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Process and Impact Evaluation of the Multi-Operator Self- Exclusion Schemes

Baseline report (Evaluation Phase 1)

Ipsos MORI Public Affairs

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1 Introduction

This is the report of findings from Phase 1 of the evaluation of Multi-Operator Self-Exclusion Schemes.¹

This report is structured as follows:

- The remainder of the Introduction presents an overview of the Multi-Operator Self-Exclusion Schemes and a summary of the objectives of the evaluation.
- Chapter 2 is a stand-alone **Executive Summary**.
- Chapter 3 details **the evaluation framework** - the Theory of Change and process map which were developed at the inception stage. The Theory of Change describes the causal links through which the Multi-Operator Self-Exclusion Schemes inputs and activities are anticipated to lead to target outputs and outcomes. The process map illustrates the key processes involved in the implementation and delivery of the scheme's impacts.
- Chapter 4 gives a more detailed account of the **objectives of the evaluation and an overview of the methodological approach**.
- Chapters 5-7 present the **key findings** under the headings of **planning, implementation and delivery**. Each of these chapters will:
 - Revisit the context in which the current schemes are operating² (as identified in the scoping interviews with providers);
 - Present the findings and whether outcomes are being achieved; and
 - Provide recommendations to support the desired outcomes.

Overview of Multi-Operator Self-Exclusion Schemes

Since April 2016, the Gambling Commission has required all non-remote operators³ in the land-based arcade, betting, bingo and casino sectors to participate in **multi-operator self-exclusion schemes**, in addition to offering their own single-operator schemes. The multi-operator schemes were developed and managed to allow

¹ As the evaluation will be largely limited by the availability of usable sample of problem gamblers and Multiple-Operator Self-Exclusion Scheme users, the evaluation programme has been divided into two phases – the first of which primarily focuses on the scoping phase where we will determine the availability of this sample and its potential use (for example if longitudinal research will be a possibility). The commissioning of the second phase is subject to the findings of this first phase.

² Please note fieldwork took place January – December 2019 (pre COVID-19 pandemic and UK lockdown)

³ Land based operators with physical premises, excluding online

customers to exclude from multiple operators from that sector with a single request. The current schemes include:

- **Self-Enrolment National Self-Exclusion (SENSE)** which allows people who believe they have a problem with their gambling to voluntarily enrol in a scheme to exclude themselves nationally from all land-based **casinos** in Great Britain.
- **The Bingo Industry Self-Exclusion Scheme** enables people to request exclusion from all land-based licensed **bingo** premises across Great Britain via the Bingo Association;
- **The Multi Operator Self Exclusion Scheme (MOSES)** for Betting Shops, run by a subsidiary of the Senet Group, allows people to self-exclude from **betting** shops centrally with more than one operator by contacting a call-centre;
- **Bacta and Smart Exclusion (IHL)** are two separate multi-operator self-exclusion schemes for the **arcades** sector which work collaboratively to provide a single scheme for consumers who gamble in this sector, and;
- **GAMSTOP**, a service which allows users to self-exclude from **online** gambling.

It should be noted that in March 2020, responsibility for SENSE was transferred to the Betting and Gaming Council (BGC). Although the BGC is the single industry association for betting and gaming, representing betting shops, online gaming businesses and casinos, MOSES and GAMSTOP remain independent schemes

If a gambler thinks that they are spending too much time or money gambling – whether online or in gambling premises – and wish to be supported in their decision to stop, they can opt-in to one of these Multi Operator Self-Exclusion Schemes and ask to self-exclude from multiple operators across a sector. The consumer enters a voluntary agreement that commits them to abstain from gambling and the operators to take all reasonable steps to prevent them from gambling with them for a period of time. The minimum self-exclusion period is six months.

According to recent research undertaken by the Gambling Commission,⁴ 5% of gamblers have self-excluded and a further 42% of gamblers are aware of the scheme facility but have not self-excluded. Men and those aged 25-34 are most likely to self-exclude. The most common reason gamblers give for having entered into a self-exclusion is to help the individual control the amount they were gambling overall (50%), followed by wanting help to control spending with a particular gambling company (41%).

⁴ Gambling Commission, Gambling participation in 2019: behaviour, awareness and attitudes. Annual report (Feb 2020)

Objectives of the evaluation

The key aim of the evaluation is to explore how far Multiple-Operator Self-Exclusion Schemes have led to the desired changes in levels of awareness and to explore perceptions and delivery arrangements of the schemes. It also aims to highlight any unanticipated barriers to the achievement of the self-exclusion objectives that might form the focus of future policy improvements. For completeness, the objectives outlined below are for the full evaluation programme (including Phase 2).

Whilst many of the objectives related to understanding and improving the efficiency of the Multi-Operator Self-Exclusion Schemes can be answered in Phase 1, this phase is predominantly a formative evaluation which is not expected to provide an empirical assessment of impacts. The latter will be achieved from the completion of Phase 2 of the evaluation, where we hope to build in longitudinal insight from multi-operator self-excluders and quantitative results from engaging with a larger sample of scheme users.

Objectives have been grouped by audience, and for clarity, the objectives which relate to Phase 1 have been labelled as such '(1)' and those which will be partially achieved from this initial stage and fully achieved through the completion of Phase 2, have been labelled '(1/2)' below.

Gamblers experiencing harms and users of self-exclusion schemes/Multi-Operator Self-Exclusion Schemes

- Determine levels of awareness and perceptions around the schemes (1);⁵
- Assess the accessibility of the schemes and identify barriers that may prevent someone from self-excluding (1);
- Assess the effectiveness of self-exclusion generally and Multiple-Operator Self-Exclusion Schemes specifically as a harm minimisation tool (1/2);⁶
- Identify whether self-excluding prompts further harm minimisation actions addressing gambling behaviours, and vice-versa (1/2); and
- Identify possible improvements to each of the five schemes (1).

Operators and frontline staff within each sector

- Assess the effectiveness of the staff training (1);
- Assess the effectiveness of communication activities and marketing material to inform gamblers of the Multi-Operator Self-Exclusion Schemes (1);
- Establish whether staff are supported by appropriate self-exclusion identification systems (1); and

⁵ '(1)' - indicates that we would expect to achieve this objective during Phase 1 of the evaluation.

⁶ '(1/2)' – indicates that we would expect to partially achieve this objective during Phase 1 using indicative findings and fully at Phase 2

- Ascertain the level and extent of monitoring information collected which supports staff in registering gamblers displaying harmful behaviour and/or identify those who attempt to breach their self-exclusion period (1).

Multi-Operator Self-Exclusion Scheme owners by sector / Gambling Commission

- Determine the effectiveness of current communication methods between Multiple-Operator Self-Exclusion Schemes providers and operators (1);
- Identify any barriers to completing a registration with gamblers who make contact with Multi-Operator Self Exclusion Schemes (1);
- Assess uptake of offer of treatments or formal support for self-excluded gamblers (1/2); and
- Determine the feasibility of contact sample from those who have chosen to self-exclude (1).

2 Executive Summary

Introduction

This executive summary encapsulates the findings from Phase 1 of the evaluation of Multi-Operator Self-Exclusion Schemes.

The key aim of the evaluation is to explore how far Multiple-Operator Self-Exclusion Schemes have led to the desired changes in levels of awareness and to explore perceptions and delivery arrangements of the schemes. It also aims to highlight any unanticipated barriers to the achievement of the self-exclusion objectives, so that these might form the focus of future policy improvements.

The evaluation is phased to be delivered in two parts. The first phase is focussed on understanding and improving the efficiency of the Multi-Operator Self-Exclusion Schemes and providing a limited assessment of the impact of the schemes on individuals. This predominantly formative assessment will inform a longer-term goal (as part of Phase 2) to assess scheme effectiveness in securing anticipated impacts: in modifying harmful gambling behaviours and reducing problem gambling-related harms. From a practical perspective, Phase 1 will also provide insight on the methodological approach to achieving Phase 2.

Overview of the Multi-Operator Self-Exclusion Schemes under evaluation

A summary of the schemes is detailed in table 2.1 below, however the primary differences between schemes, which have relevance for the findings, are:

- Contextual: whether an individual is required to register to gamble in that sector as part of a formal membership scheme (in most Bingo only venues and casinos); and
- Reach: some Multi-Operator Self-Exclusion Schemes have national, and some have only regional or local coverage.

Table 2.1: A summary of Multi-Operator Self-Exclusion Schemes

Sector	Bingo membership	Casino Membership	Online	Bingo High Street	Arcades	Betting
Scheme provider	Retail Bingo Association	National Casino Forum*	GAMSTOP*	Smart Exclusion	Bacta	Senet Group*
Names of scheme	Bingo Industry Self-Exclusion Scheme	SENSE	GAMSTOP	Smart Exclusion	Bacta	MOSES
Exclusion coverage	National Great Britain	National Great Britain	National*	1000 meters	1000 meters	specific shops identified
Length of exclusion period available	12 months	6 months	6 months, 12 months or 5 years	12 months	6 months 12 months	12 months

The findings in this report are based upon primary evidence gathered from the following sources:

- The scheme providers representing Bacta and Smart Exclusion, the Bingo Industry Self-Exclusion scheme, GAMSTOP, MOSES and SENSE;
- Compliance officers and frontline staff representing the arcade, bingo, online, betting shop and casino sectors;
- The general public, including gamblers who are not signed up to a Multiple-Operator Self-Exclusion Scheme; and
- Users of the Multiple-Operator Self-Exclusion Schemes.

Considerations

At the time of fieldwork:

- The provision of GAMSTOP (the online Multi-Operator Scheme) was not a licensing condition for operators;
- The Betting & Gaming Council, which is the new trade body for the casino, online and betting sectors, had yet to be established; and
- There was no evidence of the Coronavirus in the UK. Lockdown in the UK commenced 23 March 2020 - fieldwork took place January – December 2019.

The work undertaken to consult with compliance officers, frontline staff and multi-operator self-exclusion scheme users was qualitative in nature. This means that a relatively small sample of these populations was consulted and as such their results are indicative of what we may have found had we interviewed a larger sample, but they cannot be extrapolated to represent the whole population.

Overview of findings

What is working well:

- Identification of individuals who try to breach their self-exclusion agreement works well when an individual is required to provide membership details before they can gamble.
- The Multi-Operator Self-Exclusion Scheme promotional materials for consumers are clear and easy to understand. There is a need, however, for improved visibility (see point below re the need for stronger promotion).
- The sign-up process to Multi-Operator Self-Exclusion Schemes is generally considered straight forward.
- Whilst the long-term impact of the Multiple-Operator Self-Exclusion Schemes is yet to be evaluated, there is an indication that at least in the short-term the schemes are proving effective for scheme users either by modifying their behaviour or (at the point of interview) having completely stopped them from gambling in the sector.

Areas for improvement:

- Identification of individuals who try to breach their self-exclusion agreement in non-membership premises requires further development.
- Staff training appears to be inconsistent. Weaknesses include:
 - Training coverage – staff churn and part-time staff make dissemination of information challenging.
 - Staff confidence – to approach a gambler who is displaying harmful gambling behaviour or to challenge an individual who is in breach of their exclusion agreement.
 - Not all staff are trained to register an individual to their sector specific Multi-Operator Self-Exclusion Scheme.
 - There was evidence that on occasion, frontline staff actively advise against Multi-Operator Self-Exclusion as they deem it to be an uncompromising option for an individual.
- There is a need for stronger promotion of the schemes. Generally, there is low public awareness. Scheme users generally became aware of the Multi-Operator Self-Exclusion Schemes through internet searches or recommendations from concerned friends and relatives, rather than through active promotion by the operators.
- Communication to scheme users as to how the Multi-Operator Schemes works could be strengthened. There was evidence of incorrect assumptions from scheme users about the coverage of schemes (geographic/cross sector/online vs land-based operators) and the length of the exclusion.
- There is limited cross-promotion of schemes. Operators in one sector are not taking opportunities to direct gamblers to schemes in other sectors.
- Systems to aid the identification of individuals who try to breach are limited in their effectiveness – either because these rely on members of staff remembering faces, or because the quality of digital facial recognition software is not particularly sophisticated.

Key findings

The Multiple-Operator Self-Exclusion Schemes Operating Models

Each gambling sector is at different stages of development of their Multiple-Operator Self-Exclusion Scheme. Whilst there is motivation from the scheme providers to develop robust schemes, a membership operating model i.e. where an individual requires an ID card or login details to gamble, has two distinct advantages: the ability to assess and understand the gambling behaviour of individuals through customer data analytics; and the ability to identify those who are attempting to breach their self-exclusions via unique ID verification.

Non-membership venues are reliant on staff identifying customers through photographs which requires regular updates, a good memory and/or knowing your customers in order to prevent breaches. Facial recognition software can support customer recognition, but some operators believed that it had greater levels

of success if the venue has a single easy to manage access point. A challenge to the betting shop and arcade sectors is whether account based play could be incorporated into their operations.

At the time of fieldwork, GAMSTOP was still an embryonic scheme which was yet to be made a licensing condition for operators⁷, but early evidence would suggest that it is working well.

Effectiveness of training for frontline staff

There is clear evidence that scheme providers are cascading policies, procedures and staff training to compliance officers to disseminate to operating staff. Frontline staff engaged with this evaluation were aware of their obligations in relation to Multiple-Operator Self-Exclusion Schemes, but there was concern from compliance officers and frontline staff that staff churn and a relatively high proportion of part-time staff made dissemination of information a challenge.

Evidence from scheme users and feedback from frontline staff also suggest there is a need for improved training in relation to customer interactions. This is two-fold, firstly identifying when a customer is showing signs of stress⁸ and secondly in challenging an individual who they suspect of breaching their self-exclusion 'contract'.

It is recommended that operators develop concise and practical material that staff can easily access when facing a situation where they think customers may benefit from customer interaction. Such guidance material should provide clear steps for staff to abide by if deciding to approach the customer and signpost them to support and advice including Multiple-Operator Self-Exclusion, and a summary of the key terms and conditions of the scheme.

Electronic means of training, such as podcasts and distribution of digital content, should be recommended as a potential means to increase reach to more staff and reduce the need for group events and multiple site visits by operator compliance officers. There was also a desire from operator staff to be exposed to more training videos of interactions between customers and staff at the point where that individual should be approached because they are self-excluded and attempting to breach this self-exclusion.

Awareness and promotion of Multiple-Operator Self-Exclusion Schemes

Generally, there is low public awareness of Multi Operator Self-Exclusion Schemes, including amongst 'at risk'⁹ gamblers. Many scheme users became aware because they sought out information on self-exclusion themselves or heard about a scheme through someone they knew (who had also actively sought the information), usually as a first port of call to stop their gambling after a catalytic moment or event (e.g. a big loss).

⁷ GAMSTOP was launched in April 2018 and will be required by operators from April 2020

⁸ This is prior to an individual making themselves known to staff that they would like to self-exclude.

⁹ At risk is defined as per an individual's PGSI score - either low risk, moderate risk or problem gambler

While Multi Operator Self-Exclusion materials were seen to be clear and effective in explaining what the schemes entail, many gamblers felt that the promotional materials were not made sufficiently visible to those who may need this information.¹⁰ A review by operator compliance officers of the way in which the scheme is promoted on premises would be welcome to ensure visibility and consistency. Consistent branding of Multi-Operator Self-Exclusion Schemes should also be explored – as a minimum, this could be a shared slogan.

One cross-sector Multiple-Operator Self-Exclusion Scheme?

The volume of users and whether a scheme is membership based or not has an impact on operators' ability to identify those who self-excluded and are attempting to breach. There is a desire from many scheme users for an all-encompassing cross sector scheme. Whilst scheme providers suggest that promoting the remote operator scheme for their sector may be practical, it would be impractical to administer as there are over 1 million incidences of self-exclusion online. This would be impossible to monitor in venues with current photo recognition processes and limited facial recognition software.¹¹

Improved cross-promotion of schemes is something that would be straightforward to deliver in the short-term which scheme users would welcome. Some scheme users interviewed in this evaluation believed that they should be made aware of other Multi-Operator Self-Exclusion Schemes in other sectors when registering for a specific sector, including online (if registering on a non-remote scheme) or vice versa.

Barriers to Multiple-Operator Self-Exclusion Schemes which have been identified

When it comes to registration there is a need for immediacy – otherwise that individual may change their mind to the detriment of their well-being. Barriers to an individual being able to register immediately include:

- **Having a hierarchical internal process for registration.** In some sectors, there is a need for an individual to register for a Multiple-Operator Self-Exclusion Scheme with a manager and that person of seniority is not always available on the premises¹²
- **Not being able to register on-site** – this is specifically in relation to MOSES where you can only register via a contact centre for the Multi-Operator Self-Exclusion Scheme.
- **Not being able to register with other sectors' Multiple-Operator Self-Exclusion Schemes at one location**
- In the case of MOSES, **having to list the individual addresses and postcodes of the venues from which to self-exclude** – there was a desire from scheme users to simplify this process by specifying a radius. Taking this recommendation further, the use of mobile technology (in the form of an app) would enable an individual to pinpoint their location and the location of betting shops within a radius and to communicate their 'bulk' request for exclusion to the scheme provider.

¹⁰ It is acknowledged, however, that effective marketing of the schemes may generate higher volumes of scheme users which are unmanageable for the operators without a significantly different approach to identification.

¹¹ Industry Statistics, Gambling Commission, (September 2018) – Please note the number of people who have self-excluded may be lower than these figures suggest because individuals may have self-excluded from more than one operator and therefore been counted more than once.

¹² Gambling Commission guidance suggests that all front line staff should be sufficiently trained to feel confident to administer the self-exclusion process

Among gamblers who have not self-excluded through a Multi Operator Self-Exclusion Scheme, the perceived barriers included:

- A lack of perception that they were experiencing some level of gambling-related harm, despite some gamblers citing risky gambling behaviours;
- A perception generally that self-exclusion does not work, either because of a lack of confidence in premises' or websites' ability to prevent breaching, or because it is not sufficiently broad to prevent harmful gambling behaviour beyond the exclusion areas or in different sectors.
- A perception that it is not realistic to expect frontline staff to enforce self-exclusion effectively. Some also doubted staff motivation and talked about the incentives that they have to allow those harmed by gambling to gamble uninterrupted.
- That the length of the exclusion period might put people off signing up. However, others conversely, felt exclusions were not long enough.

Perceptions of the effectiveness of Multiple-Operator Self-Exclusion Scheme

The evidence suggests that some gamblers demonstrating harmful behaviour do utilise self-exclusion as a tool to reduce or control their gambling. In our qualitative interviews with scheme users we found that self-exclusion tended to be the first harm-minimisation tool sought out – often where the scheme user enquired about banning themselves from a specific venue or sector.

Whilst the long-term impact of the Multiple-Operator Self-Exclusion Schemes is yet to be evaluated, there is an indication that at least in the short-term, the schemes are proving effective for scheme users either by modifying their behaviour or (at the point of interview) stopping them gambling completely. The reasons why the schemes were considered effective varied:

- **Faith in the system** – some individuals simply assumed that if they did attempt to breach, they would be caught.
- **They were psychologically able to draw a line under their behaviour** - making the decision to self-exclude made some individuals less likely to want to try to gamble.
- **Making gambling less convenient** - even if sector schemes were breached, it was found that all schemes have some degree of effectiveness as it requires more effort from the individual to gamble¹³. By virtue of this they then spend less time and money gambling than if not self-excluded.
- **Being caught when attempting to breach** - Those who self-excluded from within the membership sector (bingo and casinos) were more likely than those in other land based schemes to have been stopped when entering the premises, as the individual is required to either show membership or an ID at entry point, which immediately flags their identity to staff.

There were however examples among scheme users of those who had continued gambling. Those who did continue gambling tended to do so by going to venues outside their self-exclusion zone (i.e. with MOSES or

¹³ For example, they would have to travel further distances or have their gambling cut-short if they were caught breaching.

Bacta). Few would gamble in a different sector from which they were self-excluded, although there were some instances where an individual would start or increase their online gambling. Some of these individuals would then later self-exclude through GAMSTOP after noticing they were transferring their problem gambling to online. It is also worth noting that some individuals registered with GAMSTOP after registering with one of the land-based schemes simply as a safety net even if they had rarely gambled online. This evidence adds to the discussion on whether an automatic self-exclusion from online gambling should be considered when registering through a land-based scheme.

There is **desire among scheme users for self-exclusion periods to be longer**. In some cases, scheme users said they would have preferred an indefinite self-exclusion period. This does present a challenge for non-remote scheme providers as a scheme-user's appearance can change and it can make it more challenging to identify a breach. Longer self-exclusions would also mean greater volumes of self-excluders for staff to memorise and identify. The varying time-lengths for each of the schemes also created some confusion, with a few scheme users who were registered to more than one scheme not recalling which scheme ends at which point. Some users reported they did not want to visit a gambling premises to obtain these details out of fear or anxiety. More consistency on providing scheme users with details about their self-exclusion should be considered including allowing users to access this information digitally so there is no need for them to visit a gambling premises to obtain this information.¹⁴

Supporting harm minimisation tools

The effective implementation of Multiple-Operator Self-Exclusion Schemes is expected to lead to gamblers experiencing harms registering to such a scheme. In doing so, we would also expect self-excluded gamblers to be referred to treatment providers or other harm-minimisation services.

In our interviews with scheme users we found treatment services (e.g. GAMCARE and Gamblers Anonymous) to be the primary services to have been signposted when individuals were registering for self-exclusion. This was most often mentioned by GAMSTOP scheme users while it was also mentioned, though less frequently, by MOSES and Bacta scheme users.

Our survey with the general public also showed that some online gambling self-excluders have used additional blocking software as a tool, although this was not said to be directly as a result of the GAMSTOP registration process.

Gaps in evidence to be addressed

There are gaps in evidence which have been identified during Phase 1 of the evaluation. These areas for further investigation have been identified below and will be incorporated into the design of Phase 2.

¹⁴ it would also be advisable to review the performance of GAMSTOP's new consumer account functionality once it has bedded in, as this allows an individual to check the status of their exclusion and to extend it.

- Guidance from the Gambling Commission states that Multi-Operator Self-Exclusion should be one of a suite of harm minimisation tools offered to an individual who is displaying harmful gambling behaviour. We would therefore have expected greater evidence of scheme users also trialling other methods of harm reduction, but this was not the case. What is unclear is whether this is due to a lack of knowledge or confidence on the part of operator staff to suggest these additional measures, or whether it is a wish of the individual requesting to sign up to the scheme. There is also evidence to be collected around whether Multi-Operator Schemes are more effective if they are supported by additional harm minimisation strategies.
- To understand the potential scope of using play data, relevant only to account based play, to better understand the gambling behaviour of individuals, so those who are displaying harmful behaviour, for example based on unusual patterns of play may be identified quickly and signposted to help.
- The identification of ongoing data collection and monitoring activities which will support scheme improvements through the sharing of best practice at a sector level, among sectors and with the Gambling Commission.

3 Overview of Multiple-Operator Self-Exclusion Schemes

This section presents an overview of the Multiple-Operator Self-Exclusion Scheme. In the first instance, a theory of change is presented which is applicable to all gambling sectors. It shows our understanding of the inputs, activities, outputs and outcomes that Multi-Operator Self-Exclusion Schemes hope to generate. Next, we present the process map – also applicable to all gambling sectors – underpinning the activities depicted in the theory of change.

