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RESEARCH ARTICLE

'Of course we make money, but it has to be in a responsible way': safer gambling practices reported by state-owned gambling operators

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ABSTRACT

Background: Gambling can be regulated in different ways, with some jurisdictions having competitive markets of privately-owned operators, some jurisdictions having state-owned operators that have exclusive legal monopolies, and in other jurisdictions former state-owned monopolies now compete in markets against privately-owned operators. While privately-owned operators tend to emphasize gamblers' individual responsibility while implementing suboptimal voluntary harm-prevention measures, less is known about the safer gambling practices of state-owned gambling operators, a topic which we aim to contribute to here.

Method: Semi-structured interviews were conducted with participants employed in safer gambling roles at state-owned gambling operators in 10 jurisdictions, with transcripts then subjected to thematic and discourse-based analyses.

Results: Participants constructed distinctive identities for their organizations. State-owned operators were portrayed as being uniquely capable of balancing profit with consumer protection, of building consumer trust, and in pioneering in harm reduction. The safer gambling practices of privately owned operators were described as 'performative', whereas state-owned operators emphasized a more 'authentic' approach. This included making safer gambling tools accessible, proactively contacting customers experiencing harm, and implementing operator-driven limits based on risk profiles. When discussing competitive market dynamics, participants challenged dominant narratives about illegal gambling markets. Participants criticized excessive marketing practices by private operators and advocated for system-wide approaches to harm prevention rather than fragmented ones.

Conclusions: The perspectives from state-owned gambling operators should be integrated into new harm-prevention approaches for today's online and interconnected gambling world.

Gambling can be regulated in different ways. For example, Great Britain (GB) has both a monopoly for its National Lottery, and competitive markets for most other gambling formats. Under standard economic logic, markets lead to competition between a number of suppliers on either product price or quality, either of which should increase consumer satisfaction over time. This is essentially the logic underpinning the 2005 Gambling Act, the most wide-ranging current government legislation for gambling. Monopolies, contrastingly, where only a single firm provides a given product, are generally run or licensed by states in situations where the cost of building rival networks is thought to outweigh the potential benefits of market

competition, with rail and water being two examples of such 'natural monopolies' (Varian 1999). Lotteries could also be considered a natural monopoly, in that having a large userbase allows lotteries to offer high jackpots (Clotfelter and Cook 1989). There is still an aspect of market competition with the National Lottery, however, as private firms periodically bid to win the monopolistic license (Gambling Commission 2024). Meanwhile, there has been increasing recognition among both policymakers (House of Lords 2020; DCMS 2023) and academics (Orford 2019; van Schalkwyk et al. 2019; Wardle et al. 2019; Cassidy 2020; Regan et al. 2022) that competitive markets may not be keeping gamblers sufficiently safe. This is

particularly as novel online- and mobile-based gambling products have a strong association with harm (James et al. 2019; Allami et al. 2021), which could be exacerbated by high levels of gambling marketing (Rossi et al. 2021; Wardle et al. 2022). Insights on keeping gamblers safe should be drawn from the full range of market structures.

Gambling regulation can be inspired by various conceptual models, of which models which place the main responsibility on the individual gambler, such as the Reno model (Blaszczynski et al. 2004), are arguably still dominant around the world (Hancock and Smith 2017). This model emphasizes individual responsibility while promoting collaboration between industry, government, healthcare, and research sectors. While some jurisdictions have attempted to pivot from the Reno model's individual focus toward public health-oriented regulations, these efforts are still ongoing (Wardle et al. 2024). This shift emphasizes operators' duty-of-care obligations and the importance of stricter harm-prevention requirements (Livingstone and Rintoul 2020). However, legislation moves slowly, while industry can innovate new harmful gambling products and practices at a faster rate. Therefore, there is still a need for international jurisdictions to continue learning best practices from each other, a topic that we contribute to by focusing on safer gambling practices reported by state-owned operator stakeholders.

