the reports are relevant to policymaking. Another said they are all relevant to some extent, but they need a

sharper focus on policy. A third interviewee said the influence on policy often occurs indirectly or several years after publication. Around half the interviewees said the reports are often relevant to some jurisdictions but not all.

"They've been reasonably good, although I think you could probably argue that some of the projects aren't kind of laser focused on policy." – Interviewee

The majority of interviewees and 40% of survey respondents (n=10) considered "The second national study of interactive gambling in Australia (2019-20)" GRA's most influential piece of work (Figure 5). Survey respondents said it had the biggest influence because it was relevant, useful, timely, and up to date.

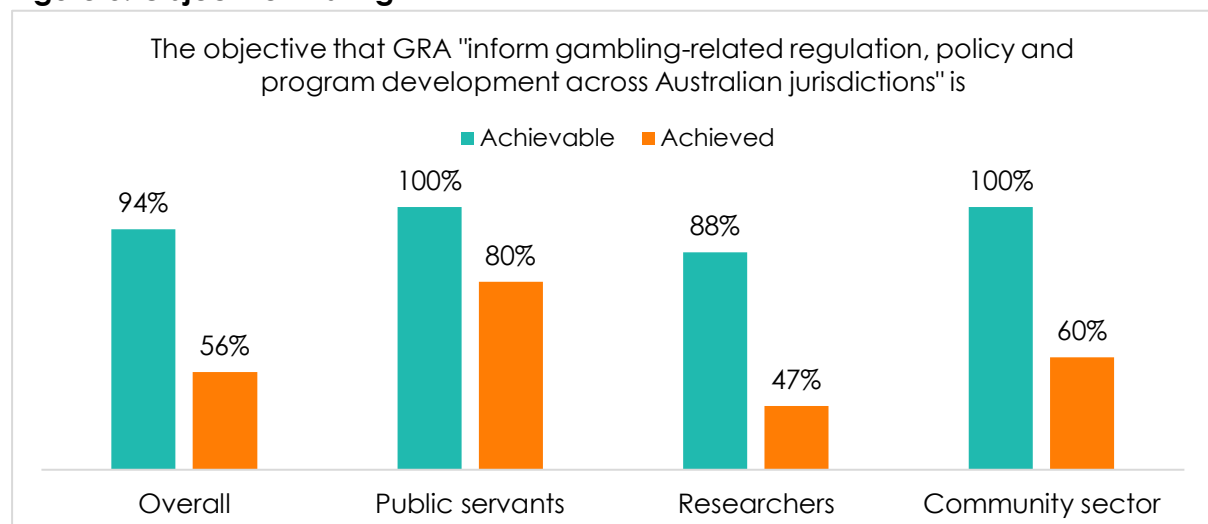
The majority of interviewees felt the skill-based gambling report was impactful, but two interviewees said it would have been more useful if it had been delivered much earlier, at the time a policy decision was required.

"If that project [skill-based gambling] was delivered three years ago it would have been highly valuable." – Interviewee

According to most interviewees, the report considered least practical for developing policy was the behavioural trial of gambling messages. This was stated to be due to the messages not being considered realistic for government to implement, and the RCT generating null findings. However, according to several interviewees, when the study was redone by a market research firm which used "more of a comms concept testing and focus group approach" to enhance the acceptability of existing government messages, the findings helped to inform policy responses.

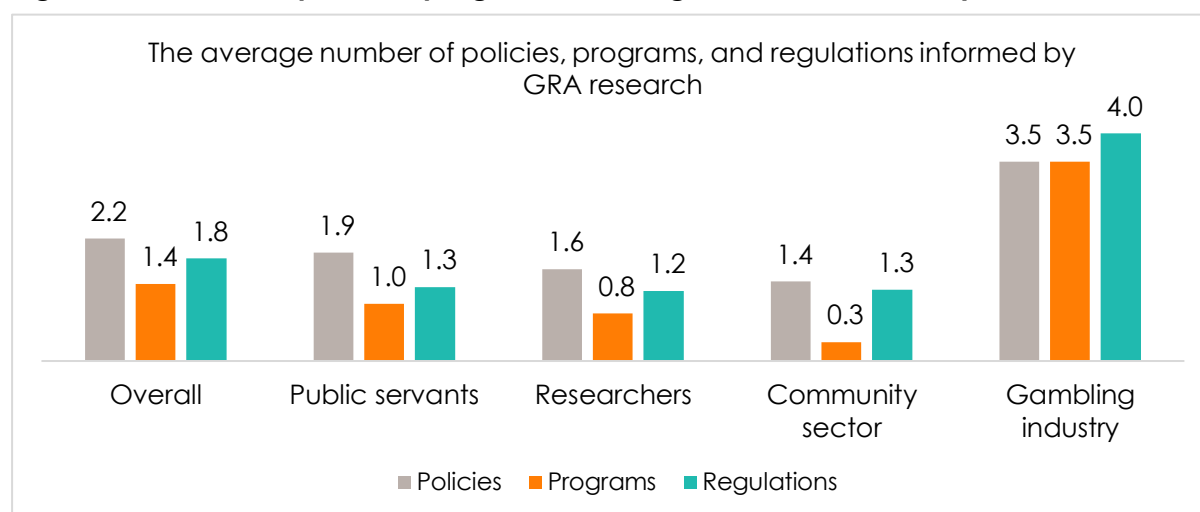
Two interviewees said the affiliate marketing report (currently being completed) would assist the development of new policy even before it was published.

Figure 3. Objective 1 rating



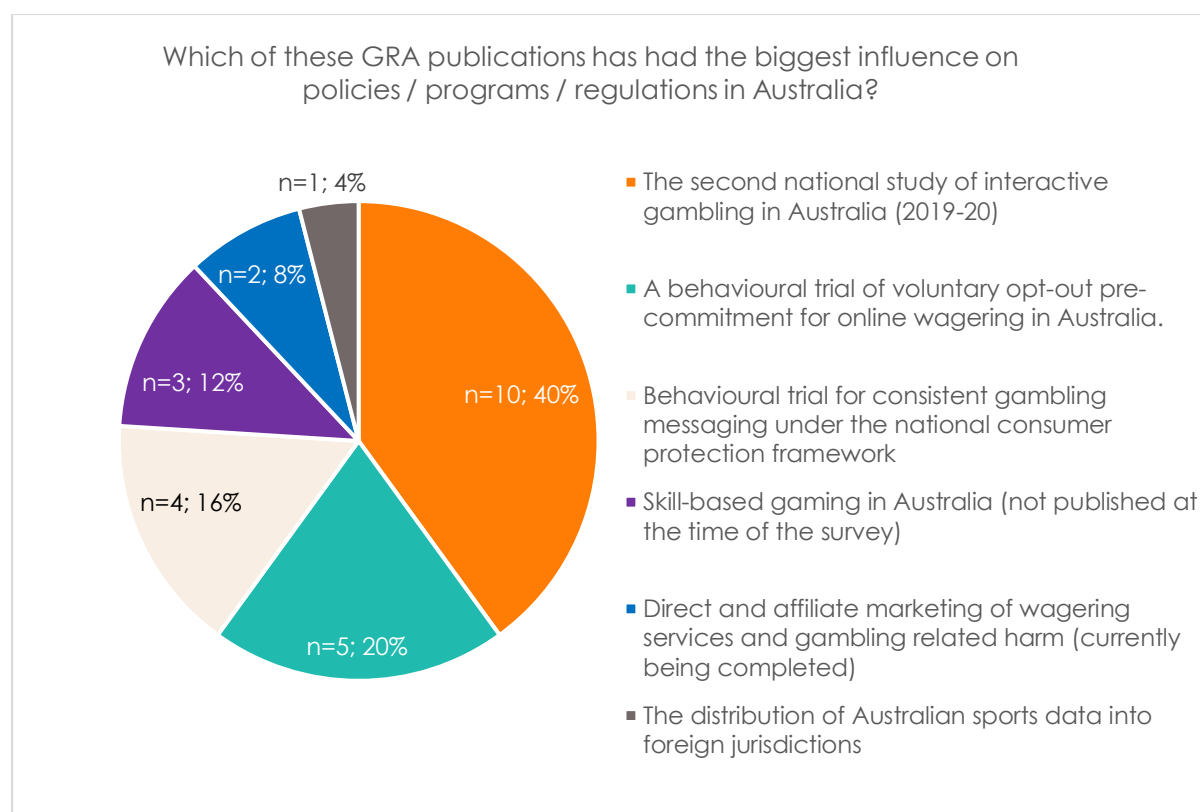
Note: The percentage indicates the proportion of respondents who selected the correspondent option. Individuals who selected 'Don't know' were excluded from the calculation. N=34 (n=10 public servants, n=17 researchers, n=5 community sector, n=2 gambling industry). The bar for gambling industry is omitted due to the limited number of observations.

Figure 4. Number of policies, programs, and regulations informed by GRA research



Note: N=33 (n=10 public servants, n=13 researchers, n=5 community sector, n=4 gambling industry, n=1 'others'). The bar for 'other' stakeholders is omitted due to the limited number of observations.

Figure 5. GRA publication influence



Overall, GRA's influence was limited by producing only six reports between 2017 and 2023. Eight survey respondents said GRA publications would be more influential if they covered a wider range of topics (identified by engaging more relevant stakeholders) by funding more smaller projects.

5.2.2 Objective 2: Build and strengthen the evidence base for the effective regulation of gambling in Australia.

While 91% of survey respondents said this objective was achievable, only 58% agreed that it had been achieved (Figure 6).

One interviewee said the interactive gambling study built the evidence base for many regulations.

"[It's] the most comprehensive online gambling data set in the country. Without exception... The influence of that going forward is going to be enduring". – Interviewee

Other stakeholders consistently agreed this study was GRA's most useful contribution to the evidence base because it helped every jurisdiction understand the size of the problem.

However, overall, according to most interviewees, GRA *strengthened* the evidence base by publishing research which confirmed existing evidence, but it was less successful at *building* new evidence.

"I don't think there was ever a lack of evidence in that space, and part of what government needs to do in research is to fund things that the academics will not fund themselves". – Interviewee

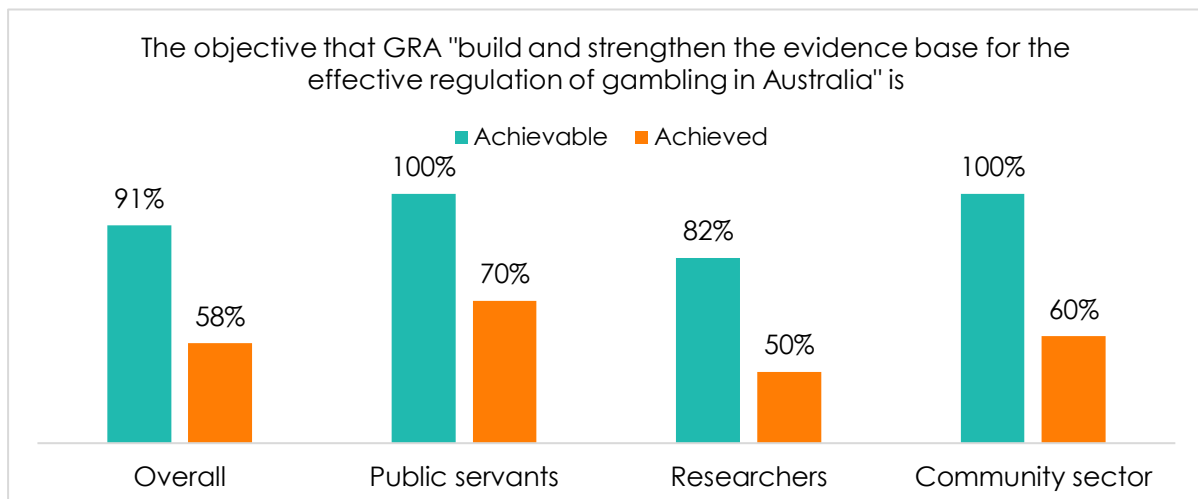
"I do find that a lot of the academic research just tends to reinforce previous research that's already been done". – Interviewee

One interviewee suggested the problem was that academics are reluctant to make strong claims about their findings which means the research tends to only strengthen rather than build the evidence base:

"There's almost a demand for stronger claims in the research, but the researchers won't deliver that because of their own standards." – Interviewee

76% (n=29) of survey respondents said the research in the last GRA publication they looked at was rigorous, which is consistent with our assessment of the methodologies reported in the publications. Most survey respondents also said the publications were produced by skilled researchers (82%, n=31) and trusted research institutions (82%, n=31).

Figure 6. Objective 2 rating



Note: The percentage indicates the proportion of respondents who selected the correspondent option. Individuals who selected 'Don't know' were excluded from the calculation. N=34 (n=10 public servants, n=17 researchers, n=5 community sector, n=2 gambling industry). The bar for gambling industry is omitted due to the limited number of observations.

One interviewee was dissatisfied with the number and quality of researchers responding to GRA's research briefs.²

"There would be a lack of bids or you know suitable bids and then we would have to go [out to market] again...It's a very small pool of researchers...they all work together, which also makes peer review very challenging." – Interviewee

Another two interviewees agreed that the same researchers supplied GRA and the state-based research organisations.

"People are kind of getting the same buckets of money across the country." – Interviewee

"A quick look at all of the research pieces that have been delivered over that 2017 to 23 period, the majority of them have been delivered by one research institution, which I think is a potential limitation. It certainly doesn't allow for a great deal of diversity in contributions or perspectives from the myriad research institutions operating in this space, let alone the other research bodies and consultancies." – Interviewee

A fourth interviewee believed the lack of suitable bids was because some academics did not like GRA's project management approach.

² Verian can confirm that the UK Gambling Commission recognised a similar problem in the UK and deliberately went to market to attract new entrants.

"[They] will not work with GRA the way that GRA works." – Interviewee

There was strong agreement among interviewees and 69% (n=11) of researcher survey respondents that GRA has not built the capacity of the gambling research sector.

"To build capacity is to fund junior researchers and they're not doing that." – Interviewee

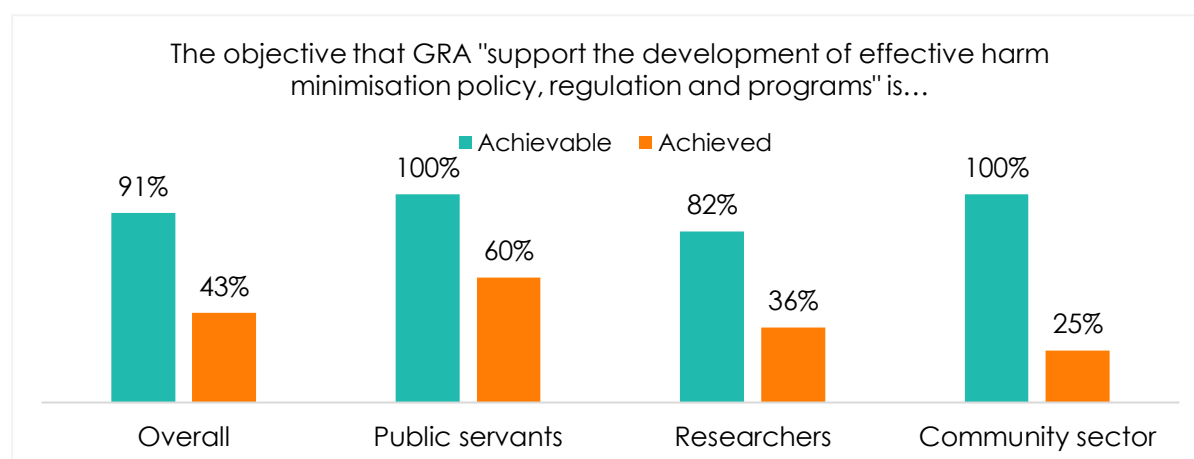
"GRA is not building the capacity of the research sector because they award large grants rather than smaller value PhD student grants." – Interviewee

Several interviewees said building the capacity of the research sector was not a focus of GRA but GRA's Research Framework lists it as an enabler for GRA to achieve its objectives.

5.2.3 Objective 3: Support the development of effective harm minimisation policy, regulation and programs.

91% of survey respondents agreed this objective was achievable but only 43% agreed it was achieved. There was less variation in opinion between different types of stakeholders on this objective compared to other GRA objectives (Figure 7).

Figure 7. Objective 3 rating



Note: The percentage indicates the proportion of respondents who selected the correspondent option. Individuals who selected 'Don't know' were excluded from the calculation. N=33 (n=10 public servants, n=17 researchers, n=4 community sector, n=2 gambling industry). The bar for gambling industry is omitted due to the limited number of observations.

All GRA studies stated alignment with this objective either in the project brief or in the publication. However, a majority of interviewees believed the behavioural messaging report did not support effective harm minimisation policy. The problem

was methodological, particularly testing message territories and “clunky” messages with an RCT which generated a null result.

Interviewees who expected GRA to focus on harm minimisation did not see the relevance of the sports data report. Our document review found the sports data report was the least aligned with harm minimisation. According to the project brief, one of the key justifications for the study was regulating match-fixing which was of interest to Sport Integrity Australia who partly funded the research and confirmed it will “inform a number of pieces of work.”

“The sports data project in particular I was disappointed by because there’s actually a really interesting policy question in that area, but it just doesn’t advance the consideration of that area at all.” – Interviewee

On average, survey respondents reported reading 2.3 publications (Table 5) and a high proportion said the recommendations in the last report they looked at were actionable (62%, n=21) and affordable (74%, n=17).

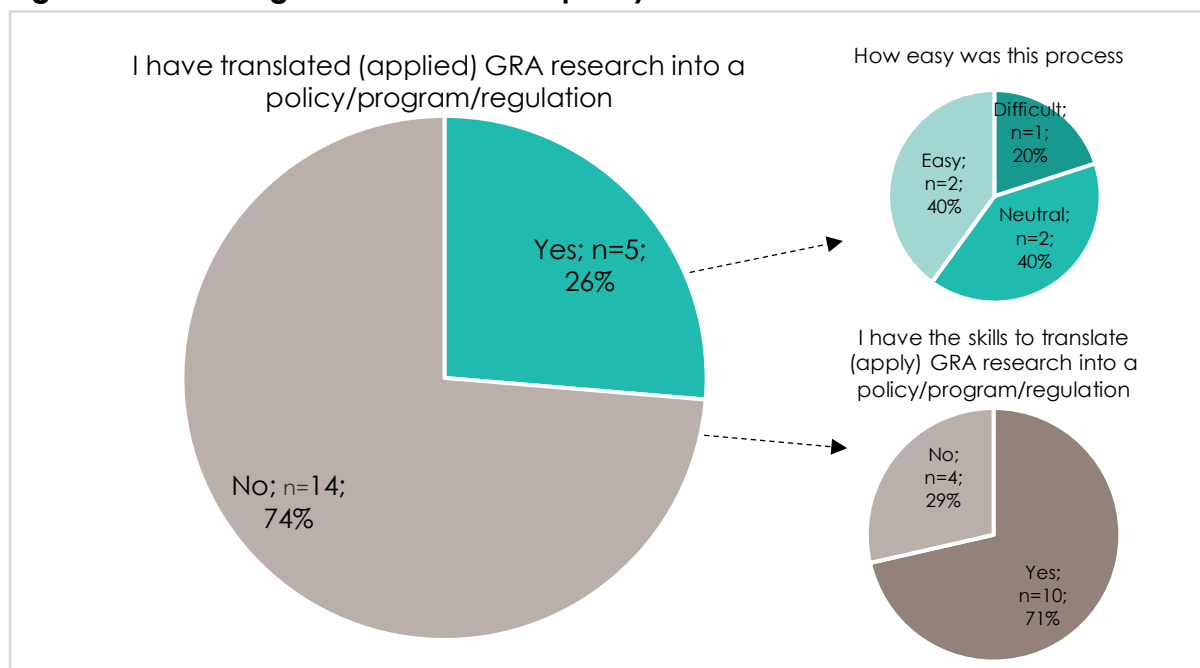
Table 5. Number of reports read by stakeholders					
Stakeholder	Mean	Median	Min	Max	N
All	2.3	2	0	4	50
Gambling Industry	1	2	0	2	6
Public servants	2.9	2	0	4	17
Researcher	2.2	2	0	4	18
Community sector	1.8	2	0	4	8

Note: This table shows summary statistics of responses to the question “Of the four reports published since 2017, approximately how many GRA publications have you read?”