Multi-Operator Self-Exclusion Scheme Theory of Change

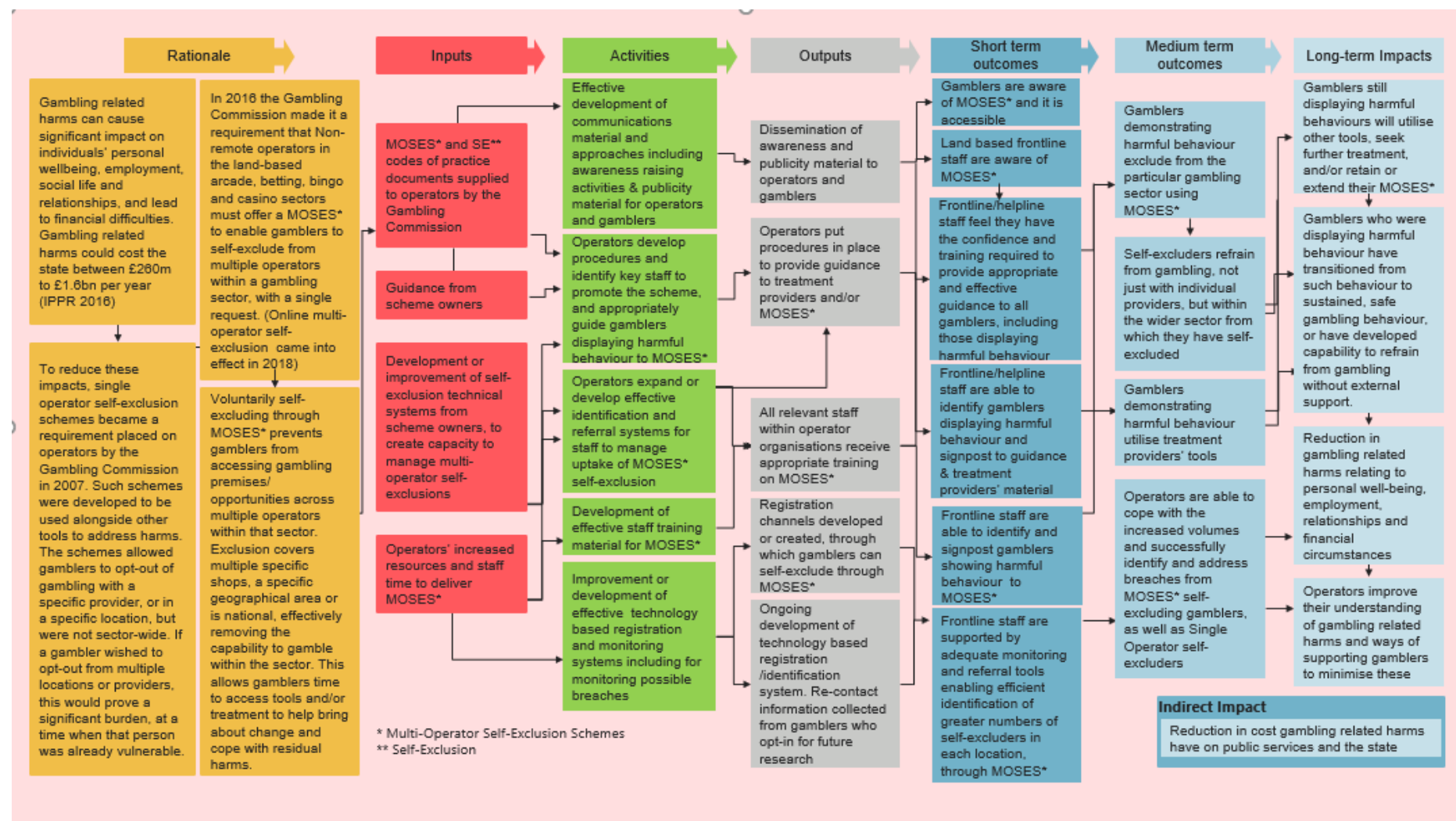
The overarching objective of self-exclusion schemes is to allow gamblers currently experiencing gambling-related harm to stop their gambling activities and to re-gain control over their gambling habits. This may happen either through the sole act of self-exclusion; or by consolidating this action using additional blocking tools such as software or payment blocking and/or receiving gambling related treatments. As such, self-exclusion aims to be an effective harm-minimisation tool for individuals who have recognised that they have a problem with their gambling and have made a commitment to deal with it. The Multi-Operator Self-Exclusion Scheme model allows individuals to self-exclude from a number of operators they would like to be refused service by through a single registration process.

Ipsos MORI developed a theory of change of the Multi-Operator Self-Exclusion Schemes based on the information gathered through the familiarisation interviews, focus groups and documents review. This describes the causal links through which the Multi-Operator Self-Exclusion Schemes inputs and activities are anticipated to lead to target outputs, outcomes and impacts. Note that one theory of change applicable to all gambling sectors has been developed as it is assumed that the rationale for the Multi-Operator Self-Exclusion Schemes and the gambling related harms the schemes hope to minimise are similar across gambling sectors. Whilst the application and development of Multi-Operator Self-Exclusion Schemes varies across the different gambling sectors, the intended outcomes are the same.

The theory of change presented in Figure 3.1 shows our understanding of the causal mechanisms (explained below the figure), common to all gambling sectors, that are hoped to bring about the desired change amongst those harmed by gambling. The theory of change depicts the key desired short, medium and longer-term outcomes across operators, frontline staff and those experiencing gambling related harm, and the anticipated causal pathways to these resulting from activities and inputs brought about by MOSES.

It should be noted that this theory of change was reviewed at several points in the evaluation process by the six scheme providers, and given that it is a working model, we would expect it to be revisited and expanded as required to ensure relevance as the evaluation progresses during Phase 2.

Figure 3.1: Theory of change for Multi-Operator Self-Exclusion Schemes



Source: Ipsos MORI

Causal Mechanisms

Figure 3.2 outlines the steps which will be measured between the rationale for Multi-Operator Self-Exclusion Schemes and its impact. Below we highlight how the planned activities are expected to lead to the intended outcomes and impacts:

- By having a comprehensive set of policies, procedures and staff training in place, operators' frontline staff will be aware of their obligations in relation to Multi-Operator Self-Exclusion Schemes and suitably trained and confident to deliver on these.
- A communications strategy, including publicity material, will also help raise frontline staff's awareness of Multi-Operator Self-Exclusion Schemes, further contributing to enhanced confidence to provide appropriate and effective support to gamblers experiencing harm from their gambling. Furthermore, staff will be able to signpost those harmed by gambling to Multi-Operator Self-Exclusion Schemes.
- Making gamblers aware of Multi-Operator Self-Exclusion Schemes and the wider support available to them via the communications strategy and signposting from staff, will make gamblers more likely to take this up, leading to their decision to self-exclude across multiple operators in a particular gambling sector.
- During the self-exclusion phase, it is hoped that Multi-Operator Self-Exclusion Schemes will facilitate gamblers to refrain from gambling activity in the sector from which they have self-excluded. They may also utilise other treatment provider tools in conjunction with this period. Abstinence, supported by self-exclusion, will enable gamblers to gain control of their gambling behaviour minimising any gambling related harms, including those related to personal well-being, employment, relationships and financial circumstances.
- Investment in appropriate systems for monitoring and tracking consumer activity will enable operators to successfully identify and address breaches from self-excluded gamblers. This will enable operators to improve their understanding of gambling related harms and ways of supporting gamblers displaying harmful behaviours to minimise these.

Assumptions

There are a number of key enablers necessary for the realisation of short and medium-term outcomes, some of which are common across the gambling sectors:

- Operators will be motivated to invest in appropriate policies, systems and procedures to implement Multi-Operator Self-Exclusion Scheme effectively.

- Gamblers who are displaying harmful behaviours will respond positively to sign-posting to Multi-Operator Self Exclusion Schemes and other support and be motivated to self-exclude.
- There is relevant and accessible support available, to which those experiencing gambling related harm can be sign-posted or referred.
- It will be possible for operators within each sector to share data with their scheme owners to facilitate the successful implementation of Multi-Operator Self-Exclusion Schemes.
- Multi-Operator Self-Exclusion Schemes will significantly reduce the capability to gamble within the sector from which the user has self-excluded.

Barriers

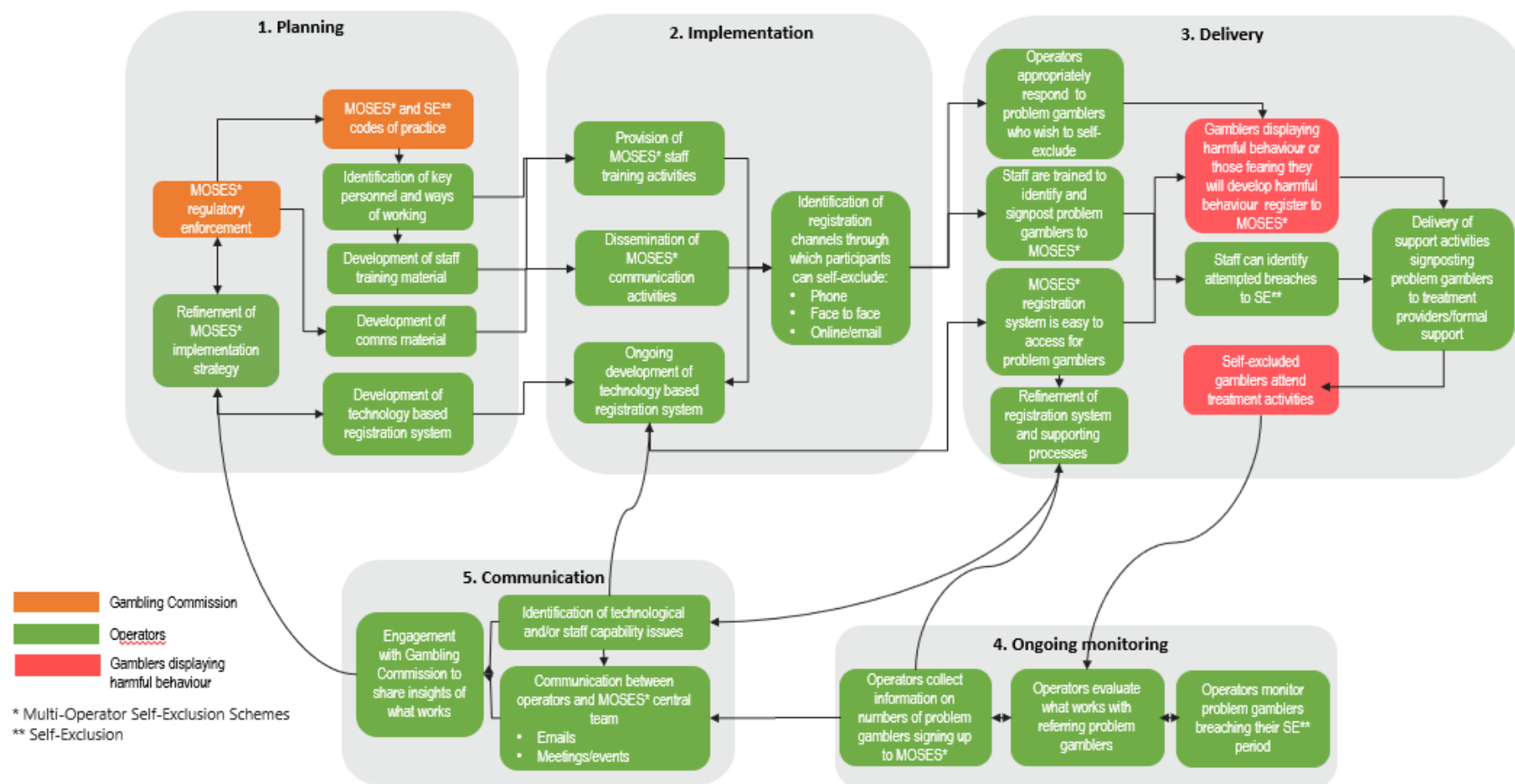
Lastly it is worth identifying some of the potential barriers to reaching the impacts highlighted in Figure 3.1 which will be explored through the evaluation. These include:

- Access to relevant training may not be engaging or accessible to operator staff.
- Lack of confidence of operator frontline staff in identifying and approaching individuals displaying problematic behaviours. This may also be a result of staff churn; more new staff would mean more people who are less experienced with identifying and approaching those displaying harmful behaviour.
- Consumers not taking up available treatment options.
- Lack of ability by operator staff and/or technology to identify those who breach or attempt to breach their self-exclusion.
- Other influences may contribute to an individual's experience with Multi-Operator Self-Exclusion Schemes (e.g. family, friends, counselling, etc).

Multi-Operator Self-Exclusion Scheme Process Map

Ipsos MORI developed a process map describing key processes involved in the implementation and delivery of the schemes. This is based on the documents review, familiarisation interviews, the frontline staff focus group and the compliance officers' workshop.

Figure 3.2: Process map for Multi-Operator Self-Exclusion Schemes



Source: Ipsos MORI

4 Objectives and methodological approach

This section expands on the outline objectives listed in the introduction and the methodological approach that has been developed to answer the questions formulated around the objectives.

Objectives of the evaluation in detail

The full range of objectives and the questions drawn from these objectives are listed below. As previously stated, for completeness, the objectives outlined below are the intended aims for the full evaluation programme (including Phase 2). The number depicted after each objective indicates whether the objective is expected to be achieved in full at Phase 1 - (1) or partially at Phase 1 - (1/2) or during Phase 2 - (2)

Gamblers experiencing harms and users of self-exclusion schemes/Multi-Operator Self-Exclusion Schemes

- Determine the level of awareness of Multi-Operator Self-Exclusion Schemes and the operators' own self-exclusion schemes (1);
- Explore perceptions around these schemes (1);
- Determine how easy or difficult gamblers and users of self-exclusion schemes and Multi-Operator Self-Exclusion Schemes found the system registration process, including channels of registration (e.g. online, telephone, face to face) and clarity of terms and conditions (1);
- Ascertain the effectiveness of self-exclusion schemes/Multi-Operator Self-Exclusion Schemes as a harm minimisation tool:
 - Are self-exclusion schemes complementing each other? (1/2);
 - Is one scheme more effective than others, and if so, what are the learnings from this? (1/2);
 - Is there a cumulative impact of being registered to more than one self-exclusion scheme? (1/2);
 - Are they promoted effectively so that those that would benefit from the schemes are aware of them as a harm minimisation tool? (1);
 - Is the registration process clear and straight forward for those signing up to the scheme? (1);
 - What barriers may prevent someone from self-excluding (1);
 - Does self-excluding prompt further harm minimisation actions to address gambling behaviours, and vice-versa. For example, accessing formal support such as treatment programmes as a result of self-exclusion, or accessing treatment and taking action to self-exclude as a result. (1/2).

- Identify possible improvements to each of the five schemes, specifically around:
 - The registration processes (1);
 - Prevention of breaches to the self-exclusion period (1);
 - Signposting of self-excluded gamblers to treatment providers (1).
- Do the schemes stop or limit gambling by effectively identifying and preventing them from doing so? (1/2).

Operators and frontline staff within each sector

- Effectiveness of the staff training activities in relation to:
 - Staff's ability to identify gamblers displaying harmful behaviour (1/2);
 - Staff's ability to effectively signpost gamblers displaying harmful behaviour to self-exclusion, informing them of the terms and conditions (1/2); and
 - Staff's ability to recognise self-excluded gamblers (1/2).
- Assess the effectiveness of Multi-Operator Self-Exclusion Schemes, self-exclusion communication activities and marketing material to inform gamblers of the schemes (1/2);
- Establish whether staff are supported by appropriate self-exclusion identification systems e.g. application of digital or analogue systems identifying and cataloguing self-excluded gamblers (1/2);
- Ascertain the level and extent of monitoring information collected that supports staff in registering gamblers displaying harmful behaviour, and/or identify those who attempt to breach their self-exclusion period (1/2).

Multi-Operator Self-Exclusion Scheme owners by sector / Gambling Commission

- Determine the effectiveness of current communication methods between Multi-Operator Self-Exclusion Scheme owners and operators, specifically in relation to:
 - The registration processes (1);
 - The communication processes between Multi-Operator Self-Exclusion Schemes owners and operators around registration, notifications and breaches (1);
 - Do operators effectively communicate progress, barriers or key enablers to Multi-Operator Self-Exclusion Schemes to central staff who are implementing Multi-Operator Self-Exclusion Schemes? (1/2);

- Do staff responsible for delivering Multi-Operator Self-Exclusion Schemes consider the feedback and suggest refinements to the Multi-Operator Self-Exclusion Schemes implementing strategy and the gambling regulatory requirements to the Gambling Commission? (2);
- Identify any barriers to completing a registration with gamblers who contact Multi-Operator Self-Exclusion Schemes (1);
- Assess uptake of offer of treatments or formal support for self-excluded gamblers (1/2); and
- To test feasibility of collecting a contact sample from those who have chosen to self-exclude (1).

Overview of the evaluation methodology

The table below summarises the methodological approach which has been undertaken to deliver this evaluation and answer the objectives listed. The primary data collection took place between January 2019 and December 2019. A technical report detailing the data collection methods, response rates and the evaluation and research tools is appended to this report.

Table 4.1: Summary of the Methodological Approach

Method	Rationale
1 x familiarisation interview with each of the 6 scheme owners across sectors 2 x follow up interviews with each scheme owner to discuss the TOC 1 x final interview with each scheme owner to plug knowledge gaps	The initial interviews were to gain a better understanding of the processes underpinning the Multi-Operator Self-Exclusion Schemes implementation. The barriers for self-exclusion, context for this evaluation and to determine the feasibility of using contact sample of self-excluders. The follow up interviews were specifically to consult with scheme providers on the content of the Theory of Change. To make subsequent adaptations following initial interviews with frontline staff and Compliance officers. The final interviews with scheme owners happened post-fieldwork and they were undertaken to address points from findings which required further clarification.
2 x familiarisation interviews with treatment providers and 2 x academics	To gain a clearer understanding of the journey gamblers experiencing harm from their gambling go through, ultimately leading them to self-exclude. These interviews also provided insight around the ethics and best ways to approach the subject with gamblers experiencing harm.
1 x extended focus group was carried out with 14 frontline staff working in gambling premises across the land-based gambling sectors	To gain a better understanding of the day-to-day working of the Multi-Operator Self-Exclusion Schemes, and perceptions from staff on the take-up, success and limitations.

1 x workshop with 19 operators' compliance officers across gambling sectors, including the remote gambling sector	To gain a better understanding of the ideas and principles guiding the implementation of Multi-Operator Self-Exclusion Schemes, including the dissemination of information and training to staff, mechanisms for signposting gamblers experiencing harm to Multi-Operator Self-Exclusion Schemes, and enablers and barriers to the consistent execution of processes supporting the Multi-Operator Self-Exclusion Schemes and satisfied customers.
Document and dataset review (GambleAware, the Gambling Commission and Adrian Parke our academic partner suggested relevant documents and datasets)	To aid the development of the conceptual framework and to provide context for this evaluation.
A telephone survey of 1,500 interviews with the general public, with a boost of gamblers ¹⁵	To gather evidence on general public and gambler awareness of self-exclusions schemes, and some top-level attitudes and perceptions. The re-contact sample was also used to recruit gamblers to take part in online focus groups.
5 x online focus groups with gamblers in each sector	To explore in further depth awareness and attitudes towards multi operator schemes amongst gamblers in each sector. This sample did not include those that had taken part in a multi-operator scheme.
42 x depth interviews with scheme users	To gather qualitative evidence from users of the five schemes on the effectiveness of the schemes, and some early evidence of impact.

¹⁵ 1,500 UK adults aged 18+. Within this, 1,000 of those interviewed were gamblers, and 500 non-gamblers. This approach was chosen to ensure that statistical sub-group analysis could be done within the gambler sample population, while still being able to assess a flavour of the wider general public perceptions at an overall level.

5 Planning activities

In planning the implementation of Multiple-Operator Self-Exclusion Schemes, operators need to develop staff training and promotional material, develop an appropriate identification system and identify internal ways of working. These developments need to be considered in relation to the regulatory system for self-exclusion as detailed in the Licence Conditions and Codes of Practice (LCCP).

Context

The single-operator self-exclusion schemes which preceded Multiple-Operator Self-Exclusion Schemes varied in their sophistication and application. Different sectors therefore had different existing capacity for self-exclusion from which to build in order to implement a Multiple-Operator Self-Exclusion Scheme.

The different sectors are at different stages of development of Multiple-Operator Self-Exclusion Schemes therefore impact may be seen comparatively sooner for some sectors. The Casino sector was the first to launch their scheme in August 2015, and all of the non-remote self-exclusion schemes were developed by April 2016. Although GAMSTOP, the online Multi-Operator Self-Exclusion Scheme, decided to begin a soft launch in April 2018, at the time of undertaking this evaluation it was not a licence condition for all operators to participate.

Development of technology-based registration and identification systems

There is a base assumption that operators will be motivated to invest in appropriate policies, systems and procedures to implement Multiple-Operator Self-Exclusion Schemes effectively and indeed the interviews with the scheme providers, and operator staff reflect this. Operators accept that it is the right thing to do, and whilst there is a cost associated with the training and an administrative burden on employees, at a human level they do not want to see their customers getting into difficulty.

Gambling sectors have different operational models which impact how easy it is to implement their Multiple-Operator Self-Exclusion Schemes. These are summarised in the table below and then described in detail.

Table 5.1: Summary of Multiple-Operator Self-Exclusion Schemes by Sector

Sector	Bingo membership	Casino membership	Online	Bingo High Street	Arcades	Betting
Scheme provider	Retail Bingo Association	National Casino Forum*	GAMSTOP*	Smart Exclusion	Bacta	Senet Group*
Names of scheme	Bingo Industry Self-Exclusion Scheme	SENSE	GAMSTOP	Smart Exclusion	Bacta / Smart Exclusion	MOSES
Exclusion coverage	National Great Britain	National Great Britain	National Great Britain	Specific geographic coverage (1,000 metres) from 2 individual venues	Specific geographic coverage (1000 mtrs). Users can request more than one exclusion zone	Specific shops identified
Length of exclusion period available	12 months	6 months	6 months, 12 months or 5 years	12 months	6 months 12 months	12 months
Registration process	Application on the premises	Application on the premises	Online application with contact centre support	Application on the premises	Application on the premises or via a contact centre	Application via a contact centre
Renewal process	Expires after 6 months if no contact made post exclusion period. Face to face meeting required to reinstate even after the expiry period. Followed by a 24 hr cool off period	Face to face return to gambling meeting required to reinstate if before this expiry period followed by a 24 hr cool off period	Expiry date of 7 years if no contact made post exclusion period. Telephone interview required to reinstate before this expiry period		Expiry date of 2 years if no contact made post exclusion period. Face to face meeting required to reinstate if before this expiry period Followed by a 24 hr cool off period	Expires after 6 months if no contact made post exclusion period. Face to face meeting required to reinstate if before this expiry period

* At the time of fieldwork the Betting & Gaming Council had yet to be formed – which is the new trade body

**limited to operators who have signed up to the scheme

Bingo

The Bingo Association delivers a Multi-Operator Self Exclusion Scheme in dedicated bingo halls where an individual has to be a member in order to play Bingo. This membership model makes it easier to assess gambling behaviour and identify self-excluders attempting to breach, however not all operators have real time technology which will allow them to cross reference details, so an individual may swipe their membership card and gain access.