Any investigation of state-owned gambling provision can be informed by experiences from the state-owned provision of alcohol. With alcohol, state-ownership can be seen as helping raise revenue for other aspects of government spending (Room and Cisneros Örnberg 2019). In gambling, it has been argued that state-ownership could make government budgets dependent on gambling revenues, thereby implicating states in the creation of gambling harm (Cosgrave and Klassen 2001; Marionneau et al. 2021). By comparison, alcohol state-provision appears to be associated with lower levels of population consumption and harm (Hahn et al. 2012). This could be because state-ownership results in fewer locations with restricted opening times to purchase alcohol from, or because it allows for faster implementation of population-based preventative measures, such as minimum unit pricing (Room and Cisneros Örnberg 2019). The state-owned provision of gambling also appears to perform somewhat better in terms of gambling harm prevalence and total consumption compared to privately owned operators (Marionneau et al. 2021). However, there is a lack of empirical research in this area. Importantly, state-owned alcohol providers have been shown to add to the evidence-base on alcohol harms by sharing data with academics (Stockwell et al. 2013), and by publishing data from randomized-controlled-trials (Norström and Skog 2005; Bergsvik et al. 2025;).

Similar collaborations have occurred between privately-owned gambling operators and academics (Catania and Griffiths 2021; Louderback et al. 2021; Jonsson et al. 2024; Andersson et al. 2025), but such partnerships appear limited to a few researchers with strong industry funding links (Schüll 2012; Cassidy et al. 2013; Orford 2019). In contrast, state-owned gambling operators, despite being fewer in number and having less global revenue than private operators, appear to have made a proportionally greater effort in collaborating with academics (Jonsson et al. 2019, 2020, 2023; Balem et al. 2022, 2023; Hopfgartner et al. 2022, 2023; Auer and Griffiths 2023, 2024; Murch et al. 2023; Marionneau et al. 2024; Zhang et al. 2024b, 2024a).

In both alcohol and gambling, successful state-provision requires consumers to stay with the state-provided product. Alcohol can be smuggled in from other jurisdictions, and illegal gambling has always held an appeal for organized crime (Ferentzy and Turner 2009). However, gambling is especially vulnerable to this issue, given its utilization of technological innovations. Telephone betting and online gambling in turn, transformed the gambling sphere, by providing gamblers with access to products that lay outside of existing regulatory environments (Cassidy 2020). This subsequently encouraged policymakers in various jurisdictions to expand the regulated market's scope to try and recoup some of the resulting lost tax revenue (Jiménez-Murcia et al. 2014; Calvosa 2017; Cassidy 2020). The same logic has led policymakers in Denmark (Nikkinen and Marionneau 2021), Ontario (Turner et al. 2024), The Netherlands (Littler and Järvinen-Tassopoulos 2018), and Sweden (Goedecke et al. 2024) to allow privately-owned gambling operators to compete against state-owned operators that used to enjoy a legal monopoly, with Finland looking to make the same change from 2026 (Järvinen-Tassopoulos et al. 2023). In all instances, expanding the scope of the legal market allowed for tax revenue to be collected from operators that joined the regulated market, which then also had to comply with safer gambling regulations.

From this perspective, it may seem that opening gambling monopolies up to competition is of clear public benefit in today's online world. However,

privately-owned gambling operators have strongly emphasized individual responsibility narrative around gambling harms, which conveniently minimizes the role of harmful products and practices in contributing to population-level harms (Markham and Young 2015; Hancock and Smith 2017; Livingstone and Rintoul 2020; van Schalkwyk et al. 2021). Regulated gambling operators in private markets have also argued against proposed regulations such as affordability checks (Zendle and Newall 2024) or advertising restrictions (Newall et al. 2024), by warning that these will drive gamblers toward illegal operators (Wardle et al. 2021). This is similar to the arguments used by privately-owned operators to help end the Finnish and Swedish monopolies (Sama and Hiilamo 2024), and shows that illegal gambling can be an issue in online gambling whether a given country chooses the monopolistic or competitive market model.

