



PLAYING SAFE

TWO YEARS ON



TM

Innovating
Responsible
Gambling

EXECUTIVE SUMMARY

Playing Safe was established in 2013 as the social responsibility programme for the casino industry promoting responsible gambling in every casino.

The objectives defined in Playing Safe one year on are conducted and managed by Playing Safe's executives. It does this in many ways:

Implementing and evaluating initiatives

NCF launched SENSE™ the only National Voluntary Self-Exclusion programme in the UK August 2015. All land-based casinos offer the SENSE system which enables operators to enrol casino customers quickly and simply through a web-based system. The Playing Safe executive is now conducting a thorough evaluation of SENSE using a variety of research tools. The Playing Safe executives will be looking not just at the experience of the casino operators but also at the experience of customers who have been registered and have resigned from SENSE.

Advising, supporting and accrediting operators

Playing Safe's ACE (Accreditation, Certification and Evaluation) expert panel has developed a procedure for evaluating operators' policies and practices against the Playing Safe principles. The largest operators in the sector, comprising 78% of casinos currently operating, have now been evaluated. The aim is also to share good practice across the sector and to identify shared issues. The Playing Safe executive has received positive and encouraging communication from the Gambling Commission regarding the ACE process.

Supporting, conducting and evaluating research

In 2013, NCF was invited to partner Focal Research (Canada) to assess a new method for identifying high-risk gambling patterns amongst casino slots players. Through Playing Safe operators are collaborating with Focal Research on the second phase of the project. The aim is to develop tools that will aid operators to effectively identify and intervene when players exhibit early signs of potential problem gambling behaviour.

The Playing Safe executive also conducts its own bespoke research projects, for example, an assessment of whether systems that indicate the volatility of games, notably IGT's Game Chooser, could be useful tools for responsible gambling messaging; The executive acknowledging the useful dialogue with IGT who provided the background information which assisted this project. The executive also reviews other research for its usefulness to the land-based casino sector.

Wider stakeholder engagement

The Playing Safe executives remit is to engage with progressive research initiatives to further improve the understanding of responsible gambling and its applications, in 2016 the executive will be assisting with innovative studies with organisations such as Ridgeway Information Ltd and the King's College Policy Institute.

Through the Industry Group for Responsible Gambling (IGRG) the executive continues to help develop and improve cross-sector responsible gambling methods.

Tracy Damestani

Chief Executive, National Casino Forum

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THE PLAYING SAFE EXECUTIVES

Professor Yvonne Guerrier BA. MA. Ph.d

Yvonne Guerrier is a visiting professor at West London University, she recently retired from the University of Roehampton where she was Professor of Organisation Studies and, previously, Dean of the School of Business and Social Sciences.

Yvonne conducted two research studies into gambling commissioned by Southlands Methodist Trust: the first looking at the social impacts of a local casino and the second looking at the attitudes of young people to gambling (focusing particularly on University students).

Yvonne brings wide experience as an academic researcher and industry expert in hospitality and tourism.

Dr Guy Bohane

In 2012 and 2013 Guy Bohane was the lead researcher on two Southlands Methodist Trust-funded research projects on the social impact of gambling in the UK. He is senior lecturer in corporate social responsibility and management at the University of Roehampton Business School, London. He has a Masters Degree in Education and a PhD in Business Ethics. Guy originally trained in hospitality and leisure management and also has 10 years' experience in corporate hotel and leisure management property brokerage and valuation having worked for Knight Frank International and Christie and Co.

Tom Kavanagh CBE

Tom Kavanagh was Deputy Chief Executive at the Gambling Commission until his retirement in 2010. He was previously Secretary to the Gaming Board for Great Britain from November 1991 until it was wound up in September 2005. He is both a past Chairman (2005 to 2008) and past Secretary (1991 to 2005) of the Gaming Regulators European Forum.

He is currently a trustee of GamCare.

He was awarded the CBE in the Queen's birthday honours list in June 2003 and was ordained as a Deacon in the Catholic Church in September 2005.

Dr Christeen George

The Playing Safe executive is pleased to welcome Dr Christeen George.