The Bingo Association is in the process of moving from a paper-based registration system to a tablet-based system. This will make the process quicker and ensure greater levels of accuracy as data will not have to be entered manually and the customer has greater involvement in the registration process. This transition has posed some challenges however in that some of the bingo venues did not have wi-fi. It should be noted that at the time of the Phase 1 evaluation this roll out was not complete and therefore any impact will be assessed at Phase 2.

Some licensed bingo premises are much smaller than a traditional bingo hall and are based on the High street. Such venues do not typically have a membership system, so an individual can walk in off the street and play. The Multi-Operator Self-Exclusion Scheme for such operators is run by Smart Exclusion, and whilst the system to register is electronic, it is reliant on staff identifying customers from previously supplied photographs. This creates an additional challenge as this system requires staff to be provided with regular updates on self-excluders, know their customers and have a good memory for faces. This challenge is not limited to the bingo sector and exists for all sectors that do not require membership.

Casino

In order to sign up to SENSE, which is the casino industry Multiple-Operator Self-Exclusion Scheme, an individual must request a one-to-one meeting with a senior member of the team working within the casino. The individual is taken through the online registration process, which enables exclusion details to be cross referenced with the personal data which is currently held. An individual can request a national exclusion from all of the casinos in the country or specify venues or specific geographic coverage.

The majority of casinos operate on a membership system and so the administration and detection of individuals trying to breach their self-exclusion is straight forward. However, the larger casinos also operate a guest list which can delay the identification of an individual.

To support the identification process, some casinos operate facial recognition software, this is effective as the buildings generally have single entrances making it easier to regulate.

Online

To self-exclude online an individual can access the link to GAMSTOP through a remote operator or with GAMSTOP directly. As of April 2020, the service requires all operators, to sign up to the scheme as part of their licensing condition. Remote gambling is a technical challenge for the successful implementation of a Multiple-Operator Self-Exclusion Scheme. There are a significant number of operators using different operating systems and needing to connect with the central GAMSTOP database to get real time feedback on their customers.

This requires matching specific criteria provided by the individual with that held by GAMSTOP, so they acknowledge that the system is not full proof although enhanced verification requirements have been introduced with the intention of improving this aspect.¹⁶

“An individual can use different details - change their name for example to enable them to activate their account. It works for those who want it to work”. (GAMSTOP scheme provider)

The present scheme operation requires the provision of a number of mandatory identifiers, with the option for users to voluntarily provide further information. GAMSTOP commented that the more mandatory information which is provided by the scheme user, the easier it is to identify breaches, but there is a balance between collecting sufficient data and putting an individual off the process because it is too onerous. Once registered a person can add further personal details via a user account facility but they cannot remove any information.

Arcade

An individual can sign up to the Arcade Multiple-Operator Self-Exclusion Scheme either in a venue or via a contact telephone centre. A person wishing to exclude from multiple operators will identify the venue or location (such as their home address) and they will be excluded from any arcades which are located within a 1km radius. There is acknowledgement that self-exclusion is a very personal conversation which should be handled discreetly, but an arcade may be single manned, and finding a space in a small venue for privacy may not be possible.

Detection of individuals trying to breach the system is a challenge for staff.

“It's workable but it's not perfect”. For 99% of the operators it works well. The 1% are those dealing with a high number of self-excluders in their area, who struggle with the numbers.” (Bacta representative)

Training is also perceived to be a challenge by the operators as coastal arcades are generally manned by transient or seasonal staff.

Betting shops

In order to sign up to MOSES which is the Multiple-Operator Self-Exclusion Scheme for betting shops, an individual has to make contact with a call centre and specify the shops from which they want to be excluded. Call centre staff can advise as to which shops are in the vicinity if an individual is unfamiliar with the area, although evidence from those who have signed up to the scheme suggests that this advice is not always provided. Whilst MOSES will accommodate requests for a significant amount of shops when this is necessary, this is rare, and individuals tend to self-exclude from shops which are local to their home, work or places where they visit most often.

¹⁶ <http://www.gamblingcommission.gov.uk/news-action-and-statistics/News/new-age-and-identity-verification-rules-changes-to-the-lccp-from-tuesday-7-may>

A photograph of the individual is sent to each of the betting shops specified, but as with other non-membership schemes there was an admission that the system was not full proof. Customer identification is reliant on regular internal staff updates of latest self-excluded customers, and staff's ability to remember faces and details of customers who self-excluded. Identification of self-excluded customers is harder in those premises which are responsible for a greater number of self-exclusions. This can occur because it is a popular shop or in a central area regularly named in the parameters of a multi operator self-exclusion agreement.

"Training can be fantastic, processes can all be in place but if you have 180 faces to flick through on an iPad and remember whilst working on a busy shop floor, it's always going to be almost impossible." (Frontline staff member, betting shop)

The implementation of the General Data Protection Regulation (GDPR) affects the collection, storage and monitoring of Multi-Operator Self-Exclusion Schemes related data. Although digital storage of photographs ensures only authorised individuals have access to scheme users' images, frontline staff said that being unable to display photographs of self-excluded individuals in back-room premises was a significant barrier, and having to scroll through photographs on a tablet was not as efficient and effective.

While technology such as facial recognition is improving, not all operators are confident in its ability to recognise self-excluders who are breaching. Representatives from the arcade and bingo sectors noted that having trialled 'passport style' facial recognition software in various premises, this form of monitoring breaches was unsuited to open premises, with multiple entry points. The recognition software was not always successful. It relies on an individual stopping at the entrance and looking into the camera without face coverings, no distinct changes in their appearance or the picture being distorted by sunlight. It should be noted that it was not evidenced in the interviews with self-excluders that having such software may act as a deterrent to those trying to breach, and could potentially be explored as part of Phase 2.

Preparedness of staff

By having a comprehensive set of policies, procedures and staff training in place, operators' frontline staff will be aware of their obligations in relation to the Multi-Operator Self-Exclusion Scheme and suitably trained and confident to deliver these.

A communications strategy, including publicity material, will also help raise frontline staff's awareness of Multi-Operator Self-Exclusion Schemes and contribute to enhanced confidence to provide appropriate and effective support to individuals who display harmful gambling behaviour. Furthermore, staff will be able to signpost such gamblers to Multi-Operator Self-Exclusion Schemes.

Guidance from scheme owners

Compliance officers within the schemes were consulted as part of this evaluation as they have an overview of the policies, procedures and staff training in place for individual operators. Frontline operators were consulted to provide a user's perspective.

Frontline staff in non-remote operators generally believe that the documentation and processes have improved since Multiple-Operator Self-Exclusion Schemes were first formed. There have been improvements made in training, and better equipment has been put in place to identify breaches.

In arcades, betting shops and casinos, guidance and best practice is cascaded from compliance teams to operations managers who then inform venue staff. The Bingo Association has standardised guidance which is sent direct to all retail bingo operators. Guidance is delivered in a variety of ways:

- By email (betting shops, casinos and arcades);
- Online training (casinos and betting shops); and
- Face-to-face training (casinos, bingo and betting shops).

All of the frontline staff who took part in the evaluation exercise placed great emphasis on training to ensure the implementation of the scheme was successful. In addition to a standardised training package on interventions, there was specific mention from the Bingo association and Bacta of the need to identify when a customer is showing signs of stress and spending more than they should before they identify themselves as wanting to take up self-exclusion.

“Staff aren’t social workers or counsellors but are asked to do a lot of things associated with this so training is imperative. They need to be trained to have meaningful conversations” (Bacta compliance officer)

Within the bingo and arcade sectors it was felt that there is a better chance than most of being able to identify individuals in need of support because they are community-based activities and staff are more likely to know their customers well. A finding which was borne out when we talked with some individual scheme users from these sectors.

Membership-based sectors are also in an advantageous position as they can collect data on an individual to identify those displaying harmful behaviour. The Bingo Association has developed an app which provides insight on the frequency and time spent gambling by an individual. Casinos and online operators generate profiles of individuals demonstrating harmful behaviour through data tracking and developing algorithms based upon length of visit, frequency of visits and time spent on certain machines.

Frontline staff who took part in the evaluation were asked to consider whether there could be improvements made to the provision of guidance.

It was felt that decisions made at a strategic level within the sectors were very quickly cascaded down to the business which is then under pressure to ensure changes are being implemented at lower levels. There was mention of training conferences in city centres when changes are made, but people may miss such sessions or join just after they have taken place and so the responsibility is with the manager to plug any gaps in knowledge.

Those working in the bingo sector felt that their system works well and mentioned a constant auditing process and quick implementation of change.

Another challenge mentioned was a high staff turnover in the industry and so there was a constant need for training and development, particularly in betting shops where personnel have to visit stores to specifically train and retrain new starters to check they're up to date.

All sectors agreed that more training and guidance around the interaction with customers would be very useful,¹⁷ particularly for younger, less confident or part-time staff. There was specific mention that live video examples of interactions with customers would be useful.

Frontline staff across the arcade, betting and bingo sectors felt that more guidance was needed on the differences between operator self-exclusion and Multiple-Operator Self-Exclusion Schemes.¹⁸

Identification of key personnel and ways of working

In order to provide effective advice and guidance to gamblers experiencing harm, frontline operator staff should be able to identify customers showing signs of gambling related distress, and be in a position to take decisions on whether to recommend self-exclusion as the most appropriate harm-minimisation tool for the customer. Subsequently, this needs to be followed by staff carrying out the actual registration to a self-exclusion scheme. Operators must establish ways of working for staff to handle and signpost customers to self-exclusion registration and be clear on responsibilities to do so.

Different sectors have different approaches. Whilst all members of staff are trained to understand the Multiple-Operator Self-Exclusion Scheme process, the arcade sector has a hierarchical process where frontline staff flag customers to their superior, explaining the signs that makes them think the person may have a gambling problem, to then the superior deciding the best course of action. The frontline staff interviewed believe that one person giving a clear message works well. Other sectors such as the betting sector take a more 'everybody's business' approach, but if staff have any issues this is fed back up the lines of responsibility.

Outcomes achieved

Short-Term

A short-term outcome associated with planning activity and identified in the theory of change, is that land-based frontline staff are aware of the Multiple-Operator Self-Exclusion Scheme for their sector. There is clear evidence that scheme providers are cascading policies, procedures and staff training to compliance officers to disseminate to operating staff. The frontline staff who engaged with this evaluation were aware of their

¹⁷Gambling Commission released Customer Interaction guidance on 31st July 2019. <http://www.gamblingcommission.gov.uk/PDF/Customer-Interaction-Formal-Guidance-Non-Remote-July-2019.pdf> (after fieldwork with these stakeholders).

This guidance is for Operators to support them in the development of their customers interaction policies and procedures

¹⁸ Whilst staff did not specify who should provide such clarity, this should be the operators responsibility as they are responsible for their own self-exclusion schemes and how they integrate with the multi-operator one.

obligations in relation to Multiple-Operator Self-Exclusion Schemes, but there was concern that staff churn made dissemination of information a challenge.

Medium-Term

A medium-term outcome is that operators are able to cope with the increased volumes of excluders and successfully identify and address breaches from Multi-Operator Self-Exclusion Schemes. In order to assess this outcome, it will be necessary to witness an increase in volumes and to review breaching data alongside more qualitative or quantitative research with scheme providers and operators.

Long-Term

Operators improve their understanding of gambling related harms and ways of supporting gamblers to minimise these. This insight will be addressed at Phase 2 when sufficient time has elapsed to allow scheme providers to have undertaken more sophisticated analysis of their membership data.

Recommendations to support desired outcomes

Given the inherent challenges of identification of scheme users breaching their contracts in non-membership based venues, it would be prudent to assess whether account based play could be feasible across all gambling sectors.

The identification of key personnel and defined ways of working needs to be supported by clear guidance material for staff to refer to when facing a situation where they think they might have identified customers experiencing some level of gambling related harm.

The challenge of staff churn means operators must develop concise and practical material that staff can easily access when facing a situation where they think customers may benefit from self-exclusion or other harm minimisation tools or advice. Such guidance material must provide clear steps for staff to follow, and a summary of Multi-Operator Self-Exclusion Schemes key terms and conditions, if deciding to approach the customer to signpost them to Multi-Operator Self-Exclusion Schemes.

An audit of internal training and communication material across the sectors may prove beneficial to identify best practice examples.

Electronic means of communication is the most practical way in which to reach out to part-time staff and negate the need for multiple on-site visits to address new members of staff. Compulsory online orientation sessions and training may be accessed via smartphones¹⁹ and downloadable podcasts from the Gambling Commission as an alternative to attendance at group events.

¹⁹ 79% of UK adults aged 15+ years own a smartphone : Source Ipsos MORI Tech Tracker QTR 3 2019

6 Implementation activities

Multi-Operator Self-Exclusion implementation activities pertain to the actual administration of the schemes by each operator. It relates to the provision of staff training, dissemination of promotional activities and the identification of channels through which gamblers experiencing harm can self-exclude.

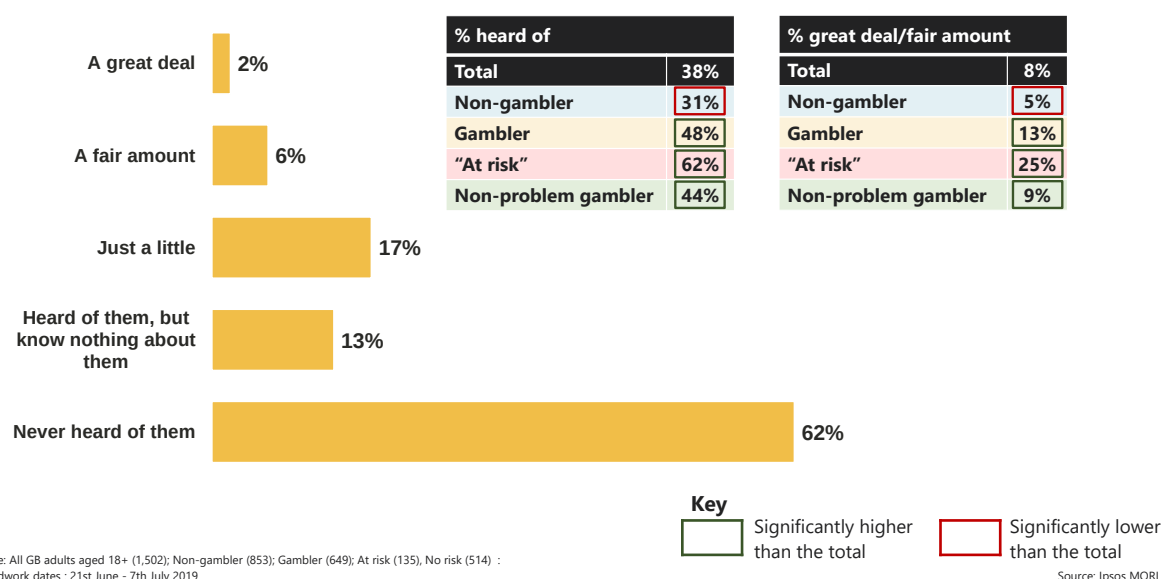
Awareness of self-exclusion schemes and Multi Operator Self-Exclusion Schemes

Public awareness of self-exclusion

- In our quantitative survey of the general public²⁰ we asked participants how much, if anything, they know about self-exclusion schemes within the gambling industry. While around two in five (38%) individuals have heard of self-exclusion, a much smaller proportion know “a great deal” or “a fair amount” about them (8%). Awareness rises to nearly half amongst those who gamble²¹ (48%) and 13% of this audience know “a great deal” or “a fair amount” about self-exclusion schemes.

Figure 6.1: **General public awareness of self-exclusion schemes**

Q6. Before this interview, how much, if anything, would you say you know about self-exclusion schemes within the gambling industry?



It is positive to note that those who are “at risk” - low risk gamblers (score of 1-2), moderate risk gamblers (score of 3-7), or problem gamblers (score of 8-27), as defined by their PGSI score,²² are significantly more likely than average to have heard of self-exclusion (62% vs. 38% overall).

²⁰ Ipsos MORI Telephone Survey: UK adults aged 18+, base: 1,500 (1000 Gamblers and 500 Non-Gamblers), fieldwork conducted 21 June – 07 July 2019

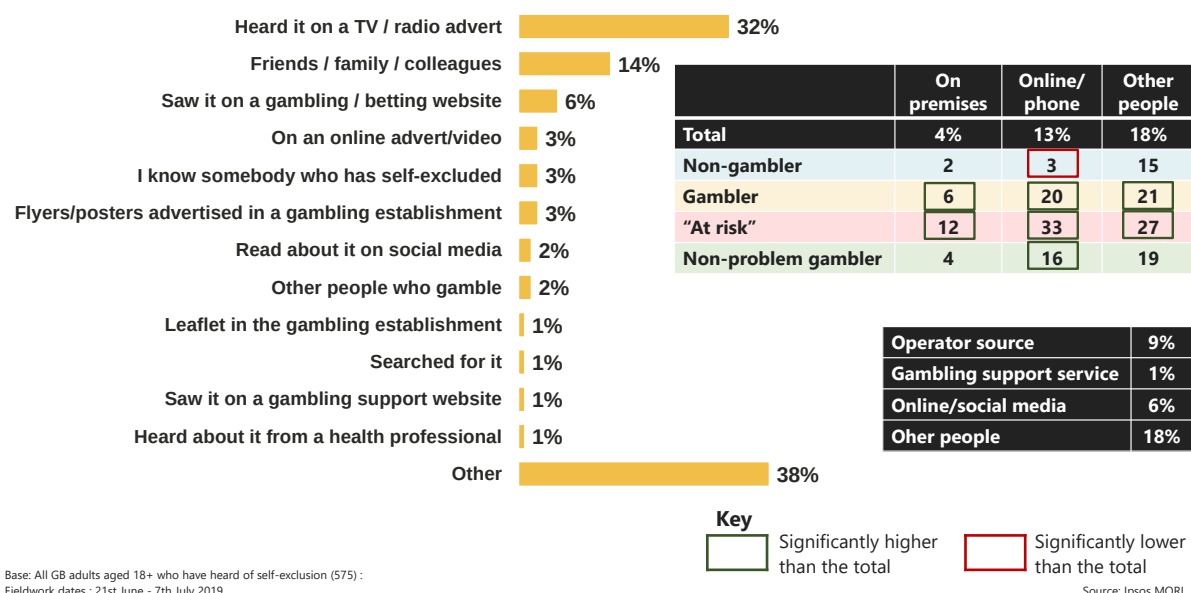
²¹ Defined as those who have taken part in at least one gambling activity in the past 12 months, excluding National Lottery or Scratch cards *only*

²² Problem Gambling Severity Index, UK, Ferris, J, and Wynne, H. (2001).

- Within the gambling population, males are more likely than females to have heard of self-exclusion (56% of male gamblers vs. 39% of females), males are more likely to be classified as “at risk” gamblers on the PGSI. Gamblers who are in employment are also more likely to have heard of self-exclusion schemes (51% vs. 44% of those not working), even though there are no discernible differences in our study between the two in terms of those “at risk”, suggesting there might be a gap in exposure amongst those not in employment.
- As shown in the figure below, those who had heard of self-exclusion were most likely to recall hearing about it on a TV or radio advert²³ (44%), while others were told about it by friends, family or colleagues (21%) or on a gambling website (6%). Very few had picked up this information from gambling premises (5%).

Figure 6.2: **Source of information about self-exclusion schemes**

Q7. How did you first hear or find out about self-exclusion schemes within the gambling industry?



- Older participants aged 55+ are more likely to have heard of self-exclusion through TV or a radio advert (47% vs. 32% overall). Those aged 25-34 are more likely to have received information through someone they know (26% vs. 14%) or read about it on social media (6% vs. 2%). “At risk” gamblers are more likely to have seen this information on premises (12% vs. 4% overall).

²³ There haven't been specific TV or radio adverts commissioned by schemes, however documentaries and news have mentioned self-exclusion

Figure 6.3: **Source of information by key demographic groups****Q7. How did you first hear or find out about self-exclusion schemes within the gambling industry?**

	Age						Region				Work status		PGSI score	
	18-24	25-34	35-54	55-64	65-74	75+	North	Mids/Wales	South	Scotland	Working	Not working	"At risk"	Non-problem gambler
Heard it on a TV / radio advert (32%)		19%		45%	50%		24%		40%				22%	
Friends / family / colleagues (14%)		26%		6%	7%				9%	29%	18%	7%	24%	
Saw it on a gambling / betting website (6%)					1%				3%		8%		18%	9%
On an online advert/video (3%)													7%	
I know somebody who has self-excluded (3%)														
Flyers/posters advertised in a gambling establishment (3%)				*%									8%	
Read about it on social media (2%)		6%						*%			3%			
Other people who gamble (2%)										11%				3%
Leaflet in the gambling establishment (1%)													6%	
Searched for it (1%)													3%	
Saw it on a gambling support website (1%)														
Heard about it from a health professional (1%)														

Base: All GB adults aged 18+ who have heard of self-exclusion (575) :
Fieldwork dates : 21st June - 7th July 2019

Green shading denotes a proportion which is significantly higher than the average
Red shading denotes a proportion which is significantly lower than the average

Source: Ipsos MORI

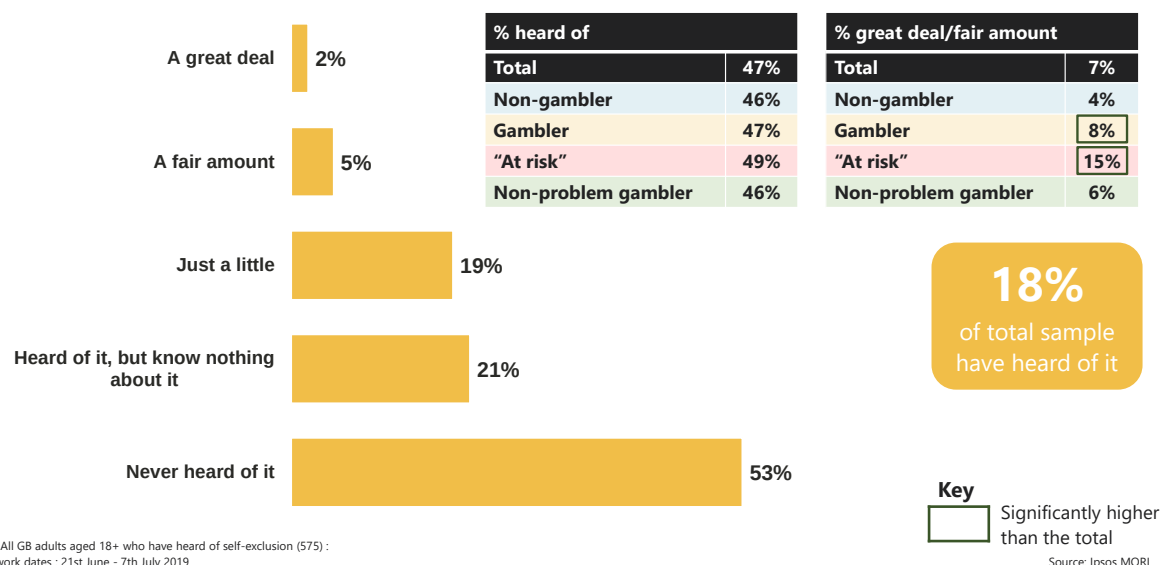
Participants who had heard of self-exclusion were also asked if they had heard of Multi Operator Self-Exclusion Schemes, with just under half (47%) of this group saying they had. This equates to 18% awareness amongst the general public overall (the total sample including those who had not heard of self-exclusion).