Privately-owned gambling operators have further argued that industry self-regulation – voluntary and non-legally binding operator-led changes – are a better way of keeping gamblers safe. Self-regulatory moves to date include voluntary limitations on gambling marketing, the implementation and design of safer gambling tools on online gambling platforms, and voluntary messages and adverts addressing gambling harms. However, independent evaluations have found that many adverts are still present in marketing formats subject to self-regulatory limits (Torrance et al. 2023; McGrane et al. 2025), that safer gambling tools and online platforms more generally are built in ways to encourage gambling (Parke et al. 2016; Behavioural Insights Team 2022), and that safer gambling messages and adverts can induce gambling urges (Newall et al. 2022; Newall et al. 2025). GB's privately-owned operators are required by the regulator to contact gamblers showing risky activity patterns, but overwhelmingly prefer to make contact *via* email (Forrest et al. 2022), an intervention which is less effective than the regulator's alternative of calling *via* telephone (Jonsson et al. 2020). Another limitation is that gamblers can evade any operator-level spending limit by gambling with another licensed operator. The GB industry has, for example, volunteered a 'single customer view' to address this limitation. However their current data infrastructure and preventive measures are limited compared to, for example, the Finnish monopoly's universal player-tracking system (Newall and Swanton 2024).

The present work aims to better understand the safer gambling practices of state-owned operators, as reported by their employees. Specifically, we investigate the competing priorities and ideological tensions of these organizations, such as balancing revenue generation and preventing gambling harm. By understanding how these dilemmas are navigated, we aim to identify transferable insights that can inform harm-prevention approaches internationally.

Method

This qualitative study is reported in accordance with the Consolidated Criteria for Reporting Qualitative Research (COREQ) guidance (Tong et al. 2007). Ethical approval was obtained from the University of Bristol, School of Psychological Science Research Ethics Committee (#18473). Seven participants were recruited purposively based on the personal networks of the research team, and the remaining four participants were recruited by snowball sampling from these original interviews. A final sample of 11 participants (Mean age = 46.2; 54.5% female) from 10 gambling operators were recruited *via* email (one interview was conducted with two participants, at our initial contact's suggestion). Overall, seven participants were based in Europe, and four were based in North America. One operator was not state-owned but rather a state-licensed monopoly to support a specific charitable cause. However, despite this difference, this interview provided similar material to the other interviews and was therefore included in the present work. All participants were employed in professional roles relating to some aspect of safer gambling. However, they worked at organizations of varied size and at different levels of seniority. This helped to ensure a range of perspectives and to ensure participants' anonymity.

Following provision of an information sheet, all participants consented digitally and provided brief demographic information (Table 1). Subsequently, in-depth online interviews were conducted between April and May 2024. Before each interview commenced, we further explained to participants the aims of the study and our reasons for conducting it. Participants primarily joined the online interviews from their homes, while a few used private meeting rooms at their workplaces. Regardless of location, all interviews were conducted exclusively with those who consented to

Table 1. Participant demographic information.

Demographic category	$N = 11$
Gender	
Male	5
Female	6
Age (years): M(*SD*)	46.2 (*SD* = 9.4)
Experience in gambling sector (years): M(*SD*)	14.3 (*SD* = 6.9)

participate. Interviews were led by the first and last authors who both have experience in conducting qualitative gambling research (Newall, Rawat, et al. 2025; Torrance et al. 2021, 2024). Participants did not receive payment for taking part in the interviews.

