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Multi-Operator Self-Exclusion

Theory, Evidence and Future Directions

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Knowledge Transfer Partnership



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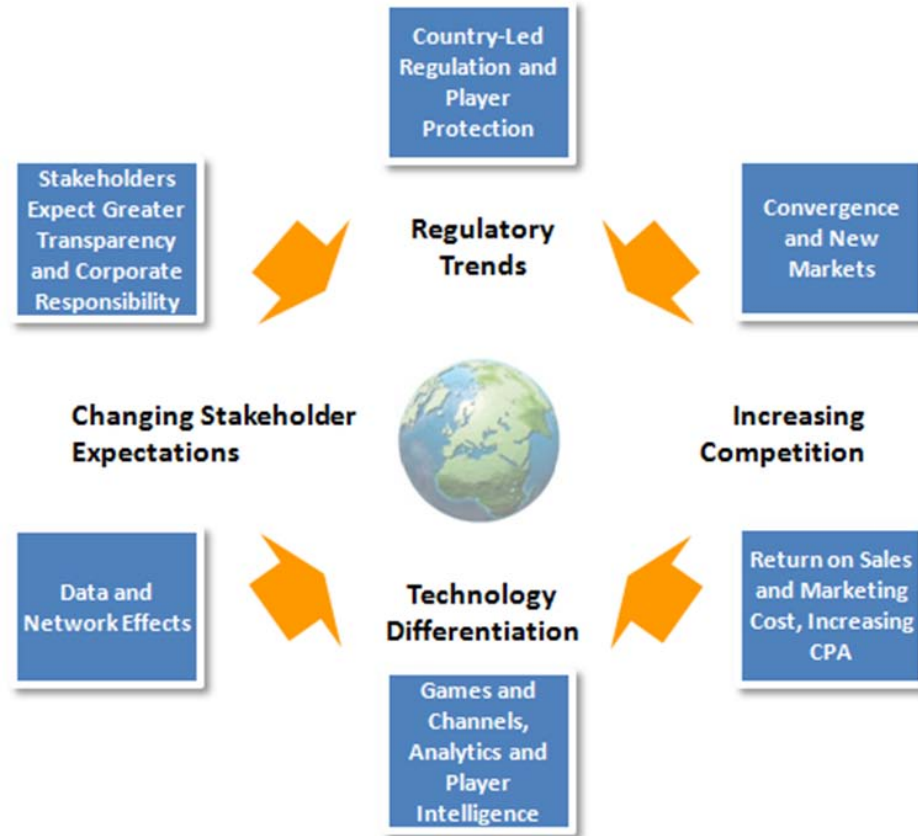
Research Approach

Objective

To assess the effectiveness of self-exclusion in an online environment, specifically analysing the approaches and feasibility of implementing a multi-operator self-exclusion system