Only 26% (n=5) of government and community sector survey respondents said they have translated GRA research into a policy / program / regulation. Among those who had not translated GRA research (n=14), 71% said they had the skills to do so (Figure 8). The published literature suggests public servants’ skills are critical to the use of research in policymaking.³

³ Jakobsen, M. W., Eklund Karlsson, L., Skovgaard, T., & Aro, A. R. (2019). Organisational factors that facilitate research use in public health policy-making: a scoping review. *Health Research Policy and Systems*, 17(1), 1-22.

Figure 8. Translating GRA research into policy

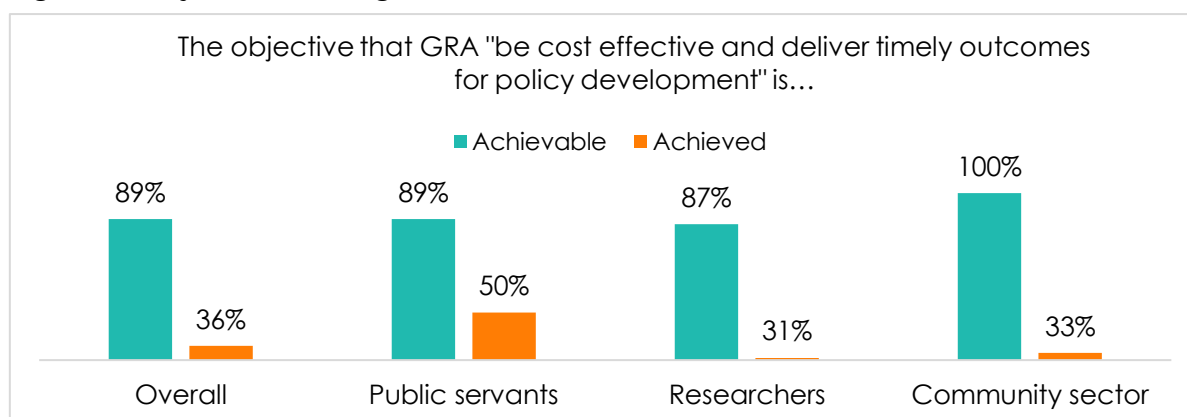


Note: The percentage indicates the proportion of respondents who selected the correspondent options. Individuals who selected 'Don't know' were excluded from the calculation. 'n' indicates the number of responses.

5.2.4 Objective 4: Be cost effective and deliver timely outcomes for policy development.

Only 36% of survey respondents agreed that GRA had achieved this objective despite 89% saying it was achievable (Figure 9).

Figure 9. Objective 4 rating



Note: The percentage indicates the proportion of respondents who selected the correspondent option. Individuals who selected 'Don't know' were excluded from the calculation. N=28 (n=9 public servants, n=15 researchers, n=3 community sector, n=1 gambling industry). The bar for gambling industry is omitted due to the limited number of observations.

GRA was perceived to be cost effective because costs were low, with one interviewee referring to GRA as “cheap” because the only ongoing direct cost was the Secretariat (approximately \$26K/year). The project documents showed that the total website cost was approximately \$30K.

One interviewee said GRA was cost effective because regulators were directly involved in the Governance Committee, so there was no need to fund intermediaries to link the research to policymaking.

"Everyone has other jobs so juggling. But if you invested in more people, you'd have costs to get them attuned with regulators." – Interviewee

However, several interviewees noted there were in-kind costs in project management. Larger jurisdictions voluntarily provide a Project Manager for each GRA research project as this role is not centrally funded. One interviewee said this equated to approximately 0.5 FTE per project.

"I don't think we have issues with projects being expensive once they're commissioned. I know though that a lot of in-kind support has been provided when it comes to project management." – Interviewee

"We have relied on the larger states, so there's no doubt from where we sit on the model of the GRA that we are a beneficiary of it." – Interviewee

Interviewees said GRA's research was most cost-effective when states valued the findings, and it would have cost them more money to undertake the study alone. One example cited was the interactive gambling study which saved states having to do their own prevalence study.

50% (n=8) of researcher survey respondents perceived GRA's funding was appropriate and the average cost per publication (\$469,632) is similar to comparable research.⁴ One publication (interactive gambling) cost over \$1 million which skewed the average upwards but according to one interviewee this figure reflects the market rate for a national prevalence study.

Lack of timely delivery was a consistent evaluation finding. All six GRA publications (including one which is still in progress) were or are behind schedule according to GRA project documents. On average, the five completed projects were completed 1.85 years after the initial estimated completion date in the project brief. This may explain why only 15% (n=2) of public servant survey respondents waited for a GRA project to be completed to inform a decision.

Most interviewees pointed to GRA's structure as a key reason for delays, including the consensus model of decision-making, and some representatives that attend meetings not having decision-making authority.

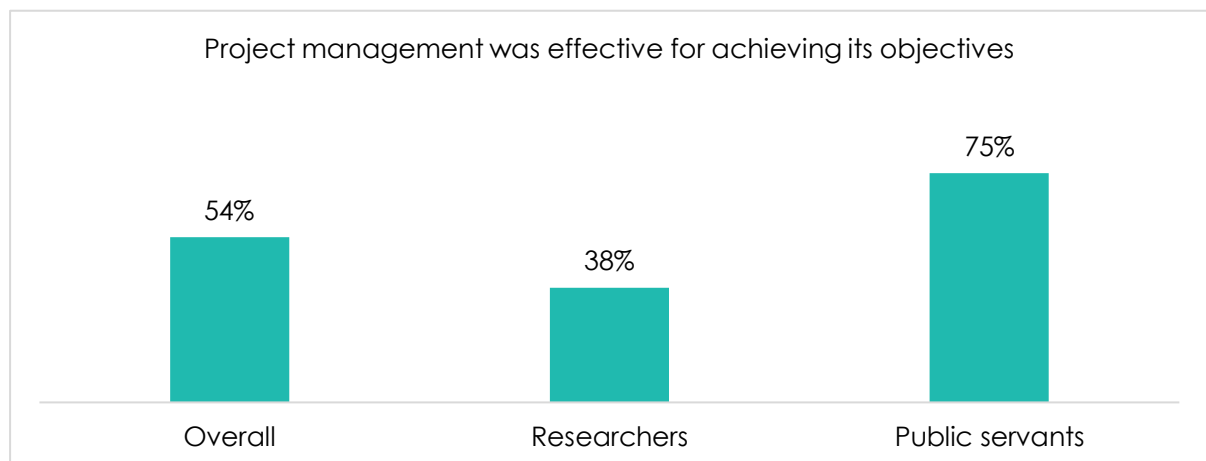
⁴ VRGF and NSW ORG provide research grants of up to \$200,000. In the US, the average research grant for health research in 2022 was much higher at USD 592,617. <https://report.nih.gov/nihdatabook/report/155>

"You've got eight jurisdictions trying to outsource a project and then eight agreeing on the output of an outsourced project." – Interviewee

"This particular piece took a while and I think part of it's the consensus model, but I'm not sure you can get around that much. Part of it is just, you know, having the ability to get the statements of requirements cleared and all those types of things ... So yeah, it can be a little bit tricky in that respect. And then probably isn't as timely as we'd like." – Interviewee

Only half (54%, n=6) of all survey respondents agreed that GRA's project management was effective for achieving its objectives (Figure 10). Some interviewees believed managing research contracts is a specialised skill set which is not consistently available in GRA (see KEQ 4). While a third of interviewees believed GRA should have professional (funded) positions to manage research delivery, another third felt the cost was not worth it and a third did not comment. Interviewee views were related to how ambitiously they interpreted GRA's objectives.

Figure 10. GRA project management effectiveness



Note: The percentage indicates the proportion of respondents who selected 'Yes'. Individuals who selected 'Don't know' were excluded from the calculation. N=13 (n=4 public servants, n=8 researchers, n=1 gambling industry). The bar for gambling industry is omitted due to the limited number of observations.

Most interviewees said that academic research tends to be slow and run late so GRA needed to get better at defining the problem it wanted to solve and be more realistic about timelines before commissioning researchers, rather than assuming academics can meet all research needs. They believed academic research had its place in delivering very rigorous research but where policy is looking for "good evidence" for a time-sensitive decision, GRA should commission commercial research agencies with rapid turnaround times. The COVID-19 pandemic may also have contributed to delays in the second half of GRA's term.

"Most [academic] research projects are over time I think it's mainly to do with optimistic scheduling." – Interviewee

"Maybe what we need to learn to do better is think really carefully about what's the nature of the problem that we're trying to solve. And therefore, what's the nature of the evidence that we need and the provider that can give that to us? And before we even commission, and before we even do up the brief, who should we be talking to as the GRA?" – Interviewee

"We've experimented in the past with getting ourselves some questions in an omnibus survey to get something within you know, three or four weeks to get that quick turnaround." – Interviewee

Planning fallacy is a well-established phenomenon which is associated with optimism bias⁵. Especially on longer term projects, people tend to overestimate the benefits and underestimate the costs and timeframes of delivery. Because the consequences of planning fallacy can be severe, many Treasury departments require project plans to account for optimism bias (e.g., using an approach called reference class forecasting), but this is not common in research.⁶ Several interviewees and survey respondents were aware of this issue and thought GRA should commission more rapid bite-sized research:

"We need to reframe the research so that it is achievable within 12 months." – Interviewee

"What we need to focus on is more bite-sized achievable research to get an outcome that isn't going to take five years." – Interviewee

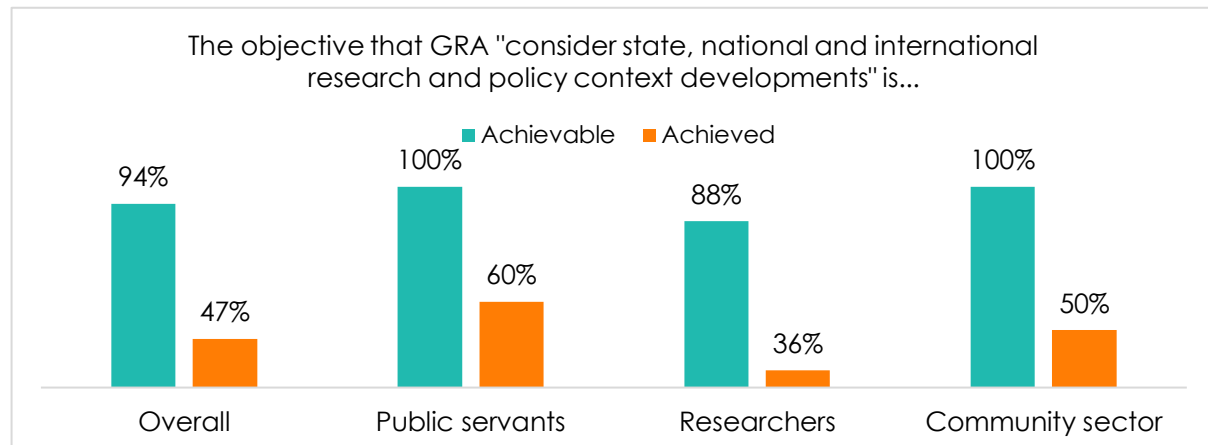
⁵ Flyvbjerg, Bent, Over Budget, Over Time, Over and Over Again: Managing Major Projects (April 1, 2011). Peter W. G. Morris, Jeffrey K. Pinto, and Jonas Söderlund, eds., The Oxford Handbook of Project Management, Oxford: Oxford University Press, pp. 321-344, 2013.

⁶ https://www.treasury.nsw.gov.au/sites/default/files/2023-04/tpg23-08_nsw-government-guide-to-cost-benefit-analysis_202304.pdf

5.2.5 Objective 5: Consider state, national and international research, and policy context developments.

Only 47% of survey respondents agreed that GRA had achieved this objective but 94% said it was achievable. (Figure 11)

Figure 11. Objective 5 rating



Note: The percentage indicates the proportion of respondents who selected the correspondent option. Individuals who selected 'Don't know' were excluded from the calculation. N=32 (n=10 public servants, n=16 researchers, n=4 community sector, n=2 gambling industry). The bar for gambling industry is omitted due to the limited number of observations.

All five of GRA's completed research publications that were evaluated referenced state, national, and international contexts. For example, the report on skill-based gambling included an international environmental scan.

The survey found 89% (n=33) of respondents said the last GRA publication they looked at was relevant to more than one jurisdiction and 72% (n=21) said the recommendations are likely to be supported by more than one jurisdiction.

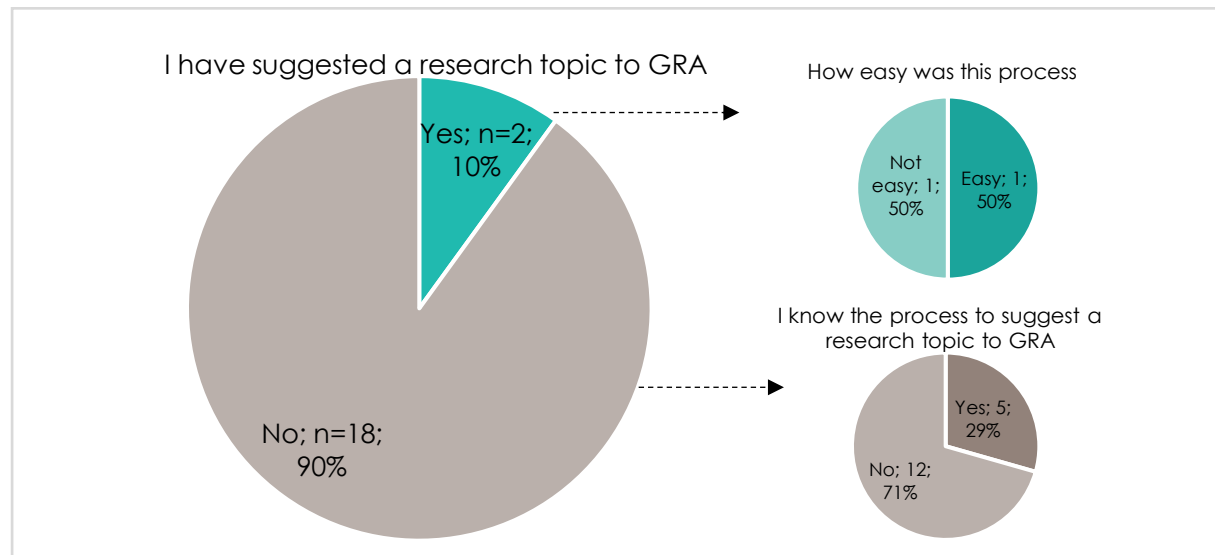
However, to fully consider the research and policy context, GRA needs to engage effectively with policymakers and researchers. Survey respondents reported low engagement with GRA, with average annual engagement of 6 days and only 10% (n=2) of government and community sector survey respondents suggested a research topic to GRA (Figure 12).

One interviewee said it was not worth trying to suggest topics to GRA because you have to "lobby for two years and hope that it eventually gets funded." This same interviewee said they would engage more in GRA if they saw more value in it. Another interviewee said their jurisdiction didn't get much value out of GRA because they didn't engage due to lack of resources and the proliferation of gambling harm minimisation forums.

Interviewees were mixed on whether GRA was engaging the right people. Around half said all the right people were involved in the Governance Committee but two said the gaming CEOs should be connected to GRA, and another said other Commonwealth agencies should be engaged. We did not find any evidence that AGRC or VRGF provided advice to the Governance Committee despite the paper

which proposed the GRA model (endorsed in 2017) recommending the Governance Committee determine this on a case-by-case basis (A National Collaborative Gambling Research Program, p. 3).

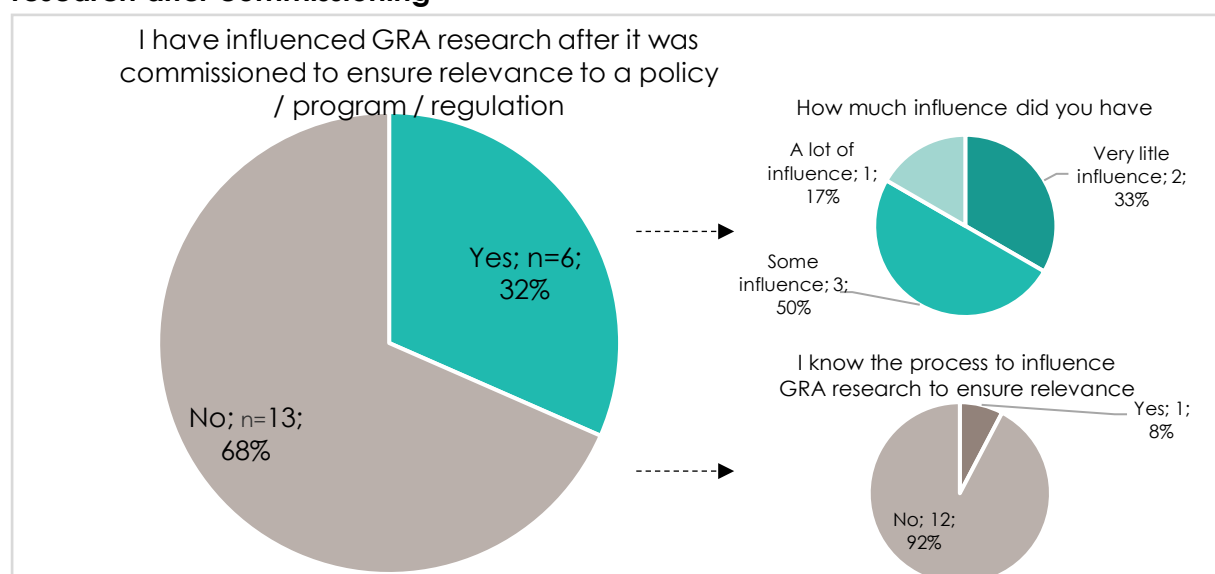
Figure 12. Government and community sector respondents that suggested a research topic



Note: The percentage indicates the proportion of respondents who selected the correspondent options. Individuals who selected 'Don't know' were excluded from the calculation. 'n' indicates the number of responses.

Only 32% (n=6) of government and community sector survey respondents said they had influenced GRA research after it was commissioned to ensure relevance to a policy / program / regulation, with half of these respondents saying they only had "little" or "some" influence. Among the remaining respondents, 92% did not know the process for influencing GRA research to ensure policy relevance (Figure 13).