The interviews lasted between 64- and 96-minutes, and were guided by semi-structured interview schedules consisting of open-ended questions and relevant prompts. Over the course of the study, interview schedules were further developed through an iterative process. Specifically, transcripts and researcher notes from preceding interviews were utilized to inform discussions in subsequent sessions (Srivastava and Hopwood 2009), thereby refining the interview schedules based on emerging insights (Morgan and Nica 2020). Despite these refinements, core questions remained consistent such as: '*What are the general principles that underpin "safer gambling" in your organization?*' and '*How do you generally ensure that customers gamble safely*?'. Overall, we addressed the following key domains across all of our interview schedules: (1) participants' professional backgrounds and experiences; (2) safer gambling principles and practices; (3) stakeholder collaboration and market dynamics; and (4) evaluations of the state-owned model. No repeat interviews were conducted, but some participants were recontacted *via* email to provide further context or clarity to their quotes where necessary. Data collection concluded once the research team determined that a comprehensive and robust understanding of the subject matter had been attained, thereby reaching saturation (Braun and Clarke 2021). Specifically, this saturation point became evident when interviews with new participants yielded no additional insights. The final respondents were reiterating perspectives and experiences that had already been documented in earlier interviews. It was therefore concluded that the dataset was complete in relation to the study aims. Interview data were subsequently recorded and transcribed verbatim.

In developing our analytical framework, we initially employed a descriptive thematic analysis to identify and characterize key patterns and themes within the data. This approach allowed us to systematically map the content and surface-level meanings as expressed by participants (Braun and Clarke 2006). However, to deepen the rigor and interpretive power of the study, we subsequently adopted a more critical epistemological lens. Specifically, we utilized a social constructionist approach (Edley 2001), using discourse analysis to explore how participants constructed their organizational identities and navigated ideological tensions (Billig et al. 1988). Transcripts were analyzed by the third author, who coded recurring language patterns. Verification was provided by the other authors, and regular meetings were held to solidify the resulting domains underlying our analyses.

For the sake of positionality, it is crucial to acknowledge the role of the participants as employees sharing experiences and opinions about their own organizations (Merriam et al. 2001). Participants' accounts were therefore seen as active identity work, negotiating corporate loyalty and ethics in gambling harm prevention, rather than direct reflections of reality (Cutcliffe and McKenna 2002). The first-hand accounts provided by participants therefore offer unique and novel insights from within organizations that would otherwise be unattainable in other jurisdictions.

This study was not preregistered. For reasons of participant confidentiality, we are unable to share the transcripts underlying this study.

Results

The analysis revealed how representatives from state-owned gambling operators engaged in complex identity construction while navigating varying ideological dilemmas. Three main domains were identified: (1) Constructing organizational distinctiveness, (2) Negotiating responsibility territories, and (3) Positioning within competitive landscapes. These domains reveal how participants negotiated the conflicting demands of providing gambling services as a state-owned operator.

Domain one: constructing organizational distinctiveness

The 'balanced operator' identity
Participants' discourses aimed to set state-owned gambling operators apart from private ones. They often portrayed their organizations as being uniquely able to juggle the opposing goals of making money and protecting consumers. This identity construction served to establish state-owned operators as organizations that could minimize the gambling harms attributed to private operators:

> That's what our stakeholders say when we ask them 'what is our primary responsibility?' And they all say preventing gambling harm. (Participant 2)

This language showed that participants recognized the tension between their conflicting goals of making money and keeping gamblers safe. However,

participants addressed this tension by emphasizing that their organization resolved the dilemma in a way that was slanted more toward gambler safety:

> Of course we make money, but it has to be in a responsible way. (Participant 1)

Building consumer trust

Participants emphasized 'consumer trust' as a form of symbolic capital that further differentiated state-owned operators from private competitors. By positioning trust as both a consequence of state ownership and a product of 'fair business practices', participants constructed an identity that elevated their organizations' social legitimacy:

> If you can create good trust with your customers, increased regulations aren't necessarily going to negatively impact us as an operator. It can actually increase trust further. (Participant 3)

This discursive strategy resolved the dilemma of adhering to stricter regulations while keeping the business profitable. From this perspective, 'trust' functioned as a way that state-owned operators could create value for their customers.