- Once again, there appears to be a lack of depth of knowledge, with just 7% saying they know "a great deal" or "a fair amount", dropping to 2% amongst to the total sample.

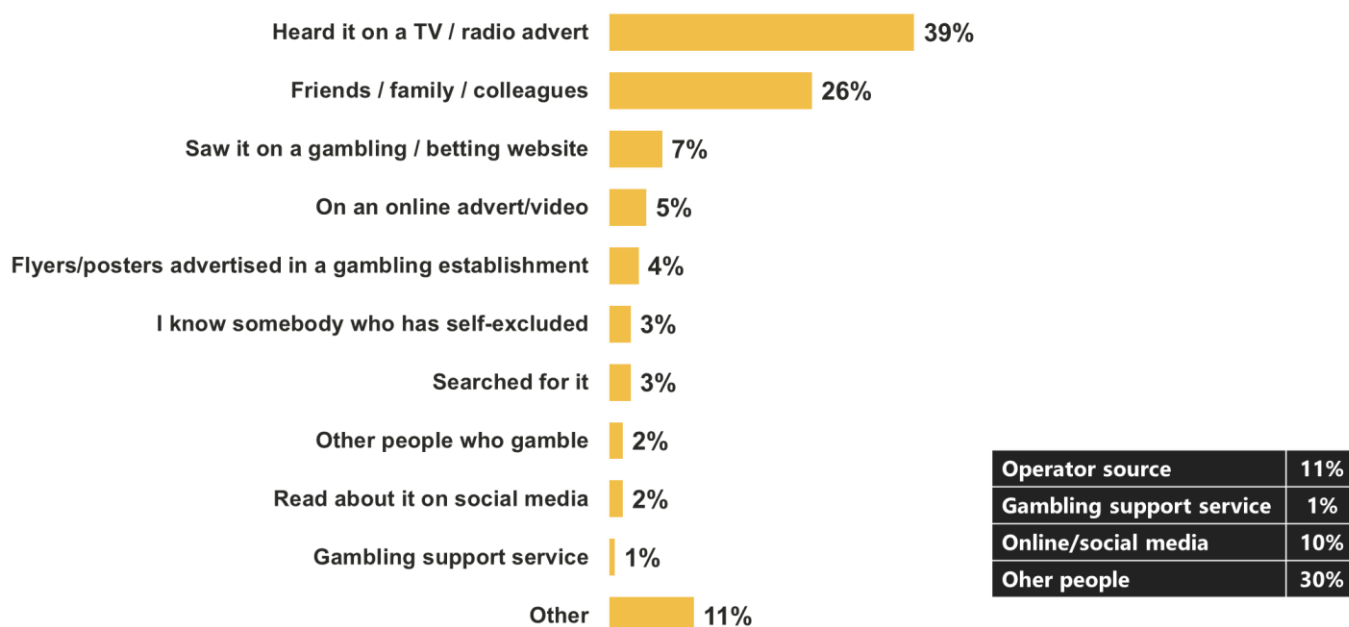
Notably, there are no real discernible sub-group differences when it comes to awareness of Multi Operator Self-Exclusion, including amongst gamblers who are “at risk”.

Figure 6.4: **Awareness of Multiple-Operator Self-Exclusion Scheme**

Q10. Before this interview, how much, if anything, would you say you know about the Multi Operator Self Exclusion Schemes such as SENSE or GAMSTOP?



- Those who had heard of Multi Operator Self-Exclusion Schemes recognised them based on similar channels to that of self-exclusion generally; through TV/radio (39%), or through people they know (26%). Again, awareness through the operators themselves was low, with just 7% seeing it on a gambling website and 4% through materials on premises.

Figure 6.5: **Sources of information about Multiple-Operator Self-Exclusion Schemes****Q11. How did you first hear or find out about Multi Operator Self Exclusion Schemes?**

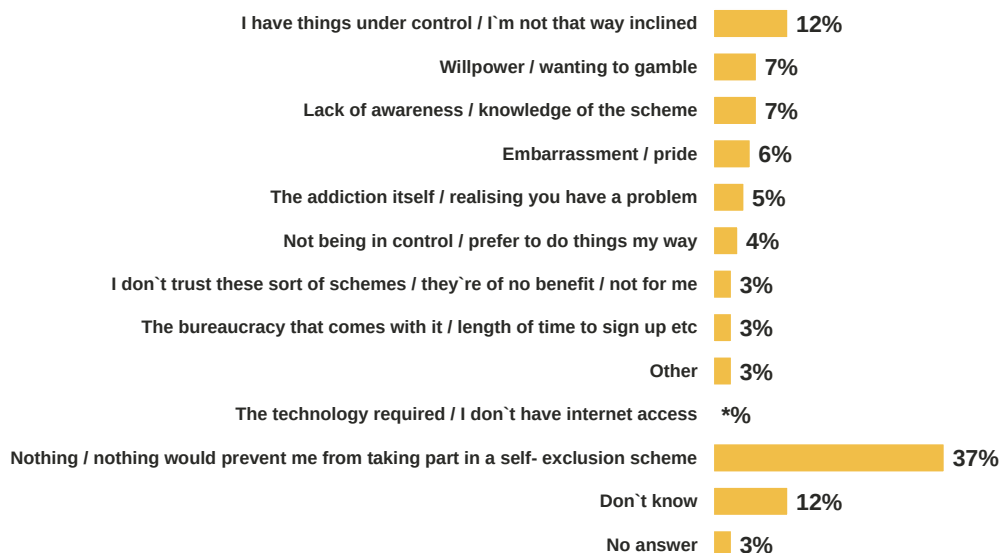
Base: All GB adults aged 18+ who have heard of MOSES (268) :
Fieldwork dates : 21st June - 7th July 2019

Source: Ipsos MORI

Participants were also asked to state, in their own words, what might prevent them from taking part in a self-exclusion scheme. As shown in the figure below, a “lack of awareness or knowledge of the scheme” is one of the top reasons given as a potential barrier (7%). This question was only asked of “at risk” gamblers, therefore people who might benefit most from taking part in Multi Operator Self-Exclusion Schemes.

Figure 6.6: **Barriers to self-exclusion**

Q15. If you ever got to the point in which you had concerns about the amount of time or money you spent gambling, what, if anything, would prevent you from taking part in a self-exclusion scheme?



Base: All GB adults aged 18+ who are low, medium and high-risk gamblers who are not self-excluders (123) :
Fieldwork dates : 21st June - 7th July 2019

Source: Ipsos MORI

Gamblers' awareness of Multi Operator Self-Exclusion Schemes

Our quantitative survey of the general public shows that there is relatively low awareness of Multi Operator Self-Exclusion Schemes, even amongst those who are experiencing some level of harm in terms of their gambling behaviour.

Discussion groups with gamblers were conducted to explore awareness around self-exclusion, including Multiple-Operator Self-Exclusion Schemes, and what the perceived barriers to joining the schemes might be. We also looked at levels of understanding of how the schemes worked, and the distinction between Multi-Operator and Single-Operator Schemes.

While many gamblers had at least heard of self-exclusion, very few were able to accurately explain the logistics of how schemes worked, or the specific details. Others appeared to categorise it amongst other harm-minimisation tools such as limit setting, timeouts or blocking. Some had not come across self-exclusion despite gambling regularly for many years. Although it is important to note that this sample had a mix of gamblers including some whose PGSI score indicated that they were not eliciting harm as a result of gambling.

"If you self-exclude online there's no way back – you do it for 90 days and that's it. Nothing like that exists for shops." (Male, Betting shop gambler).²⁴

²⁴ This quote, as throughout, is a direct verbatim from a research participant, based on their own perceptions. We recognise that these perceptions may not always represent factual truth, but they serve to show the extent of participant understanding of the schemes.

"I had never heard of it and I have been playing bingo for 20 years." (Female, Bingo gambler).

While personal experience of self-exclusion appeared to be limited, a number of participants did mention that they knew of friends or family that had self-excluded.

"A friend of mine had to set himself up for the roulettes." (Male, Betting shop gambler).

There appeared to be even lower awareness of Multi Operator Self-Exclusion Schemes amongst online focus group participants, with only a handful alluding to it unprompted. When asked if they knew any names of Multi Operator Self-Exclusion Schemes, only one participant named a specific scheme (GAMSTOP), and even those who had taken part in single operator self-exclusion weren't aware of the schemes and appeared more likely to think the schemes were run by other organisations such as "Gamban" or "GambleAware". After introducing the concept, there was certainly some confusion about the distinction between single-operator and multi-operator schemes, which was reflected within the scheme user interviews (as referenced in the delivery section).²⁵

"Assuming you'd be excluded from all accounts but that's just an assumption". (Male, Betting shop gambler)

"I know very little other than it excludes you across a number of platforms in one hit." (Female, Betting shop gambler).

Scheme-users' introduction to Multiple-Operator Self-Exclusion Schemes

Scheme users in the qualitative research were also asked about how they came to be aware of Multi Operator Self-Exclusion Schemes. In many cases, scheme users either proactively sought out a way to self-exclude, or it was recommended to them by a concerned family member or friend. The catalyst that culminated in them seeking out a means to stop their gambling was often a "crisis point", such as losing a lot of money or winning a lot of money, or a fear of losing a house or a partner and from that point not being able to stop gambling. A few participants found out about it through other help they were getting (such as GamCare, Gamblers Anonymous, or a counsellor). In more cases than not, gamblers sought out self-exclusion themselves as opposed to intervention from operator staff.

²⁵ See page 54

"My partner, she finds this. She says there's the option to go for the self-exclusion because it's better because they help you. You go to the customer service... She found it on the Internet." (Male, 22, Bacta).

"I'd, kind of, seen it out of the corner of my eyes [in a betting shop], as you would when you think about it. And then, of course, my counsellor that I did go to with GamCare, he suggested all this as well." (Male, 43, MOSES).

In cases where scheme users had been approached by operator staff, it was usually when they had a pre-existing relationship with an individual staff member who was able to approach them and suggest it might be a good idea to self-exclude.

"People in the bookies who worked there knew I had a problem, and just came up to me [and said] 'You need to stop.' [...] I think they just saw, you know, if I'd won a high amount, they saw me putting it back in. Because I got quite friendly with them, they said, you know, 'Pack it in. You can't control it.'" (Male, 38, MOSES, Bacta, GAMSTOP).

"It was to do with the leaflets and also obviously the staff that I, you know, had a rapport with. And they said 'look, you can self-exclude yourself' and at the time I didn't realise, though I'd seen the leaflets I didn't really understand it much." (Female, 33, Bacta).

For many though, it was a case of approaching staff and enquiring about self-exclusion. There was very little to suggest that this had been prompted by visible promotional material.

"They have about three leaflets in a little thing saying, 'GamCare'. Or they have a poster, 'Keep your gambling in control'. That's it." (Female, 42, GAMSTOP, MOSES).

Amongst those who had self-excluded from online gambling, a common pathway to finding this option was conducting an internet search, either themselves, or via a friend or family member who then relayed the information to them. Others registered with GAMSTOP only after finding out about it following Multiple Single Operator Self-Exclusion Schemes. Some users felt that GAMSTOP wasn't particularly well advertised given they had self-excluded online and not come across it.²⁶

²⁶ Note at the point of interview GAMSTOP was not a licensing condition for online operators and therefore the scheme had only had a 'soft launch'

"I found out about GAMSTOP which I kind of wish I had found out about that a long time ago, although I don't think it's that old but I just didn't feel it was that well-advertised either unless you look for it. [To find it I] probably just googled problem gambling or something like that." (Male, 36, GAMSTOP).

Communication materials / marketing of Multi Operator Self-Exclusion Schemes

The evaluation research also explored each sector's marketing and promotion materials specifically relating to Multi Operator Self-Exclusion Schemes, and how this was perceived and used by customers.

The operators' perspective

In the workshop with operators, staff were asked to describe their approach to the marketing of Multi Operator Self-Exclusion Schemes.

It was apparent that each sector had its own approach to marketing self-exclusion, with sectors usually having their own slogans or branding for self-exclusion and Multiple-Operator Self-Exclusion Schemes. On premises, information provided about Multi Operator Self-Exclusion Schemes formed part of more generic materials that operators provided around problem gambling, such as leaflets about staying in control or support organisations.

There were mixed views on how visible materials were in land-based premises. Betting shop frontline staff tended to feel that their yellow leaflet was quite prominent and carefully placed in areas where they might be noticed, for example in machine dispensers, or in more discreet places such as toilets where gamblers might pause to reflect. Other premises, such as arcades and casinos, felt that materials specific to Multi Operator Self-Exclusion Schemes weren't particularly visible compared to more general support leaflets such as links to GamCare or GambleAware.

Scheme users' views of the scheme publicity materials

There were some instances where scheme users reported being made aware of Multi Operator Self-Exclusion Schemes thanks to the marketing materials provided by schemes and displayed by operators. The most recognisable materials in terms of branding appeared to be the yellow MOSES leaflet – which was mentioned on a few occasions as a source of awareness amongst scheme users. Generally, however, gamblers did not feel that there was particularly visible promotion of the schemes within gambling premises.

General gamblers' views of the scheme publicity materials

Ipsos MORI used the discussion groups with gamblers who were not scheme users as a platform to explore recognition of materials and general gamblers' awareness of scheme promotion by scheme operators, and how these might be improved. Recognition of materials and awareness of schemes was low amongst this group. Few felt that operators were meeting obligations to make gamblers aware of the schemes, and many suggested improvements to both materials and their promotion by scheme operators. Further detail for each scheme is provided below.

MOSES

In the betting shop discussion group, when shown the MOSES leaflet there was no recognition. Most felt the information was clear and they were able to relay information about the scheme to the group from a brief reading of the materials. There were also comments that the leaflet stood out because of the colours, though the low recognition among this group of (sometimes occasional) betting shop users suggests the leaflet might not stand out very well in the premises. One participant suggested that printing details on the back of betting slips would be more effective than a separate leaflet:

“Get bookies to print these details on the back of the betting slips they give to customers, then everyone will read it.” (Male, Betting shop gambler).

Gamblers who frequented betting shops were asked if they felt the scheme operators were meeting obligations to promote MOSES. One view was that schemes were doing the bare minimum to promote the scheme, while another felt that self-exclusion information, if available, was lost in the high volume of general gambling awareness advertising.

“[MOSES is being promoted] probably to the letter of the law – in reality, the least they can get away with.” (Female, Betting shop gambler).

“There are loads of GambleAware ads, that’s not the problem, but that isn’t self-exclusion.” (Male, Betting shop gambler).

GAMSTOP

A few online gambling group participants recognised the GAMSTOP materials. One from discussion on the radio the previous week, rather than from activity online. There was general agreement that the material is clear and effective, and most participants picked up important points about the scheme from briefly viewing the materials.

Participants did not generally seem to feel that information about GAMSTOP was readily available. Some felt this varied by operator, whilst others thought it was not advertised enough. There were comments that more publicity was needed, and others felt that bigger, ‘government driven’, advertising campaigns were needed to raise awareness.

“It needs more publicity.” (Male, Online gambler).



"I think it is in early days - as more sites come on board I think it will get more exposure." (Male, Online gambler).

"I hadn't heard of it in depth before, it's not advertised much?" (Female, Online gambler).

Bacta

There was no recognition of the Bacta information leaflet, or the self-exclusion scheme itself. Group participants who gamble in arcades were divided in opinion on the materials. Some felt it was clear and easy to understand, although a little wordy. Others felt that it wasn't direct enough and might not hit its intended audience (those harmed by gambling) because this audience wouldn't necessarily proactively engage with posters. When asked to recall details of the scheme from a brief viewing of the materials, most were able to recall that there was a number to call but they felt this information should be more directly presented.

"Very confusing and again you need to accept you have a problem first." (Male, Arcade gambler).

Most felt that the operators were not meeting their obligation to make gamblers aware of the scheme. They felt that the operators were not particularly proactive and there was a sense that if obligations were being met, this was at a 'bare minimum' level.

"I have never seen any information in arcades about issues with gambling/self-exclusion." (Male, Arcade gambler).

"I think pretty much all the arcades I frequent have posters displayed (though different to the one linked) plus stickers on the machines, but none of them are screamingly obvious, it's like they are fulfilling some minimum obligation, but don't really want to draw your attention to it, as obviously it hurts their profits if you do." (Male, Arcade gambler).

Bingo Industry Association Self-Exclusion

There was no recognition of the 'Keep it Fun' leaflet shown to the group of participants who frequent retail Bingo. Though participants felt that the advice was clear, easy to understand, and pitched appropriately. It should be noted that the material shown was a leaflet made by Mecca Bingo, but does reference the Bingo Industry Self Exclusion Scheme.



"It's very well written. not condescending, quite clear." (Female, Bingo gambler).

"It's good simple advice." (Female, Bingo gambler).

Some felt the leaflet might be a little lengthy for people to digest. Suggestions for improvement included:

- Bullet points, to make information easier to digest;
- Helpline and contact information bold and at the top;
- Making the most important information the most visible;

There was general agreement that the scheme needs to be better publicised, because 'everybody should be aware'. Participants felt that the lack of awareness in the group demonstrated that obligations to make gamblers aware of the scheme were not being met. If leaflets are being displayed, these displays are not sufficiently prominent.

SENSE

There was no recognition of SENSE scheme materials amongst participants from the casino gamblers' group. On a brief viewing of the information, participants expressed concerns that there was too much information, that the materials could be more to the point and more digestible at the point of provision.

"I think I'd pick that up and try reading it later. I'm interested by stuff like this."
(Male, Casino gambler).

"Need more succinct info for a toilet poster or to grab attention." ***(Male, Casino gambler).***

"I wouldn't read it there and then, but I'd probably take it home and read it the next day."
(Female, Casino gambler).

Participants did not seem to think information on self-exclusion or other ways of getting help was readily available in Casinos. Participants felt that this information would be helpful, suggesting that leaflets or posters in the toilets would be useful to people, as they could discretely take down details. Some said it should be mandatory for operators to provide information about the scheme at the point of casino membership sign-up.



The role of operator staff in raising awareness

The evaluation also explored the role of operator staff in effective promotion of Multi Operator Self-Exclusion Schemes for those who might need it, and their perception of staff confidence in approaching people.

In the discussion groups with gamblers, participants were asked about operator staff and how helpful they were in terms of guiding gamblers towards support.

Some gamblers voiced that they had good friendly relationships with operator staff - this tended to be in retail bingo and arcade establishments. There was a perception amongst general gamblers that it was not really the duty of operators to signpost people to support or tools like self-exclusion. Some felt that staff should not have

this responsibility, either because they saw it as the responsibility of the individual, or because they felt it was too difficult for the operators to know what constituted a gambler displaying harmful behaviours at their level of training or job grade. They understood the transient nature of the job and the difficulty of the logistics involved in training part-time staff.

***"They have too much of a high turnover of staff to train them up like that...too expensive."
(Female, Arcade gambler).***

Others felt that they should show more professionalism in exercising their duty of care, and while there was a recognition that staff were not counsellors, they did think that staff should be more adequately trained to police irresponsible behaviour and stop people from harmful gambling by recognising the signs. Equally there was some scepticism among gamblers about operators' motivations to help those who are gambling unhealthy amounts of money. It was felt they were essentially there to facilitate gambling to help the success of the business and this took precedence over gambling safety.

"No disrespect but some of the ones I've seen are not the most professional looking bunch...I'm sure they have the information, but I don't think the ones who work behind counters are the ones I would want to talk to." (Female, Betting shop gambler).

"I think it should be their duty. But I wouldn't trust them to do it" (Male, Casino gambler).

***"Shop managers have targets to meet so putting off a punter isn't realistically going to happen"
(Male, Betting Shop Gambler).***

There was, however, also some mention that it might be difficult to approach someone who is presenting with issues related to gambling-related harm, particularly if they are showing signs of distress or anger, and that ultimately some responsibility also lies with the gambler to control their own behaviour.

***"You try and approach somebody who's getting angry, with a GamCare leaflet, it doesn't happen."
(Female, Betting shop gambler).***

Scheme user experience of staff support

Scheme users were also asked about their experiences of staff support, particularly when enquiring about self-exclusion. Generally, many scheme users found staff to be helpful particularly when they already had a good established relationship with them and when they felt staff were acting in their best interests and supportive of the decision. In many cases, to avoid any possible embarrassment or stigma, scheme users would take the decision to register to a Multi Operator Self-Exclusion Scheme from a premises that they were familiar with, or felt comfortable in, as opposed to going somewhere new.

Scheme users tended to feel positive when they had visited premises that offered private conversations to talk through the possible options, and when their need for help was taken seriously by the staff.

"Because I've got to know them anyway, they were really supportive over it. And I do see them occasionally when I'm walking down the high-street, and they ask me how I'm doing, and I say, 'Oh yes, I'm alright. I'm a lot better now I'm not doing it.'" (Male, 23, Bacta).

"When I excluded from the local shop, they mentioned MOSES. They said it's better than self-exclusion, gave me their number and said we recommend you do that instead." (Male, 34, SENSE, MOSES, GAMSTOP).

While many of the scheme users did receive sign-posting to gambling support services from staff, not all did. There was a general feeling that staff fulfil their minimum duties rather than ensuring that gamblers are supported to avoid harm.

"There's no support at all. They don't say that there's GamCare, or all the services are out there, or Money Matters. They just do nothing. They just, like, want you to sign that form and get out." (Female, 42, MOSES, GAMSTOP).

Examples given where staff were not helpful tended to have a detrimental effect – particularly when the staff were deemed to be unfriendly and not forthcoming with their support. For many of the scheme users who took part in the evaluation, it was seen to be a big moment for them personally in actually taking the decision to seek help, and therefore they needed staff to be helpful, supportive and discreet at the point they enquired about self-exclusion. While there was some positive evidence of this, generally the research suggests that the quality of staff interactions can be wide-ranging and in instances where scheme users have had bad experiences, it can have a negative effect on their perception of self-exclusion.

"There's no look of respect, it's the kind of, 'Oh, okay'... they don't come across as approachable and they don't really make it discreet, so, they contact the manager over the phone and they say, 'Oh, hi, yes, there's a customer that wants to sign up for SENSE.'" (Male, 32, SENSE).

Some participants also felt that Multi Operator Self-Exclusion wasn't promoted to them when it should have been. For example, one participant mentioned that he made 20 calls to self-exclude from individual operators, yet it was never suggested to him that he might benefit from a Multiple-Operator Self-Exclusion Scheme.