Dr Christeen George is currently the Programme Director for the MSc in Occupational/Organisational Psychology at the University of Hertfordshire. She is a Chartered Occupational Psychologist

and her particular research interest is in psychological contracts: her book on this subject was published by Open University Press. She has managed and delivered research projects in many large organisations including Aviva, Tesco, Ernst & Young, Computech, Mars, Pilkington Glass, M&S, various local

authorities, the Royal Navy and the NHS.

Christeen will be working initially on the evaluation of SENSE where her expertise in the design and analysis of on-line surveys will be invaluable and her background as an Occupational Psychologist will complement the skills of the rest of the team.



SEVEN CORE ELEMENTS

- 1 Responsible Gambling Culture and Governance
- 2 Protecting Children and Young People
- 3 Protecting the Vulnerable
- 4 Advice and Information for Customers
- 5 Customer Interactions
- 6 Marketing and Advertising
- 7 Training and Development

The seven core elements of the Playing Safe principles are embedded into the responsible gambling policies of all NCF member companies. Companies are encouraged to test the robustness of their responsible gambling policies in accordance with the Accreditation Certification and Evaluation (ACE) programme.



SENSE (SELF-ENROLMENT NATIONAL SELF-EXCLUSION)

The UK land-based casino industry is at the forefront of raising public awareness about responsible gambling. As part of this strategy, a key Playing Safe initiative, SENSE™ the Self-Enrolment National Self-Exclusion programme was launched by the National Casino Forum (NCF) August 2015. This national programme was introduced in advance of the Gambling Commission's licensing condition which is due to come into force 6th April 2016.

All land-based casinos are participating in the SENSE programme which enables customers to self-exclude in a simplified and transparent way. SENSE means that customers are for the first time sharing their request to self-exclude from all

operating casinos.

Offering SENSE is a condition of NCF membership; it provides operators with an instant and intuitive enrolment system through a web-based application. It provides operators with a breach alert warning function and the ability to record and share self-exclusion activity reports.

Early indications reveal that customers are willing to join a national sector specific self-exclusion programme.





SENSE EVALUATION

The Playing Safe executive has been tasked with evaluating the self-exclusion SENSE programme. The evaluation process has been designed to conform with 'best practice' guidelines for evaluation and will include collecting data, using both qualitative and quantitative methods, from the various stakeholders who have been involved with SENSE.

The executive will be interviewing the senior decision makers who have been responsible for implementing SENSE; surveying the managers and operatives who are at the front line of registering people on to the SENSE programme and ensuring they are excluded from all participating casinos; visiting a sample of casinos to check how SENSE has been implemented; and interrogating the statistical data collected on SENSE registrations and resignations. All those who resign from SENSE after the 6 month minimum period are being asked if they are willing to complete a survey on their experience of the scheme, and are automatically sent a survey link if they agree. **For ethical reasons, the executive will not contact anyone who is currently registered on SENSE.**

The process is already underway and an initial report will be produced for the end of the first year of operation of the scheme. The evaluation should indicate any changes that need to be made to improve the operation of SENSE. It will also help us answer more fundamental questions such as: how helpful those who decide to voluntary self-exclude find this process in managing their gambling, how often and where they try to breach their self-exclusion, and whether they continue gambling in other sectors whilst self-excluded from land-based casinos. Evaluation is not a one-off process. The survey of those resigning from SENSE will be an on-going part of the scheme and other parts of the evaluation repeated as required.



ACCREDITATION, CERTIFICATION AND EVALUATION (ACE)

The ACE panel is an independent body of experts (Professor Yvonne Guerrier, Dr. Guy Bohane and Tom Kavanagh) which has been tasked by the National Casino Forum with evaluating land-based casinos' responsible gambling policies and practices against the Core Code of Practice outlined in *Playing Safe One Year On 2014*. ACE developed its own methodology and its evaluations and decisions are made without reference to NCF.

The evaluation and accreditation process includes a review of company documentation and procedures as well as interviews with senior head office management and visits to a sample of casinos. At these casinos, the panel interviews a range of staff across functions and at management,

supervisory and operative levels. The aim is to ensure that companies do not just have the correct procedures in place but also that these procedures are fully embedded throughout the company.