Innovation pioneers

Participants constructed their organizations as innovation pioneers who influenced industry standards through leadership in harm prevention:

> So we try to do the right things and to have a plan when we do these things, this often then causes other operators to follow. (Participant 5)

This discourse established state-owned operators as institutional entrepreneurs who shape industry boundaries rather than merely operating within them, legitimizing their dual commercial-protective mandate. However, participants viewed pioneering in harm prevention measures as commercially risky, recognizing that unilateral action could position them as overly restrictive in the wider market. This created an ideological tension between their desire to innovate in protective measures and their need to ensure industry-wide adoption of similar standards.

> As well as the regulation, we try to encourage all other operators to move in the right direction. This is important because if it was only us making the changes, we would be out of business. (Participant 3).

Domain two: negotiating responsibility territories

Technical vs. substantive responsibility

Participants navigated ideological tensions regarding consumer protection by distinguishing between superficial provision of safer gambling tools and meaningful accessibility. Their discourse differentiated between 'performative' and 'authentic' safety measures:

> Safer gambling tools are integrated so they are right there, wherever you are on the website or app. You're always one click away from these tools and they are always visible … So the tools are super easy to find, super easy to navigate, and super easy to set up as well … and you can set them up at any time, and they take effect immediately. (Participant 9)

This discourse allowed participants to position their organizations as genuinely committed to harm reduction. Simultaneously, they criticized competitors who offered safer gambling tools that were difficult to access:

> This researcher came in, and our CEO was present. She made a very clear demonstration of how not so easily accessible some of our safer gambling tools were. The CEO was not happy to see that, and he said: 'of course we will be more than happy to make sure customers can more easily access them'. (Participant 7)

Operator-driven contact, limits and exclusion

Participants positioned harm-reduction efforts as both moral imperatives and business assets. These measures were described as protecting customers while ensuring 'long-term sustainability' through a healthier gambling base. Some implemented firm global loss limits where gamblers 'are then locked for the rest of the year and cannot play at all' once limits were reached. Operators also often imposed lower limits on gamblers who were flagged as 'at-risk' by internal systems. Many participants expressed that 'proactively reaching out' *via* telephone was one of the most effective ways of reducing harm:

> We have proactive conversations with players. People can also request to be called up, but most often we just have the at-risk player list per age group and per game type that we call up ourselves. And people are really positive for the most part to that approach. A lot of them actually do either lock their limits to a lower amount or take a player break after the calls. (Participant 2)

Classification systems revealed age-sensitive protection as part of operator identity:

> There are separate loss limits for 18–19-year-olds, 20–24-year-olds, and for those above 25. (Participant 6)

Operator-imposed limits were viewed as a crucial component in protecting gamblers. One participant noted their business decision to only allow in-play

sports betting during a limited number of sporting events, in recognition of the elevated harms of this type of betting. When asked about operator-imposed limits, a few participants were aware of private operators limiting or restricting gamblers who had *won* large amounts of money. These participants expressed criticism toward this approach, and stated clearly that their organization had never taken such action, only that they limited gamblers *losses*.

Ethical lines in marketing practices

The tension between commercial and protective imperatives revealed contradictions in the participants' identity construction. While acknowledging marketing communications 'work', state-owned operators were positioned as exercising restraint by 'restricting direct marketing communications' to vulnerable populations. This identity work also involved distinguishing themselves from less responsible operators through more ethical marketing decisions:

> We do not advertise live betting, only fixed odds sports betting… and that's a conscious decision. (Participant 8).

The described practices of extending marketing bans beyond exclusion periods and avoiding advertising for 'more risky or harmful' products construct an organizational identity that balances commercial legitimacy with social responsibility. This careful positioning allowed these organizations to maintain their gambling provider identity *via* self-imposed restrictions.