Figure 13. Government and community sector respondents that influenced GRA research after commissioning

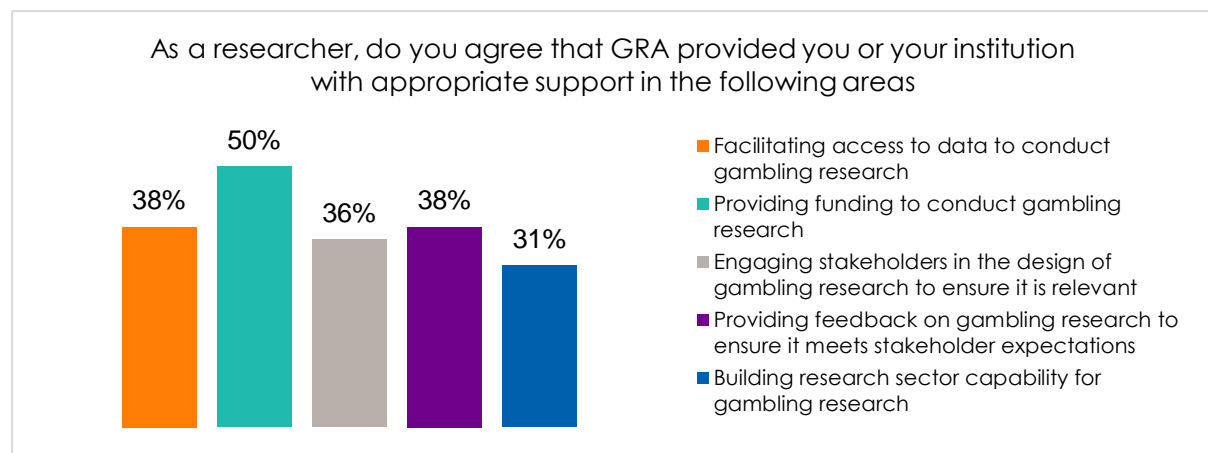


Note: The percentage indicates the proportion of respondents who selected the correspondent options. Individuals who selected 'Don't know' were excluded from the calculation. 'n' indicates the number of responses.

Interviewees confirmed GRA had limited engagement with the researchers after commissioning and before reporting which was perceived as appropriate to maintain research independence. At the same time, half of the interviewees thought there was a lack of consideration given to the policy context in the design of GRA research.

A low proportion of researchers that responded to the survey agreed that GRA provided adequate support in facilitating access to data to conduct gambling research (38%), engaging stakeholders in the design of gambling research to ensure it is relevant (36%) and providing feedback on gambling research to ensure it meets stakeholder expectations (38%). (Figure 14)

Figure 14. GRA support for researchers



Note: The percentage indicates the proportion of respondents who selected "Yes". Individuals who selected 'Don't know' were excluded from the calculation. There was n=16 researchers responding to this question. They had the option to skip certain areas. As a result, the count of observations may slightly vary across support area categories.

06

KEQ 3: Has GRA met key research needs of jurisdictions and avoided overlaps?

6.1 High-level findings for KEQ 3

Research by its nature is overlapping as one piece of research builds on findings from another. The evaluation found that while GRA's research did not avoid overlaps, it did avoid duplication.

61% of public servant survey respondents said GRA meets their needs well, 23% were neutral, and 15% said it does not meet their needs well. The interviews found that the extent to which GRA met stakeholder needs was related to their expectations for how research would be used. As noted in the previous chapter, research is used in policymaking in three key ways: instrumental (direct application), conceptual (combined with other information to discuss approaches), and strategic (legitimise/affirm existing approaches). Refer to Appendix A for a summary of the published literature on the influence of research on policy.

Interviewees who prioritised the instrumental use of research (around half) did not believe their needs were met, whereas those who prioritised conceptual and strategic uses of research (around half) agreed their needs were largely met.

Stakeholder suggestions for better meeting their needs included:

- Developing clearer project briefs that articulate the tangible implementation outcome the research will inform and being realistic about the timeline.
- Commissioning market research agencies to conduct applied research and commissioning academics to conduct prevalence studies.
- Evaluating implemented harm minimisation initiatives or interventions.
- Commissioning "systems thinking" research.
- Broadening the scope of GRA's research offer to include state-based research, as described under KEQ 5.
- Ensuring the end users of the research (the GRA committee and co-funding bodies such as Sport Integrity Australia) make timely decisions about adapting the research delivery when there are inevitable challenges (e.g., sample recruitment) so that the focus stays on policy outcomes, not process or academic interests.

6.2 Detailed results

6.2.1 GRA's research avoided duplication.

All sources of evaluation data found GRA's research overlapped with other gambling research, but it was not duplicative which is a more appropriate aim. Research by its nature is overlapping because building an evidence base is typically incremental and too little similarity across studies can complicate the interpretation and communication of findings.⁷

Nearly 50% of survey respondents agreed that GRA's research was unique and nearly 60% said that the scope of GRA's work overlaps with other gambling research organisations. This is consistent with the KEQ 2 finding that GRA strengthened the evidence base by commissioning research which confirmed existing evidence, but it was less successful at building new evidence.

"This research is done elsewhere as well." – Interviewee

"As someone who's looked at that [skill-based gambling] from a policy perspective, there was nothing new in there." – Interviewee

As noted in KEQ 2, GRA conducted a prevalence study which cost just over \$1 million, and while all states and territories conduct their own prevalence studies, GRA's study is the only one that provides comparable, representative data across all jurisdictions. One interviewee said this makes it a very unique study that only GRA could produce because no state or territory would fund a study like that on its own. This interviewee also said AGRC's prevalence studies typically use online panels with small samples of professional research participants rather than probabilistic sampling, which means the insights may not be as representative of the broader population.

6.2.2 GRA met the needs of jurisdictions.

61% of public servant survey respondents said GRA meets their needs well, 23% were neutral, and 15% said it does not meet their needs well.

Willingness to Pay (WTP) is a proxy of perceived value. In the context of GRA, we do not interpret the dollar figure as the inherent value of GRA's outputs but instead look at the magnitude of difference between stakeholders to interpret how well GRA meets their needs.

⁷ Lunny, C., Pieper, D., Thabet, P., & Kanji, S. (2021). Managing overlap of primary study results across systematic reviews: practical considerations for authors of overviews of reviews. *BMC Medical Research Methodology*, 21(1), 1-14; Smith, T. B., Vacca, R., Krenz, T., & McCarty, C. (2021). Great minds think alike, or do they often differ? Research topic overlap and the formation of scientific teams. *Journal of Informetrics*, 15(1), 101104.

WTP was higher among gambling industry (\$108) and public servant (\$98) survey respondents compared to researcher (\$44) and community sector (\$17) respondents (Table 6).

Table 6. Willingness to pay for GRA research						
Stakeholder	Mean	Median	75 th percentile	Min	Max	N
All	\$62	\$0	\$50	\$0	\$1,000	45
Gambling Industry	\$108	\$90	\$200	\$0	\$250	4
Public servants	\$98	\$13	\$50	\$0	\$1,000	15
Researcher	\$44	\$0	\$20	\$0	\$500	18
Community sector	\$17	\$0	\$50	\$0	\$60	7

Note: This table shows the summary statistics of responses to the question "What is the maximum amount you'd be willing to pay for a GRA publication if they weren't free?"

Research uses

The literature points to three key ways research is used in policymaking (for more see Appendix A):

1. Instrumental: direct application
2. Conceptual: combined with other information to discuss approaches
3. Strategic: legitimise/affirm existing approaches

Instrumental impact

The survey and interviews found around half of stakeholders prioritised the instrumental use of research. For example, a stated need of stakeholders that prioritise the instrument use of research is applied findings and recommendations. The survey found that the most common response to the question "What would make GRA publications in general more influential?" was practical, actionable, and timely recommendations (n=12).

The interviews found those with a policy role had high expectations of GRA research to have instrumental use whereas those with a government research role were satisfied with conceptual use, and regulators were satisfied with strategic use. Instrumental use of research is the hardest to achieve, and fairly unrealistic given GRA's structure (see the literature in Appendix A). We found little evidence GRA achieved instrumental impact which may explain why those with this expectation did not feel their needs were met.

"Have you been waiting for a piece of research to influence anything? The answer was no...We're not waiting for a piece of research that's on the tip of our tongues." - Interviewee

The key example of instrumental research interviewees provided was the revised version of the behavioural messaging report which was produced by a market

research agency. It had direct impact on gambling advertising taglines. However, this report was funded by the Commonwealth (not GRA) after the initial GRA study only delivered “key territories” or message themes which interviewees said could not be practically implemented.

“I'd almost give it [market research agency report] a gold star by being able to put that into, you know, legislation or code of practice.” - Interviewee

One interview said the affiliate marketing study would have direct impact because it was practical, but it was not finalised at the time of this evaluation.

“We could already pull bits out of that and using our codes of practice and stuff like that.” - Interviewee

Two interviewees said a potential solution for commissioning research with direct impact is developing clearer briefs that articulate the tangible implementation outcome the research will inform. Several interviewees also said it was important to be realistic about the timeline.

Around half the interviewees said that while academic research is rigorous it can be too “niche” to have instrumental use. They believed there was a place for commissioning commercial research agencies to deliver rapid, applied research to meet jurisdiction needs in areas such as message testing.

“The research reports are quite niche... which is exactly why I don't think we should just stack it [GRA] full of researchers because researchers tend to go very niche.” – Interviewee

“Researchers aren't public communications professionals, so even the messages they might test in a research report...they're clunky, they're academically written.” – Interviewee

Two interviewees made suggestions for commissioning research which the literature suggests can enable more instrumental use of research (see Appendix A). One interviewee thought GRA should evaluate implemented harm minimisation initiatives or interventions.⁸ Another said GRA research needed to take a macro view and

⁸ The Commonwealth's original statement of intent for GRA in response to the 2015 O'Farrell Review of the Impact of Illegal Offshore Wagering included evaluation. “The Government will also introduce nation-wide research on this issue to assist with the development and evaluation of policy responses to gambling and its impact within Australia”. One interviewee said stakeholders decided to drop evaluation when GRA was formed but it is unclear why.

address potential counterarguments by industry in order to inform new policy directions. This is known as “systems thinking.”

“If you're gonna make policy, you also wanna know the counterarguments... [Because unless the research is] a knockout kind of thing..., it's actually hard to balance [counterarguments by industry] when you only know one side of the argument.” - Interviewee

Timeliness was the most common reason survey respondents gave when asked why any existing publication was influential (e.g., the interactive gambling prevalence study). Interviewees who favoured the instrumental use of research also commented that GRA's delivery needed to be faster.

“It's taken so long from the idea being suggested, the brief being agreed, the research being commissioned, now delivery, that it reinforces decisions already made.” – Interviewee

Lack of timeliness has been a persistent problem for GRA according to the 2019 midpoint review and 2010 Productivity Commission Inquiry into Gambling (the Inquiry). The Inquiry noted that while the previous Gambling Research Australia has been a: “key institutional innovation... it has been slow to produce research, and that which has been undertaken has not focussed sufficiently on the major questions for the design of gambling policy.” (Research Framework, p. 10)

Conceptual and strategic impact

We found evidence GRA's research has achieved conceptual and strategic impact which was aligned with the expectations of government researchers and regulators. Conceptual impact was achieved when GRA commissioned research relevant to understanding the size of the problem. This includes the interactive gambling report (a prevalence study) and the sports data report (which established the scale of in-play sports betting that was occurring offshore as a by-product of the study's recruitment challenges).

“[The interactive gambling study] first study since 2014. [It was] highly relevant due to the magnitude of change in the gambling environment since the 2014 study. [It] covered the beginning of the COVID period, which has been associated with significant changes/increases in gambling participation. [It] expanded regulator's perspectives beyond EGM harm and got us focusing more acutely on online activity.” – Government survey respondent

Most interviewees felt that this study was relevant because understanding the size of the problem is always useful regardless of jurisdiction-specific policy priorities.

"That's a really broad study that gives you evidence and prevalence data...no matter what sort of policy issue you are looking at." – Interviewee

Another interviewee said it is the only dataset that exists that can evaluate the impact of different policy decisions in different jurisdictions because it's comparable across jurisdictions.

Several interviewees suggested GRA should conduct regular national prevalence studies in order to save states and territories from having to conduct their own, which is duplicative and inefficient.

"[A national prevalence study] would help an awful lot because at the moment each state and territory does its own prevalence study." - Interviewee

Inter-jurisdiction coordination on a national prevalence study was recommended by the 2010 Productivity Commission Inquiry into Gambling to achieve greater coverage and consistency. However, GRA documents showed that an attempt to replace state and territory prevalence studies was not successful because of the requirement to have unanimous support on a set of core questions.

"Under the previous Gambling Research Australia Program, the decision to release data sets or achieve greater consistency in prevalence studies (through agreement to a set of core questions) required unanimous agreement from all Commonwealth and State and Territory parties. At this time Gambling Research Australia hosted an expert symposium exploring prevalence studies and the decision supported by most jurisdictions on core measures in prevalence studies was prevented from progressing because of the requirement to have unanimous support." (Research Framework, p. 7)

Although "The distribution of Australian sports data in foreign jurisdictions" report was considered by those working in harm minimisation as having the least instrumental use because of the research aims, a by-product of the methodology was that it helped GRA members understand the level of participation in in-play sports betting that was occurring offshore. Therefore, it had conceptual use. The researchers struggled to recruit research participants who had participated in this type of gambling, suggesting that the problem was smaller than industry claimed. This informed evidence-based decisions about whether to permit in-play sports gambling by Australian gambling companies who had argued that allowing it onshore would reduce offshore participation where it cannot be regulated.

"[The sports data study] tried to recruit people who bet offshore, [and] struggled, which probably suggests it's not that of a huge market." – Interviewee

"It gave us evidence that in fact, these behaviours might not be as widespread as people have feared." – Interviewee

GRA research was most often used strategically, to justify existing policy positions, according to around a third of interviewees. A common example cited was the skill-based report which was delivered after several jurisdictions had already regulated skill-based gaming machines.

"[The skill-based gambling report] basically confirmed our position that we won't be approving those games and we've now got an evidence based to do so." – Interviewee

A majority of interviewees (unrelated to their preference for instrumental, conceptual or strategic uses of research) wanted GRA to broaden the scope of its research offer to include more state-based research. This is described in more detail under KEQ 5.

Project management and escalation to the Governance Committee

A third of interviewees said GRA's research did not meet government needs when project management issues were not efficiently communicated to the Governance Committee. Two key examples provided were the behavioural messaging report and the sports data report.

Interviewees felt project management on the behavioural messaging report allowed it to become too focused on academic interests. Although the sports data report was of less interest to core GRA members, a key stakeholder said the project management was too focused on expecting the research supplier to achieve an unrealistic sample size. In both cases, interviewees said the Secretariat and Project Managers should be ensuring the Governance Committee and any other end users of the research are heavily involved in making decisions about the research design so that the focus stays on policy outcomes, not process or academic interests.

"I think there needs to be better communication flows between those parties and the committee, and I think that was part of the problem with the example you're citing [behavioural messaging]. A lot of work just went on the side and then there's all this other disjoint of work going on and no one was sort of putting the whole picture together or and coming back to the committee and raising some of these issues." – Interviewee

"It's that communication thing, even though they can be distinct sort of

functions and roles, there still needs to be very clear communication through those meetings [from both the Secretariat and the Project Manager]...to bring back relevant issues as they emerge and be very proactive about that rather than just having those issues start bubbling away on the side and then no one's aware of them until it's all too late." – Interviewee

Several interviewees recognised that the way research is designed significantly affects its ability to answer specific policy questions⁹ and they believed that GRA members needed to understand the implications of methodological choices when commissioning and overseeing the delivery of research, rather than leave this up to researcher to work out independently.¹⁰ For example, the behavioural messaging study was initially conducted with an RCT which led to findings that did not meet jurisdiction needs. It was then redone using a focus group method which led to findings that did meet their needs.

"I don't know if that's with the project manager or the researchers, or how it works, but I think if in hindsight if we'd looked at that [behavioural messaging study] more often or in more detail, we might have brought them back on to the track that we were after." – Interviewee

One interviewee highlighted that academics have a *"drive around curiosity-driven research which can creep in very easily unless it's managed"* but believed the answer to ensuring GRA research stayed relevant was strong contract management by the Governance Committee rather than a co-delivery approach. *"I think policy officers embedding themselves in the process overly has its own dangers."*

In the case of the sports data report, Sport Integrity Australia was an end user of the research. One interviewee said that when the research design needed to be adapted because of recruitment challenges, it would have been better to quickly move the decision to the Governance Committee who could take a pragmatic view of the intended policy outcome, rather than the Secretariat and Project Manager getting bogged down in contract management.

⁹ A research design goes beyond the choice of qualitative, quantitative, or mixed methods research. It includes philosophical assumptions about knowledge claims, strategies for inquiry, and specific research methods. Combined, these choices determine the research framework and the extent to which the research findings can connect with the audience's understanding of the problem and intended use of the findings. Cresswell, J.W. (2003). *Research design: Qualitative, quantitative, and mixed methods approaches* (2nd edition). Sage Publications

¹⁰ The methodology used to answer research questions (e.g., causal versus observational analysis, systems thinking versus discrete interventions, short-term versus long-term outcomes, self-reported versus objective data, cross-sectional versus longitudinal trends, sampling and settings for internal validity versus external validity), determines whether the findings will be policy-relevant. Oliver, K., & Boaz, A. (2019). *Transforming evidence for policy and practice: creating space for new conversations*. Palgrave Communications, 5(1), 1-10.

"There was too much focus on the nitty gritty of processes and you know how many consumer survey participants we were speaking to as opposed to the intent of what we're trying to capture from that process." – Interviewee

Two interviewees said having different Working Groups for each project compounded project management issues because despite having standardised processes such as status reports, the effectiveness of project management comes down to the skills and capacity of Working Group members which varies from project to project. In particular, they said Working Group members needed skills in applied research to balance methodological considerations with policymaking considerations.

"When you're getting Working Group members who don't have those [applied research] skills, it does put a lot of pressure on those who do know." – Interviewee

Another two interviewees said greater clarity was needed around the division of decision-making power between the Secretariat, Working Group, and Project Manager as this was sometimes a cause of tension which contributed to delays in escalating issues to the Governance Committee.

"To some extent the Secretariat needs to take a bigger role in the day-to-day management of projects, but the Secretariat needs to be better about how it does that...I think the working groups is OK with the different jurisdictions and getting people involved in that way I think is OK." - Interviewee

07

KEQ 4: Is the GRA
structure and
composition
appropriate?

7.1 High-level findings for KEQ 4

GRA is composed of representatives from all jurisdictions but not all jurisdictions are equally engaged due to smaller states having fewer resources. Only 63% of public servant survey respondents said GRA represents the interests of all jurisdictions equally which may be because larger states contribute more in-kind resources (such as project management) and therefore have more influence.

GRA's structure and processes are appropriate for producing research for conceptual and strategic purposes but not for instrumental purposes. Agreement by survey respondents that GRA's structures and processes are effective for achieving its objectives was highest for "Funding" (55%) and lowest for "Stakeholder consultation" (29%). Public servants were much more likely to rate GRA's structures and processes effective compared to researchers.

Some researcher respondents may not have worked with GRA directly and their perspectives may be impressionistic, but this cannot be determined from the data (refer to limitations in chapter 3). Nevertheless, as several GRA members want to expand the pool of researchers responding to GRA tenders (see KEQ 1), it will be important to address any impressionistic perspectives of these indirect stakeholders.

Almost all interviewees said the timeliness of GRA's outputs was constrained by the consensus model of decision-making and jurisdictions having high staff turnover. A majority of interviewees felt resigned to the consensus model because of the benefits of interjurisdictional collaboration, but two interviewees were supportive of moving away from the consensus model.

7.2 Detailed results

7.2.1 GRA's composition

GRA is composed of representatives from all jurisdictions. Almost all interviewees said GRA has equal representation from jurisdictions but not equal engagement, with smaller states less engaged due to having fewer resources. One interviewee from a small state said that they would have more capacity to engage if there were not so many gambling research forums as this created competing demands (refer to KEQ 5 for more detail).