Evaluations have already been conducted for the largest operators comprising 78% of all casinos operating in the UK. Professor Yvonne Guerrier, Chair of ACE, said, *"The operators we have visited have told us they found the evaluation a demanding but constructive process and that the feedback from the panel was helpful in identifying how they could further improve their policies and practices. The panel's perspective is that the process is also identifying good practice which can be shared and areas where, by discussions across the sector, we may be able to address issues that all companies find difficult (for example, evaluating training and keeping it up to date)."*

All members of NCF will be evaluated so the next stage will be visits to the smaller and independent operators.



FOCAL RESEARCH CONSULTANTS

20 Years of Research to Reduce Gambling Risk and Harm for Players and Operators

Focal Research Consultants is an independent private research firm in Nova Scotia Canada that has been studying consumer gambling behaviour since 1988, with specific expertise in using player data for risk detection and prevention.

Focal Research has amassed a significant body of peer reviewed academic and applied research that has shaped international public health and social policy, as well as, best practices for responsible gaming and corporate social responsibility.

The Focal team consults widely with gambling stakeholders around the world including regulators, public health organizations, government and industry resulting in a balanced understanding of the dynamics influencing gambling in the global market.

In 1999, Focal Research started using computer simulations to model gambling behaviour leading to research to assess the feasibility of using loyalty data and behavioural analytics to identify and reduce gambling related risk and harm.



USING PLAYER LOYALTY DATA TO DETECT RISK FOR PROBLEM GAMBLING

Developing and Testing Risk Identification Models for Use in the UK Casino Market

As part of the National Casino Forum's (NCF's) Playing Safe initiative, four of its member casino operators assisted Focal Research in an international collaborative research project. We examined the potential for using gaming machine data routinely gathered by UK casinos to detect behaviour patterns associated with a high probability of high risk for problem gambling.

The project, conducted from June 2014 to February 2015, was the first step in assessing the feasibility of a new prototype designed by Focal Research to automate the customization process for building risk-identification models for gaming operators in diverse markets.

Focal approached operators from four countries with specific interest in exploring this technology, including members of the National Casino Forum (NCF) in the UK, inviting them to take part in this international collaborative multi-stage research project. Each participating operator provides access to player data, IT support and partial funding to cover industry sponsorship project requirements.

The Pilot Study and Phase One of the project were completed 2013-2015 with monthly reporting and oversight by the Canadian Government throughout the process (Technical Report to be released Spring 2016).

Overall, 1,498 eligible, regular UK casino gamblers voluntarily completed a player survey measuring their risk for problem gambling using the Problem Gambling Severity Index (PGSI), as well as the Focal Adult Gambling Screen (FLAGSc). This overall sample was then used to build and test how well resulting models performed in identifying risk using a training and validation sample. Study results were promising; the prototype produced preliminary

models achieving pre-set standards for success with models produced in other markets. The current research provides strong proof of concept for the model automation process, although variations in data characteristics and small sample sizes did not permit model optimization at the UK operator level during this initial phase of study.

Based on the results, the next steps for this research are now underway. We will increase sample sizes at an individual casino level to build operator-specific models, resulting in improved model sensitivity (recall) and precision (accuracy). Resulting models will be tested over a 12-month trial to assess model performance over time.

During the trial phase, there is an opportunity to use an evidence-based approach in linking risk identification to appropriate customer interactions to evaluate the value of the technology as a tool in assisting operators and customers in reducing or preventing development of risk and gambling harm.

Additionally, NCF and its members will be collaborating in new co-funded international research by Focal Research exploring risk identification using "un-carded" data among those who gamble without using a player membership or loyalty card. This new research also includes development of algorithms for detecting money laundering (AML models) and gambling with misappropriated funds.

Phase Two of the study Focal Research will examine the use of carded and non-carded data to identify risk, incorporation of a self-updating component to extend model shelf-life as well as development of models to detect other forms of high-risk gambling such as gambling with misappropriated funds (Technical Report to be released Spring 2018).



QUALITATIVE GAMBLING RESEARCH PROJECTS

Player information and messaging

Casino operators are committed towards offering clearer information about the 'return to player' on gaming machines, including information about the ratio between the size and frequency of jackpot wins.