> In the exclusion durations, we stop marketing to those customers. After this, customers have to wait another 12 months before they go back on the marketing list again. So, it's an extended period of no communication for these customers. (Participant 5).

Domain three: positioning within competitive landscapes

Challenging the 'channelization' discourse

Channelization in gambling markets refers to the process of directing bettors from unregulated or illegal gambling operations toward licensed, regulated betting platforms. Efforts to channelize consumers usually occur through implementing balanced regulations, by providing competitive offerings, by enforcement measures like blocking illegal sites, and by consumer education to direct gambling activities toward legal and licensed platforms. However, participants contested dominant industry discourse about illegal gambling markets. They reconstructed the distinction between

legal and illegal gambling by questioning the supposed threat of customer migration:

> Customers consistently play with us. They say they're gonna go to some of the unlicensed operators, but I keep seeing them. So what people say and what they do, we all know that it's different. (Participant 2)

This counter-discourse resolved the ideological dilemma between regulatory compliance and competitive pressure by challenging the assumption that stricter regulation necessarily drives consumers to illegal markets.

Criticism of competitors' marketing practices

Participants constructed moral distinctions around appropriate marketing practices, positioning private operators' marketing as excessive and potentially harmful:

> The private operators bombarded everybody from one end to the other with marketing and promotions. During COVID it was awful. You'd see an ad every 30 minutes. (Participant 5)

This demarcation allowed participants to navigate the dilemma of being market competitors while criticizing competitive market practices, positioning state-owned operators as reluctant but responsible market participants. By focusing criticism on the frequency and intensity of competitor marketing, participants established a relative moral standard that positioned their own marketing practices as more ethical by comparison:

> They [private operators] use social media so much. They use all kinds of different ways to get themselves known to the public, and the government isn't doing anything at all about it. (Participant 8).

Systemic vs. fragmented protection

Participants articulated a vision of consumer protection that transcended organizational divisions, highlighting the limitations of fragmented approaches in competitive markets:

> I think it would really help everybody, if there would be some classification that we [operators] all use and that we all agree upon, one that we have to use. (Participant 9)

By advocating for cross-operator standards and data sharing, participants resolved the dilemma between organizational autonomy and effective consumer protection, positioning state-owned operators as champions of systemic rather than merely organizational solutions:

You can be playing very little with one company and then you could be classified as high-risk with another company, and really have gambling problems, but you will be sent a lot of commercials due to the fact that you're not risk flagged at both companies. (Participant 6)

This discourse distinguished between holistic and fragmented approaches to consumer protection, allowing participants to critique the competitive market structure while positioning their organizations as advocates for more effective regulatory frameworks.

Discussion

Current debates about regulation within private gambling markets can be informed by a wide range of evidence (Orford 2019; van Schalkwyk et al. 2019; Wardle et al. 2019; Cassidy 2020; House of Lords 2020; Regan et al. 2022; DCMS 2023), and the present work contributes to perspectives on gambling regulation by qualitatively analyzing interviews from stakeholders at international state-owned gambling operators about safer gambling. While privately-owned gambling operators focus on individual responsibility as a factor in gambling harm (Markham and Young 2015; Hancock and Smith 2017; Livingstone and Rintoul 2020; van Schalkwyk et al. 2021), participants in the present study constructed identities which recognized operators' corresponding corporate responsibility: 'Of course we make money, but it has to be in a responsible way'. Participants' identities thereby acknowledged current academic perspectives on the societal burden of gambling harms (Langham et al. 2016; Public Health England 2021; Wardle et al. 2024), and also took proactive steps in terms of limiting losses and marketing strategies, and attempting to build safer gambling platforms. These self-reports need to be subjected to critical analysis, however, and might for example focus on recent positive steps taken by these organizations, instead of for example reflecting the full historical context of how they got to these recent initiatives. However, they do accord with other evidence in gambling (Järvinen-Tassopoulos 2022), and alcohol (Room and Cisneros Örnberg 2019), that state-owned provision can result in a greater focus on harm-prevention than is seen from privately-owned businesses.