Many participants who took part in one Multi Operator Self-Exclusion scheme also had pre-existing gambling-related problems in other sectors. These participants felt there was no real evidence of cross-promotion of other Multi Operator Self-Exclusion schemes from operator staff and for some scheme users this may have been beneficial, particularly those who were addicted to a type of play that could also be accessed via another sector (e.g. poker can be played in a casino and online). There was evidence of a desire for this cross-promotion of different schemes available and indeed as detailed in the next section, a wish that there was a cross-sector Multiple-Operator Self-Exclusion Scheme.

“There’s an exclusion for online, arcades, bookmakers as well - I wasn’t aware of any of those, just that SENSE really... It was just the land-based casinos, then it didn’t really help, but I think, if it was an all-in-one self-exclusion from all sorts of gambling within the UK, then that would help much, much better.” (Male, 31, SENSE).

Staff training / confidence in approaching customers

In the workshops with operator staff, those working in land-based premises were asked to give examples of how staff were trained in relation to identifying those eliciting potential harm.

Generally, operator participants communicated that all staff were trained to a basic level in terms of spotting gambling-related harm, but there was an admission amongst some that it can sometimes be difficult to have a conversation with individuals. There was also a consensus amongst frontline staff that there isn’t a “one size fits all” approach to training staff to engage with gamblers, because of the different situations that people find themselves in. For example, it was felt that while some customers may usually be in control, they could have a particularly bad day (perhaps for other reasons) and it might not always be appropriate to approach them. Some staff felt they would not always want to approach customers because of the risk of aggravating a situation further – particularly if a customer is displaying aggressive behaviour or is very emotional. In other instances, it was felt that certain behaviours such as monitoring money spent might be a grey area, as big stakes are not always necessarily harmful. Therefore, there may be a gap in current training practises that focuses on the “tell-tale” signs of harmful gambling behaviour and some simple messaging for all levels of staff around appropriate steps to take.

“Approaching this can be very difficult and I know that people struggle. You can’t really train people for that.” (Betting Shop Operator).

[On what they would improve about implementation processes] “Behaviour recognition training and difficult conversation training... to improve staff confidence.” (Casino Operator).

In terms of best practice, some felt it was most important for junior staff to have the confidence to interact with gamblers in an informal way and check they are okay, before feeding back to a more senior member of staff, such as the shift manager, to decide on the best options (e.g. self-exclusion, or suggesting a timeout).

Operators felt it worked well when a manager had a higher level of training to conduct the conversation about the self-exclusion process. Although this may limit capacity to support gamblers if the manager is not available. Bingo operators had a training video for staff in identifying certain harmful behaviours. There was also general agreement across all operators about certain signs or triggers of harmful behaviours and that staff should be trained to identify, including:

- Length of time spent within a venue;
- Erratic or aggressive behaviour (banging on machines, getting angry); and

- Asking to borrow money to sustain gambling.

However, there was little evidence of training for less senior frontline staff that specifically dealt with customers for whom it might be appropriate to suggest self-exclusion, or Multi Operator Self-Exclusion Schemes, beyond a signposting role using the leaflets or materials provided if a customer enquires about it. This was seen to be a particular issue for younger or less experienced workers who don't have a long-term rapport with customers, suggesting a gap in training provision for these staff members.

“There is a lot of younger people in the industry. How do you ask a 20-year-old to approach a 50-year-old? There might just be 3 youngsters working, who does it?” (Betting shop operator).

From the operator perspective, it was felt further training, such as live video examples showing different types of interactions with customers, might help inform all staff to have a more proactive role. This may be key to limiting harm at an earlier stage for certain customers.

Outcomes achieved

Short-Term

There are two short-term outcomes related to implementation which have been identified in the Theory of Change. Following feedback from scheme providers and emerging fieldwork findings, the first outcome, awareness and accessibility of the schemes for those who might benefit from registering, was retrospectively added as a short-term outcome

Individuals who could benefit from the schemes are aware of them and it is accessible for those who wish to register

There is generally low public awareness of Multi Operator Self-Exclusion Schemes, including amongst those harmed by gambling. Many scheme users became aware because they sought out information on self-exclusion themselves or heard about them through someone they knew, had also actively sought the information, usually as a first port of call to stop their gambling after a catalytic moment or event (e.g. a big loss).

Examples of best practice in terms of this outcome being achieved are when operator staff have taken a proactive and timely role in making customers aware of Multi Operator Self-Exclusion Schemes and helping them to take the step to register or at least consider different options. This would normally, although not exclusively, happen when there was a pre-existing relationship between individuals.

There is arguably a balancing act in terms of how much resource should be put into marketing the schemes, given that the majority of customers gamble safely and with more excluders the schemes may find the higher volumes unmanageable with the current identification technology. However, many gamblers felt that the schemes' materials were not always made visible to those who may need this information. The majority of materials were seen to be clear and effective in explaining what Multi Operator Self-Exclusion Schemes entails.

There is little evidence of cross-promotion of the other Multiple-Operator Self-Exclusion Scheme where it might be necessary, both in terms of what appears in the marketing materials and communication from operator staff. Therefore, some scheme users were not aware of the other Multi Operator Self-Exclusion Schemes when they may have benefitted from registering to them and risked merely deflecting their harmful behaviour into another sector.

Frontline/helpline staff feel they have the confidence and training required to provide appropriate and effective guidance to all gamblers including those harmed by gambling

Generally, there was a perception amongst gamblers and scheme users that there wasn't always sufficient training of operator staff to provide appropriate guidance, including signposting to Multi Operator Self-Exclusion Schemes. Some gamblers and scheme users felt that operator staff lacked the skills or motivation to support customers within the business-driven environment.

For scheme-users, there is mixed evidence of how helpful the staff had been in supporting them to self-exclude. However, we consistently found that staff interaction was deemed to be critical in the moment when they decided to address their gambling, as they tend to be in a vulnerable frame of mind. In instances staff were not deemed to be responsive to these sensitivities and this had detrimental effects on the gambler in terms of their willingness to self-exclude at that time or in the future.

There is sometimes an issue with staff confidence to approach gamblers where they might be behaving erratically or being potentially volatile, particularly amongst less senior employees who may not know the customer personally. Sometimes these customers can be amongst the most vulnerable.

Linked to this there is sometimes a perceived grey area of when to approach someone, either because they are normally a safe gambler and might simply be having a bad day, or if they are spending a lot of money but not necessarily demonstrating signs of harm. It was felt further training might be required to standardise the scenarios in which staff should approach customers.

The evidence suggests that while there are obvious efforts to make progress toward these short-term implementation outcomes, there are still some fundamental barriers which will need to be further explored in the second phase of research. Below we summarise some recommendations that could address these barriers and help achieve the short-term outcomes.

Recommendations to support desired outcomes

- Ensure staff are aware of the distinction between Single Operator and Multi Operator Self-Exclusion Schemes, including schemes in other sectors. This could be implemented within current training on self-exclusion, and part of the responsibility of staff to learn a little more about customer's other gambling behaviour, if they are willing to share it, to see if they might need further support or benefit from another self-exclusion. Consider making it a requirement that all staff are trained on being empathetic and sensitive towards customers. As evidenced in the qualitative interviews, the decision to self-exclude can be a deeply emotional moment.

- Consider aligning the branding of Multi-Operator Self-Exclusion Schemes to have a common identifier, such as a shared slogan. This could build on existing branding such as, When The Fun Stops, Stop, or at least have an element of common branding in line with other harm-minimisation materials, such as all having a link to BeGambleAware or GamCare. This could be a link to a landing page that also contains information about other schemes, to raise awareness of Multi Operator Self-Exclusion Schemes, and act as a cohesive tool to be applied across sectors. It is important to note that the aim should not necessarily be to promote self-exclusion schemes to encourage registration but to ensure materials are consistently visible and accessible for those who need them and there are better linkages between scheme materials for people who may wish to enrol on multiple schemes.
- Develop a cohesive training programme that looks at signs of gambling harm that can be rolled out across all land-based sectors. This could include some specific triggers or using learned information about a customer who may benefit from self-exclusion or other harm-minimisation tools as a case-study example. A possible tool to aide this could be the Gambling Commission customer interaction guidance, and operators could ensure that this is consistently implemented into staff training. There is a need to ensure training enables staff of all levels/seniority to feel confident to approach those who might be displaying harmful behaviour and to interact with all types of gamblers (including building rapport with customers to make those conversations easier for staff). Ensuring staff are able to do this may, in the long-term, reduce the numbers of people who feel the need to self-exclude as they are supported to take other preventative measures such as taking time out or spending limits.

Gaps in knowledge

- How analysis of account-based play is used to identify gamblers experiencing harm could be key to effective implementation of Multi Operator Self-Exclusion Schemes and signposting gamblers to support more widely. There is a gap in knowledge about how session-based play can be monitored using technology to identify harms. There may be a need to explore further how these systems can work alongside customer interaction training for frontline staff. This will enable staff to feel more confident when approaching an individual and evidencing why they have done so. It could also remove some of the ambiguity for more junior members of the team, in terms of interpreting whether a situation requires intervention or not.

7 Delivery activities

The delivery of Multiple-Operator Self-Exclusion Schemes relates to the systems and supporting activities carried out by each operator and enabling the ongoing identification of gamblers displaying harmful behaviour. As well as the signposting to Multi-Operator Self-Exclusion Schemes and self-exclusion.

Current registration

In our quantitative survey of the general public we found that **1% of those who have heard of self-exclusion say that they are currently registered to a self-exclusion scheme**, while 2% say they have done so in the past. A further 1% said they are not registered to a self-exclusion scheme but have given it consideration. The number of self-excluded individuals in the survey rises depending on gambling behaviour. While only 5% of all gamblers in the survey say they are registered, or have been registered in the past for self-exclusion, this number is higher amongst those considered to be 'at risk' gamblers (15%) compared with just 2% who are classified as non-problem gamblers on the PGSI..

Figure 7.1: **Registration to a self-exclusion scheme**

Q10. Before this interview, how much, if anything, would you say you know about the Multi Operator Self Exclusion Schemes such as SENSE or GAMSTOP?

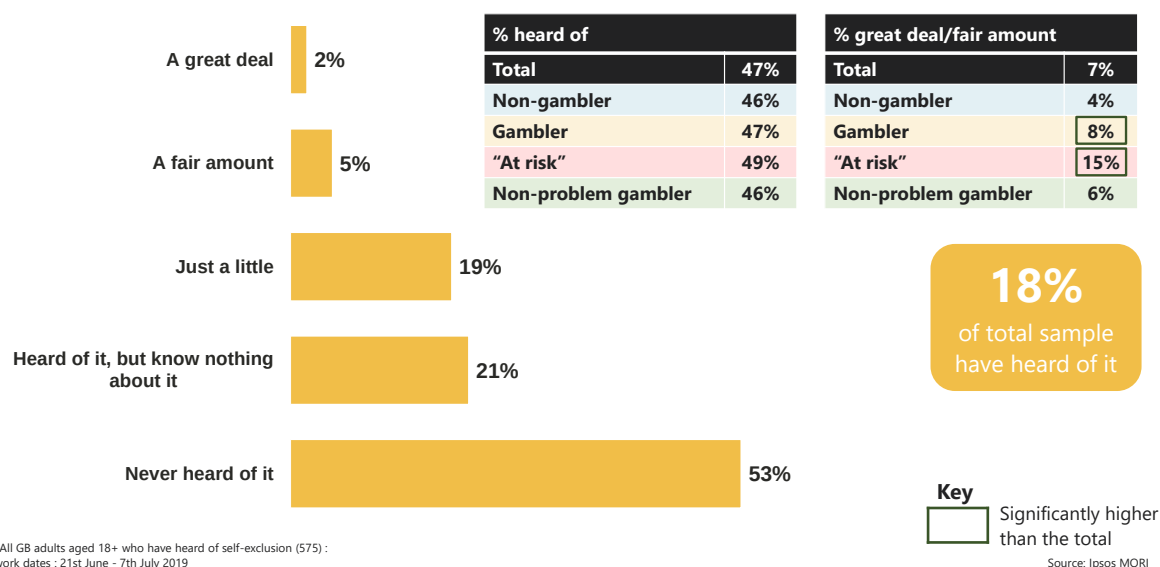


Figure 7.2: **Self-exclusion by sector**

Q9. From which of the following, if any, types of gambling have you self-excluded from?

Absolute numbers



Base: All GB adults aged 18+ who have self-excluded (16) :
Fieldwork dates : 21st June - 7th July 2019

Source: Ipsos MORI

Most individuals who were self-excluded within the survey say they were self-excluded from online betting websites. There was only one self-excluded individual for each of the following sectors - casino, arcades and betting shops. It is important to note that these findings are only indicative as the sample size of self-excluders in the survey was too small to extrapolate to the population.

The process of registering to self-exclude

Scheme operator staff responsiveness to gamblers displaying harmful behaviour who want to self-exclude

Our earlier consultations in the research confirmed the perception established in the literature review that Multi-Operator Self-Exclusion Schemes are a self-help tool that gamblers displaying harmful behaviour must themselves step towards. Key to this evaluation is the assessment of the extent to which operators respond to gamblers' expression of interest in Multiple-Operator Self-Exclusion Schemes, with appropriate support enabling gamblers displaying harmful behaviour to sign up to Multiple-Operator Self-Exclusion Schemes.

In our interviews with scheme users, **operator staff were said for the most part to be helpful**, however there was some variation between and within gambling sectors. Scheme users said staff at casinos were helpful when registering to SENSE. Managers were viewed as taking the self-exclusion process seriously and responded quickly when a customer approached personnel requesting to self-exclude. They treated the process with sensitivity, taking the customer to a separate location, and walked them through the self-exclusion registration process.

"It was pretty straight-forward, so I asked to speak to the manager about self-excluding myself and within five minutes they came out, they talked me through the process of what it involved and it was a minimum of one year to do it for." (Male, 25, SENSE, GAMSTOP).

"Process with the managers is fantastic. They explain all of the implications to it, and at the end of it all they say, 'Look, I know I'm a manager of this place and our aim is to try and get as many people as possible, but you have made the right decision in the circumstances that you are in.'" (Male, 32, SENSE, MOSES).

There was mixed opinion when it came to staff responsiveness at non-membership operators. The responsiveness of staff in these premises was usually attributed to the prior relationship a customer may have had with the operator staff. Where there was a relationship already established, typically as a result of the customer visiting the premises frequently and/or being located within smaller communities, staff were seen to be knowledgeable and attentive. Where there was not a previous relationship between staff and the customer, staff were often seen as less knowledgeable or interested in assisting the customer through the self-exclusion process.

"They [staff] knew I had a daughter and obviously they were putting my daughter's interests at heart as well, so it was really good." (Female, 33 Bacta).

"There's no support at all. They don't say that there's GamCare, or all the services are out there, or Money Matters. They just do nothing. They just, like, want you to sign that form and get out." (Female, 42, MOSES)

There were also instances where some scheme users felt operators actively discouraged them from self-excluding, asking them to go away and think about it instead, or suggesting that they do a shorter self-exclusion than that which the scheme user had requested. These issues were mentioned by several registered with Bacta:

"[I'd] always ask for twelve months [exclusion], and they say, 'Are you sure you don't want three or six months?' And I'm saying, 'No, twelve months,' because the staff who do the self-exclusions on the tablets try to encourage people to carry on gambling." (Female, 58, Bacta).

"I'd say to the member of staff, you know, 'Look, I've lost another £800, I need to self-exclude.' 'No, no, no, don't do that because then you can't come in. I love seeing you, it's lovely to have a chat" and, 'Don't self-exclude, just try again next week. Give it a couple of days, come back.' That's what I was doing for years." (Female, 44, Bacta).

Those who registered with GAMSTOP mentioned that it lacked a human touch because the process is conducted online. Despite GAMSTOP having a live chat function, with a live representative for customers to ask any questions, the use of this chat function was not mentioned by any of the scheme users. Some said the process itself was not clear, for example which specific sites they were signing up to self-exclude from. One

individual mentioned that the lack of a follow-up email following the registration process contributed to this confusion.

“It was all a bit grey, what I was actually registering to when I registered to GAMSTOP... It was all a bit unclear on how it worked and then there were no follow-up emails after it.” (Male, 31, GAMSTOP, MOSES, SENSE, BISES, Bacta).

While operator staff were generally seen as helpful when walking customers through the registering process a few scheme users interviewed said they were not made aware of, or signposted to, self-exclusion schemes in other gambling sectors. This is a key finding as many self-excluders are registered in more than one scheme and have spontaneously mentioned in the interviews that they would desire a universal scheme.

Ease of access and navigation during registration

At the delivery phase we would expect the work done so far in the development of appropriate technology that supports the self-exclusion registration of gamblers displaying harmful behaviour to have come to fruition. As such, we expect the delivery stage to see operators working with appropriate technology (e.g. I.T. based or paper-based registration processes) to support the referral of gamblers displaying harmful behaviour.

Several scheme users interviewed felt the registration process for self-excluding was relatively straight forward.

“It wasn’t difficult, I had to phone them, and then it was just a case of emailing them with a photo, just a valid photo.” (Male, 38, GAMSTOP, Bacta, MOSES).

“Oh, it was an easy process. I just gave my details...They needed, like, passport on me, my details, my date of birth, all kinds of details about me and how I feel about it.” (Male, 22, MOSES).

“It was absolutely easy, yes...they’ve got, like, an iPad and they ask you questions” (Female, 33, Bacta).

Whilst the actual act of self-exclusion in terms of providing personal details to register was straight forward across all sectors, for MOSES and Bacta specifically some felt that the process was made difficult as they had to give addresses/postcodes of the venues. Where this was done over the phone it was particularly hard as they couldn’t look at a list. They then had further difficulty remembering which they had self-excluded from.

“I still did a half job...just so much effort...Because I had to pick all the bookies in and around me, and tell them the exact address, the location, what it is, blah blah blah, for them to exclude me from certain ones ... And I can’t even remember which ones I’ve told them and which ones I haven’t.” (Male, 30, MOSES).

This was similar for those who lived in urban areas, where there were a high number of venues in a given area, as well as more rural areas, where they would need to know the venues within a larger area which is unfamiliar.

“You have to name all the shops you want to exclude from and that’s very difficult to remember who all the shops are in the areas close enough to you to get to. I mean, you know, there should be some way of doing it throughout the country.” (Male, 81, Bacta, MOSES).

One individual mentioned the difficulty he had registering betting shops in a city he has just moved to and was not familiar with yet.

“I’ve had to phone them up a number of times saying, ‘I want to add this one on, I want to add this one on’... And then it’s a lot of difficulty because they’ve got to do it by street name as well, and I don’t know all the streets... So, there were a couple of them that I knew that I could get around because they couldn’t find the street. They said, ‘There’s no bookmaker on this street, we can’t do that.’” (Male, 27, SENSE, Bacta, MOSES).

Another person was an electrician which meant they were constantly in new areas for work and would need to frequently call MOSES in order to add new betting shops to their self-exclusion list.

“Now I’m electrician, so if I find myself working in an area for a while, I’d phone them up...I think they can [sic] one by one but I think the poor girl would end up spending ten years of her life on my account.” (Male, 36, MOSES, GAMSTOP).

As a result, when asked how the system could be improved, there was an express wish from some to simply pick a radius or area and automatically be self-excluded from all betting shops within that area. Others in Bacta and MOSES wanted a written confirmation, or list, of all the venues that they were self-excluded from so they would definitively know where they could not go.

The immediacy of being able to self-exclude is also an important factor, as a delay can lead to a change in intention. Bacta scheme users, for example, referenced the need to accommodate management schedules or incorporate a 24-hour cooling off period before the scheme user could proceed with the self-exclusion. For some this led to an extension of their gambling behaviour.

“... you could’ve been thinking about it for days and days and days and days, but you want to do it and go in there and say, ‘Look, I don’t want to come anymore. I want to bar myself because I know I’ll get paid tomorrow and I’ll come in here,’ and they say, ‘Oh, you’ve got to wait 24 hours.” (Male, 28, MOSES, Bacta, GAMSTOP).

“A lot of the staff don’t know how to deal with it [Bacta registration], and you get, ‘Oh, we can’t do that just now because the manager’s not here,’... When you’re also going into the venue, the temptation to just not go to the counter, to go to, you know, gamble.” (Male, 31, MOSES, GAMSTOP, SENSE, Bacta, Bingo).

There was a suggestion made by MOSES scheme users specifically that they should be able to discreetly register for self-exclusion within the betting shop rather than doing it via the MOSES helpline. It was also suggested that to do so would result in better interaction with staff members, who therefore may gain better skills to recognise gamblers experiencing harm, speak with them, and assist them when needed.

“We recognise [you have a problem], would you like to come in the office so we can talk to you? We have got an exclusion scheme; would you like to do it now?”. And you probably would just do it there and then...obviously they should have a phone or something and take your picture there and then and then you just sign on and then go.” (Female, 42, MOSES, GAMSTOP).

There were also a few mentions that the MOSES helpline was not available late enough in the evening when problem gamblers are more likely to want to seek help or self-exclude.²⁷

“I went to self-exclude through MOSES once and I think, the number that you rung, it wasn’t 24 hours at the time. I think it was shut and I never ended up doing it.” (Male, 26, MOSES, GAMSTOP).

Lastly, in terms of carrying out the registration process, there was some concern about the lack of **discreetness in some premises** when enquiring how to self-exclude, particularly in betting shops.

“It was quite embarrassing to actually stand there and exclude yourself and take the photo. I kind of would have liked to have gone into a separate room.” (Male, 48, MOSES).

There was appreciation for those registering to SENSE, where casinos brought the customer into a separate room for the registration process.

Operator staff signpost problem gamblers to treatment providers and/or formal support

The effective implementation of Multiple-Operator Self-Exclusion Schemes is expected to lead to gamblers displaying harmful behaviour registering to such a scheme. In doing so, we would also expect self-excluded gamblers to be referred to treatment providers. The longer-term effectiveness of Multiple-Operator Self-Exclusion Schemes in ensuring that gamblers who are displaying harmful behaviour are able to resolve/minimise their gambling addiction problems is contingent on (1) operators ensuring clear signposting to treatment providers, (2) the Multiple-Operator Self-Exclusion Scheme’s central team signposting registered gamblers to treatment providers and gambling support available.

In our interviews with scheme users we found **counselling treatment (e.g. GAMCARE and Gamblers Anonymous) to be the only treatment services to have been signposted** to an individual when registering for self-exclusion. This was primarily mentioned by GAMSTOP scheme users, while it was also mentioned, though less frequently, by MOSES and Bacta scheme users.

“GAMSTOP did [signpost], because they put me in touch with a company called Beacon Counselling, who I used...they did give me numbers of helplines that I could ring if ever I felt I needed to talk to someone.” (Male, 38, GAMSTOP, Bacta, MOSES).

Our survey with the general public also revealed that several online gambling self-excluders have also used blocking software as a tool. While a few online scheme users mentioned they used this it was not directly as a result of the GAMSTOP registration process. This was followed by speaking with someone that knew about their addiction, while only one individual mentioned professional counselling.

²⁷ The helpline is open until 10pm

Figure 7.3: Other harm minimisation tools used by self-excluders

Q16b. Other than self-exclusion, which of the following, if any, have you done to help you cut down the amount of time or money you spend gambling?