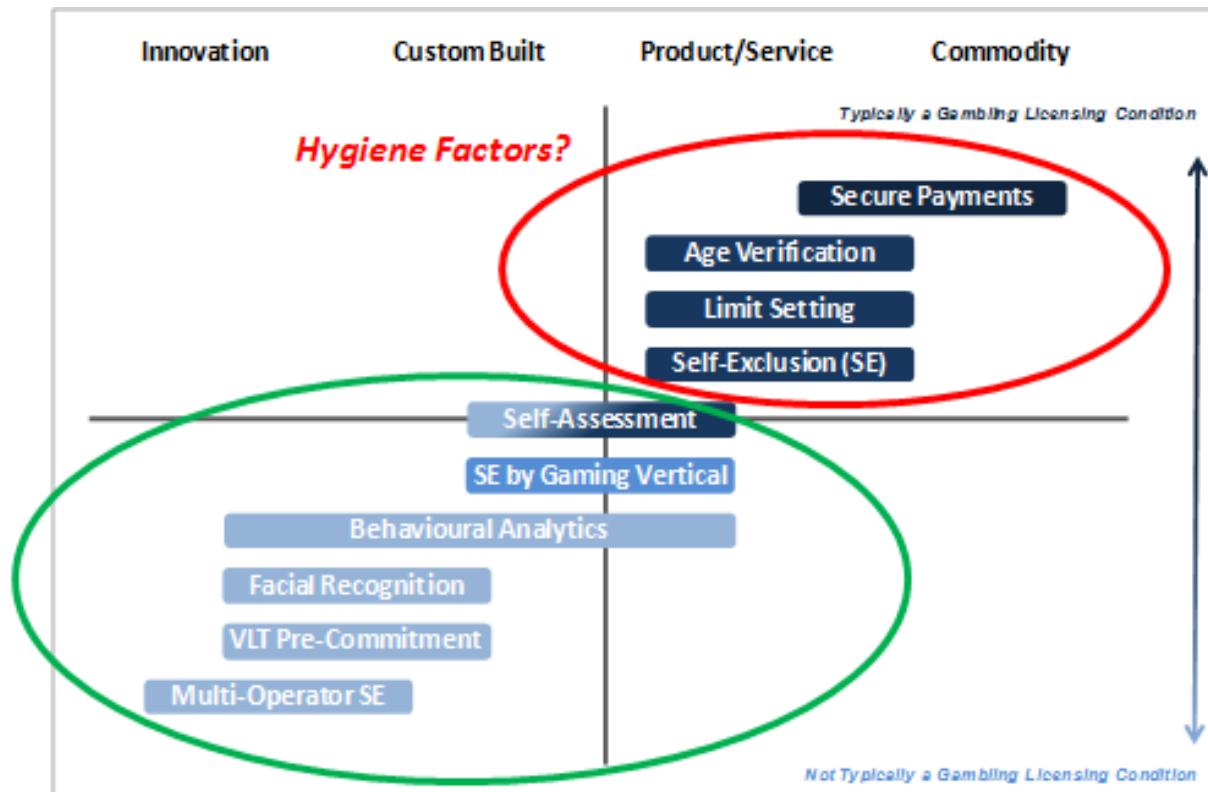
Emerging Thoughts Industry Trends



Source: GamCare and University of Salford KTP and Bet Buddy

Emerging Thoughts

Adoption of responsible gambling tools



Differentiators or Up and Coming Regulations?

Source: GamCare and University of Salford KTP and Bet Buddy, adapted from Wardley's (2011) product lifecycle s-curve

The Need for Multi-Operator Self-Exclusion

Employee and player thoughts...

*“Even if you self-exclude from us you could just go to [another company]...or vice versa if you self-exclude with them you could come to us and **we’d all probably be none-the-wiser that you had self-excluded elsewhere...**”*

Remote gambling employee

The Need for Multi-Operator Self-Exclusion

Employee and player thoughts...

*“You almost could quite easily move around the bookmakers couldn’t you and **that’s one thing that worries me** because I think we almost pass on our, not out rubbish, but our problems. **We’ll stop them and they’ll just go to somebody else.** Only if you had some sort of data base where if somebody excludes with us, they also get excluded from [another company].”*

Remote gambling employee



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The Need for Multi-Operator Self-Exclusion

Employee and player thoughts...

*“...apart from the sites that I self excluded from, I could go into any land based bookies or casino and gamble, and same would be true of the internet and the 100's of sites still available to me... **I ...remember how difficult it was for me to ignore the voices in my head that were encouraging me to go back on line and play. I think self exclusion across the board would have made it easier for me.**”*

Online gambler



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The Need for Multi-Operator Self-Exclusion

Employee and player thoughts...

*“I was curious if there was **some sort of self-exclusion list** out there on the internet somewhere that was **capable of preventing further use on any of the gambling websites**...I wanted to make one last effort to find such a thing and sign up immediately (**before another craving alters my decisions**).”*

Online gambler

The Need for Multi-Operator Self-Exclusion

Some statistics...