Privately-owned gambling operators have built online platforms that appear well-tailored to maximize losses (Parke et al. 2016; Behavioural Insights Team 2022; Newall 2025), and taken self-regulatory actions that appear ineffective when evaluated independently (Newall et al. 2022; Torrance et al. 2023; McGrane et al. 2025;; Newall et al. 2025;). Contrastingly, participants reported active efforts to design safe platforms *via* for example the prominent placement of tools and universal loss limits, by striking the right marketing balance, and by actively intervening on gamblers with high losses. Finally, regarding jurisdictions where former state-owned monopolies were now in competitive markets, participants stated that this market structure may not necessarily be effective at keeping gamblers away from illegal operators, and that liberalization came with noted downsides, such as a bombardment of advertising, and a difficulty in tracking gamblers across operators. Overall, this study provided an in-depth view of the safer gambling practices as perceived by employees at state-owned gambling operators.

However, one data-driven comparison can be made regarding GB and state-owned operators' levels of recent collaboration with researchers. In GB, we are aware of only one recent randomized-controlled-trial (Behavioural Insights Team 2021), and one dataset that was recently shared (Forrest et al. 2022). Although this dataset was intended – by an independent group of policy advisors who helped initiate the study – to be shared with the whole research community (Responsible Gambling Strategy Board 2018), this was not in the end permitted by industry, perhaps because of the initial analyses' strong impact (Forrest et al. 2022). Contrastingly, state-owned operators have enabled many diverse research studies in recent years (Jonsson et al. 2019, 2020, 2023; Balem et al. 2022, 2023; Hopfgartner et al. 2022, 2023; Auer and Griffiths 2023, 2024; Murch et al. 2023; Marionneau et al. 2024; Zhang et al. 2024b, 2024a). This openness is further evidenced by the current study, where the process of contacting, arranging, and conducting in-depth interviews was frictionless, reflecting a commendable level of transparency and cooperation. Such accessibility is often starkly different in relation to private operators, where similar research engagements are notoriously challenging, if not entirely unfeasible for the majority of the research field (Cassidy et al. 2013; Orford 2019).

However, prior research has noted that neither model fully succeeds in mitigating gambling-related harm effectively (Forsström and Cisneros Örnberg 2019). Therefore, instead of asking which out of state- and privately-owned operators is best in terms of safer gambling, a more enlightened perspective may be to suggest integrating insights from each jurisdiction in the design of improved approaches. Previous insights on how privately-owned operators highlight the threat

of illegal online operators (Wardle et al. 2021), paired with the results regarding channelization here, suggest that there is no single solution to preventing illegal gambling in today's online world. There is a lack of understanding regarding the effectiveness of blocking measures (Egerer and Marionneau 2024), and how new technologies, such as cryptocurrencies, may further increase the accessibility of illegal gambling (Andrade et al. 2023). An effective joined-up approach could include measures that prevent illegal operators from advertising themselves *via* celebrities or in professional sports (Noyes and Shepherd 2020; Burgess 2023), as well as exploring for example the effects of privately-owned operators actions of banning successful sports bettors (Kaunitz et al. 2017). It is important to explore novel harm-prevention approaches, as introducing a new state-owned operator into an existing market may not lead to the same level of consumer trust as existing state-owned brands benefit from, and may therefore result in quite different outcomes (Kairouz et al. 2017). Another approach could be to introduce a mandatory independent payment system, which could mimic monopolies' ability to track gamblers and implement harm measures, while also allowing the potential benefits of downstream market competition (Newall and Swanton 2024). This is just one untested approach among many.