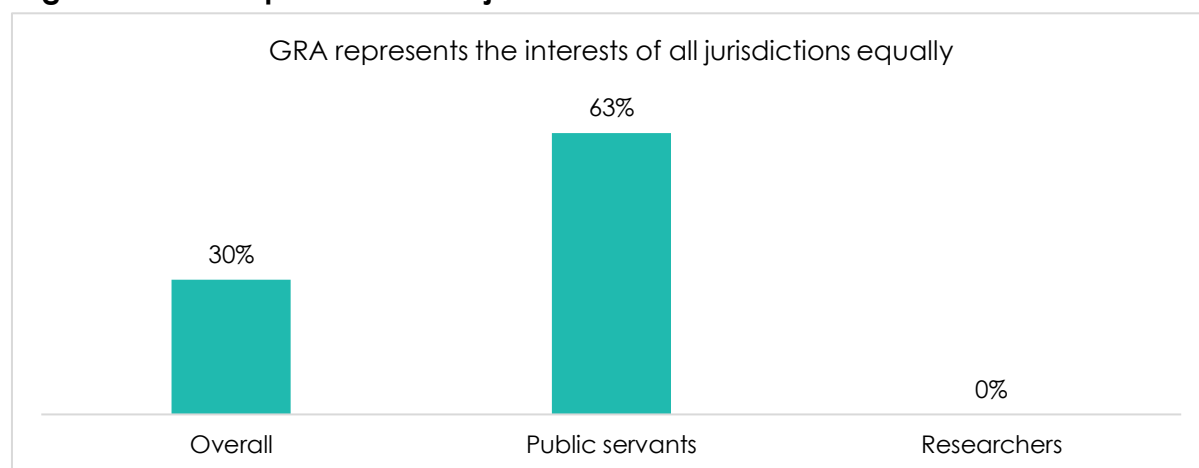
When asked if GRA represented the interests of all jurisdictions equally, only 63% of public servant survey respondents agreed. (Figure 15). Some interviewees felt this stemmed from GRA's model of funding.

GRA's funding model is as follows:

"The Commonwealth will contribute an annual funding contribution of up to \$500k, with jurisdictions matching this sum through combined funding" (A National Collaborative Gambling Research Program, p. 2).

The Secretariat, which is funded, is based in a single state for the duration of the MoU term and, because GRA is a network rather than an organisation, all other critical functions are undertaken by jurisdictions on a voluntary basis, such as project management, even though they incur an in-kind cost. This leads to larger states taking on more responsibility which increases their influence and their expectations of having their interests represented.

Figure 15. GRA representation of jurisdictions interests



Note: The percentage indicates the proportion of respondents who chose 'Yes'. Individuals who selected 'Don't know' were excluded from the calculation. N=20 (n=8 public servants, n=10 researchers, n=2 gambling industry). The bar for gambling industry is omitted due to the limited number of observations.

7.2.2 Effectiveness of GRA's structures and processes

Less than half of survey respondents thought GRA's Governance Committee, stakeholder consultation, and procurement of researchers were effective (Figure 16). However, this is consistent with the divergent expectations of GRA reported under KEQ2 – half the interviewees had realistic expectations of GRA and believed it was successful and the other half had high expectations and believed GRA was only partly successful.

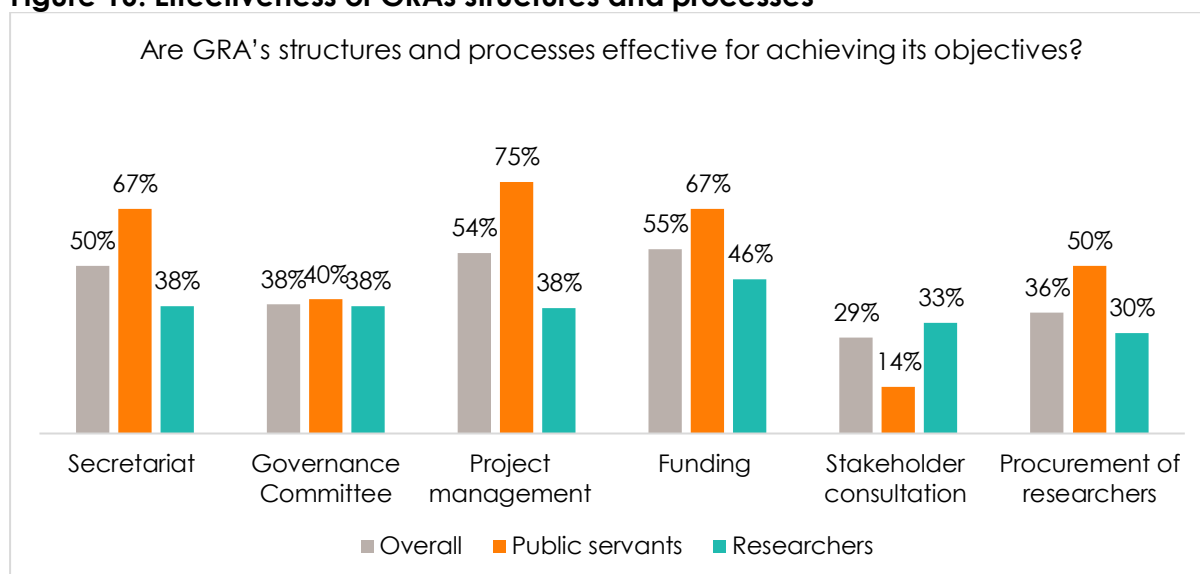
GRA structures and processes are appropriate for producing research for conceptual and strategic purposes but not for instrumental purposes (see previous chapter). One interviewee clarified that GRA is not an organisation and therefore cannot deliver on the expectations of an organisation. Another said:

"Something that I've tried to kind of push over the last few years when it comes to GRA is about recognising GRA's position and its makeup and what it should be doing based off that." - Interviewee

When survey respondents were asked if GRA's project management was effective for achieving its objectives, 75% of public servant agreed but only 38% of researchers agreed (Figure 16). Several interviewees said GRA's project management was effective on the affiliate marketing project but not on the behavioural messaging and sports data projects. They said the main difference was how well the Secretariat

and Project Manager escalated issues to the Governance Committee, as well as the skills of the Working Group (refer to the previous chapter for more details).

Figure 16. Effectiveness of GRAs structures and processes

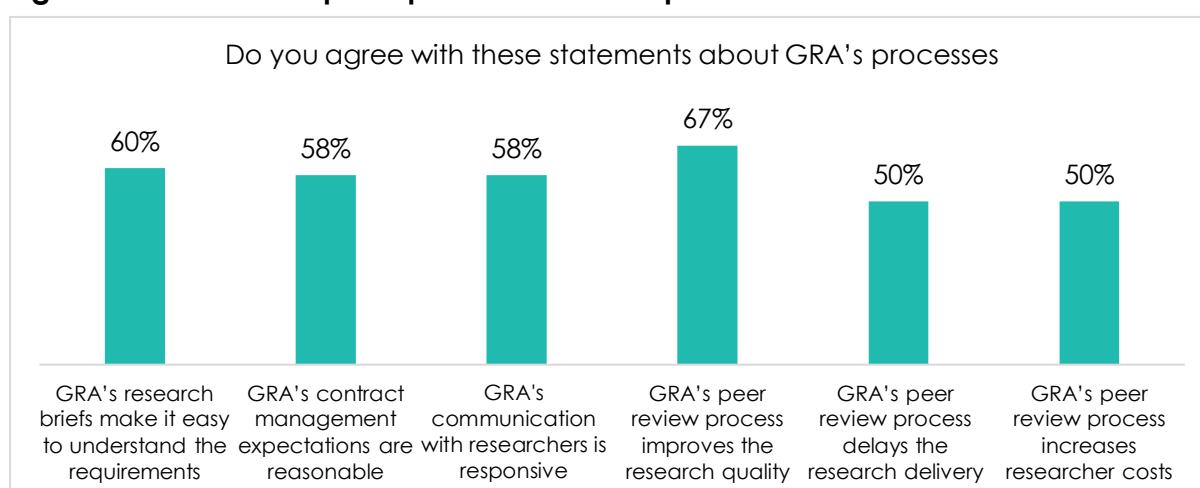


Note: The survey used the term 'Research supplier panel' to refer to the procurement of researchers. The percentage indicates the proportion of respondents who selected 'Yes'. Individuals who selected 'Don't know' were excluded from the calculation. N=21 (n=7 public servants, n=12 researchers, n=1 community sector, n=1 gambling industry). Survey participants had the option to skip certain structures/processes. As a result, the count of observations may slightly vary across structures/processes. The bars for community sector and gambling industry are omitted due to the limited number of observations.

Only 47% of researcher survey respondents said they would recommend GRA funding to other gambling researchers which suggests only moderate satisfaction with how GRA manages research contracts. Figure 17 highlights that around 60% of researcher survey respondents felt that GRA's processes were helpful.

Some researcher respondents may not have worked with GRA directly and their perspectives may be impressionistic, but this cannot be determined from the data (refer to limitations in chapter 3). Nevertheless, as several GRA members want to expand the pool of researchers responding to GRA tenders (see KEQ 1), it will be important to address any impressionistic perspectives.

Figure 17. Researcher perceptions about GRA processes



Note: The percentage indicates the proportion of respondents who selected 'Yes'. Individuals who selected 'Don't know' were excluded from the calculation. There were n=15 researchers responding to this question. They had the option to skip certain statements. As a result, the count of observations may slightly vary across statements.

GRA members' skills

There were mixed findings on whether GRA members have relevant skills in managing research.

One interviewee believed current committee members have the right skills because they are the research person in their jurisdiction.

"From my perspective, certainly it seems like everybody who sits on the GRA seems to be the relevant research person in their jurisdictions." – Interviewee

Another interviewee believed the Project Managers do not have the right skills because managing large scale research projects requires a different skillset to managing other government funded projects.

"The project managers that are in there are not people who've previously managed \$1,000,000 research projects." - Interviewee

A third interviewee said committee members having a research background would not be helpful because GRA research should have a sharp focus on policy.

"I don't think we should just stack it [GRA] full of researchers because researchers tend to go very niche." – Interviewee

A fourth interviewee said committee members need to have research literacy and practical policy expertise, but these people are not easily found.

"Someone that speaks to research but also speaks policy or [plain] English and has their eye also on what the outcomes are meant to be." – Interviewee

Other interviewee views reflected this range of perspectives.

7.2.3 Efficiency of GRA's decision-making model

GRA's decision-making model is based on inter-jurisdiction consensus, which is slow by its nature. This applies to GRA as well as other Council of Australian Government (COAG) forums and international forums such as the United Nations.

A majority of interviewees agreed that the consensus model of decision-making reduced GRA's efficiency.

"My understanding is there can be quite a long time for the committee to agree to a topic area and then the brief." – Interviewee

One interviewee noted that even with Working Groups making some of the day-to-day decisions, such as developing project briefs, getting sign-off on key decisions via consensus slowed things down.

"What often will happen [when a project brief is developed] is that a jurisdiction will go oh, can we also consider this or why don't we consider this because it's been developed in isolation...So then we're another three months down the track really." – Interviewee

GRA's midpoint review similarly noted *"the necessity for a consensus decision-making process"* was an issue and was further impacted by Machinery of Government changes. *"To date the process for project proposal, development and consensus agreement of a project brief, along with the procurement and contracting of projects, has been protracted."*

However, most interviewees were resigned to the consensus model because of the benefits of interjurisdictional collaboration.

"This is the lovely, federated model we work with...Having to have consensus over reports, sometimes hamstrings you and things become less relevant after two years down...I don't know how you resolve that." - Interviewee.

The documents showed that the Governance Committee held a vote in 2019 to change to a majority vote model, but the committee opted to keep the consensus model. An interviewee explained why:

"In my view, you will never get away from the consensus model because I think that any jurisdiction will feel that they need to have an ability to say no to a project." - Interviewee.

Nevertheless, two interviewees said they would be willing to move away from the consensus model. One said only the selection of research topics should be decided by the full Governance Committee, not final sign-off on reports which a smaller number of committee members could do. Another interviewee said even the

selection of research topics could be agreed by a smaller number of committee members if their jurisdiction wanted to fund it. Another two interviewees commented that they did not want the Commonwealth to have more control if there was a move away from the consensus model in the future.

"My only concern will be the Commonwealth not having more veto power than everybody else's just because they've chunked in a few more dollars." – Interviewee

Three interviewees said high staff turnover (particularly in the Commonwealth) and/or Machinery of Government (MOG) changes contributed to inefficiencies in decision-making because corporate knowledge of GRA was lost.

"[The challenges are] high turnover, the machinery of government changes means you lose all the corporate knowledge of GRA." – Interviewee

"The Commonwealth were on the working group for that, and they were engaged, but because it's the Commonwealth the person who was engaged has left since." – Interviewee

7.2.4 GRA's Research Framework

GRA has a Research Framework which articulates enablers to achieve its objectives (see overview below). A key finding of the interviews is that almost no one on the Governance Committee or Implementation Governance Committee had heard of it.

"Until I was prepping for this meeting, I had never seen that Research Framework." – Interviewee

According to the document review and one interviewee, the Research Framework was never formally agreed. Another interviewee said it was endorsed but was intended to be a living document.

"I don't think it was ever actually agreed by the jurisdictions and I don't think it was ever the guiding document for GRA." – Interviewee

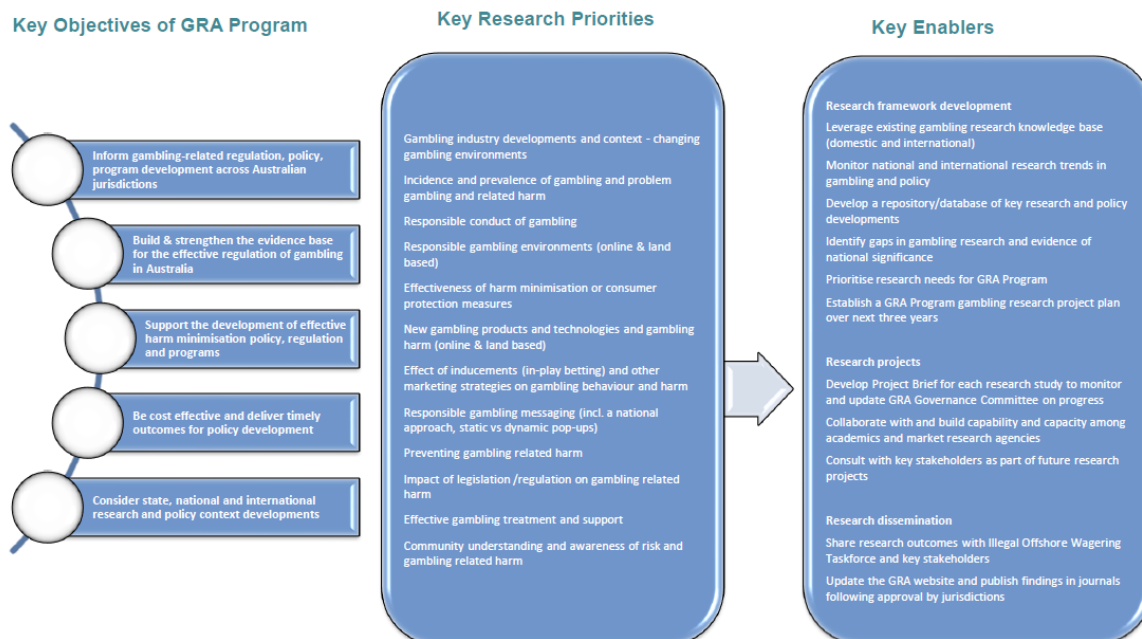
GRA undertook stakeholder engagement to develop the Research Framework, and the original 2017 document was updated after the 2019 midpoint review. It is not clear what happened after that.

A number of the enablers in GRA's Research Framework were not prioritised by GRA but are consistent with suggestions stakeholders made to improve GRA in the future (see next chapter). This includes:

- Develop a repository/database of key research and policy developments
- Identify gaps in gambling research and evidence of national significance
- Collaborate with and build capability and capacity among academics and market research agencies

Overview of GRA's Research Framework

Attachment A – GRA Program Research Framework



Key Enablers

Research framework development

- Leverage existing gambling research knowledge base (domestic and international)
- Monitor national and international research trends in gambling and policy
- Develop a repository/database of key research and policy developments
- Identify gaps in gambling research and evidence of national significance
- Prioritise research needs for GRA Program
- Establish a GRA Program gambling research project plan over next three years

Research projects

- Develop Project Brief for each research study to monitor and update GRA Governance Committee on progress
- Collaborate with and build capability and capacity among academics and market research agencies
- Consult with key stakeholders as part of future research projects

Research dissemination

- Share research outcomes with Illegal Offshore Wagering Taskforce and key stakeholders
- Update the GRA website and publish findings in journals following approval by jurisdictions

08

KEQ 5: What should
GRA look like in the
context of an
implemented National
Framework?

8.1 High-level findings for KEQ 5

Stakeholders shared the view that GRA should continue to focus on issues of national significance. A minority of interviewees wanted GRA to only commission research on topics that states/territories would be less likely to commission on their own, such as online gambling.

Most interviewees wanted to operationalise national significance in a broader way, such as (1) commissioning research based on gap analysis, including gaps in knowledge about issues that occur within state/territory borders (2) developing a centralised repository of gap analysis and research outputs about issues that occur within state/territory borders (3) sharing and discussing the application of research to policy that occurs within state/territory borders, and (4) regular national prevalence studies to improve the efficiency of prevalence studies that occur within state/territory borders.

Two interviewees noted that the current GRA (2017-2023) was focused on the NCPF, but the previous GRA considered research that occurred within state/territory borders to be in scope, and it would be valuable to return to that approach in the future.

When asked about an ideal national research model, we found mixed views, consistent with other evaluation findings. However, almost all stakeholders agreed there should be better stakeholder engagement to inform a future model and research priorities.

GRA could continue as is to meet the needs of half of interviewees who expect research to have conceptual and strategic use in policymaking. Therefore, we examine the evidence for stakeholder preferences that favour the instrumental use of research in policymaking, such as having an independent board, stronger collaboration with industry and researchers, and strategic dissemination of the research. By exploring these preferences, the evaluation offers readers food for thought about whether such a model is feasible in the current policy context.

8.2 Detailed results

8.2.1 Future research topics

In the survey, participants were asked:

“If GRA was dedicated to informing an implemented National Framework, what research gaps should it focus on addressing?”

The most suggested research gap GRA should focus on was harm prevention/minimisation/treatment (n=13), followed by online gambling (n=4), and consumer protection measures (n=2). Other gaps individual survey respondents mentioned were:

- Interactive gambling evaluation after implementing reforms
- Evaluating messaging
- Electronic gaming machines
- Best practice gambling environments

- Impact on rural/remote communities
- Focus on national in scope research that does not overlap.

A minority of interviewees wanted GRA to exclusively focus on issues that are national.

"The things that I'd like to see the GRA doing is the things that would not get done otherwise because there isn't an incentive for any one state to lead that work." – Interviewee

"That's the online gambling space, but we actually have a joint interest in doing stuff." – Interviewee

"[GRA] should be focused on issues that are national in scope, you know, things relating to online gambling, things relating to wagering, because there's a national market there." – Interviewee

" [GRA] could be doing research into better support pathways and support services and stuff...However, that is one where the States I think are currently really incentivised to do that work and do it....So whether you need GRA to be doing it or you just need better coordination between the States and better knowledge sharing." – Interviewee

Most interviewees and some survey respondents wanted to broaden the interpretation of nationally relevant research to include:

(1) Commissioning research based on gap analysis including on state-based issues.

Most interviewees suggested GRA should conduct gap analysis to inform research commissioning decisions. However, one interviewee said this would require GRA to be more independent rather than use a consensus model of decision-making which is tied to government priorities in each jurisdiction.