Remote Sector: April 2010 – March 2011

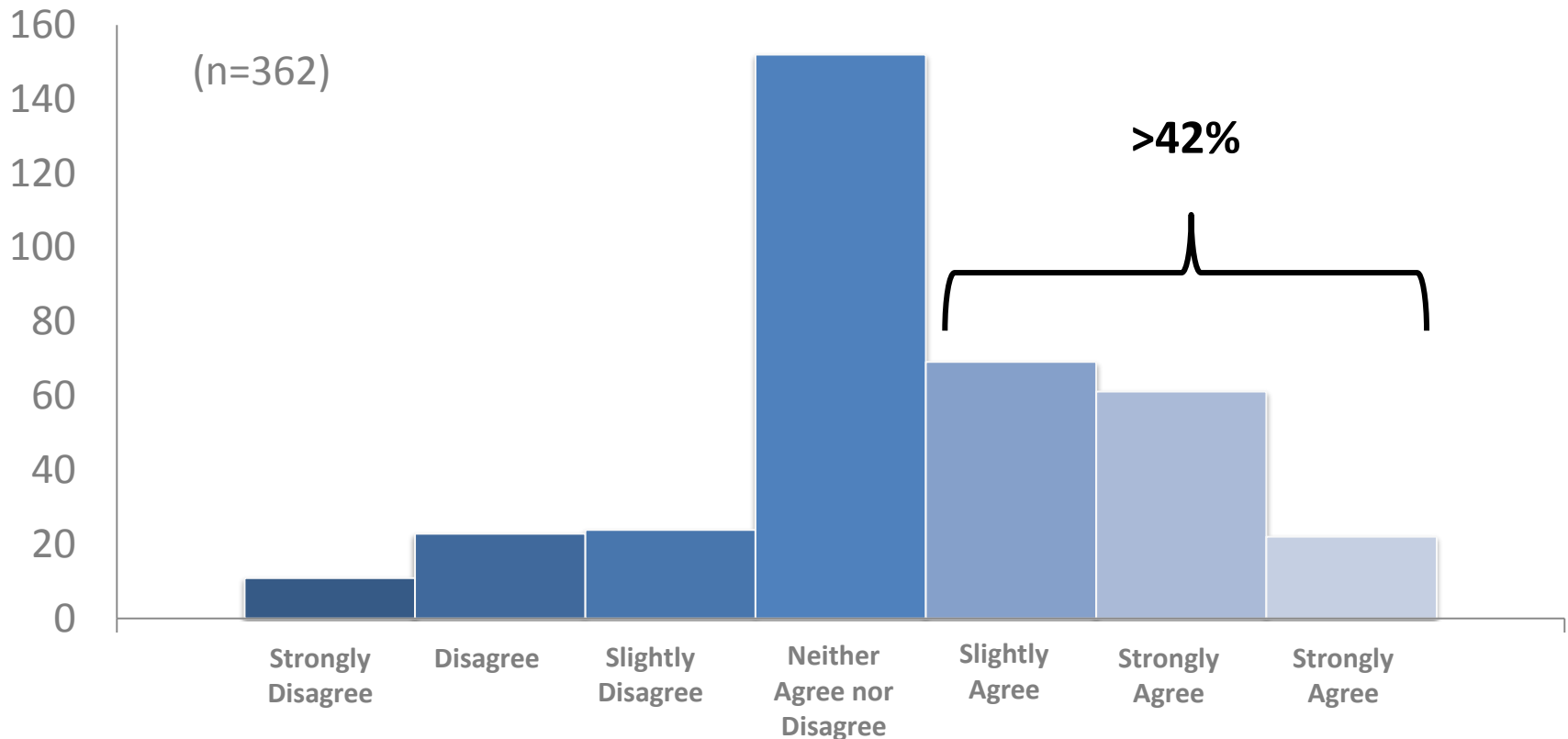
Over 35,000 reported self-exclusions (1% of active accounts)

2,619 reported breaches of self-exclusion (7.5% of total SEs)