As part of the Playing Safe initiative, the National Casino Forum (NCF) commissioned a research project to assess Game Chooser™. Game Chooser was introduced in February 2014 by IGT on their casino slot machines to enable players to easily determine which type of volatility a game offers, so they could choose a more "entertainment style" or more "high-volatility style" game with the help of an easy-to-identify icon. NCF and IGT recognised that it might have added value and wanted to explore whether it could be further developed as an information tool for helping people manage their gambling. Volatility defines how risky a game is. Game Chooser divides games into three categories, using traffic light symbols marked with a roller coaster.

The research project has looked at the way the 'Game Chooser' tool was implemented by four major casino operators: In August and September 2015, NCF researchers visited a variety of UK casinos and conducted interviews and focus groups with 20 regular slot players to gain their views and perceptions about slot playing and in

particular their knowledge and understanding of the 'Game Chooser' messages.

Whilst the 'Game Chooser' symbols were present on IGT machines in the casinos none of the customers interviewed knew what the 'Game Chooser' messaging on the games meant, although once explained they could envisage the benefits when making informed decisions.

Overall this NCF research has found that there is currently little in-depth knowledge or understanding by customers and staff as to the real purpose of the 'Game Chooser' tool. However, a scheme to make the volatility of games transparent might be a useful tool for responsible gaming if such a scheme used a standard set of symbols/information for indicating volatility and operated across all games and not just for IGT games and was accompanied by a campaign to educate players and technicians about 'volatility' and the system for comparing the volatility of games. Considerations remain that an unintended consequence of informing slots players about volatility of games is that it may encourage players to play the higher volatility games.

Through the Playing Safe executive the members of NCF intend to continue with qualitative research to further explore the options for improving messaging to players.



Young People and Casinos

This small-scale qualitative research project will assess key stakeholder perceptions of the risks of casino gambling for younger people. In 2016 the National Casino Forum, through researchers within the Playing Safe Executive, will conduct a series of interviews and focus groups with key stakeholders including casino operators, young casino players, youth groups, and support organisations providing information including financial advice and guidance on responsible gambling. The key objectives of the research are to: critically analyse customer behaviour and the playing strategies of younger players; to assess young peoples' perceptions of the risks of casino gambling and the messages that are most effective in helping them manage their gambling; and to consider ways of improving the support and guidance for young customers and casino staff around gambling safely. The research will be published in the form of an Executive Report.



Objectives



AGE VERIFICATION TEST PURCHASING

In 2013, NCF members voluntarily introduced age verification tests in order to ensure underage entry is prevented. NCF members continue to test their robust entry systems through an independent test purchasing provider. The programme (Think 21 and Think 25) is operating in every casino in NCF membership.

In 2013-2014 NCF member venues achieved a 91% pass rate of 122 venues tested. In 2014-2015 NCF member venues achieved a 98% pass rate of 129 venues tested, only 2 failed to challenge for ID. Following remedial action all venues which had not challenged for ID were retested and passed.

Following the outstanding success and pass rates of the last 2 years, the scheme has moved to a 12 month rolling programme. The test purchase scheme is open and accessible to all casino operators.

NCF members welcomed the acknowledgement from the Gambling Commission in response to the recent results.



CROSS SECTOR COLLABORATION

Through dialogue with the Industry Group for Responsible Gambling (IGRG) the Playing Safe executive has contributed to the development of the training programme which along with the messaging project is intended to benefit all gambling sectors, these projects will be financially supported by the Responsible Gambling Trust (RGT) but will require the operators support and active participation with the working groups.

The Playing Safe executive looks forward to further collaboration with IGRG on the messaging and training projects including sector specific self-exclusion signposting “**Opt-In to Self-Exclude**” and other future responsible gambling initiatives.

RIDGEWAY INFORMATION LTD

Through NCF, the Playing Safe executive looks forward to assisting the Policy Institute at King's College with their cultural and community research into gambling behaviour.

A further proposed strand of research will look into gaining a better understanding of gambling and people with borderline and fluctuating mental capacity and identify best practice in enabling responsible gambling for this group.

Staff employed in the gambling industry reportedly face difficulties identifying people who may present as fit to gamble, but who are genuinely suffering from cognitive impairment, early-stage dementia and other mental health issues.



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