"How they've done it to date has probably been more of a call to the members for ideas of questions that need to be answered as opposed to doing a gap analysis and looking at where those gaps are." – Interviewee

"I think there's an argument for them to be a bit more proactive in identifying gaps." – Interviewee

"I don't think GRA has done a great job [at filling gaps]. I don't think the model that it has really works." – Interviewee

Several interviewees believed there was not enough focus on the cross-jurisdiction relevance of state-based research, such as regulating casinos and pokies. One interviewee said there should be provisions for the Commonwealth to support projects that are only relevant to states.

"From a research point of view, a gaming machine in Queensland looks exactly the same as a gaming machine in Tasmania, which looks exactly the same as a gaming machine in Victoria. Fundamentally, it's the same set of issues". – Interviewee

"One of the questions for me is can we use the GRA as the collective of regulators even if one party says [an issue] doesn't affect us ...or it's nothing to do with us. That's something that probably needs some clarity because otherwise it just becomes an online wagering research function and nothing else." – Interviewee

However, two interviewees said different jurisdictions were dealing with different local issues and it made sense for them to conduct their own research to address these particular issues. For example, one interviewee noted NSW has a large culturally and linguistically diverse population which influences its gambling research agenda, and this is not the same for all other states. Another interviewee said there is a perception that gambling harm issues are completely different in WA.

(2) Developing a centralised repository of gap analysis and research outputs.

One interviewee said sharing state-based gap analysis would be cost-effective for a future GRA. One survey respondent and one interviewee said tracking state-based research would also allow states to do their own research without risk of duplicating research other states are doing.

"I think it's more cost effective for jurisdictions to undertake their own gap analysis, but we get together, we share our findings, we see what questions there are of national significance and work together to fund those projects." – Interviewee

"I think it'd be great to be able to join things up and have a really consistent understanding of who's doing what... because there is a lot of inefficiency, a lot of duplication and wasted research and money, and that's not what anybody wants." – Interviewee

Half the interviewees were in favour of a clearing house or library to synthesise state-based or third-party research. This is because there is not a national database or a single website to go to for finding gambling-related research.

"There are some UK models, public sector reform, I think, NESTA [and What Works Centres], which do a clearing house for research ...it draws on the research available, puts it into a centralised kind of space, but also provides some practical guidance and guidance notes for policymakers and practitioners." – Interviewee

"I'm a big fan of not reinventing [the] wheel. I think having a pool of what is out there is worthwhile, just as a library even. If [NSW finds that] the patterns of problem gambling happen at 3 o'clock in the morning, then it's probably relevant to all of us. Do we need a GRA to do that [study] or can we just get together as a collective of regulators and say this is what we need?" – Interviewee

"GRA could become a repository of research that jurisdictions could go to to inform whatever policy they're working on. It could be a useful tool for finding what's been done." – Interviewee

"[State-based research projects are] all sitting on disparate jurisdictional websites. Sometimes I struggle to find even the research reports that we've commissioned so having some sort of repository, a clearing house, would be of benefit." – Interviewee

"I like the clearing house function, but it has to be very clear of its identity and its purpose." – Interviewee

Only one stakeholder was against a clearing house model.

"I don't see much value in a clearing house. I think we can, you know, Google stuff that we need to collect." – Interviewee

(3) Sharing and discussing the application of state-based research to policy.

Two interviewees said an organisation like GRA should be a forum to share research learnings and discuss the application to policy.

"I know from the IGC's point of view in the lead up to the implementation it would have been nice to meet a bit more regularly because things were cropping up that needed decisions." – Interviewee

"Not many people talk at it [Governance Committee meetings], so pretty much it's the Chair, it is the Secretariat person, and they will read through the papers and say pretty much the exact same thing, and then no one asks questions apart from the Commonwealth and then the meeting will end... [The meetings] last for about 15 minutes...they're meant to go for 90 minutes." – Interviewee

(4) Regular national prevalence studies to improve the efficiency of state-based prevalence studies.

A majority of interviewees wanted a future GRA to conduct national prevalence studies. Not only because this was cost-effective but also because having comparable data across jurisdictions enabled evaluations of harm minimisation

interventions. One interviewee said because WA does not have the same EGM regulations as other states, it's possible to compare the difference in harms between WA and other states and attribute some of this to EGMs.

"GRA should do a national prevalence study that is done frequently...if you could get agreement on a national study, that would be very powerful and would help an awful lot because at the moment each state and territory does its own prevalence study." – Interviewee

8.2.2 Ideal national research model

When survey participants were asked about the ideal national research model, the most common responses related to better stakeholder engagement to define a future model:

- Engagement with a wide range of stakeholders to inform such a model (n=7, 28%)
- A consultation process to identify research priorities (n=6, 24%)

GRA would need to agree on how to improve stakeholder engagement and put in place the relevant infrastructure as one interviewee said communications to non-core members (such as Sport Integrity Australia) was "non-existent". Another interviewee explained that each jurisdiction has a different agency structure, so GRA only engages with Committee Members and any outreach to policy and regulatory people in other branches/agencies is up to the individual, which means few people have heard about GRA or know how to engage. A contributing factor has been the low volume of work GRA produces which makes it hard to engage policymakers.

"It's been such a slow burn and low profile that there'd be people or there are people that either don't know any exists or just forget about it." – Interviewee

8.2.3 A model to support the instrumental use of research.

As GRA could continue as is to support conceptual and strategic uses of research in policymaking, we outline the evidence for moving to a model that supports the instrumental use of research in policymaking (see Appendix A for a literature scan). Stakeholder preferences related to this model included having an independent board, stronger collaboration with industry and researchers, and strategic dissemination of the research.

Independent board made up of diverse stakeholders.

One interviewee and one survey respondent suggested a future GRA should have an independent board. The interviewee explained that this would shift the basis of research commissioning decisions from political priorities to policy priorities.

"If you need that consensus, it's not really possible to get any potentially contentious research up... It's also complicated because of the level of approval required because it's not an independent organisation." – Interviewee

The same interviewee explained that this governance structure could look similar to ANZOG or ANROWS, with 50% Commonwealth and 50% state/territory funding and a rotating chair. They said the independent board should comprise people from the sector with diverse skills, including one state government board member and one Commonwealth Government board member.

"...input into the research agenda, isn't fully driven by government, it's also driven by, you know, people from business, people from academia, people from the sector... [because the] inherent contradiction between different government interests is problematic." – Interviewee

Conversely an interviewee that had less ambitious expectations of GRA was not in favour of a rotating chair because they believed not all members had the right skills. The cost implications of an independent board would also need to be balanced against the value of a more instrumental research model.

Collaboration with researchers and industry

A few interviewees felt that academic research needed to be shaped by policymakers to have instrumental value.

"How much does it need to be in the vacuum of pure research and how much is it practically linked to governments trying to implement policy?" – Interviewee

"I think maybe that tension between market research and pure research is something that needs to be worked through a little bit more." – Interviewee

"In my experience, there's definitely been situations where academics will start going off on a tangent and you have to bring them back. And there's definitely situations where they've made decisions independently, saying, well, we started doing that, but that didn't work." – Interviewee

However, a majority of stakeholders were hesitant to have greater collaboration with researchers because of the optics of the research losing independence. The sports data study involved some co-design with the researchers and one interviewee said they maintained independence of the findings because policymakers were careful not to get involved in any of the stakeholder consultations.

One interviewee said co-design with researchers was intentionally not pursued by GRA as standard practice because it would slow down research delivery.

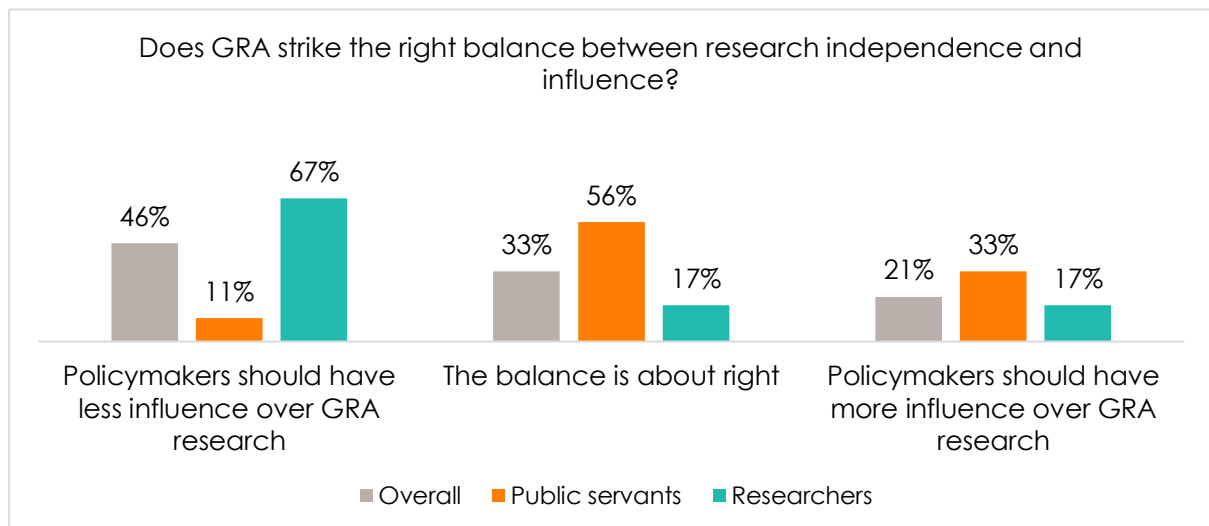
In terms of collaboration with industry, one interviewee thought industry collaboration was the only way to ensure policy-relevant findings, but another thought it was unrealistic to expect industry to provide access to high quality relevant industry data.

"If you really want to understand what's gonna work and what's not, then you probably need to be partnering with an industry partner and actually doing it live rather than trying to do it behind the scenes." – Interviewee

"You cannot get industry to give data, even if they give you data its useless." – Interviewee

Among survey respondents, a majority of public servants agreed that GRA struck the right balance between research independence and influence. However, twice as many public servants (33%) as researchers (17%) wanted policymakers to have more influence over GRA research. By comparison, a much higher proportion of researchers (67%) wanted policymakers to have less control over GRA research compared to public servants (11%). (Figure 18) The literature suggests that academics may not want to align their research with the function of the public service because "there are career and reputational risks attached to engaging too closely with the policy world".¹¹

Figure 18. GRA's research independence vs influence



Note: The percentage indicates the proportion of respondents who selected the correspondent option. Individuals who selected 'Don't know' were excluded from the calculation. N=24 (n=9 public servants, n=12 researchers, n=1 community sector, n=2 gambling industry). The bars for community sector and gambling industry are omitted due to the limited number of observations.

¹¹ Connelly, S., Vanderhoven, D., Rutherford, R., Richardson, L., & Matthews, P. (2021). Translating research for policy: the importance of equivalence, function, and loyalty. *Humanities and Social Sciences Communications*, 8(1), 1-11.

Strategic research dissemination

A majority of public servant survey respondents thought GRA communications were effective for disseminating research (Figure 19). However, eight survey respondents said GRA publications would be more influential with better dissemination methods. Three interviewees discussed how GRA could improve the communication of gambling research for greater policy impact such as using a **variety of channels**.

"Like if I can have the research report put into eight dot points, I'm much more likely to read it...in active tense, preferably not in any form of academic tone. Not long emails and all reports...something that's visual...like the thing that is useful is a lunchtime learnings where they invite researchers to discuss the findings of the research." – Interviewee

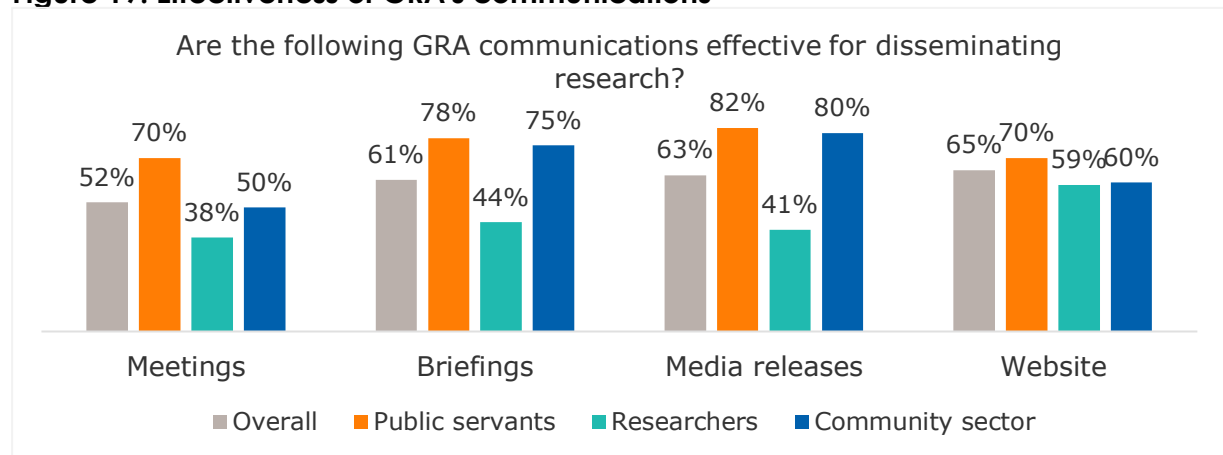
Several interviewees also identified **VRGF as a dissemination exemplar**.

"Victoria is the one that I see putting out the most work, getting their work name out, getting their research out... VRGF is...very prominent in the field. I come across their work more than anybody else. Now that could be just about positioning and stuff and getting their name out there and making sure they're always funding stuff... It's an investment in being visible as well and like so part of it's doing good work and getting that reputation [talking about newsletters]." – Interviewee

One interviewee said GRA's consensus model of decision-making was a barrier to **promoting the research to non-government interest groups** (such as support services) who can advocate for it.

"You wanna go out with controversial findings; things that are gonna create debate and division. That's what you want from a media perspective. From a government perspective, if you have to get all of the States and Territories to agree to a media release, you're gonna have the most boring, boring media release that you can imagine... In order for research reports to get traction, they have to be picked up by people who are not government...If you want GRA research to be influential, those are the groups that it has to engage with, and governments will pick it up if those groups pick it up because it will come back to them." – Interviewee

Figure 19. Effectiveness of GRA's communications



Note: The percentage indicates the proportion of respondents who selected 'Yes'. Individuals who selected 'Don't know' were excluded from the calculation. There were n=35 responses to this question (n=11 public servants, n=17 researchers, n=5 community sector, n=2 gambling industry). Survey participants had the option to skip certain communication channels. As a result, the count of observations may slightly vary across communication channels. The bar for gambling industry is omitted due to the limited number of observations.

KEQ 6: To what extent does GRA duplicate other government funded gambling research mechanisms such as AGRC, VRGF, NSW RGF and other State and Territory funded research?

9.1 High-level findings for KEQ 6

74% of survey respondents agreed that GRA is not duplicating other gambling research. GRA is also valued more than other national research organisations but not as much as the Victorian Responsible Gambling Foundation (VRGF) and the NSW Office of Responsible Gambling (ORG). The majority of survey respondents felt that GRA research was more credible (85%), relevant (83%), and usable (69%) than other Australian sources of gambling research, although fewer agreed it was more ambitious (43%), unique (52%), and timely (52%).

A third of interviewees said they did not know what GRA's point of difference was in relation to other gambling research organisations and this contributed to dissatisfaction with GRA outputs. Three interviewees said the gambling research landscape is more crowded and less coordinated compared to the time of the first GRA which made it harder for the current GRA to have clarity of purpose.

One interviewee believed that the proliferation of gambling forums contributed to jurisdictions sending more junior staff to GRA meetings who did not have sufficient decision-making authority to fully engage or were in roles with high turnover and therefore weren't able to build relationships which is the main value of interjurisdictional organisations like GRA. This created a negative feedback loop whereby low engagement reduced the perceived value of GRA and this further reduced engagement.

9.2 Detailed results

9.2.1 Not duplicating other gambling research

74% of survey respondents agreed that GRA's research does not duplicate other research. Two thirds of survey respondents said GRA filled gaps in the evidence base about the nature and impact of gambling activities and policy interventions.

9.2.2 Value of GRA research compared to other gambling research organisations.

According to survey respondents, GRA is less important for minimising harm from gambling than the Victorian Responsible Gambling Foundation and the NSW Office of Responsible Gambling. However, it was considered more important than 'Other State/Territory gambling research units', 'Australian Gambling Research Centre', 'National Association for Gambling Studies', and 'International Association of Gambling Regulators'. (Figure 20)

Interviewees consistently said the main value of GRA is interjurisdictional collaboration.

"The GRA ...brings everybody together and so I think I've always kind of skewed towards it." – Interviewee

One interviewee felt the Australian Institute of Family Studies, which houses AGRC, has limited capacity to provide national research. Another interviewee said AGRC's prevalence studies were not as representative of the population as GRA's prevalence study so GRA's unique value was in coordinating and conducting national research to the highest standards.

The majority of survey respondents felt that GRA research was more credible (85%), relevant (83%), and usable (69%) than other Australian sources of gambling research, but fewer agreed it was more ambitious (43%), unique (52%), and timely (52%). Extremely positive responses across all of these factors by the two gambling industry respondents were outliers. (Figure 21)

9.2.3 GRA's point of difference

A third of interviewees said they did not know what GRA's point of difference was in relation to other gambling research organisations and this contributed to dissatisfaction with GRA outputs.

"I don't know what the point of difference really is with GRA as opposed to other research forum communities of practice or entities." – Interviewee

"That's really sort of making it ad hoc and a bit muddled and ineffective... what is the purpose?" – Interviewee

"Some of the disappointment with GRA research is "a product of not necessarily having great clarity in purpose and continuing down the road of the work." – Interviewee

Two interviewees said GRA suffers from an "identity crisis."

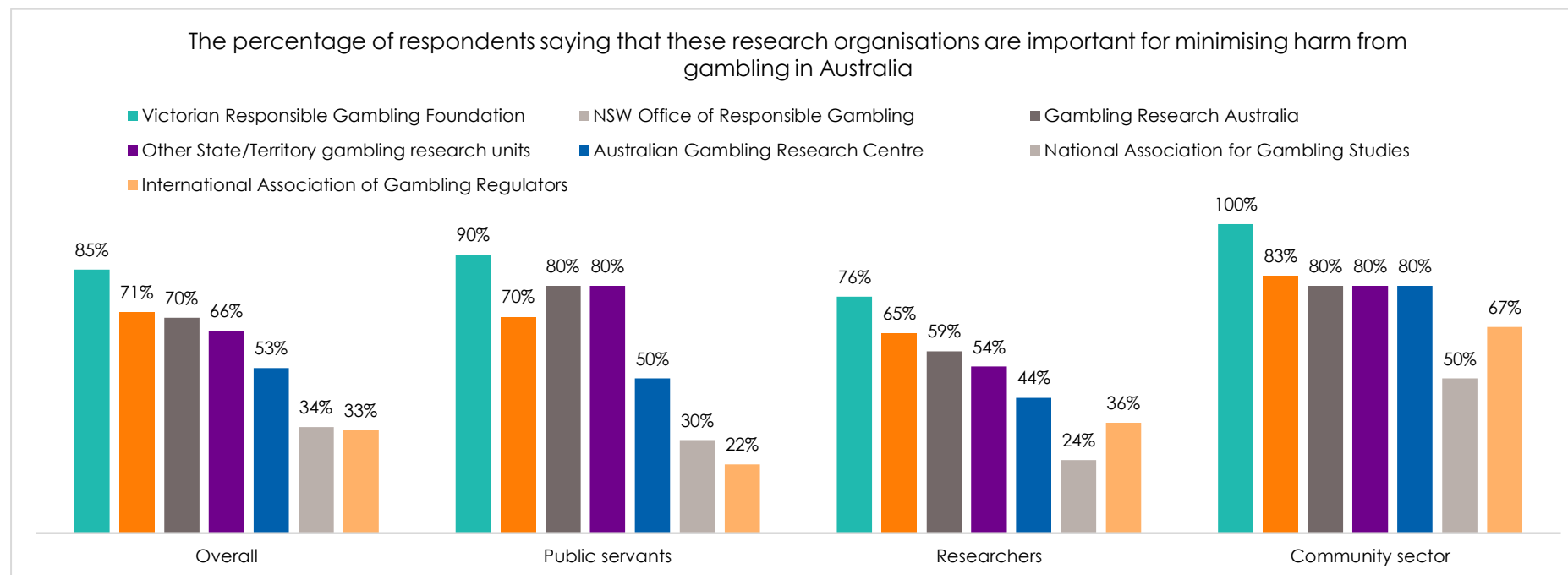
Three interviewees noted that GRA struggled to have a clear purpose because the context is very different to the first GRA. There are now many more gambling research organisations and forums, including AGRC. The previous GRA was established under the Ministerial Council on Gambling which ceased in 2014. The current GRA was established in response to the 2015 Review of the Impact of Illegal Offshore Wagering when the Commonwealth committed to establish a National Consumer Protection Framework. Two interviewees believed that because the Ministerial Council is gone, there is less coordination of gambling forums which makes it harder for GRA to have clarity of purpose.