The Need for Multi-Operator Self-Exclusion

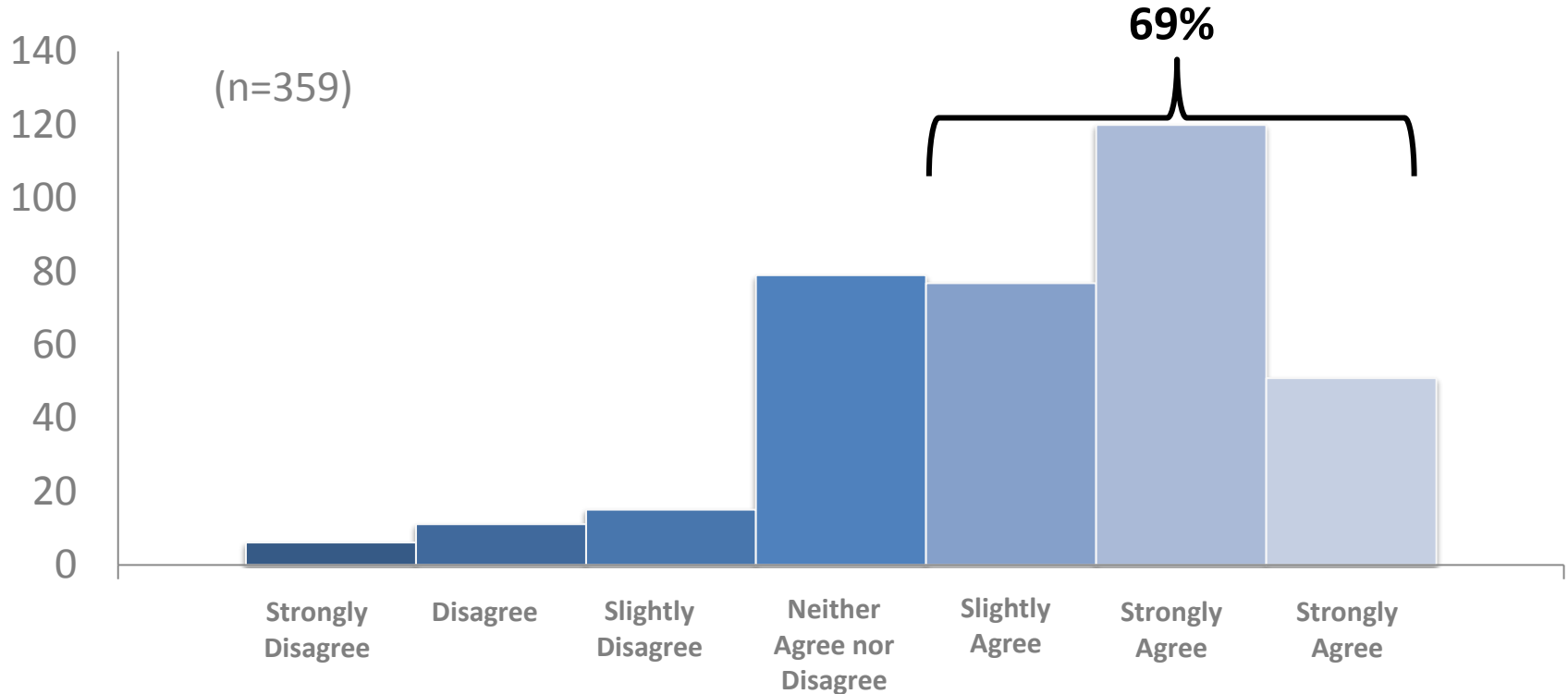
Online player survey...