Base: All GB adults aged 18+ who have self-excluded (16); At risk (13) :
Fieldwork dates : 21st June - 7th July 2019

Source: Ipsos MORI

Scheme users understanding of Multiple-Operator Self-Exclusion Scheme at the time of registration

The scheme users we interviewed were asked about their understanding of the self-exclusion at the time of registration, in other words if they felt familiar with the fundamentals of self-exclusion. There were some instances where an individual was not fully aware when probed on the detail. For example, some scheme users said they **did not have a complete understanding of which operators they were self-excluded from**. These individuals were mainly registered with MOSES, and they made their selection of betting shops from which to be self-excluded at the point of registration, but then failed to recall each of these.

A few individuals also mentioned that they were not sure if the self-exclusion scheme they registered to was in fact multi-operator or single operator.

"I understood that obviously if you're like one Cashino, it goes for another Cashino. I knew that, because obviously it's the same chain but I didn't realise, you know, how far it went... another amusement arcade literally round the corner from Cashino called Admiral and I didn't realise it had actually gone to there as well..." (Female, 33, Bacta).

There was some confusion amongst a few scheme users, across the sectors, on **whether online gambling was included in the non-remote schemes**. For example, they believed that if they self-excluded from land-based betting shops then this meant that they were also self-excluded from online betting shops. This did not only relate to land-based venue self-exclusion. One individual using GAMSTOP was not sure if they were also self-excluded from land-based casinos when registering. When discovering later that they were not, they then sought to self-exclude with SENSE.

“I actually thought it was linked to land casinos at the time which is what I'm sure I clicked an option for that but obviously I was told after it isn't.” (Male, 43, GAMSTOP, SENSE).

There was also some confusion across the schemes as to what happens when the self-exclusion period ends. Some had simply forgotten their expiry date, while others had forgotten how long their self-exclusion period would last, or would confuse the time period with another scheme, in the case of multi scheme excluders. This was partly due to having no further communication with the scheme providers after registration, which is understood to be a condition for the schemes. An unintended consequence was that some individuals were anxious about their schemes ‘running out’ and as a result went into venues to double check they still couldn’t gamble.

“Well, they don’t let me know at all, but I do pop in, into places at different times, to say, is my self-exclusion up because I want to renew it.” (Female, 58, Bacta).

There was also some confusion around what happens when the self-exclusion period ends. Those self-excluded from casinos tended to know they required a return-to-gambling meeting if they wished to end the self-exclusion after 6 months, however in other sectors it was not as clear.

“He, like, just explained that it’s, obviously, six months and if you do want to come off, you have to come in and have an interview and explain why you should be taken off it and stuff like that.” (Male, 34 SENSE).

Effectiveness of multi-operator self-exclusion

Overall effectiveness of multi-operator self-exclusion

Most scheme users interviewed felt that self-exclusion was effective in limiting their gambling or, had at the point of interview, stopped it completely.

The reasons why the various schemes were considered effective varied.

- **Faith in the system** – some individuals simply assumed that if they did attempt to breach, they would be caught. One individual even believed he would be arrested if caught.

Membership sectors were mostly seen to be more effective than non-membership sectors in this respect, which was largely down to a membership ID being required in order to enter the premises which made breaching more difficult.

“With the smaller [casinos], you have to, like, sort of, log-in, sort of thing, check-in, a membership, or even as a guest, you have to come in with ID and stuff like that... [at the larger casinos] they will check.” (Male, 34, SENSE).²⁸

One user of GAMSTOP felt it would require technical know-how to breach, so would not be able to do it. Just knowing they could not do so provided them with a safety net.

“GamStop and the other schemes are, like I said before, a safety blanket that stops me from doing it. It’s like a suit of armour.” (Male, 31, GAMSTOP, MOSES, SENSE, Bacta, Bingo).

“... because it’s not as accessible...that was really effective for me. I haven’t done any online gambling for well over a year... I’ve won that battle... it’s the only thing that’s ever, sort of, worked...” (Female, 44, GAMSTOP, MOSES, Bacta).

There were several Bacta and MOSES scheme users who felt the scheme to be just as effective as a membership scheme, but this was often because they had an established relationship with venue staff or, in a couple of cases, the scheme user just believed if they entered a premises they were self-excluded from they were guaranteed to get caught.

“...where I’d thought beforehand that I could go into any gambling shop any time that I...felt the need to gamble, as soon as I’d made that process and sent my identification off and my picture, I thought, ‘Well, that’s it. It’s impossible for me to go into a betting shop now.” (Male, 43, MOSES, GAMSTOP).

- Psychologically drawing a line under their behaviour - making the decision to self-exclude made them less likely to want to try to gamble, while another simply said he never had the temptation to breach.

“It’s been good for me because I’ve never tried, to be fair, from the shops I’m self-excluded from, I’ve never tried to get in and have a bet.” (Male, 26, GAMSTOP, MOSES).

“...it’s more the piece of mind in knowing that, actually, I am registered with these schemes... it’s just that security blanket that just stops me from wanting to do it. It’s just the physical aspect of, if I do go in and I am part of it...” (Male, 31, GAMSTOP, MOSES, SENSE, Bacta, Bingo).

- Making gambling less convenient - even if sector schemes were breached the evaluation still found all schemes to have some degree of effectiveness because it required more effort from the individual to gamble (i.e. they would have to travel further). By virtue of this they therefore spend less time and money gambling than if not self-excluded.

²⁸ It is important to note that despite the respondent having this perception there are indeed some larger casinos that are not exclusively membership and allow walk-in customers.

"It got gambling out of my life. Like, it really did... if I want to gamble, I've got to get in my car and drive out." (Female, 36, GAMSTOP, Bingo, SENSE).

- **Being caught when attempting to breach** - those within the qualitative interviews who self-excluded from the membership sector - bingo and casinos, were more likely than the other land schemes to have been stopped when entering the premises. This is unsurprising as the individual is required to either show a membership card or ID at the point of entry, which immediately flags their identity to staff.

"...there was a number of casinos in Glasgow and I was drunk, and I was trying to go to a few of them, but I was not able to get in whatsoever. So that really did work..." (Male, 27, SENSE, Bacta, MOSES).

There were however examples of positive identification of scheme users who were attempting to breach in non-membership sectors

"I went into Whitstable...I'd never been in there before and she actually recognised me from a picture immediately. They obviously check every single new person that ever comes in.... The others aren't so good to be truthful with you... In the local area they do take you seriously because they say they know me, so it's a personal thing." (Male, 81, Bacta, MOSES).

As mentioned in the previous section there was confusion among some scheme users as to when their self-exclusion period ended. Several suggested that self-exclusion could be more effective if they were able to opt for a longer exclusion period, some mentioning indefinitely. This way the expiry date or trying to work out when it was due to expire if forgotten, would not be a concern for them.

"I'd prefer lifetime... If you make the decision to phone up and self-exclude, it's obviously a big decision, you know you want it. I think it needs to be a lifetime." (Male, 38, Bacta, MOSES, GAMSTOP).

Ineffectiveness of multi-operator self-exclusion

Gambling in non-self-excluded venues

Several scheme users interviewed had continued gambling during their self-exclusion period at venues which they were not registered with. Those who did this were usually self-excluded with either MOSES or Bacta which do not allow for a blanket self-exclusion in all venues. These individuals would simply travel a given distance outside their self-exclusion zone.

"I find myself just going to different establishments. Going to different bookies. They're literally all over the place. There are thousands of them. You're never too far from one." (Male, 31, MOSES, Bacta).

"Even though I was excluded from that one, I would travel out of town and go to the ones that I wasn't excluded from. Because you're only excluded from certain ones. That's what made it harder for me. So, I would just go anywhere where I know I could get in." (Female, 42, MOSES, GAMSTOP).

One SENSE scheme user mentioned that he changed his self-exclusion to only casinos in his city. He felt that after his first 6 months with a national self-exclusion he was in control of his gambling so could occasionally gamble with friends while on holiday.

Very few individuals moved on to gambling in a completely different or new sector. Some scheme users would carry on their preferred gambling method to online. For example, if they self-excluded from SENSE or Bacta they would then play casino or arcade type games online.

"When it's online it's easier to see...you click a button and you've put money straight from your account. In a casino you have to physically go to a cash machine sometimes outside with limits so I wouldn't." (Male, 22, SENSE).

Some of these individuals would then self-exclude through GAMSTOP after noticing they carried on their harmful gambling behaviour online. It is also worth noting that a few scheme users interviewed had self-excluded with GAMSTOP immediately after registering with one of the land-based schemes simply as a safety net, even if they rarely gambled online prior to self-exclusion.

Breaching – scheme users' experiences

In our interviews we found many examples where **scheme users across all sectors had attempted to breach their self-exclusion agreement** at some point. Their breach experience, and ability to continue gambling, differed according to which sector they were self-excluded from.

It was non-membership schemes which were considered easier to breach. However, with casinos there were some occasions when individuals were able to bypass getting stopped at entry either by going to a non-membership required casino or entering via a guest list at larger casinos.

"If you go to casinos in the big cities, the casinos are like an open door. You can just walk in, they don't check your ID." (Male, 34, SENSE, GAMSTOP, MOSES).²⁹

[On SENSE] "...someone who's self-excluded can still go in and play, like, if they really wanted to... they don't ask for ID, and then, if you're not taking out anything over £1,500, they won't ask for ID, you can just say you're a guest." (Male, 34, SENSE).

Despite getting through the door these scheme users were typically caught, often when attempting to cash in their winnings, or their identity had been flagged when staff reviewed the guest list.

"It was a casino I wasn't even a member of, either. So, I like, signed in as a guest. I, like, put my name on the guestlist, and it flagged up on the guestlist, that name." (Male, 27, SENSE).

Experiences in non-membership sectors, betting shops and arcades, were mixed. Scheme users attempting to breach within these sectors tended to go to premises where they felt they would not be recognised. In these instances there appeared to be a lot of dependency on the alertness of staff or a reliance on their relationships with customers. Where individuals were less likely to have known or had a prior relationship with staff there was a higher likelihood that they would not be caught.

"[When someone is able to breach their self-exclusion] I understand why it happens but, in that instance, it was just me and I was the only person in there for about three hours... He [the staff member] could see I was losing shedloads of money. I would be able to recognise an addict's behaviour if I saw it. So, as someone who works in the store and works there every day, I would imagine they can too." (Male, 24, MOSES, GAMSTOP).

One individual who had self-excluded from motorway arcades said that she often went to arcades she self-excluded from and was rarely ever caught. Being caught would most likely happen if a staff member happened to be on site, but even then, she often managed to breach when they were present.

"I checked to make sure I was banned with Welcome Break and they assured me I was, but I was never, ever challenged. If I'd been challenged, that would [have been] it. They'd do, 'No, I'm sorry, you've got to leave the premises because you're self-excluded,' and then I would never have gone back." (Female, 40, Bacta).

There were mixed feelings from scheme users regarding the perception of how staff handled these situations. Overall, there was a general appreciation that staff were simply doing their job and therefore acted in a professional and understanding manner, asking the self-excluded individual to leave the premises and explaining why.

²⁹ We note this quote contradicts the quote on page 56. This is due to a variance in user perceptions.

“...they don’t shout about it. They do come up to you and speak to you quietly. Twice it’s happened where someone’s come up to me and said, ‘You’re excluded from here, can you please leave?’ ...There are three locally to me, and each one has got a person I know in there. They’re very good, and they will tell me to get out.” (Male, 38, Bacta, GAMSTOP, MOSES).

There were instances whereby staff either didn’t successfully identify, or didn’t proactively approach self-excluded individuals, particularly within establishments where they were regular visitors and felt they should be recognised, or in smaller premises with lower footfall.

“...two or three times in the past, two or three weeks and yes, nobody’s batted an eyelid. Nobody said to me, you know, ‘Oh, you’re not allowed in there. You’re self-excluded.’ Again, I don’t think they actually look at the forms.” (Female, 44, GAMSTOP, MOSES).

Although rare, there were a couple of occasions mentioned where the scheme users thought that staff handled the exchange unprofessionally and the interactions could have been more discrete.

“The staff is, kind of, a bit lazy. I’m self-excluded around my area. If I go to [operator], if I try to walk through [operator]’s shop, they start calling the police. They tell me that I need to leave the premises, if I gamble...” (Male, 35, MOSES).

“One shop let me go in, the staff knows I’m self-excluding, but they let me gamble, they lend me cash... they wait until you lose all your money, then they say, ‘Oh, you’re self-excluded. You’re not supposed to be here.’ But they wait until I’ve lost all my money...” (Male, 35, MOSES)

There were a few examples given from membership scheme users - particularly SENSE- who were caught breaching at the point of cashing in, having entered the premises and gambled for sometimes significant periods of time. In these instances, although the scheme users understood their obligations under the terms of the scheme, they were unhappy that identification had not taken place sooner, with a perception that operators were focusing on the money and not the gambler in these instances.

“If I lose money, I lose money; If I win money, I lose money... I spent £700 on a table quite freely and easily considering I’m on SENSE. I won about £2000, they asked for my name and DOB, I tried not to give it but they got it out of me. Then the manager came over and said you’re self-excluded so we’re confiscating your funds...” (Male, 34, SENSE, GAMSTOP, MOSES).

“I re-entered on maybe four or five occasions. Went in and found I was allowed to play, nobody stopped me until I’d actually won some money and went to cash the chips- at which point they became interested in me which I found rather annoying.” (Male, 48, SENSE).

Breaching –operator frontline staff perspectives

When discussing breaching behaviour with frontline staff there was agreement from all participants that there needs to be greater emphasis on customer responsibility. This would be done by:

- Providing greater clarity to customers that it is part of their responsibility to not attempt to breach, both in promotional materials and at the point of registration;

“There’s nothing anywhere that says it is also your responsibility.” (Casino operator)³⁰

- Placing emphasis on the fact that winnings will not be paid out at the point of detection.

Using other self-harm-minimisation tools in conjunction with self-exclusion

In our interviews with scheme users we found that very few use other harm minimisation tools in conjunction with self-exclusion. A few scheme users had used counselling (such as GAMCARE or Gamblers Anonymous) however these individuals mentioned they had used counselling prior to self-exclusion.

“Contacted GamCare a few times. Normally get pointed to a local Gamblers Anonymous sort of thing. I’ve never been to one. Never believed that group sessions with people with the same problems have any benefit.” (Male, 34, SENSE/MOSES/GAMSTOP).

One user mentioned he had used GAMCARE prior to self-exclusion but did not continue to do so after registering. This was because he felt counselling had no effect on him and he probably would have stopped regardless of self-excluding. Another individual mentioned that they found social media to be a useful, though unofficial, tool where they were able to hold discussions and confide in other people around the world with similar issues.

Outcomes achieved

Short-term

The Theory of Change identifies two short term outcomes:

- Frontline/helpline staff being able to identify gamblers displaying harmful behaviour; and
- Signpost those individuals to a) guidance & treatment providers’ materials and b) multi-operator self-exclusion schemes.

The achievement of these short-term outcomes is limited. Our interviews with scheme providers and operator front line staff showed that frontline staff are provided with training to identify gamblers displaying harmful behaviour, but there was a request for more training of this nature. In our interviews with scheme users, the vast majority said they took the initiative themselves to inquire about self-exclusion, and only a few said that they were approached by staff after being identified as presenting with self-harm gambling. These instances

³⁰ Gambling Commission guidelines however do say that it is a joint responsibility: See <https://www.gamblingcommission.gov.uk/for-the-public/Safer-gambling/Self-exclusion.aspx>

primarily occurred where there was already a relationship between the individual and the staff member, who then felt morally obliged to be more proactive. Still, the scheme users who were approached by staff said it was done so in a sensitive manner and felt appreciative that they took the time to speak with them.

When scheme users talked to operator frontline staff about a Multiple-Operator Self-Exclusion Scheme, only a few mentioned that they were signposted to other self-harm minimisation tools either prior to being told to consider self-exclusion or during the self-exclusion registration process. A few had been told about counselling treatment providers although the take up for these was limited.

Another short-term outcome identified is that **frontline staff are supported by adequate monitoring and referral tools enabling efficient identification of greater numbers of self-excluders in each location through Multi-Operator Self-Exclusion Schemes**. There are identified inadequacies in a number of the schemes which have been identified by the scheme providers themselves, specifically non-membership schemes whereby the identification of individuals is reliant upon regular briefings to staff on self-excluders, a good memory for faces and strong relationships with customers. The use of a tablet computer, rather than physical photos, which was introduced to meet with GDPR regulations, makes this task harder for staff in terms of ease of reference. It should be noted that all of this can have a direct consequence on staff confidence as outlined in the Theory of Change.

Medium-term

A medium-term outcome identified in the Theory of Change is **that gamblers displaying harmful behaviour exclude from a particular gambling sector using Multiple-Operator Self-Exclusion Schemes**.

We know that some gamblers who display harmful behaviour do indeed utilise self-exclusion as a tool to reduce or control their gambling. In our interviews with scheme users we found that self-exclusion was most likely the first harm-minimisation tool sought out, often where the scheme user enquired about the possibility to ban themselves from a particular venue or sector. Our discussion groups with gamblers, and quantitative research, provided insight into a number of barriers which may prohibit a gambler who displays harmful behaviour from partaking in self-exclusion. These barriers include:

- A lack of awareness about the existence of Multi-Operator Self Exclusion Schemes;
- Gamblers not perceiving themselves to be experiencing gambling-related harm, despite citing harmful gambling behaviours;
- A perception that self-exclusion doesn't work, either because of a lack of confidence in the ability of premises or websites to prevent breaching, or because it is not sufficiently broad to prevent problem gambling beyond the exclusion areas or in different sectors;

“I self-excluded from casino games but you can do that and still bet on sport.” (Male, betting shop gambler).³¹

“The ex-friend I referred to [...] he just got people to put bets on for him” (Male, casino gambler).

- Participants did not think it was realistic to rely on frontline staff to enforce self-exclusion effectively and stated that too much pressure seems to be placed on them. Some doubted staff motivation and talked about the incentives that they have to allow problem gamblers to gamble uninterrupted.
- Some worried that the length of the exclusion period might put people off signing up.

“People might not think they have a big enough issue to quit for a year” (Male, betting shops gambler).

- Others, conversely, felt exclusions were not long enough.
- One participant said they worried about missing out on chances to win when gambling.

“Sometimes I feel regret at not placing a bet when the results would be good and that makes me sad.” (Female, online gambler).

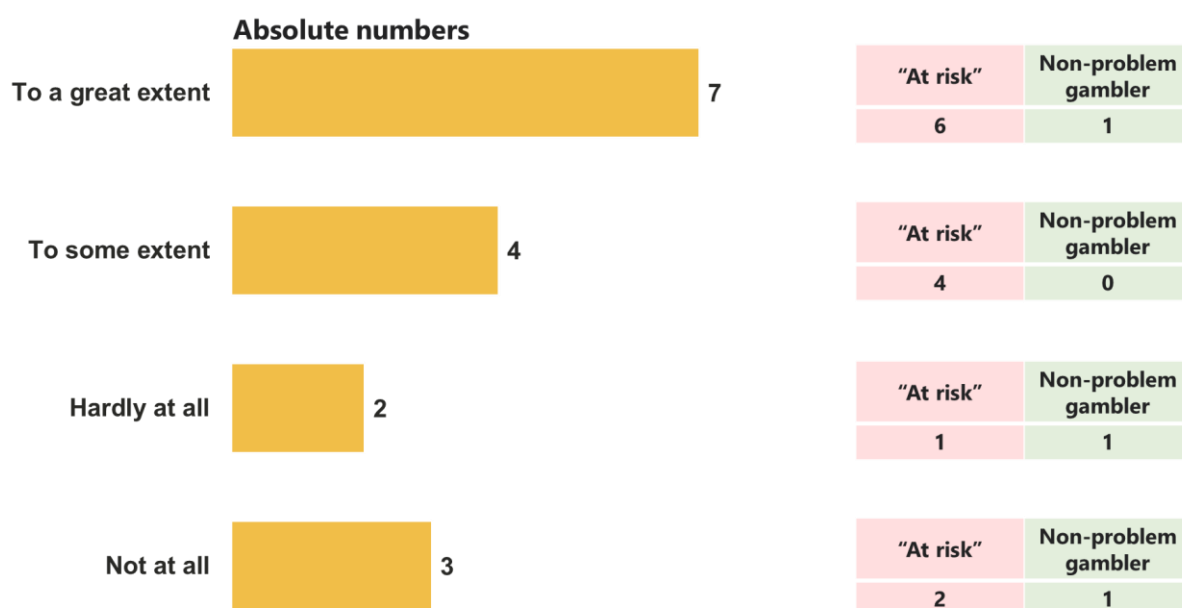
Another medium-term outcome we would expect to see is that **gamblers who display harmful behaviour access and utilise treatment providers’ tools.**

There was little evidence in our interviews with scheme users that they utilise other treatment providers’ tools. Counselling (such as GAMCARE or Gamblers Anonymous) was the most mentioned treatment provider tool. Several individuals mentioned they had done this prior to self-exclusion. Some said they received counselling after self-excluding, but in most instances they had stopped attending sessions as they did not find it useful.

Whilst it is too early in the evaluation to make a judgement, there is an indication that **Multiple-Operator Self-Exclusion Schemes are working towards ensuring that self-excluders refrain from gambling**, not just with individual providers, but within the wider sector for which they have self-excluded. This is another medium-term outcome.

Although we are not able to fully determine if this outcome has been reached at this phase of the evaluation, we have provided evidence that some of those who have self-excluded have at least limited their gambling.

³¹ This individual self-excluded online via individual casino websites and not GAMSTOP or an individual self-exclusion scheme. The respondent was from the online focus groups and not the qualitative in-depth interviews with scheme users.

Figure 7.4: **Has self-exclusion stopped or limited gambling?****Q8b. In your opinion, to what extent did self-exclusion help stop or limit your gambling?**

Base: All GB adults aged 18+ who have self-excluded (16) :
Fieldwork dates : 21st June - 7th July 2019

Note: By "at risk" we mean 'low risk gamblers', 'moderate risk gamblers' and 'problem gamblers'

Source: Ipsos MORI

Our quantitative survey found that 11 out of 16 individuals who have self-excluded found the scheme to have helped stop or limit their gambling to either some or a great extent. While interviews with scheme users showed that most had attempted to breach their self-exclusion agreement, with some exceptions, these individuals were gambling to a lesser extent than they were before self-exclusion. This was largely because self-exclusion, as a minimum, created a barrier to gambling. Having to go further distances to enter a venue they were not self-excluded from, or the subterfuge required to enter a venue from which they were self-excluded.

Long-term

This first phase of the evaluation is working towards assessing the following longer-term impacts:

Gamblers displaying harmful behaviour will utilise other tools and/or seek treatment to transition from harm generated gambling behaviour to sustained safe gambling behaviour

- However, as mentioned above, most scheme users interviewed to date tended not to use other harm minimisation tools in parallel to their self-exclusion. This will be explored in more depth in the next phase of the evaluation.

Gamblers who display harmful behaviour transition from harm-generating behaviour to sustained, safe gambling behaviour, or have developed the capability to refrain from gambling without external support.