"It was under that Ministerial Council...because all of that coordination has gone is why these disjointed groups are operating." – Interviewee

One interviewee believed that the proliferation of gambling forums contributed to jurisdictions sending more junior staff to GRA meetings. These staff often did not have sufficient decision-making authority to fully engage or were in roles with high

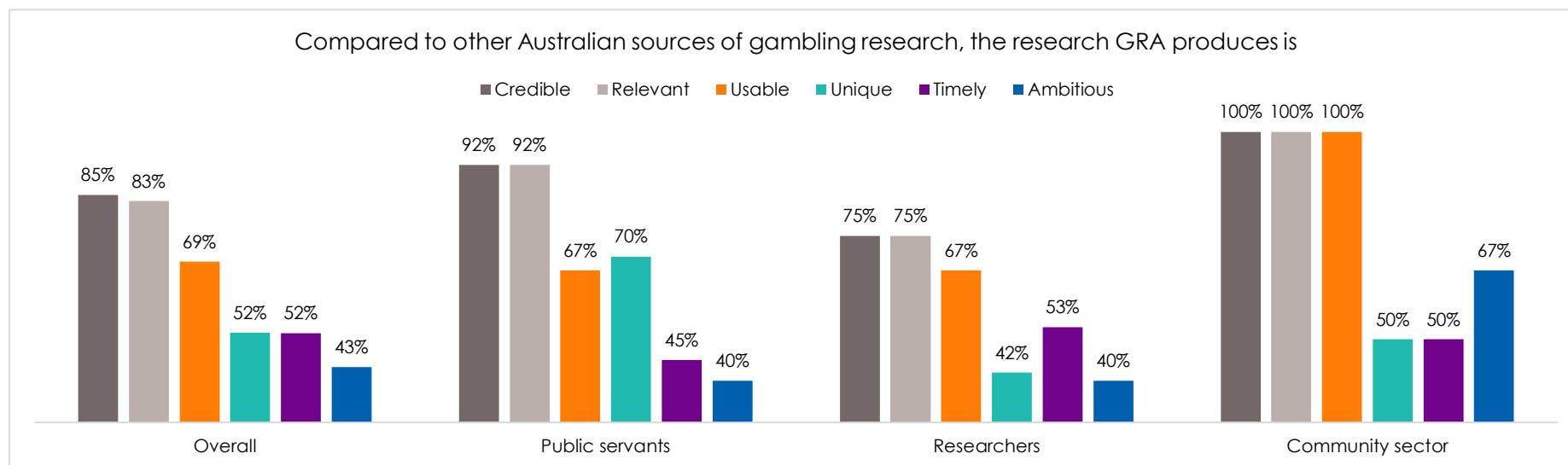
turnover. Therefore, they are not able to build relationships which is the main value of interjurisdictional organisations like GRA. This creates a negative feedback loop whereby low engagement reduces the value of GRA and this further reduces engagement.

Figure 20. Importance of other gambling organisations



Note: The percentage indicates the proportion of respondents who selected 'somewhat important' or 'very important' for each organisation. Individuals who selected 'Don't know' were excluded from the calculation. There were n=35 responses to this question (n=10 public servants, n=17 researchers, n=6 community sector, n=2 gambling industry). Survey participants had the option to skip certain organisations. As a result, the count of observations may slightly vary across organisations. The bar for gambling industry is omitted due to the limited number of observations.

Figure 21. GRA research quality compared to other sources



Note: The percentage indicates the proportion of respondents who selected 'Yes'. Individuals who selected 'Don't know' were excluded from the calculation. There were n=36 responses to this question (n=13 public servants, n=16 researchers, n=4 community sector, n=2 gambling industry, n=1 'other'). Survey participants had the option to skip certain qualities. As a result, the count of observations may slightly vary across qualities. The bars for gambling industry and 'other' stakeholders are omitted due to the limited number of observations.

KEQ 7: Is there an ongoing need for the function and role of the GRA?

10.1 High-level findings for KEQ 7

There is an ongoing need for an organisation like GRA. 75% survey respondents said they would like to see GRA continue. The lowest support was among researchers (65%), but this was still quite high. All interviewees said there are questions of national significance that a national research model could usefully answer, and inter-jurisdiction coordination and collaboration is highly valued.

In the survey, participants were asked:

“What should GRA's priorities be if it continues?”

The most common suggestions for a research focus were:

- Harm prevention/minimisation (n=7) such as focusing on emerging technologies
- A public health approach (n=2)

The most common suggestions for an operating model related to the instrumental use of research and better coordination of different gambling forums, including state-based research mechanisms:

- To commission relevant and useable research (n=7), for example, research that tackles hard issues
- Engage with other research organisations/consultants more (n=3) to improve alignment and reduce the disconnect between federal, state, and territory approaches to research

Considerations for developing a future model are provided, including a decision tree to align the structure and objectives of a future national research model.

10.2 Detailed results

10.2.1 Ongoing need for GRA

75% survey respondents said they would like to see GRA continue. The lowest support was among researchers (65%) but this was still quite high. (Figure 22)

All interviewees said there are questions of national significance that a national research model could usefully answer, and inter-jurisdiction coordination and collaboration is highly valued.

“Multiple investigations whether it's the O'Farrell review or the Standing Committee inquiry have seen the need for this...there are always new questions to be asked, new challenges...I think that stuff can always be better understood...so having somebody [GRA] who's there to do that just means that the individual people don't have to do it themselves.” – Interviewee

“If we need to continue developing good public policy, there will always be a need for research at a national level which is supported by all the jurisdictions and I guess the beauty of GRA is that it gives us the benefit of being able to

coordinate and streamline the process for jurisdictions to be able to work together, just to try and address some of those questions of national significance.” – Interviewee

When interviewees were asked if they would create GRA if it was not invented, responses were mixed. Several interviewees said GRA's value came into question because it was not mentioned in the 2023 final report of the inquiry into online gambling and its impacts on those experiencing gambling harm by the House of Representatives Standing Committee on Social Policy and Legal Affairs.

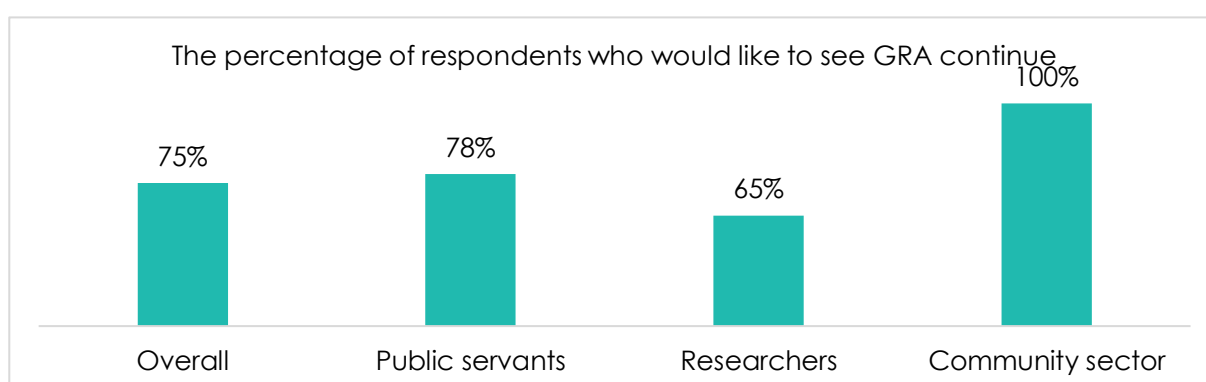
One interviewee noted “We're all broke, so it's an interesting question whether there would be support for another GRA.”

Several interviewees said that going forward, some aspects of GRA (described under KEQ 5) should be improved.

“I think there are challenges there and I think some of those are probably ones that you can fix a bit, some of them you can probably fix a lot, but generally speaking, I've found it to be quite useful having it and working with them.” – Interviewee

“There is merit in having a nationally coordinated research process of some variety...is the GRA the mechanism to deliver it? If you fixed it, maybe.” – Interviewee

Figure 22. Stakeholder views on GRA continuing



Note: The percentage indicates the proportion of respondents who selected 'Yes'. Individuals who selected 'Don't know' were excluded from the calculation. N=32 (n=9 public servants, n=17 researchers, n=5 community sector, n=1 gambling industry). The bar for gambling industry is omitted due to the limited number of observations.

10.2.2 Priorities for GRA if it continues.

In the survey, participants were asked:

“What should GRA's priorities be if it continues?”

The most common suggestion for a research focus was:

- Harm prevention/minimisation (n=7, 23%) such as focusing on emerging technologies

The most common suggestions for an operating model appear to relate to the instrumental use of research and better coordination of different gambling forums, including state-based research mechanisms:

- To commission relevant and useable research (n=7, 23%), for example, research that tackles hard issues
- Engage with other research organisations/consultants more (n=3, 10%) to improve alignment and reduce the disconnect between federal, state, and territory approaches to research

Although there is strong support for GRA to continue, unless GRA achieves greater coordination with other gambling research forums and more consistent buy-in from stakeholders around its purpose, it may struggle to attract the necessary funding and resourcing to continue. The evaluation found buy-in was strongest among longer-term stakeholders who had been on the journey of developing GRA's structure and had a historical perspective of its achievements.

As staff turnover and Machinery of Government changes are likely to be an ongoing risk to continuity, ensuring buy-in for a future GRA requires careful linking of GRA's long-term vision/purpose, definition success (including trackable metrics), the promise made to stakeholders, how stakeholders are engaged and how their expectations in those interactions are managed, and the internal structure for realising success and delivering on the promise to stakeholders. This is critical if GRA is not going to sit under a Ministerial Council as the previous version of GRA did which gave it coordination.

GRA has a Research Framework that goes some way to articulating a Theory of Change. While it was not comprehensive and some parts of it are not consistent with the published evidence on how research influences policy (particularly research dissemination),¹² the biggest limiting factor was low awareness it exists. Most interviewees had never heard of it, and one said it was endorsed but another said it was not, highlighting that it wasn't used for decision making. Therefore, below we provide considerations for developing a future research model.

¹² We found consistency between the literature and the activities listed under two categories of GRA's enablers (research framework development and research projects), but the activities listed under the third category (research dissemination) lacks supporting evidence of policy impact in the literature. One interviewee said it was assumed that those involved in policy implementation such as the IGC would undertake research translation, so this was never a goal of GRA.

10.3 Considerations for developing a future model

Stakeholder engagement

The first priority for developing a future national gambling research model is to decide on the level of policy impact it should strive for. See Figure 23 for a decision tree to align the structure and objectives of a future national research model.

After stakeholders have reached consensus on whether the model will inform (conceptually and strategically) or influence (instrumentally) policy, the next priority is to co-design a Theory of Change (ToC). The ToC should logically link how the research model will lead to the outcomes it intends to achieve. This will have cost

Reasons to develop a Theory of Change

Developing a Theory of Change (ToC) will help to address a key finding of this evaluation that many GRA stakeholders lack a clear understanding of what GRA's purpose is and how its objective should be interpreted. This lack of clarity reduced engagement and satisfaction with GRA.

According to the Australian Institute for Family Studies:

"A good theory of change can provide you with a program rationale that is based on the best available research and practice evidence while also clarifying any assumptions made about achieving success."

Most Treasury departments recommend new initiatives have a ToC or logic model at the strategic business case stage because they connect activities and impact which in turn guides performance management. For example, NSW Treasury's evaluation guidelines state:

"Theories-of-change will have been considered (formally or informally) when designing the initiative (and used to support the business case). The process of reviewing or developing the theory-of-change can be used to identify where there is limited evidence that the initiative's activities would lead to the intended changes."

implications which must be assessed for feasibility. Once the structures and processes of the model are agreed, the strategy should be articulated in a plain English document and shared with stakeholders (both research suppliers and users).

In addition, it will be important to ensure the structures and processes are designed to maximise the opportunities and benefits of interjurisdictional collaboration as collaboration is perceived by most stakeholders to be GRA's biggest value.

According to the literature,¹³ there are six key factors in realising the promise of 'the collaborative advantage' found in interorganisational partnerships:

1. **Clear common aims.** It often takes time and cycling through direction setting, action and trust building to build the superordinate partnership-level goal, common language and aims to enable and sustain a productive partnership.
2. **Trust.** This essential foundation builds on itself over time with success, often starting with modest, low-risk initiatives.
3. **Collaborative leadership.** Effective interorganisational partnership requires sustained, engaged leadership and a shift in leadership style from 'command and control' leading and managing to facilitating and empowering, from delegation to participation.
4. **Sensitivity to power issues.** In an interorganisational partnership, each partner brings different resources to the table. Effective collaboration requires careful negotiation of expectations and ground rules for decision making.
5. **Membership structures.** Shared understandings about what the collaboration involves and formalised rules, roles and structures enable participation. Both governance and task structures are important. The evidence shows the need for effective coordination infrastructure with agreed action strategies, and sufficient resources, capacity and role clarity to support good communication and management functions. Because membership often is dynamic and changing, continuing work is essential to sustain the shared understanding and common focus. Effective coordination structures speed uptake of innovations.
6. **Action learning.** Effective collaborations continuously improve through feedback loops and reflective shared learning.

Influencing or informing policy

The literature suggests that interactions between evidence producers and users shape both evidence and policy, so it is critical that a future national research model considers how it 'does' research to align with its intended outcomes.

On 25 November 2016, Ministers from all jurisdictions agreed in principle to a program of research driven by what Government requires to inform policy, rather than gambling research sector priorities.¹⁴ To that extent, GRA was created because research produced independently by academics progresses in an incremental way, with questions often driven by methodological ease and career progression, rather

¹³ Best, A., & Holmes, B. (2010). Systems thinking, knowledge and action: towards better models and methods. *Evidence & Policy*, 6(2), 145-159.

¹⁴ Gambling Research Australia (GRA) Program Research Framework 2017-18 to 2019-20

than policy decisions which are driven by public and political narratives.¹⁵ GRA went some way to bridging that gap but there is still scope to dial up or dial down the level of research independence or collaboration.

The literature finds that when dialogue between researchers and policymakers isn't occurring or isn't feasible, published research is unlikely to have an impact on policymaking even when academics use more intelligible language.¹⁶ This is because co-produced research is more holistic, useful, and relevant – in other words, it is more instrumental. *“Within knowledge translation contexts, negotiation of shared meaning is important for knowledge to be used effectively (Spyridonidis et al., 2015) and the value of collaboration and relationships between intermediaries, practitioners, policymakers and other key stakeholders is well established (Clinton et al., 2018)”*.¹⁷

Co-produced research does not have to sacrifice the independence of the research findings – see table below. However, for GRA to adopt an instrumental research model, it would need an agreed ToC and strategy which all stakeholders understand because this evaluation found that stakeholder views on the optimal approach to research independence versus influence were sometimes unclear and contradictory. Interviewees tended to think that research co-production can distort agendas and academics like to work independently. At the same time, they believed GRA's existing academic research did not always have a sharp focus on policy and 33% of policymaker survey respondents said that they should have more control over the research process. Likewise, 67% of researcher survey respondents wanted GRA to have less control over the research process but only 36% of researchers agreed that GRA provided support “engaging stakeholders in the design of gambling research to ensure it is relevant”.

Table 7. Current GRA model versus an instrumental research model				
Level of GRA influence over research	Research question	Research design	Research findings	Research communications
Current GRA	✓	x	x	N/A
Instrumental research model	✓	✓	x	✓

¹⁵ Abdo, Goh et al. (2021). What works for “what works” centres: Learnings from system level efforts to cultivate evidence informed practice. Centre for Evidence and Implementation. <https://www.edresearch.edu.au/sites/default/files/2022-02/what-works-for-what-works-centres-cei-report.pdf>

¹⁶ Connelly, S., Vanderhoven, D., Rutherford, R., Richardson, L., & Matthews, P. (2021). Translating research for policy: the importance of equivalence, function, and loyalty. *Humanities and Social Sciences Communications*, 8(1), 1-11.

¹⁷ Abdo, Goh et al. (2021). What works for “what works” centres: Learnings from system level efforts to cultivate evidence informed practice. Centre for Evidence and Implementation. <https://www.edresearch.edu.au/sites/default/files/2022-02/what-works-for-what-works-centres-cei-report.pdf>

Finally, for the recent launch of the evidence centre the “Australian Education Research Organisation (AERO)”, which is funded by the Australian Commonwealth, state and territory governments, the Centre for Evidence and Implementation produced a report titled “*What works for ‘what works’ centres*” to address the question of what makes evidence centres successful and what AERO should do as an evidence intermediary sitting in between the synthesis and implementation of evidence.¹⁸ This document provides some useful considerations that could be applied to a future national gambling research model, especially if it includes a clearing house function.

Meeting stakeholder expectations

Another consideration for developing a future national gambling research model is managing stakeholder expectations about realistic timelines for policy impact and establishing methods to evaluate this.

The health literature shows it takes an average of 17 years for research evidence to reach clinical practice.¹⁹ Stakeholders need to accept that the impact of research on policy is slow because human behaviour is complex, and policymakers need time to mitigate any potential negative externalities, e.g., banning free plastic bags in supermarkets led to increased purchases of plastic bags.²⁰

Evaluating the impact of research over the longer term would increase the buy-in of stakeholders with instrumental preferences for research. In fact, two interviewees said that they hoped this evaluation would be able to reveal GRA's impact. However, as there is no database for recording GRA's policy impact, this evaluation was limited by stakeholders' memories, and only three interviewees had been involved with GRA for more than three years.

A future GRA should systematically record cases of instrumental, conceptual, and strategic uses of its research. To unpack the bi-directional impact of research and policy, a future GRA should also undertake ongoing tracking of the evolution of gambling research through bibliographic analysis compared to the evolution of gambling policy. A published analysis of gambling research outputs across Australia, Canada and New Zealand found that gambling research foci may be shaped by jurisdictional regulation of gambling. Countries with privately operated gambling focused on harm factors that are the operators' responsibility, whereas jurisdictions with a public health model focused on treatment and harm reduction resources.²¹

A 'systems thinking' approach to designing research on gambling harm minimisation can also help to expedite policy impact by addressing potential counterarguments by industry. Systems thinking investigates how the interrelated parts and interactions within a system contribute to outcomes rather than examining a system by splitting it

¹⁸ Ibid.

¹⁹ Ibid.

²⁰ Taylor, R. L. (2019). Bag leakage: The effect of disposable carryout bag regulations on unregulated bags. *Journal of Environmental Economics and Management*, 93, 254-271.