IT IS EASY TO GET AROUND THE SELF-EXCLUSION SYSTEM FOR ANY ONE SITE

The Need for Multi-Operator Self-Exclusion

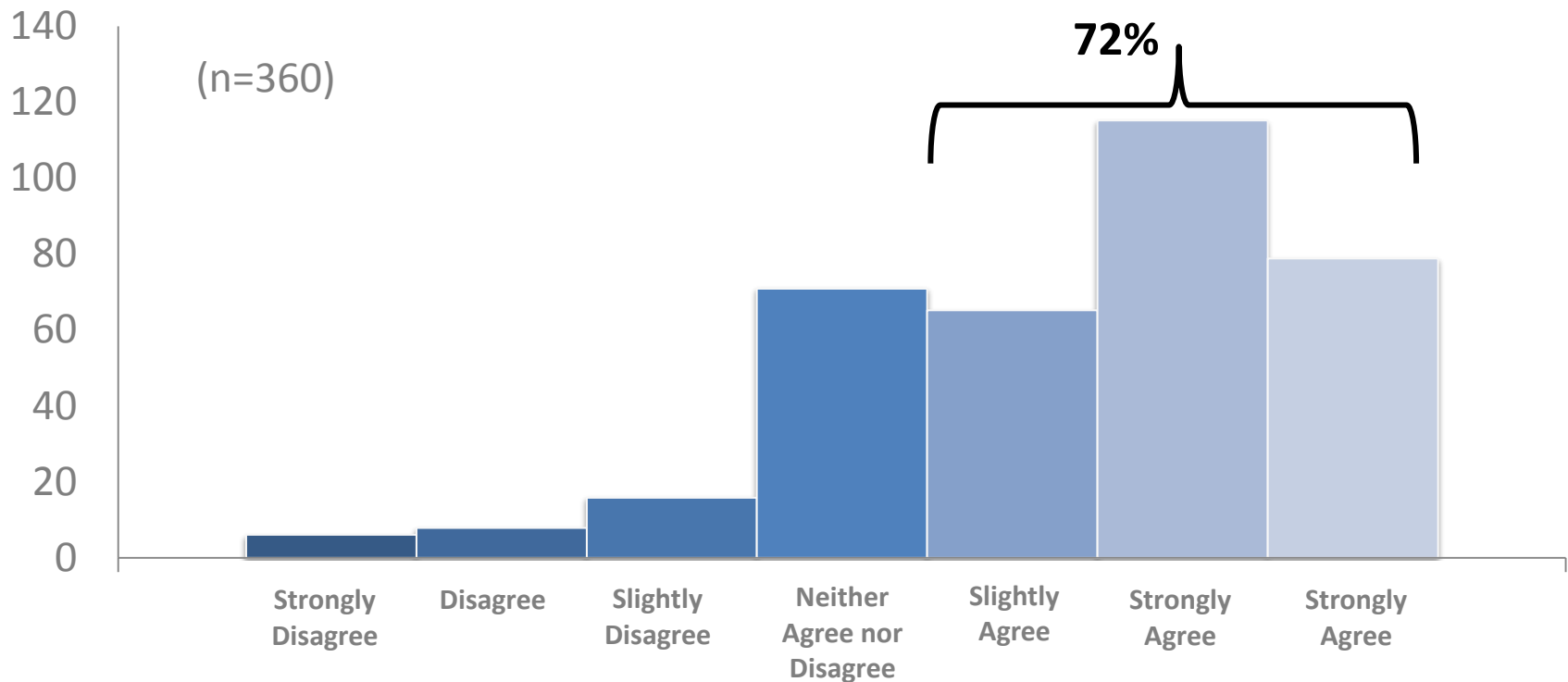
Online player survey...



SELF-EXCLUSION IS INEFFECTIVE SINCE PLAYERS CAN SIMPLY CHOOSE TO PLAY AT ANOTHER SITE

The Need for Multi-Operator Self-Exclusion

Online player survey...



FOR SELF-EXCLUSION TO WORK ALL SITES NEED TO CO-OPERATE TO HAVE AN INDUSTRY-WIDE SELF-EXCLUSION SYSTEM

Emerging Thoughts

Reasons for Internet Self-Exclusion

Reason	% Participants
As a preventative measure	62.9
Lost too much money internet gambling	51.7
Spent too much time internet gambling	35.5
Loss of control	30.1
Annoyance with win2day	26.3
Family problems	14.7
In debt because of internet gambling	12.4