- Although we cannot make conclusions at this point of the evaluation on gambling behaviour post-self-exclusion scheme, users were asked in our interviews about their thoughts regarding what they plan to do when their self-exclusion period ends. Although most interviewed did not know what they would do

at that point, many believed they would either let the self-exclusion run out and not return to gambling or would re-register. There was a perception from these individuals that they would not be able to control their gambling so believed they would need this barrier in place indefinitely.

“As soon as they come back with the lift of the ban then I’m going to stick it back on again... I don’t want to gamble. I’m in a lot better position now, so I don’t want to do that anymore.” (Male, 30, MOSES).

- A few said self-exclusion has helped them better manage the amount of time and money they spend on gambling. Therefore, they felt better placed to make a decision on whether to return to gambling. These findings are indicative and will be explored in greater depth in the ongoing phases of the evaluation.

Reduction in gambling related harms concerning personal well-being, employment, relationships and financial circumstances

- Once again, this impact will be explored further in the next phase of the evaluation. Several scheme users interviewed did mention an improvement in their lives where they either had better relationships with friends or family, and/or had more money and were therefore in a better financial position.

“Like I say, I’ve started saving now instead of spending all my money every month and that, start saving up, get a house and stuff like that. I’m going on holiday next week.” (Male, 21, Bacta, GAMSTOP).

- It should also be noted that very few had mentioned things that had become worse for them since self-excluding, several had said that there had not been any significant changes to their life;

Operators improve their understanding of gambling related harms and ways of supporting gamblers to minimise these.

- This will be explored in the next phase of the evaluation.

Recommendations to support desired outcomes

Scheme users offered a number of recommendations that they believed would help better their experience of self-exclusion. For various reasons, we understand that not all these would be possible to implement, but they do offer insight from the perspective of those the schemes are designed to help.

- **Single cross sector self-exclusion scheme:** The most frequently mentioned recommendation by scheme users was the creation of a single cross-sector self-exclusion scheme. Although the practicalities of such a scheme would face several challenges, we felt it was important to note that a desire for a blanket scheme arose out of the complexity or misperception some individuals faced when wanting to self-exclude from more than one sector. The most noted sector cross-over amongst scheme users was between a primary land-based sector with online. It may be worth exploring how online self-exclusion registration could be integrated with land-based self-exclusion schemes.

- **Improvement on venue/exclusion area selection when self-excluding:** When registering with MOSES, some customers experienced difficulty, or confusion, when selecting the venues and/or area they would like to self-exclude from. While geography and density of venues within a particular area are considerations to the effectiveness of how the scheme is managed, it would be beneficial to the customer if the member of staff registering them could provide more guidance during the registration process. For example, both being able to offer names/locations of venues near where the customer would like to exclude from, or making the customer aware in advance that they will need to know the details of the venues they want to exclude from when registering could make the registration process easier for the customer. Being able to simply pick a radius or area and automatically be self-excluded from all betting shops within that area was mentioned by some scheme users as the most desirable improvement concerning this issue.

Additionally, scheme users would find it beneficial to receive a written confirmation or list of all the venues from which they were self-excluded so they would definitively know where they should not go. Whilst not available during the evaluation, it should be noted that GAMSTOP now has consumer account functionality which will allow an individual to check the status of their exclusion and to extend it. Given that not knowing when a self-exclusion finishes creates a level of anxiety in individuals, and the fact that there is a desire from some to be able to extend their self-exclusion periods, this change in scheme management should be considered best practice.

- **Improved marketing and visibility around self-exclusion:** As many scheme users were not aware of self-exclusion prior to asking about how they could ban themselves from gambling. Furthermore, customers who register for self-exclusion should also be made aware that other self-exclusion schemes exist within other gambling sectors. They should then be signposted on where to go for further information or register for these other schemes.
- **Longer self-exclusion periods:** Many of the scheme users interviewed requested that their self-exclusion period be longer than the length of time that was available to them. In some cases, scheme users said they would have preferred an indefinite self-exclusion period. Five years was also mentioned as a suitable length. The varying time-lengths for each of the schemes also created some confusion with a few scheme users not recalling which scheme ends at which point. More consistency on self-exclusion period lengths could therefore also be beneficial.
- **Improved training for staff to sensitively deal with customers wanting to self-exclude:** Although frontline staff are trained on how to deal with customers who enquire about self-exclusion and a number of individuals said they had a positive experience with staff, some scheme users mentioned staff could have dealt with the situation in a more sensitive manner. This was usually when staff were unable to provide information to the customer and asked for them to return to speak to a different staff member.

Others said that when they did hold the discussion, they would have preferred to have done this in a more discreet location within the premises.

- **Extended hours for helplines:** It was mentioned by a few scheme users that the MOSES helpline was not available in the evening when customers are more likely to want to register for self-exclusion. We are aware that the helpline is open late but it may be worth considering if this could be extended.³² Additionally, MOSES users have suggested being able to register at betting shops themselves as they can be for Bacta.
- **Information sheet on personal self-exclusion details:** As discussed, several scheme users were unaware of when their self-exclusion period ends and the specific venues that they are self-excluded from. Some individuals mentioned it would be helpful to have this information on hand or available to them when they register but also for ease of reference to avoid customers entering premises to find out this information at a time when they might be feeling vulnerable. This information could be provided to them either in written confirmation or potentially via an online portal that users could log into to find out the details of their self-exclusion.
- **Better policing of venues:** Although they appreciate the challenges, several scheme users believed better policing of venues to make breaching more difficult would improve the effectiveness of the scheme. A challenge for non-remote sectors is a reliance on good quality photos and these to be regularly monitored or familiar to staff. Some mentioned using facial recognition technology which we are aware is being tested and implemented in more land-based venues. In our interviews we found that some scheme users who breached were caught when requiring ID to cash in their winnings, primarily in casinos. A consideration may be to do this more often at venues where this may not be the norm.
- **Improved regulations and guidelines around operator advertising:** Even though advertising falls outside the remit of self-exclusion schemes, some scheme users mentioned that it would be beneficial to them if they were not confronted with general gambling advertisements. Online advert blockers seem to work well, however regulating this on television and radio could prove more difficult. Two scheme users mentioned that certain sounds, for example the clinking of a slot machine, were enough to trigger their desire to gamble. More investigation into these triggers through advertising may be worth consideration.

³² Currently the hotline hours are open from 8am -12am seven days a week. We note that these hours were extended from 8am – 8pm in January 2019. The scheme user may have not been aware of the changes at the time of the interview.

Conclusion

Whilst each gambling sector is at a different stage regarding its development of their Multiple-Operator Self-Exclusion Scheme, the first phase of this evaluation has already highlighted a number of enablers and barriers in regard to the implementation and effectiveness of the schemes.

The first phase of the evaluation covered both awareness, amongst the general public and gamblers who display harmful behaviour, as well as the process of registration amongst scheme users. While the Multi-Operator Self-Exclusion Scheme promotional materials for consumers are clear and easy to understand there was an identified need for improved visibility. Public awareness could be increased as scheme users stated in the research that they only became aware of the Multi-Operator Self-Exclusion Schemes through internet searches or recommendations from someone else. It is also apparent that there is a gap in consistent approaches to training provision of operator staff in identifying and approaching those displaying gambling-related harm, and how technology can be used to assist in this. Something that will need to be explored further in the second phase.

Phase 1 has identified a number of areas that would benefit from improvement. The registration process to Multi-Operator Self-Exclusion Schemes is generally considered straight forward although it was demonstrated that there are instances when operator staff could deal with registration more effectively. Also communication to scheme users as to how the Multi-Operator Self-Exclusion Schemes actually works could be strengthened. For example, some scheme users were unsure of the geographical zone or time length of their self-exclusion. Tools to aid the identification of individuals breaching are also seen to be limited in their effectiveness.

While thus far this evaluation has only measured short-term impact there is an indication that the schemes are proving to be effective for scheme users, either by modifying their behaviour, or having stopped it completely. This demonstrates the need to continue evaluating the Multiple-Operator Self-Exclusion Schemes to gain a better knowledge of its long-term impacts.

Appendix

Reporting conventions

Terminology

When referring to Multi-Operator Self-Exclusion Schemes we have not used any abbreviation, to avoid confusion with MOSES (Multi Operator Self-Exclusion for Betting shops).

Stakeholders naming conventions:

- Scheme providers (e.g. GAMSTOP)
- Scheme operators (e.g. betting shops)
- Scheme users
- A member of the public (quant survey where non-gamblers)
- A gambler (someone who gambles but is not a scheme user)

Scheme naming conventions (note case sensitive)

- SENSE (casinos)
- Bacta (arcades)
- Bingo Industry Self-Exclusion (bingo membership)
- Smart Exclusion (high street bingo – no membership)
- MOSES (betting shops)
- GAMSTOP (online)

Collective nouns

- Non-member schemes (arcade, high street bingo, betting shops)
- Membership schemes (casino, non-high street bingo)
- Remote operators (online)
- Non-remote operators (land based)

Quotes.

When using a direct verbatim quote, we have referred to different groups in different ways, as shown below. It is worth noting that online focus groups were asked to use an alias, and therefore age cannot always be appended to a quote. For consistency, we therefore removed age from all online gambler quotes.

e.g. "quote" (Gender, Sector Gambler)

"If you self-exclude online there's no way back – you do it for 90 days and that's it. Nothing like that exists for shops." (Male, Betting shop gambler).³³

For scheme user surveys, we were able to attribute age, gender and any schemes they have enrolled on (some participants were registered to more than one Multi Operator Self-Exclusion scheme).

e.g. "quote" (Gender, Age, Scheme)

"I'd, kind of, seen it out of the corner of my eyes [in a betting shop], as you would when you think about it. And then, of course, my counsellor that I did go to with GamCare, he suggested all this as well." (Male, 43, MOSES).

³³ This quote, as throughout, is a direct verbatim from a research participant, based on their own perceptions. We recognise that these perceptions may not always represent factual truth, but serve to show the extent of participant understanding of the schemes.

Glossary of terms

Term	Definition
Bacta	The trade association for the amusement and gaming industry, responsible for the Multi-Operator Self-Exclusion Scheme for Gaming, Arcades and some Bingo premises.
BeGambleAware	GambleAware is the leading charity in the UK committed to reducing gambling-related harms.
Bingo Industry Self-Exclusion Scheme (BISES)	A national self-exclusion scheme which enables a customer to self-exclude from every UK bingo club with just one request.
Breaching	Gamblers who have self-excluded but attempt to gamble in a premises / on a site that is included in the terms of their self-exclusion agreement.
Causal Mechanisms	The means by which an outcome is brought about or achieved.
Depth interview	A qualitative semi-structured research method that is typically a 1 to 1 interview between a researcher and participant. Depth interviews offer more insight and flexibility than a survey and can be more appropriate than a focus group, particularly when it comes to sensitive issues such as gambling.
Focus group	A qualitative research method. Usually a group discussion, that can take place in person or online through a forum. Typically, 6-10 participants will take part in a focus group.
Gambler (survey definition)	Those who have taken part in at least one gambling activity in the past 12 months, as defined in the Gambling Participation Survey (conducted by The Gambling Commission). For this survey, those who have partaken in National Lottery ONLY are not defined as gamblers.
Gambling Commission	The regulatory body set up under the Gambling Act 2005 to regulate commercial gambling in Great Britain in partnership with licensing authorities.

Gambling sector	There are seven core sectors that cover the different types of gambling activities available to gamblers. These sectors are also responsible for their own regulation, including self-exclusion (where applicable). These sectors are Arcades (non-remote), Betting (non-remote), Bingo (non-remote) Casinos (non-remote) Remote gambling (online casino, bingo and betting), National Lottery (remote and non-remote) and Large Society Lotteries (remote and non-remote).
GAMSTOP	The Multi-Operator Self-Exclusion Scheme for remote gambling.
General Data Protection Regulation (GDPR)	The regulation in EU law on data protection and privacy. It also addresses the transfer of personal data and supersedes the Data Protection Directive in 2018.
Harm minimisation tool	Tools and policies put in place which aim to prevent or reduce harms, in this case, gambling-related harms.
Impact Evaluation	An assessment of how the intervention being evaluated affects outcomes and whether these effects are intended or unintended.
Land-based operators	Gambling operators that have physical premises, as opposed to those which operate online only.
Literacy / document review	A process to review the current literature on a topic or policy area in order to inform the basis of the evaluation. This may include current schools of thought from academia, any gaps in the research, or help in framing research objectives.
Membership/non-membership venues	Operators that require gamblers to have a membership in order to access facilities vs. those who don't and allow anyone (aged 18+) to visit.
Multi Operator Self Exclusion Scheme	Sector specific self-exclusion schemes that allow gamblers to self-exclude from multiple gambling operators for a set period of time. This can be national, or area specific. More details of each sector scheme are provided in the Executive Summary of the main body of the report.
MOSES	The Multi-Operator Self-exclusion Scheme for betting shops.

Non-problem gamblers, Low risk gamblers, moderate risk gamblers, and problem gamblers	The segment attributed to a gambler as defined by the Problem Gambler Severity Index, typically asked in survey format (see definition below). A gamblers' score defines the severity of how harmful their gambling behaviour is. Risk scores are calculated as follows: 0 (non-problem gamblers) = Gamblers who gamble with no negative consequences 1-2 (low risk gamblers) = Gamblers who experience a low level of problems with few or no identified negative consequences 3-7 (moderate risk gamblers) = Gamblers who experience a moderate level of problems leading to some negative consequences 8 or more (problem gamblers) = Gambling with negative consequences and a possible loss of control Due to low sample sizes of low, moderate and problem gamblers, we combined these three categories when analysing the survey to create a category named "At Risk"
Non-gambler (survey definition)	A member of the general public who has not partaken in any gambling activity in the past 12 months, as defined by the Gambling Participation Survey.
non-remote operators	Operators that have physical gambling premises.
Operator compliance officer	A senior member of staff responsible for ensuring their company is compliant with regulatory laws around gambling, including gambling-related harms.
Operator frontline staff	Members of staff who work within the operator's gambling premises (sales assistants, managers etc.)
PGSI	Problem Gambling Severity Index. A bank of statements asked in a survey to determine the severity of problem gambling. Participants will be given a score based on their answers to nine statements, which can be aggregated into one of four categories. A total score of between 0-27 is possible, with the scale for each question equating to a score for that statement: Never: = 0 Sometimes = 1

	Most of the time = 2 Almost Always = 3 Therefore, a participant who answered "Almost Always" to each of the nine statements would get the maximum score of 27.
Process Evaluation	Focussing on the implementation process and whether activities have been implemented as intended, including how far outcomes have been addressed.
Process map	A tool that visually describes the flow of work (in this case delivery of Multi-Operator Self-Exclusion Schemes), usually showing a series of events or processes that produce an end result.
Qualitative research	Research that seeks to answer the "how and why" of a research objective or question. Usually semi-structured and more in depth than quantitative research, typically manifested through in-depth interviews or focus groups.
Quantitative research	Research that produces numerical data to explain and quantify opinions, attitudes, behaviours or other defined variables. This can often be used to run statistical significance, or to extrapolate results from a study sample to speak for a wider population. Quantitative research is usually far more structured than qualitative research, usually in the form of a survey.
Remote operators	Operators that offer gambling services online. Many operators will have both remote and non-remote gambling facilities.
Sample/Contact sample	A small defined group selected to take part in research rather than an entire population. Usually selected through a pre-defined procedure called a sample frame. Specific to this evaluation, the contact sample for online groups was reached through the telephone survey with the general public. From this, a sample of gamblers was selected to take part. For the scheme user interviews, sample was provided by scheme owners, and again a selection of scheme users was used in the research.

Scheme users	Gamblers who are currently enrolled on a Multi Operator Self-Exclusion Scheme.
Self-Enrolment National Self-Exclusion (SENSE)	The national self-exclusion scheme for the Casino sector.
Self-exclusion period	The defined timeframe in which a scheme user has self-excluded for. This can range between 6 months and 5 years dependent on the scheme.
Self-exclusion zone	The defined radius of a non-remote self-exclusion, whereby the scheme does not have national coverage.
Single operator self-exclusion	Self-exclusion schemes run by operators, that offer exclusion from their own company only. This can be offered in conjunction with Multi-Operator Self-Exclusion.
Smart Exclusion (IHL Tech)	The company responsible for managing the mechanics of High Street Bingo Multi Operator Self-Exclusion Scheme, and some Arcade premises.
Theory of Change (ToC)	A comprehensive description and illustration of how and why a desired change is expected to happen in a particular context.
Treatment providers	The system for treatment provision for those suffering gambling-related harm. A network of organisations including GamCare, Gordon Moody, and the National Problem Gambling Clinic.
WTFSS	When the Fun Stops Stop. A call to action attached to communication activities around harmful gambling, as part of a campaign run by The Senet Group, an industry funded group created by a number of large gambling operators.

Technical report

Background & objectives

Ipsos MORI has been commissioned to conduct an evaluation of the Multi Operator Self-Exclusion Schemes, on behalf of GambleAware.

This report outlines a detailed technical description of the design, methodology and data outputs used in the first phase of the evaluation, which ran between January 2019 – November 2019.

The Multi Operator Self-Exclusion Schemes are designed to allow individuals experiencing gambling related harm to exclude themselves across a multitude of locations or sites, in order to stop gambling that has fallen out of their control. The scope of the evaluation covers the five existing multi operator schemes for each gambling sector, detailed below:

1. Multi Operator Self-Exclusion Scheme for Betting shops (MOSES)
2. National Casino Forum Self-Exclusion Scheme (SENSE)
3. Bingo Industry Self-Exclusion Scheme (BISES)
4. Online gambling Self-Exclusion Scheme (GAMSTOP)
5. Amusement and Gaming Industry Self-Exclusion Scheme (BACTA)

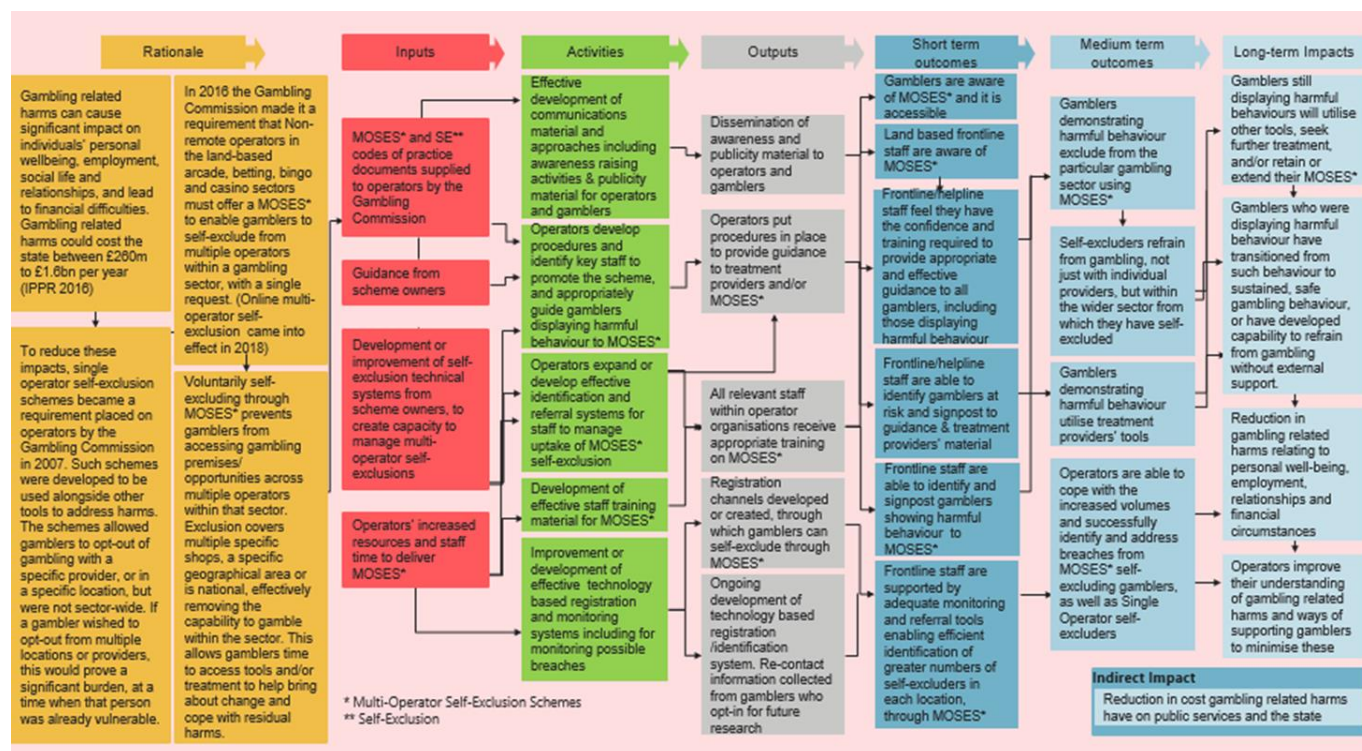
The primary objectives of the research were to:

- Evaluate the effectiveness of the *process* of planning and implementation of the Multi Operator Self-Exclusion Schemes, including enablers and barriers to each scheme running efficiently;

Gather baseline evidence of the *impact* of the schemes, including awareness and perceptions of them amongst gamblers, and how effective they have been for the intended beneficiaries who have registered in helping moderate their gambling behaviour.

Development of Theory of Change (ToC)

Figure 1.1 Theory of Change



The theory of change presented in Figure 1.1 shows our understanding of the causal mechanisms common to all gambling sectors, that are hoped to bring about the desired change with gamblers experiencing harms. The theory of change depicts the key desired short, medium and longer-term outcomes across operators, frontline staff and those experiencing gambling related harm, and the anticipated causal pathways to these resulting from activities and inputs.

In order to ensure a robust theory of change, the core research team at Ipsos MORI undertook an iterative process of development, in collaboration with the steering group, as described below:

1. Literature review of current academic thought on gambling-related harms and where the role of Multi Operator Self-Exclusion sits within the current challenges faced.
2. Familiarisation sessions with individual scheme owners, treatment providers and leading academic to understand the nuances of each scheme, and assess the feasibility of developing one single Theory of Change designed to encompass all schemes.
3. Workshops with operators to gain a further understanding of the enablers and barriers to successful planning, implementation of delivery of the schemes on the ground.
4. Development of a provisional Theory of Change, which formed part of the inception report (also including conceptual framework and a process map).

5. Revisit scheme providers as a sense check against the logic applied to the draft Theory of Change, and re-draft accordingly
6. Review the Theory of Change in a planning meeting for implementation of the phase two evaluation.

Overview of methodology

The table below summarises the methodological approach which has been undertaken to deliver this evaluation. The remainder of the report will take each of these methodological approaches in detail.