²¹ Baxter, D. G., Hilbrecht, M., & Wheaton, C. T. (2019). A mapping review of research on gambling harm in three regulatory environments. *Harm Reduction Journal*, 16, 1-19.

down into its parts. This approach is popular in other areas of complex public policy. For example, the Australian Prevention Partnership Centre is a national initiative that takes a systems approach to preventing chronic disease. Their work is co-produced by academic researchers, health system practitioners and policymakers from across Australia. See <https://preventioncentre.org.au/> for more information.

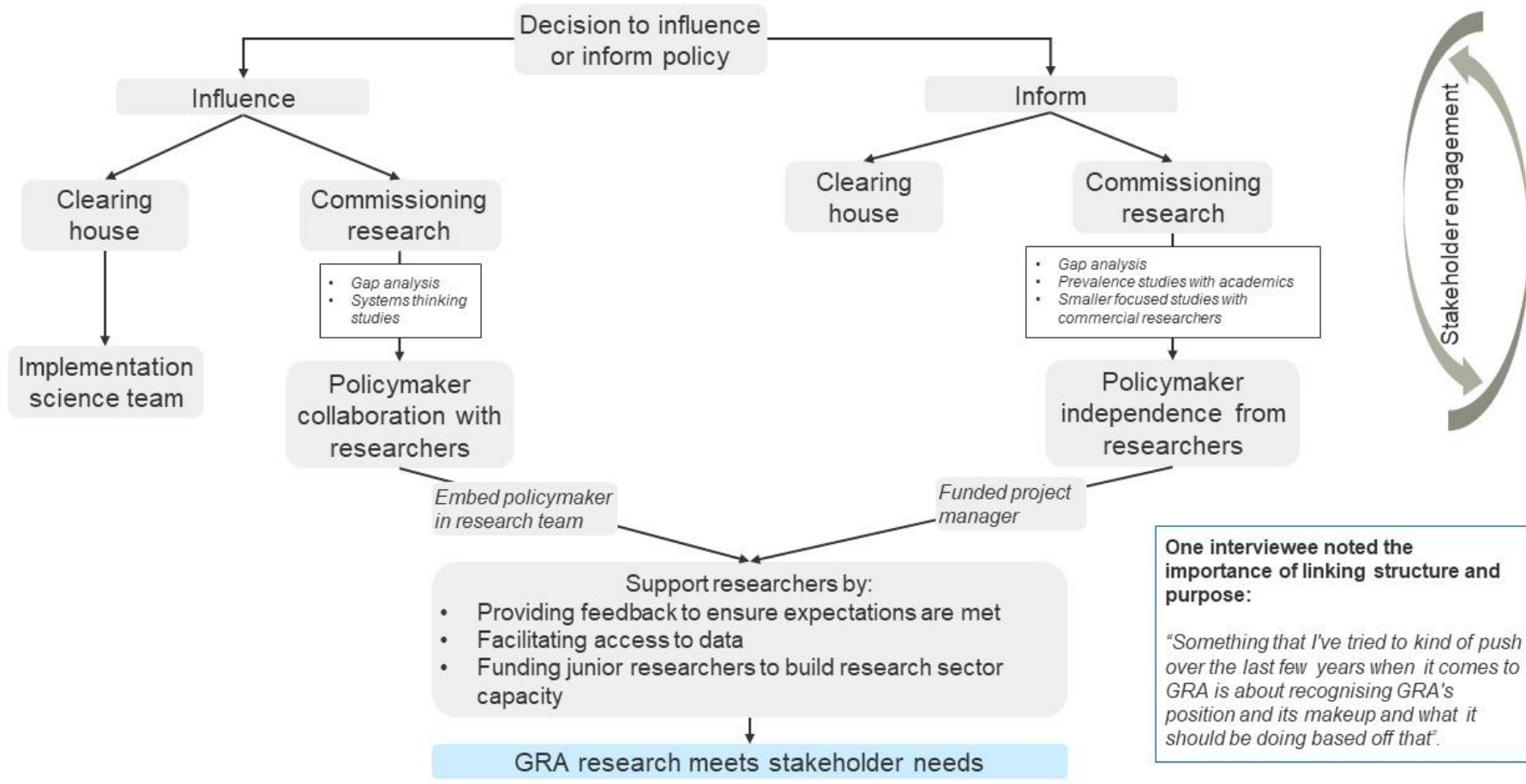
In addition to applying systems thinking to developing research questions about gambling, systems thinking should also be applied to evaluating the policy impact of a future national gambling research model. This is because “policymaking is neither rational nor linear, being complex and political, involving many stakeholders with multiple goals operating in contexts of institutional complexity”.²² A similar approach has been applied to the UK What Works Centre for Education (the Education Endowment Fund) which aims to influence education policy. Systems thinking evaluation helped to identify where research use is strongest and weakest across multiple levels of change to determine where best to intervene.²³

²² Connelly, S., Vanderhoven, D., Rutherford, R., Richardson, L., & Matthews, P. (2021). Translating research for policy: the importance of equivalence, function, and loyalty. *Humanities and Social Sciences Communications*, 8(1), 1-11.

²³ Maxwell, B., Sharples, J., & Coldwell, M. (2022). Developing a systems-based approach to research use in education. *Review of Education*, 10(3), e3368.

10.4 Model options for a future GRA

Figure 23. Decision tree to align the structure and objectives of a future national research model



Potential recommendations

Based on the findings of the evaluation which includes primary data collection, review of secondary data, and a literature scan, we recommend:

1. A future GRA should better articulate its purpose with a clear point of difference from other gambling research organisations.
2. A future GRA should develop a Theory of Change to inform its structure, composition, and processes so that they are logically linked to its purpose and measurable outcomes.
3. The Theory of Change model and success metrics for a future GRA should be developed through stakeholder consultation. It should also be transparently communicated or published to align decision-making and stakeholder expectations longer term.

Appendices

Appendix A: Literature scan

To assess the appropriateness of GRA's objectives, we undertook a rapid literature scan to answer the question of how and to what extent research influences policy, regulation and programs in comparable policy domains such as public health. The key findings are:

1. The influence of research on policy is modest and bi-directional.
2. Research is more likely to be relevant and timely when it is disseminated into live political debates or when research infrastructure facilitates collaboration between researchers and policymakers.
3. Research is used by policymakers in different ways and systems thinking research can support more effective use of research.

The influence of research on policy is modest and bi-directional.

An evidence-informed model of the various factors that influence policy shows research is only one influence among many (see upper hemisphere of Figure 1).²⁴ Other evidence suggests the influence of research on policy is not linear but rather bi-directional and iterative, and other policy influences interact with research to increase or decrease its focus and impact.^{25,26,27}

Research is more likely to have an influence on policy when it is relevant and timely. To be relevant, research must fit the political narrative of the day or solve a very specific problem for which policymakers are looking for answers. To be timely, research must be produced or become salient in policymakers' minds at the time of a decision.

A study of the influence of research on tobacco control policy argues that "While research can play a role in policy debates, political considerations will often trump best evidence". This is because research "can be used by advocates, bureaucrats and legislators when it suits their pre-existing objectives, and ignored when it does not. As well, research can be misused or distorted by industry to promote or defeat a policy measure".²⁸

²⁴ Redman, S., Turner, T., Davies, H., Williamson, A., Haynes, A., Brennan, S., ... & Green, S. (2015). The SPIRIT Action Framework: A structured approach to selecting and testing strategies to increase the use of research in policy. *Social Science & Medicine*, 136, 147-155.

²⁵ Warner, K. E., & Tam, J. (2012). The impact of tobacco control research on policy: 20 years of progress. *Tobacco control*, 21(2), 103-109.

²⁶ Baxter, D. G., Hilbrecht, M., & Wheaton, C. T. (2019). A mapping review of research on gambling harm in three regulatory environments. *Harm Reduction Journal*, 16, 1-19.

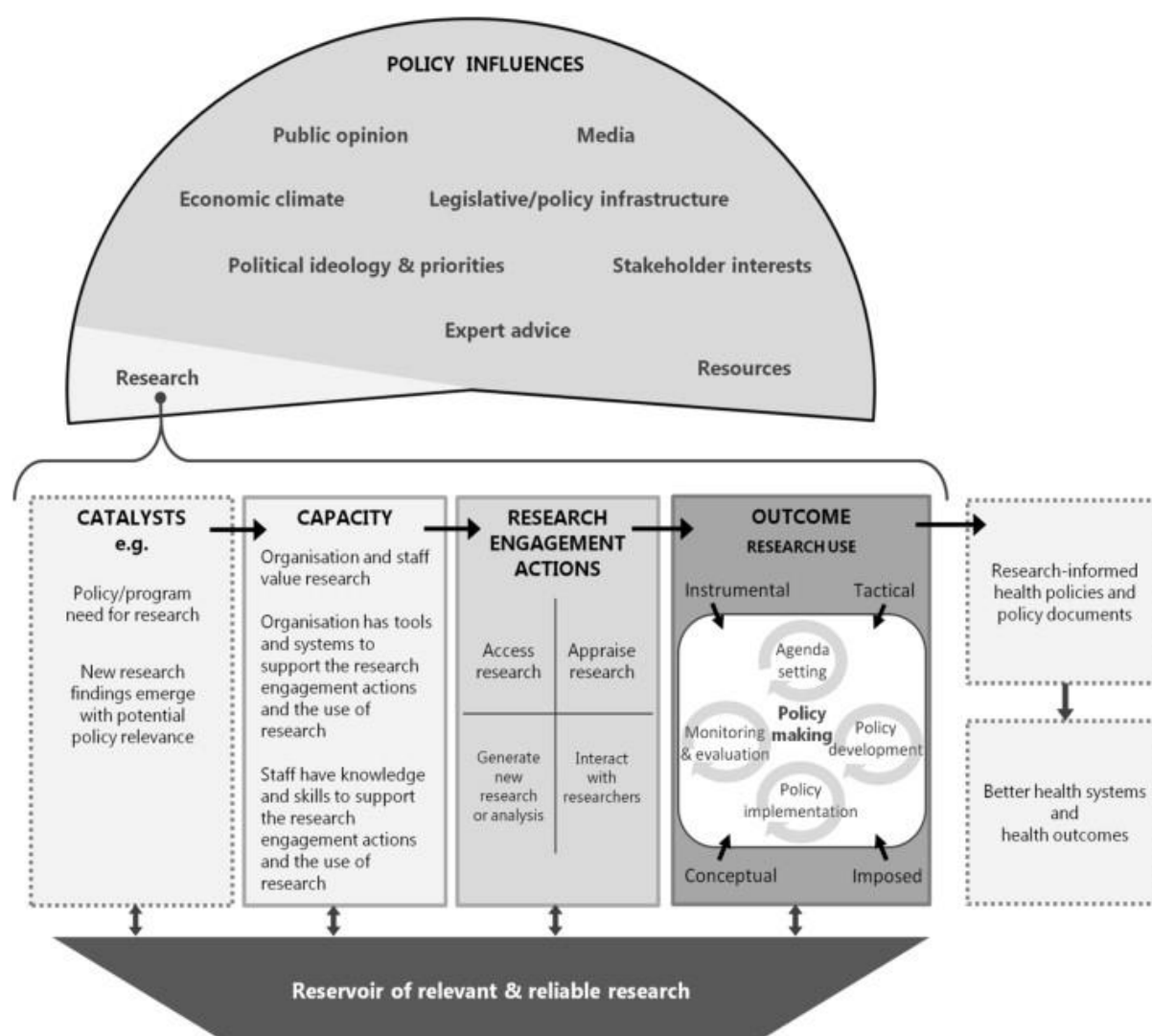
²⁷ Maxwell, B., Sharples, J., & Coldwell, M. (2022). Developing a systems-based approach to research use in education. *Review of Education*, 10(3), e3368.

²⁸ Warner, K. E., & Tam, J. (2012). The impact of tobacco control research on policy: 20 years of progress. *Tobacco control*, 21(2), 103-109

The study examined the influence of research on tobacco control policy and vice versa over a 20-year period. It found that out of eleven policy areas examined, research only had a substantial impact in three areas (clean indoor air, taxation, and cessation treatment) and a modest impact in the other areas.

The study also found that the relationship between tobacco policy and research is often two directional. For example, in the case of second-hand smoke research, "clean indoor air" laws in the US were implemented before there was significant scientific evidence on the risks associated with second hand smoke. Once research in this area was established, it strengthened arguments about banning smoking inside. This was followed by industry research claiming hospitality businesses would lose revenue, which stimulated a new research literature on the financial consequences of smoke free policies. This evidence assisted political battles to adopt such policies.

Figure 1. The influence of research on policy



Research is more likely to be relevant and timely when it is disseminated into live political debates or when research infrastructure facilitates collaboration between researchers and policymakers.

One of the leading researchers in tobacco control research has said: “Publicity arising from research can inspire politically influential media and community debate about tobacco control policies as well as feed directly into particular decision-making forums”.²⁹

In the area of tobacco taxation, the initial research that influenced US policy came from a coalition of economists and activists who convened a timely conference and disseminated the research findings to law makers just before a senate hearing. Taxation went against the priorities of the public health community at the time but after it was implemented and a positive impact was demonstrated, it became accepted wisdom and was adopted by the Framework Convention on Tobacco Control which is the most important international policy document on tobacco control. It is worth noting that this document also includes policies which were popular political decisions that went against evidence-based logic at the time, highlighting that evidence will never fully determine policy.

International evidence suggests that collaborative research and continuous close partnerships and communication between researchers and policymakers are essential facilitators of research uptake. This is because personal relationships foster trust and shared understanding of what kind of knowledge is valid, needed, and in line with community needs.^{30,31} Collaboration also improves the timeliness of research for decision-making.

One of the best examples of researcher and policymaker collaboration to deliver influential research at record speed comes from the COVID-19 pandemic.³² In the UK, Biomedical Research Centres (BRCs) are partnerships between health service organisations, such as hospitals, and universities to conduct translational research for patient benefit. For example, Oxford BRC is a partnership between Oxford University Hospitals NHS Foundation Trust and the University of Oxford, ensuring medical innovations can be moved quickly “from bench to bedside”, out of laboratories into clinical trials and onto the NHS care setting.

²⁹ Warner, K. E., & Tam, J. (2012). The impact of tobacco control research on policy: 20 years of progress. *Tobacco control*, 21(2), 103-109.

³⁰ Loncarevic, N., Andersen, P. T., Leppin, A., & Bertram, M. (2021). Policymakers' research capacities, engagement, and use of research in public health policymaking. *International journal of environmental research and public health*, 18(21), 11014.

³¹ Connelly, S., Vanderhoven, D., Rutherford, R., Richardson, L., & Matthews, P. (2021). Translating research for policy: the importance of equivalence, function, and loyalty. *Humanities and Social Sciences Communications*, 8(1), 1-11.

³² Henderson, L. R., McShane, H., & Kiparoglou, V. (2022). Rapid research response to the COVID-19 pandemic: perspectives from a National Institute for Health Biomedical Research Centre. *Health Research Policy and Systems*, 20(1), 24.

During the COVID-19 pandemic, Oxford BRC supported over 100 COVID-19 projects, 34 of which were classified “Urgent Public Health”, including the development of both the Oxford/AstraZeneca COVID-19 vaccine and the RECOVERY trial (the world’s largest randomised controlled trial of treatments for patients hospitalised with COVID-19 which was set up in just 9 days).

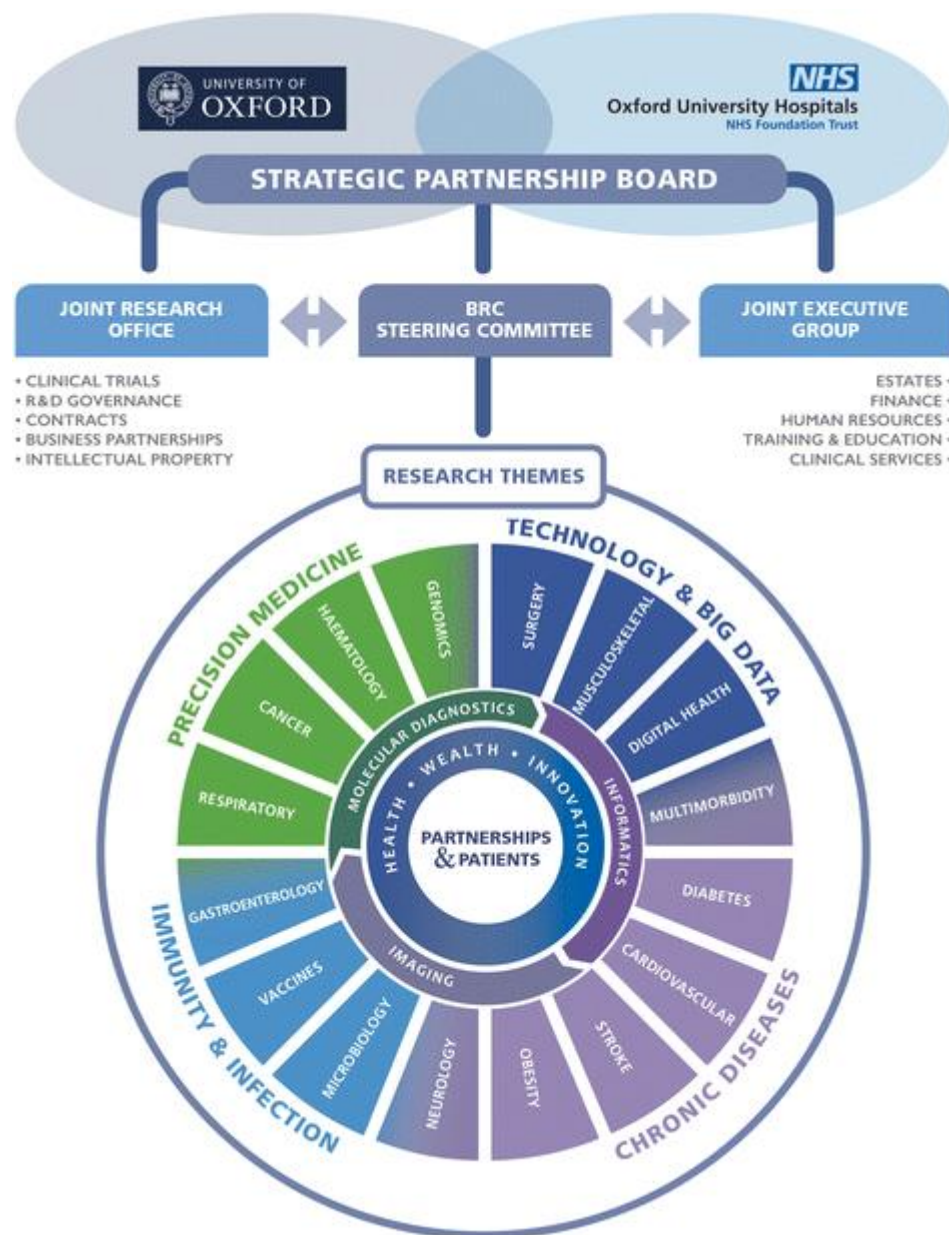
BRCs don’t just attract funding for translational research, they also have a strong focus on building relevant infrastructure, including collaborative leadership, high performing teams, and research networks to repurpose existing research resources which is critical to rapidly deliver “pump-prime” high-impact research (see Oxford BRC’s structure and governance in Figure 2). This infrastructure is what made Oxford BRC successful in providing rapid COVID-19 research, demonstrating “capacity”, “readiness” and “capability” at an organisational and research leadership level in a dynamic environment.³³

Comparisons with Canada’s clinical research system which is considered to have delivered a poor return on investment when it comes to COVID-19 research underlines the importance of the UK integrating research within the NHS to facilitate agile responses to crises. “Problems that impede the efficiency and productivity of clinical research in Canada include inefficient research infrastructure, fragmented research and a culture of research being separate from clinical practice”.³⁴

³³ Ibid.