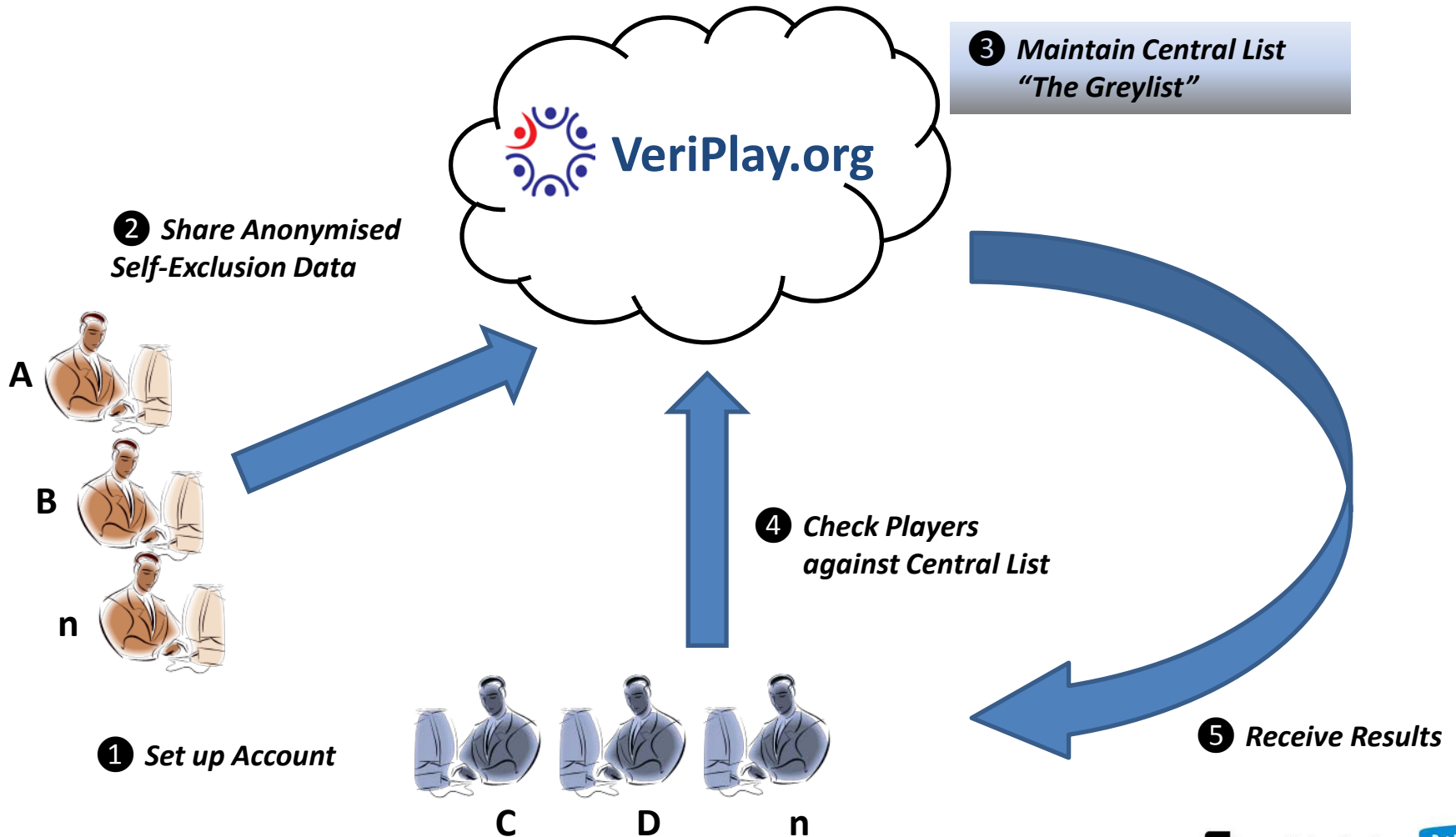
Source: Hayer and Meyer (2010) *Internet Self-Exclusion: Characteristics of Self-Excluded Gamblers and Preliminary Evidence for its Effectiveness*



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Case Study - VeriPlay



Emerging Thoughts

Industry feedback

Key Challenges

- Technical Integration
- System Development and Maintenance Cost
- Data Privacy
- Service Abuse
- Driving Customers to Unregulated Operators
- Reasons for Self-Excluding
- Independent Service Management