While our analysis identified common domains across participants' responses, it is also important to acknowledge the heterogeneity in participants' discourses. Some differences emerged in how participants positioned their organizations relative to regulatory frameworks. Participants from jurisdictions with a current state monopoly expressed greater confidence in their harm-reduction measures, while those from jurisdictions where the state-owned operator now competed against legal private operators may have appeared more defensive about their competitive positioning. Additionally, participants varied in their articulation of the tension between commercial and protective imperatives. For example, some framed this as a resolved contradiction through their 'balanced operator' identity, while others acknowledged ongoing organizational struggles to reconcile these competing demands. These variations could reflect differences in organizational cultures, regulatory environments, and market structures across the jurisdictions represented, suggesting that there could be additional heterogeneity among state-owned gambling operators for future research to explore.

Interpretations of qualitative research can be improved by understanding the researchers'

positionality. As researchers we come from a jurisdiction with a market of privately-owned operators, which has taken up a majority of our research attention to date. We may therefore have been predisposed to focus on what each state-owned operator did well. Researchers from these jurisdictions will also have important perspectives. For example, researchers from the home jurisdictions of state-owned operators might still focus on imperfections in state-owned operators safer gambling practices (Selin 2016; Selin et al. 2019), such as by critiquing their social media content (Jääskeläinen et al. 2023), a point that has also been made about privately-owned gambling operators (Rossi and Nairn 2022). Our sample size and methodology was likely inappropriate to explore the previously-noted variation in safer gambling effectiveness among state-owned operators (Marionneau et al. 2021).

As any self-report data may be subject to various biases, there are various ways of using these data. For example, a content analysis could be performed on the operators' websites to validate the self-reports against objective public-facing information. However, since the organizations that employees were interviewed from were diverse in terms of size and also geographically- and linguistically-diverse, we decided to instead use the qualitative approach of discourse analysis to see how participants constructed their organizational identities and navigated ideological tensions (Billig et al. 1988; Edley 2001).

The present research is limited to occurring at a single time period, and from cultures with a limited degree of variation, with no participants coming from the Global South, for example. Other methodologies, such as an in-depth exploration of how a single jurisdiction's gambling market has changed in response to various regulatory changes, will be better placed to explore longitudinal trends. Participants were all employees of state-owned operators, so richer perspectives could be obtained by interviewing people who gamble in these jurisdictions too. As highlighted by Forsström and Cisneros Örnberg (2019), both state-owned and private gambling operators may provide similar discourse to position themselves as ethical when interviewed by a researcher. However, the actual implementation of safer gambling measures can differ significantly. Interviewing gamblers themselves would therefore provide critical evidence to evaluate the effectiveness of these measures beyond what any employee of a gambling operator might self-report in an interview. The present research was unable to directly compare operators in the sample (Nikkinen and

Marionneau 2021), nor determine whether any operator policies had causal effects on gambling harms, for which randomized-controlled-trials are a better methodology. Qualitative data are always subject to interpretation, including the aspects of researcher positionality discussed above. The interviews also could not cover all potential relevant issues; for example, the issue of industry funding is an important one in gambling research (Adams 2011; Kim et al. 2016; Roberts et al. 2025), and there could be nuanced differences between accepting funding from state- and privately-owned operators. Lastly, recruiting participants through our personal networks may have increased selection and social desirability bias.

In conclusion, state-owned gambling representatives construct their identity across three key domains: organizational distinctiveness, responsibility negotiation, and competitive positioning. These operators distinguish themselves through balanced operations, building consumer trust, and innovating in harm prevention. Discourses were provided that emphasize substantive protection measures over superficial ones, including proactive interventions and ethical marketing boundaries. They also challenge industry discourse about channelization while advocating for systemic rather than fragmented consumer protections. These findings could inform regulatory approaches in international gambling markets by highlighting effective practices worth adopting. Increased research transparency and collaboration, as demonstrated by state-owned operators in this study, should also be further encouraged internationally. A deeper understanding of state-owned gambling operators can therefore contribute to a global evidence base on safer gambling practices in today's online and interconnected world.

Disclosure statement

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