³⁴ Lamontagne, F., Rowan, K. M., & Guyatt, G. (2021). Integrating research into clinical practice: challenges and solutions for Canada. *Cmaj*, 193(4), E127-E131.

Figure 2. Oxford BRC's structure and governance



Research is used by policymakers in different ways and systems thinking research can support more effective use of research.

The literature commonly refers to the following categories of research use by policymakers³⁵:

1. Instrumental (direct application of research-informed practices, interventions and resources)

³⁵ Maxwell, B., Sharples, J., & Coldwell, M. (2022). Developing a systems-based approach to research use in education. *Review of Education*, 10(3), e3368.

2. Conceptual (using research indirectly in conjunction with other types of evidence to rethink and discuss approaches)
3. Strategic (using research indirectly, to legitimise an approach or persuade others of its value and/or affirm an existing practice).

A survey of Danish policymakers found that instrumental use of research was reported by 86% of respondents, conceptual use was reported by 43% of respondents, and strategic use was reported by 82%.³⁶

Although the instrumental use of evidence is what is often understood when the term evidence-based policy is used, 'non-instrumental' impacts should also be valued. These impacts may not immediately result in changes but can build latent potential for changes to occur in the future or create readiness for future research engagement and use.³⁷

An example of the conceptual use of research is the President's Emergency Plan for AIDS Relief, or PEPFAR, which was US President Bush's plan to pay for antiretroviral drugs for two million AIDS patients in Africa and the Caribbean in the early 2000s. At the time, economist researchers modelled the cost-effectiveness of a large scale roll out of antiretrovirals and said it was a waste of money compared to other public health measures to combat HIV. The White House went ahead anyway because they were motivated by evidence of feasibility and efficacy, not cost effectiveness. Two decades later, the policy proved to be highly cost-effective because economists hadn't considered that the scale of PEPFAR would help bring down costs over time and the intervention scaled more easily than others. However, it took twenty years for this evidence to emerge.³⁸

The PEPFAR example points to the need for research to take a systems thinking approach and to adopt a continuous learning process through real world policy evaluations to discover emerging patterns as a foundation for more effective research use in policymaking.³⁹ Indeed, implementation science research has found that single studies are often used by policymakers to frame the problem and direction of policy, but it is case studies and project reports that are used to develop policy.⁴⁰

³⁶ Loncarevic, N., Andersen, P. T., Leppin, A., & Bertram, M. (2021). Policymakers' research capacities, engagement, and use of research in public health policymaking. *International journal of environmental research and public health*, 18(21), 11014.

³⁷ Maxwell, B., Sharples, J., & Coldwell, M. (2022). Developing a systems-based approach to research use in education. *Review of Education*, 10(3), e3368.

³⁸ <https://www.cgdev.org/blog/how-economists-got-africas-aids-epidemic-wrong>

³⁹ Best, A., & Holmes, B. (2010). Systems thinking, knowledge and action: towards better models and methods. *Evidence & Policy*, 6(2), 145-159.

⁴⁰ Jakobsen, M. W., Lau, C. J., Skovgaard, T., Hämäläinen, R. M., & Aro, A. R. (2018). Use of research evidence in policymaking in three Danish municipalities. *Evidence and Policy*, 14(04), 589-611.

Appendix B: Survey Questionnaire

Note: The survey was distributed while Verian was operating under the name Kantar Public

SURVEY QUESTIONNAIRE: Department of Social Services (DSS) ONLINE STAKEHOLDER SURVEY	
Project number:	263407796
Project name:	Gambling Research Australia Program Evaluation
Client:	NSW Dept. of Enterprise, Investment, and Trade
Researcher contacts:	Kizzy Gandy Will Hoare Hannah Nguyen
Fieldwork timing:	3 July – 21 July 2023
Participants:	Initial sample identified by DSS. Snowball recruitment to increase sample size
Recruiter:	Department of Social Services and Kantar Public
Length:	10 minutes
Incentives:	N/A
Sample size:	Target sample: n>60

General notes

DSS will send a warmup email to the initial sample.

Kantar Public will distribute the survey to the initial sample using email addresses provided by DSS, with a request to forward the survey to other relevant stakeholders.

Scripting notes – for Kantar Public team

Enable forced response for all questions unless otherwise stated.

M/R instruction refers to multiple response

S/R instruction refers to single response

Key Evaluation Questions

The following Key Evaluation Questions are addressed in the evaluation:

Value of GRA

1. Has the current GRA program achieved its purpose?
2. Were the key objectives of the GRA useful and were they met?
 - a. To what extent has the GRA program informed gambling-related regulation, policy and program development across jurisdictions?
 - b. Does the research support the development of effective harm minimisation policy, regulation and programs?
 - c. Has the GRA program built and strengthened the evidence base for effective regulation of gambling in Australia?
 - d. Is the GRA program cost effective, and has it delivered timely outcomes for policy development?
 - e. Has the GRA considered state, national and international research and policy context developments?

Structure, composition, and position of GRA

3. Has GRA met key research needs of jurisdictions and avoided overlaps?
4. Is the GRA structure and composition appropriate?
5. What should GRA look like in the context of an implemented National Framework?
6. To what extent does GRA duplicate other government funded gambling research mechanisms such as the Australian Gambling Research Centre (AGRC) within Australian Institute of Family Studies (AIFS), the Victorian Responsible Gambling Foundation (VRGF), the NSW Responsible Gambling Fund and other State and Territory funded research?
7. Is there an ongoing need for the function and role of the GRA?

KANTAR PUBLIC SURVEY INVITATION: w/c 3 July 2023

From Address: evaluationaus@kantar.com
From Name: Kantar Public
Reply-To: evaluationaus@kantar.com
Subject: Gambling Research Australia – Your feedback wanted

Hello,

You have received this email because you are a stakeholder of Gambling Research Australia (GRA).

GRA is a partnership between the Commonwealth, State and Territory Governments to initiate and manage a national gambling research program.

<https://www.gamblingresearch.org.au/>

You are invited to provide your feedback to help improve gambling research in the future.

The Department of Social Services (DSS) has partnered with Kantar Public – an independent evaluation firm that only works with the public sector – to evaluate GRA. This involves conducting a survey of stakeholders to understand how well GRA has met your needs and achieved its objectives.

Please take 10 minutes today to complete the survey by clicking on the 'TAKE THE SURVEY' link below.

[insert HYPERLINKED TAKE SURVEY BUTTON]

Or copy and paste the URL below into your internet browser:

[insert SURVEY LINK]

The survey closes at **5:00pm (AEST) on Friday 21 July 2023.**

Thank you for providing your valuable feedback.

Please forward this email to other stakeholders of GRA so they can also complete the survey.

Kind regards

Kantar Public, on behalf of the Department of Social Services

Note: Your responses will be processed by Kantar Public who abide by strict industry standards.

Responses are strictly confidential and will be reported in aggregate – individual responses will never be reported in isolation. This project is conducted in accordance with ISO 20252.

To opt out of this survey, click here:

[INSERT OPT OUT LINK- QUALTRICS RULE]

KANTAR PUBLIC SURVEY REMINDER: w/c 10 July 2023

Send one week after initial invitation

From Address: evaluationaus@kantar.com

From Name: Kantar Public

Reply-To: evaluationaus@kantar.com

Subject: Gambling Research Australia – your feedback matters

Dear [RECIPIENT FIRST NAME],

Time is running out to provide your feedback on Gambling Research Australia (GRA).

We recently reached out to you to complete a short survey.

Your feedback on whether GRA has met your needs and achieved its objectives matters.

Please take 10 minutes today to complete the survey by clicking the 'TAKE THE SURVEY' button below.

[insert HYPERLINKED TAKE SURVEY BUTTON]

Or copy and paste the URL below into your internet browser:

[insert SURVEY LINK]

The survey closes at **5:00pm (AEST) on Friday 21 July 2023.**

By completing the survey, you are helping to reduce harm from gambling.

Please forward this email to other stakeholders of GRA so they can also complete the survey.

Thank you

Kantar Public, on behalf of the Department of Social Services

Note: Your responses will be processed by Kantar Public who abide by strict industry standards.

Responses are strictly confidential and will be reported in aggregate – individual responses will never be reported in isolation. This project is conducted in accordance with ISO 20252.

SURVEY INTRODUCTION

Thank you for agreeing to take part in this survey by Kantar Public, on behalf of the Department of Social Services (DSS).

Kantar Public will use the findings from this survey, as well as interviews and a document review, to evaluate Gambling Research Australia (GRA).

By providing your feedback on GRA, you are helping to reduce harm from gambling.

This survey should take no longer than 10 minutes to complete.

Please remember:

- Your participation is voluntary.
- Your answers are confidential so please respond honestly.
- Results will be reported in aggregate so individual responses can't be identified.

To begin the survey, click on the '**NEXT**' button. As you move through the survey, use the '**NEXT**' and '**BACK**' buttons at the bottom of the page (do not use the browser buttons).

This survey must be completed in one sitting.

A SCREENER

A1 What type of organisation do you work for? S/R

OPTION	CODE	SCRIPTING INSTRUCTION
Gambling industry	1	Go to 0
Government	2	Go to 0
University or research agency	3	Go to 0
Community sector	4	Go to 0
Other (please specify)	98	Go to 0

A2 Please select the organisation you work for (you can choose more than one) M/R

OPTION	CODE	SCRIPTING INSTRUCTION
Commonwealth Government	1	
State/Territory Government	2	
The National Consumer Protection Framework for Online Wagering	3	
Gambling Research Australia	4	
Australasian Casino and Gambling Regulators CEO Forum	5	
Other (please specify) _____	98	

B GRA REPORTS AND OUTPUT

Gambling Research Australia (GRA) produces research reports on gambling issues. You can view them here <https://www.gamblingresearch.org.au/publications>

B1 Of the four reports published since 2017, approximately how many GRA publications have you read? If none, please type '0'.

RESPONSE	CODE	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
	Numeric response NUMERICAL FIELD	If response is 0, skip to B4	1.17

B2 Thinking about the last GRA publication you looked at, do you agree that

B2a The research is

1	0	98	
Yes	No	Don't know	
ITEM	STATEMENT	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
1	Rigorous (i.e., represents a very high standard of evidence)		2.3
2	Relevant to more than one jurisdiction in Australia		1.3
3	Not duplicating other research		1.48
4	Produced by skilled researchers		1.4
5	Produced by a trusted university or research agency		1.4
6	Easy to understand		1.18
7	Communicated in a compelling way		1.18

B2b Do you agree the recommendations are:

1	0	98	
Yes	No	Don't know	
ITEM	STATEMENT	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
1	Actionable		2.4

2	Affordable		
3	Likely to be supported by more than one jurisdiction in Australia		2.31

B3 Compared to other Australian sources of gambling research, the research GRA produces is

0	1	98	
No	Yes	Don't know	
ITEM	STATEMENT	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
1	Ambitious		1.19
2	Unique		
3	Credible		
4	Relevant		
5	Usable		
6	Timely		

B4 What is the maximum amount you'd be willing to pay for a GRA publication if they weren't free?

RESPONSE	CODE	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
\$_____	Numeric response	Include \$ symbol	1.21

B5 How many cases can you think of where GRA research has informed a policy / program / regulation in Australia? Please insert the NUMBER of cases.

ITEM	STATEMENT	CODE	INDICATORS (DO NOT SHOW)
1	Policy_____	Numerical value	1.10
2	Program _____	Numerical value	
3	Regulation _____	Numerical value	

B5b. Please provide specific information for each case above e.g. the name of the policy and the jurisdiction.

ITEM	STATEMENT	CODE	INDICATORS (DO NOT SHOW)
1	Policy_____	Open text	1.10

2	Program _____	Open text	
3	Regulation _____	Open text	

B6 In your opinion, which of these GRA publications has had the biggest influence on policies/programs/regulations in Australia? S/R

OPTION	CODE	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
<u>The second national study of interactive gambling in Australia (2019-20)</u>	1		1.10
<u>A behavioural trial of voluntary opt-out pre-commitment for online wagering in Australia</u>	2		
<u>Behavioural trial for consistent gambling messaging under the national consumer protection framework</u>	3		
<u>The distribution of Australian sports data into foreign jurisdictions</u>	4		
Skill-based gaming in Australia (currently being completed)	5		
Direct and affiliate marketing of wagering services and gambling-related harm (currently being completed)	6		
Other (please specify) _____	99		
Don't know	98	Skip to 0	

B7 Why was that publication influential?

RESPONSE	CODE	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
	Open text		1.20

B8 What would make GRA publications in general more influential?

RESPONSE	CODE	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
	Open text		1.20

B9 Are the following GRA communications effective for disseminating research?

1	2	98
---	---	----

Yes		No	Don't know
ITEM	STATEMENT	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
1	Meetings		2.14
2	Briefings		
3	Media releases		
4	Website		
5	Other (please specify)_____	Open text	

SKIP TO C1 IF A1=1 OR A1=98

QUESTIONS FOR RESEARCHERS (ONLY ASK IF 0=3)

B10 As a researcher, do you agree that GRA provided you or your institution with appropriate support in the following areas

1	0	98	
Yes	No	Don't know	
ITEM	STATEMENT	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
1	Facilitating access to data to conduct gambling research		2.17
2	Providing funding to conduct gambling research		2.16
3	Engaging stakeholders in the design of gambling research to ensure it is relevant		1.3
4	Providing feedback on gambling research to ensure it meets stakeholder expectations		1.4
5	Building research sector capability for gambling research		1.14

B11 Do you agree with these statements about GRA's processes

1	2	98	
Yes	No	Don't know	
ITEM	STATEMENT	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
1	GRA's research briefs make it easy to understand the requirements		1.33
2	GRA's contract management expectations are reasonable		1.33
3	GRA's communication with researchers is responsive		1.33
4	GRA's peer review process improves the research quality		1.15
5	GRA's peer review process <u>delays the research delivery</u>		1.15
6	GRA's peer review process increases researcher costs		1.15

B12 Would you recommend GRA funding to other gambling researchers?

OPTION	CODE	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
No	0		2.16
Yes	1		
Don't know	98		

QUESTIONS FOR PUBLIC SERVANTS (ONLY ASK IF 0=2)

B13 GRA was created to meet the research needs of governments. How well does GRA meet your needs?

OPTION	CODE	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
Very well	5		1.31
Somewhat well	4		
Neutral	3		
Not well	2		
Not well at all	1		

B14 Have you ever waited for a GRA research project to be completed before making a decision about a policy/program/regulation?

OPTION	CODE	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
No	0		1.30
Yes (please specify)_____	1	Open text	

QUESTIONS FOR PUBLIC SERVANTS AND COMMUNITY SECTOR (ONLY ASK IF 0=2 OR 0=4)

B15 Please complete this sentence

Each year I spend _____ days engaging with GRA?

OPTION	CODE	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
		Numeric response	1.17

Besides reading publications, how have you engaged with GRA?

B16a *"I have suggested a research topic to GRA"*

OPTION	CODE	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
No	0	Skip to B16c	1.41
Yes	1		

B16b How easy was this process?

1	2	3	4	5
Very difficult	Difficult	Neutral	Easy	Very easy

B16c *"I know the process to suggest a research topic to GRA."*

OPTION	CODE	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
No	0		1.41
Yes	1		

B17a *"I have influenced GRA research after it was commissioned to ensure relevance to a policy / program / regulation."*

OPTION	CODE	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
No	0	Skip to B17c	1.24
Yes	1		

B17b How much influence did you have on GRA research after it was commissioned to ensure relevance to a policy/program/regulation?

1	2	3	4	5
No influence at all	Very little influence	Neutral	Some influence	A lot of influence

B17c *"I know the process to influence GRA research to ensure relevance to a policy / program / regulation."*

OPTION	CODE	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
No	0		1.24
Yes	1		

B18a *"I have translated (applied) GRA research into a policy/program/regulation."*

OPTION	CODE	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
No	0	Skip to B18c	1.55
Yes	1		

B18b How easy was this process?

1	2	3	4	5
Very difficult	Difficult	Neutral	Easy	Very easy

B18c *"I have the skills to translate (apply) GRA research into a policy/program/regulation."*

OPTION	CODE	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
No	0		1.55
Yes	1		

C GRA STRUCTURE AND COMPOSITION

The following questions are about GRA as an organisation.

C1 Do you think GRA has achieved its objectives? If not, were they achievable?

Achieved	Not achieved, but achievable	Not achieved, and not achievable	Don't know
1	2	3	98
ITEM	STATEMENT	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
1	Inform gambling-related regulation, policy and program development across Australian jurisdictions		1.8
2	Build and strengthen the evidence base for the effective regulation of gambling in Australia		
3	Support the development of effective harm minimisation policy, regulation and programs		
4	Be cost effective and deliver timely outcomes for policy development		
5	Consider state, national and international research and policy context developments		

C2 Are GRA's structures and processes effective for achieving its objectives?

1	0	98	
Yes	No	Don't know	
ITEM	STATEMENT	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
1	Secretariat		1.38
2	Governance Committee		
3	Project management		
4	Funding		
5	Research Framework		
6	Stakeholder consultation		
7	Research supplier panel		
8	Other (please specify)		

C3 How could GRA be structured to make it more effective?

RESPONSE	CODE	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
	Open text		1.38

C4 Does GRA represent the interests of all jurisdictions equally?

OPTION	CODE	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
No, some jurisdictions have more input than others	0		1.46
Yes, all jurisdictions have equal input	1		
Don't know	98		

C5 Does GRA strike the right balance between research independence and influence?

OPTION	CODE	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
Policymakers should have <u>less</u> influence over GRA research	1		1.38
The balance is about right	2		
Policymakers should have <u>more</u> influence over GRA research	3		
Don't know	98		

C6 In your opinion, how important are these gambling research organisations for minimising harm from gambling in Australia?

1	2	3	4	5	98
Not important at all	Somewhat unimportant	Neutral	Somewhat important	Very important	Don't know
ITEM	STATEMENT		SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)	
1	Gambling Research Australia			2.30	
2	Australian Gambling Research Centre				
3	Victorian Responsible Gambling Foundation				
4	NSW Office of Responsible Gambling				

5	National Association for Gambling Studies		
6	International Association of Gambling Regulators		
7	Other State/Territory gambling research units		
8	Other (please specify)_____		

C7 To what extent does the scope of GRA's work overlap with other gambling research organisations?

OPTION	CODE	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
Doesn't overlap at all	1		1.48
Rarely overlaps	2		
don't know	98		
Sometimes overlaps	3		
Overlaps a lot	4		

C8 Does GRA fill gaps in the evidence base about the nature and impact of gambling activities and policy interventions?

OPTION	CODE	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
No	0		1.48
Yes	1		
Don't know	98		

D QUESTIONS ABOUT THE FUTURE

The following questions are about the future of gambling research.

D1 Would you like to see GRA continue?

OPTION	CODE	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
No	0		1.51
Yes	1		
Don't know	98		

D2 What should GRA's priorities be if it continues?

RESPONSE	CODE	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
	Open text		1.52

D3 If GRA was dedicated to informing an implemented National Framework, what research gaps should it focus on addressing?

RESPONSE	CODE	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
	Open text		1.45

D4 If you could wave a magic wand to create the ideal a national research model on gambling harm minimisation, what would it look like?

RESPONSE	CODE	SCRIPTING INSTRUCTION	INDICATORS (DO NOT SHOW)
	Open text		1.44

E CLOSE

Thank you for completing this survey. Your feedback is valuable and will help improve gambling research in the future.
You can now close this tab.