Emerging Thoughts

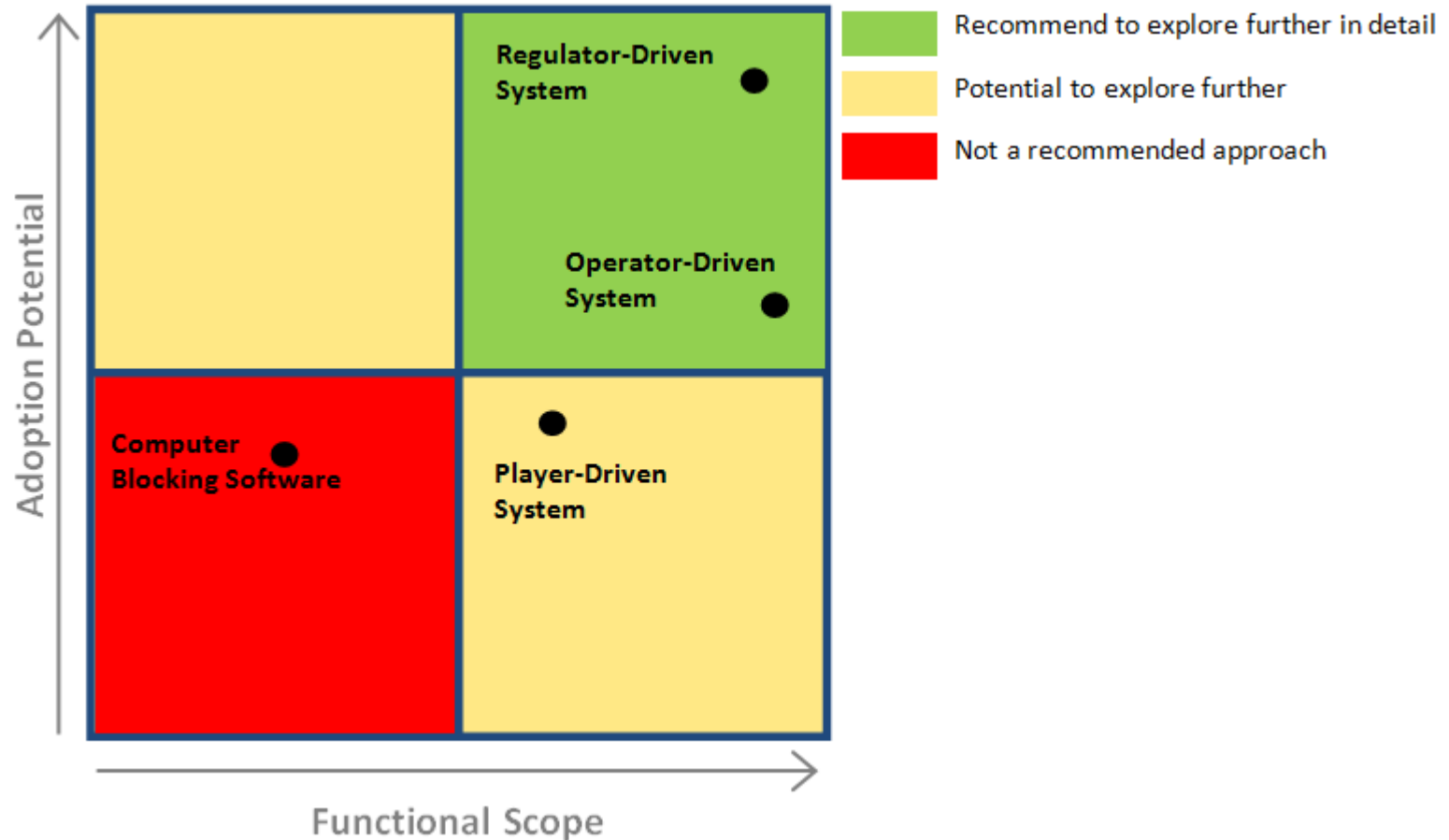
Industry feedback

Possible Solutions

- **Commonly available data sets, Agree on APIs**
- **Shift in technology cost, Leverage technology 'mega trends'**
- **Leverage data anonymisation methods to protect player details**
- **Brand and Reputation, Leverage industry approaches e.g. ESSA**
- **Nature of the Internet is difficult to regulate, however seek broad commitment from regulated operators**
- **Could be regulator or industry-driven**

Emerging thoughts

Solution Evaluation



Source: GamCare and University of Salford KTP and Bet Buddy

Summary

- **Current RG tools and features in Internet gambling commoditised**
- **Research needed to better understand online self-exclusion**
- **Need/desire for multi-operator self-exclusion exists**
- **Several challenges identified by stakeholders, in particular, data privacy**
- **Do not feel these challenges are insurmountable**
- **Regulator and Operator-Driven approaches show best potential**

Thank You

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