Table 7.1: Summary of the Methodological Approach

Method	Rationale
1 x familiarisation interview with each of the 6 scheme owners across sectors 2 x follow up interviews with each scheme owner to discuss the TOC 1 x final interview with each scheme owner to plug knowledge gaps	to gain a better understanding of the processes underpinning the MOSES implementation, as well as barriers for self-exclusion and context for this evaluation as well as determining the feasibility of using contact sample of self-excluders.
2 x familiarisation interviews with treatment providers and 2 x academics	to gain a clearer understanding of the journey those experiencing gambling-related harms through ultimately leading them to self-exclude. These interviews also provided insight around the ethics and best ways to approach the subject with those experiencing harms.
1 x extended focus group was carried out with 14 frontline staff working in gambling premises across the land-based gambling sectors	to gain a better understanding of the day-to-day working of the MOSES, and perceptions from staff on the take-up, success and limitations.
1 x workshop with 19 operators' compliance officers across gambling sectors, including the remote gambling sector	to gain a better understanding of the ideas and principles guiding the implementation of MOSES, including the dissemination of information and training to staff, mechanisms for signposting problem gamblers to MOSES, and enablers and barriers to the consistent execution of processes supporting the MOSES and satisfied customers.
Document and dataset review (GambleAware, the Gambling Commission and Dr Adrian Parke, our partner academic suggested relevant documents and datasets)	to aid the development of the conceptual framework and to provide context for this evaluation.

A telephone survey of 1,500 with the general public, with a boost of gamblers	to gather evidence on general public and gambler awareness of self-exclusion schemes, and some top-level attitudes and perceptions. The re-contact sample was also used to recruit gamblers to take part in online focus groups.
5 x online focus groups with gamblers in each sector	to explore in further depth awareness and attitudes towards multi operator schemes amongst gamblers in each sector. This sample did not include those that had taken part in a multi operator scheme.
42 x depth interviews with scheme users	to gather qualitative evidence from users of the five schemes on the effectiveness of the schemes, and some early evidence of impact.

Scheme provider interviews

Ipsos MORI made initial contact with a representative from each of the six scheme providers in order to gain an informed understanding of each individual scheme through a familiarisation interview.

A discussion guide was created to gain insight into perceptions of the scheme's strengths and weaknesses within the specific sector, internally identified areas of potential improvement and the perceived impacts upon gamblers experiencing harms. A member of the Ipsos MORI core project team each took responsibility for two sector contacts (which remained consistent throughout the process) and liaised throughout various stages of the evaluation. This included acquiring sample for the scheme user in-depth interviews, development and discussion around the Theory of Change and to factcheck scheme specific clarifications at reporting stage.

Frontline staff and compliance officer workshops

Ipsos MORI conducted a focus group with 14 frontline staff representatives from across the four non-remote gambling sectors, with representation of two operators per sector. These staff members were contacted/nominated by senior compliance officers who participated in a further workshop and whose details were provided by the Gambling Commission.

A discussion guide was developed using the draft process map and theory of change, in order to gain a deeper understanding of the experiences of frontline staff across the four non-remote sectors. This was done under the guidance of GambleAware and The Gambling Commission. The guide was designed to meet the following research objectives:

- To understand the planning and implementation of MOSES in the gambling industry, and across gambling sectors;
- To explore the commonalities or differences of how MOSES is implemented and delivered across the five gambling sectors (casinos, bingo, remote, betting shops and arcades);
- To identify potential improvements in how MOSES is implemented and delivered to encourage take up;
- To explore the ways in which technology can support the implementation and delivery of MOSES (e.g. are there limitations and/or barriers to introducing technology assisted identification of problem gamblers?); and

- To understand how current arrangements of identifying customers who have signed up to MOSES is working in practice.

Learnings were taken from this session and used to inform the design of the discussion guide used at the operator workshop. In total, 19 compliance officers from across all five gambling sectors including the remote gambling sector attended this workshop, where they were split into sector specific moderating tables. The objectives here were the same as above, however, moderators were invited to probe on learnings from discussions with frontline staff, and explore potential differences in approach between operators both large and small within the individual sectors. Plenary exercises were also included between sessions to encourage group feedback and knowledge sharing between sectors.

The frontline staff focus group took place on 1st March 2019 during the afternoon as attendees had been nominated by their employers to attend. The group lasted roughly 2 hours and was held at the Ipsos MORI North offices in Manchester.

The operator workshop took place on the afternoon of 19th March 2019 at the Gambling Commission offices in Birmingham and was roughly 4 hours in length.

Quantitative survey

Methodology

Ipsos MORI carried out a quantitative study, in order to gather top-level evidence of awareness and perceptions of Multi Operator Self-Exclusion Schemes amongst the general public, with a particular focus on those who gamble.

A Computer Assisted Telephone Interviewing (CATI) survey was conducted with 1,500 UK adults aged 18+. Within this, 1,000 of those interviewed were gamblers, and 500 non-gamblers. This approach was chosen to ensure that statistical sub-group analysis could be done within the gambler sample population, while still being able to assess a flavour of the wider general public perceptions at an overall level.

For the purpose of the survey analysis, gamblers were defined as those who have partaken in any gambling activity in the past 12 months, excluding those who have taken part in the National Lottery or bought scratch cards *only*. We also determined a sub-group of recent gamblers by asking the same question of those who gamble but stipulating gambling activity within the past four weeks. Further to this, we also asked the Problem Gambler Severity Index (PGSI) in order to analyse a sub-group of “At risk” gamblers – a combination of those who score low, moderate or problem gambler scores in the index.

Quotas were set on age, gender, region and working status to ensure the sample was broadly representative of the profile within each audience (gamblers and non-gamblers). Table 1.2, below, shows the final achieved quotas.

Table 7.2: Telephone survey quota targets vs. actual figures

	Gamblers (1000)		Non-Gamblers (500)	
GENDER	tgt %	act %	tgt %	act %
Male	54%	55%	46%	45%
Female	46%	45%	54%	55%
AGE				
18-24	15%	7%	15%	8%
25-34	22%	13%	15%	10%
35-44	19%	17%	16%	15%
45-54	12%	23%	12%	13%
55-64	15%	24%	16%	25%
65+	18%	14%	27%	29%
REGION				
North East	5%	6%	4%	3%
Yorkshire & Humber	9%	9%	8%	6%
East Midlands	7%	7%	8%	6%
Eastern	10%	9%	10%	12%
Greater London	11%	13%	14%	17%
South East	14%	14%	14%	14%
South West	9%	9%	9%	9%
West Midlands	9%	9%	9%	10%
North West / Merseyside	11%	12%	12%	12%
Wales	5%	3%	5%	3%
Scotland	10%	8%	8%	7%
EMPLOYMENT STATUS				
Working (full-time or part-time)	64%	76%	51%	61%
Not working	36%	24%	49%	39%
Other		0%		1%

Data were then weighted to match the overall sample to that of the known profile of gamblers and non-gamblers in the Great Britain order to counteract non-response bias. Table 1.3 and Table 1.4 below shows the weights applied to each group in order to match the representative profile at a national level. Data were weighted to gambler vs. non-gambler overall, and then within the two audiences, a separate weighting scheme was applied by gender, age and work status.

Table 7.3: Telephone survey weighting profile of gamblers vs. non gamblers for overall British public

	Weighted Proportion	Gambler
Non-Gambler	57.72%	570
Gambler	42.28%	430

Table 7.4: Telephone survey weighting scheme

	Non-Gambler	Gambler
Male	26%	23%
Female	31%	20%
	Non-Gambler	Gambler
18-24	8%	6%
25-34	9%	9%
35-44	9%	8%
45-54	7%	5%
55-64	9%	6%
65+	15%	8%
	Non-Gambler	Gambler
Working (full-time or part-time)	29%	28%
Not working	28%	15%

Design

Ipsos MORI worked alongside GambleAware and the wider steering group³⁴ to produce a quantitative questionnaire that explored the following themes:

- Overall gambling behaviour, including categorisation of sector-specific gambling and those displaying harmful gambling behaviour. Commonly used measures of gambling behaviour were used in consultation with the Gambling Commission, such as the Problem Gambling Severity Index (PGSI) and the Attitudes Towards Gambling Scale (ATGS)
- General perceptions towards self-exclusion, including awareness and take-up of both single and multi operator schemes, and some specific attitudinal measures of those who are aware
- Awareness and use of other harm-minimisation tools that might supplement self-exclusion
- Demographic questions for quota purposes.

³⁴ The wider steering group included members from GambleAware, including evaluation consultant Prof. David Parsons, and the Gambling Commission.

Once agreed and signed off by the steering group, Ipsos MORI's data processing team used a programme called Dimensions to create a computer assisted script for interviewers to code participant's answers. Ipsos MORI's research team then checked this script to ensure there were no spelling or routing errors before commencing with fieldwork. During fieldwork, participant responses were then inputted into Dimensions, forming the raw dataset.

Data outputs and reporting

Upon finishing the fieldwork, Ipsos MORI's data processing team produced an aggregated, anonymised data set in the form of:

- **Excel topline** – this spreadsheet contained the final weighted results for each question, with total columns for gamblers and non-gamblers which could be shared outside the immediate research team.
- **Data tables** – these showed the results for each question, but allow for bivariate analysis via a number of demographic and attitudinal cross-tabulations. The tables also included significance testing at the 95% confidence level, using letters to show where any differences between sub-groups are statistically significant, meaning we can confidently say there is indeed a true difference between these groups. In the charts provided in the report we indicated positive significant differences in green and negative significant differences in red.

Ipsos MORI also produced a short Word 'Key Findings' summary which was disseminated amongst GambleAware and the wider steering group. The quantitative findings have also been used to inform the evaluation research questions in distinct sections of the main phase one report.

Online focus groups with gamblers

Methodology

Following the quantitative study, Ipsos MORI undertook five online focus groups with gamblers from each sector included in the study (Betting, Online, Bingo, Arcade & Casinos). The purpose of the groups was to explore awareness and attitudes towards each scheme in more depth.

Because some topics of the discussion could be considered quite sensitive, it was decided that conducting focus groups online would be the most appropriate methodology – participants tend to be more comfortable sharing experiences online than in person, and it allowed potentially vulnerable adults to do this anonymously.

Online programme Adobe Connect was used to facilitate the groups. This programme allowed moderation of a focus group via a shared online forum, where only those recruited to take part could receive the link. Once joining the forum, focus group members share the online platform with the moderator and any observers. Adobe Connect also allows the moderator to share multimedia content with participants, useful for testing materials.

In terms of recruitment, Ipsos MORI used the sample from the quantitative questionnaire in order to reach gamblers. The recruitment team sent an email and followed up with a call using the sample collected made up of those who agreed to be re-contacted.

It was important to recruit participants that gamble in each sector in order to test each relevant scheme with gamblers who may be prospective users. Therefore, hard quotas were set on recruiting c.10 gamblers from each of the five sectors per focus group. In order to reach a balanced sample broadly reflecting different demographics of people who gamble, additional soft quotas were also set on the following:

- **Recent gamblers** (those who had gambled in the past four weeks)
- **Problem gamblers, moderate risk gamblers and low risk gamblers** (as defined by their PGSI³⁵ score collected in the survey)
- **Heard of self-exclusion**
- **Taken part in self-exclusion** (but NOT multi-operator schemes).

Other soft quotas: we also monitored the following variables to ensure we have a good mix of people:

- Age and gender (good mix within each)
- Education level
- Working status.

Design

Ipsos MORI designed a core topic guide, again with guidance from GambleAware and the wider steering group. Academic expert Dr Adrian Parke was also consulted, alongside Ipsos MORI's internal ethics team, to ensure that the guide was designed in an ethically robust manner.

The guide was designed to meet the following objectives:

- To what extent gamblers feel supported by operators, and how well they are signposted to further support
- How effectively operators are communicating about Multi Operator Self-Exclusion, and how clear and effective communications and implementation systems are
- Gamblers' personal or proxy experiences of self-exclusion systems in practice, and of breaches or attempted breaches

³⁵ Problem Gambling Severity Index

- To what extent do gamblers experiencing harms and gamblers more widely, see Multi Operator Self-Exclusion as the recommended route to self-exclusion? (How) do Multi Operator Self-Exclusion Schemes complement or compete with other self-exclusion systems?
- Post Multi Operator Self-Exclusion, what are the key barriers and enablers in helping gamblers to reduce or stop their gambling?

Once the core set of questions were agreed, five sector-specific guides were produced, with distinct prompt questions in each. The guides comprised of the following core themes:

- General gambling behaviours, including relationships with others and interactions with staff
- Needs for support, staying in control of gambling
- Awareness and experience of multi operator self-exclusion schemes
- Materials testing – each group asked to look at scheme-specific communication materials
- Further help – support needed alongside self-exclusion.

In addition to the guides, Ipsos MORI also produced a participant information sheet and privacy policy to inform participants of the relevant data protection protocols in order for them to give informed consent to take part.

Fieldwork took place between the 22nd – 26th July 2019, during the evening to maximise participant availability. Each focus group was roughly 90 minutes long and took place between a window of 6-9:30 PM.

Participants were given £40 in Amazon vouchers as an incentive for taking part and were emailed these shortly after completing the groups.

Data outputs and reporting

Adobe connect automatically records the forum transcripts, which were used by the Ipsos MORI research team to inform the analysis. An analytical framework was produced, designed to map findings from each group to the relevant evaluation objectives. Ipsos MORI also hosted a verbal debrief with the steering group to communicate the top-level findings.

This was used to inform the main evaluation report in each relevant section, along with anonymised verbatim directly taken from the transcripts.

Depth interviews with scheme users

Methodology

The final stage of the fieldwork was to complete 42 qualitative depth interviews with users of the five multi operator self-exclusion schemes.

The purpose of the research was to determine the effectiveness of the schemes for its users, and to gather qualitative evidence of the enablers / barriers to this from the perspective of the beneficiary.

These interviews took place via telephone, and were conducted by the core evaluation research team at Ipsos MORI, as follows:

- 12 pilot interviews to test the topic guide, followed by a pause and reflect phase and feedback to the steering group. Originally, these had been planned as cognitive interviews, i.e. building in some feedback on the questions themselves (how easy are they to understand, is this question relevant etc.). However it was decided that given the nature of the audience in these interviews, it was felt that interrupting personal stories of gambling problems to ask cognitive testing questions would be insensitive. Therefore it was decided that these interviews would be pilots, and instead the team built in a “pause and reflect” where learnings from the interviews were applied and used to tweak the guide ahead of the full interview phase.
- 30 mainstage interviews, following tweaks made to the topic guide. These interviews spread evenly across each gambling sector to ensure we gained sufficient qualitative data on each scheme.

For this stage, Ipsos MORI worked alongside each individual scheme owner who held the sample of users. A few months prior to the fieldwork, scheme owners were asked to start collecting re-contact permission from users in order to be eligible sample for the research.

After finalising individual Data Sharing Agreements with each scheme-provider, Ipsos MORI received sample with the contact details of each participant, along with any relevant demographic information. Ipsos MORI's recruitment team then contacted individuals from each team, collecting demographic information as part of a screening process.

As with the online groups, it was important to ensure research was conducted with a broad range of participants in order to broadly reflect the demographic profile of scheme-users. Aside from hard quotas on each sector to ensure an even spread, quotas were also set on demographic variables, as shown in Table 1.4.

It is worth noting that many participants tended to be registered across more than one Multi Operator Self-Exclusion Scheme, and therefore may have appeared in more than one sample. Therefore, participants were sometimes recruited from one sample but qualified for a different sector interview. GAMSTOP (online self-exclusion) did not collect re-contact information for a third party, and therefore could not provide a sample to Ipsos MORI. GAMSTOP therefore took a different approach by emailing 120 scheme-users asking them to opt in. Just one person responded via opting in, and all other GAMSTOP interviews were recruited from other sample sources.

Table 7.5: Scheme user depth interview quotas

Group	Quota target	Priority	Sourced directly from sector sample	Achievement (total)
Betting	8	High	6	8
Casino	9	High	10	9
Arcade	8	High	13	8
Bingo – High Street	4	High	7	4
Bingo – Arcade Gaming Centres	3	High	4	3
Bingo – Trade	1	High	1	1
Online	9	High	1	9
Self-exclusion	Quota target	Priority		Achievement
1-3 months	12	Medium		9
3-6 months	15	Medium		8
6 months +	15	Medium		24
Age Group	Quota target	Priority		Achievement
18-24	7	Medium		4
25-34	14	Medium		17
35-54	14	Medium		15
55+	7	Medium		6
Gender	Quota target	Priority		Achievement
Male	30	Medium		30
Female	12	Medium		12

Design

As with the previous materials, Ipsos MORI worked alongside the wider steering group to produce a topic guide for the scheme-user interviews. Ipsos MORI also worked alongside academic Dr Adrian Parke, an expert in gambling related research, and its own internal ethics board to ensure the topic guide was ethically robust. This process was particularly important given the possibly sensitive nature of some questions, such as asking gamblers to recall their own experiences of problem gambling.

The objective was to understand scheme-users experience of taking part in each Multi Operator Self-Exclusion scheme, in terms of:

- Ease of registration processes;
- Effectiveness of the scheme in controlling harmful gambling;
- The impact of the scheme in terms of how they feel about their gambling now and in the future.

In order to assess these objectives, Ipsos MORI produced a guide designed to follow the “gambling journey” of the scheme-user, using the following structure:

- First experiences of gambling, and first feeling they might have a gambling-related problem
- Doing something about this, e.g. seeking out support or self-excluding
- Registration processes of the Multi Operator Self-Exclusion scheme(s) they had enrolled on
- Effectiveness of the scheme (whether it has helped to control their gambling and whether they have breached it)
- Impact of the scheme – how they feel about their gambling looking ahead to when their self-exclusion scheme ends in the future.

The fieldwork took place between 18 September – 25 October 2019. Interviews were approximately 45 minutes and participants were paid £30 in Amazon vouchers as an incentivisation for taking part. As there were no substantial changes to the discussion guide following the initial pilot interviews, these 12 interviews were also included within the main framework analysis.

Data outputs and reporting

All interviews were transcribed, before being anonymised and input into a common analysis framework that was structured around the salient evaluation objectives. This analysis sheet helped inform the thematic commonalities across interviews as discussed in the main report.

A verbal analysis session was also hosted by Ipsos MORI, which was attended by members of the steering group. This was again used to draw on common themes and was focussed on answering the evaluation outcomes framework.

Quotes from the analysis sheet have been used to support thematic findings in the main report throughout. All quotes are anonymised but do show gender, age (for interviews with scheme users only) and which sector the quote has originated from.

Telephone survey questionnaire

Multi-Operator Self-Exclusion Schemes Questionnaire

General gambling habits & attitudes

The next few questions relate to gambling behaviours. Even if you don't gamble, we're interested in hearing from a cross-section of people

ASK ALL

Q1 Which of the following, if any, have you spent money on in the past 12 months?

Please mention all that apply.

1. Tickets for National Lottery Draws that you buy in person
2. Tickets for National Lottery Draws that you buy online
3. Scratch Cards
4. Gaming machines in a bookmakers
5. Fruit or slot machines in pubs, arcades, casinos
6. Bingo (including online)
7. Roulette, Poker, Cards or Dice in a Casino
8. Betting on horse or dog races online or in person
9. Betting on football online or in person
10. Betting on other sports or events online or in person
11. Online casino games (slot machine style, roulette, poker, instant wins)
12. Any other type of gambling
13. None of the above
14. Don't know

ASK THOSE WHO HAVE GAMBLED IN PAST 12 MONTHS (CODES 1-12 AT Q1)

Q2 And which of these, if any, have you spent money on in the past 4 weeks?

Please mention all that apply.

1. Tickets for National Lottery Draws that you buy in person
2. Tickets for National Lottery Draws that you buy online
3. Scratch Cards
4. Gaming machines in a bookmakers
5. Fruit or slot machines (not online)
6. Bingo (including online)
7. Roulette, Poker, Cards or Dice in a Casino
8. Betting on horse or dog races online or in person
9. Betting on football online or in person
10. Betting on other sports or events online or in person
11. Online casino games (slot machine style, roulette, poker, instant wins)
12. Any other type of gambling
13. None of the above
14. Don't know

ASK ALL

Q3. Thinking generally about gambling, how strongly do you agree or disagree with each of the following statements?

1. There are too many opportunities to gamble nowadays
2. Most people who gamble do so sensibly

1. Strongly agree
2. Tend to agree
3. Neither agree nor disagree
4. Tend to disagree
5. Strongly disagree
6. Don't know

ASK ALL; OPEN-ENDED

Q4. If you were concerned that someone you know might have a problem with gambling that is causing them harm, what would you tell them, if anything, to do for support?

1. OPEN ENDED TEXT BOX
2. Nothing
3. Prefer not to say

ASK ALL GAMBLERS (CODES 2-12)

Q5. Thinking about your own gambling or betting now. Thinking about the last 12 months...

1. Have you bet more than you could really afford to lose?
 2. Have you needed to gamble with larger amounts of money to get the same excitement?
 3. When you gambled, did you go back another day to try and win back the money you lost?
 4. Have you borrowed money or sold anything to get money to gamble?
 5. Have you felt that you might have a problem with gambling?
 6. Has gambling caused you any mental health problems, including stress or anxiety?
 7. Have people criticised your betting or told you that you had a gambling problem, regardless of whether or not you thought it was true?
 8. Has your gambling caused any financial problems for you or your household?
 9. Have you felt guilty about the way you gamble or what happens when you gamble?
1. Never
 2. Sometimes
 3. Most of the time
 4. Almost Always
 5. Don't know
 6. Prefer not to say

BLOCK 3: AWARENESS OF SELF-EXCLUSION AND MOSES

INTERVIEWER TO READ OUT

Now I'd like to ask you about self-exclusion schemes within the gambling industry.

Self-exclusion is a tool that can be used by individuals who wish to stop gambling for a period of time – a minimum of six months. The individual voluntarily registers and then gambling companies will take steps to prevent them from gambling with them. Individuals can exclude themselves from one company, or multiple companies in a specific type of gambling industry (such as betting shops, casinos or bingo) in a particular area or online. When you self-exclude from more than one company with a single request this is called a Multi-Operator Self-Exclusion Scheme.

ASK ALL

Q6. Before this interview, how much, if anything, would you say you know about self-exclusion schemes within the gambling industry?

- 1) A great deal
- 2) A fair amount
- 3) Just a little
- 4) Heard of them, but know nothing about them
- 5) Never heard of them
- 6) Don't know

ASK IF HEARD OF SELF-EXCLUSION (CODE 1 - 4 AT Q6)**Q7. How did you first hear or find out about self-exclusion schemes within the gambling industry?****On premises**

1. Flyers/posters advertised in a gambling establishment
2. On a digital/video advertisement in a gambling establishment
3. Leaflet in the gambling establishment
4. Signposted to it by a member of staff

Online/phone

5. Saw it on a gambling / betting website
6. Saw it on a gambling support website (e.g. GambleAware.org / GAMSTOP)
7. Via a gambling support service (e.g. National Gambling Helpline)
8. Searched for it (e.g. google)
9. Read about it on social media (e.g. Facebook, Twitter, Instagram)
10. On an online advert/video (e.g. YouTube)

Other people

11. I know somebody who has self-excluded
12. friends/ family/colleagues/
13. Other people who gamble
14. Heard about it from a health professional

Other

15. Heard it on a TV / radio advert
16. Other (write-in)
17. Don't know / Not sure
18. Prefer not to say

ASK IF HEARD OF SELF-EXCLUSION (CODE 1 - 4 AT Q6)**Q8. And have you ever registered to a self-exclusion scheme within the gambling industry?**

1. Yes – currently self-excluding
2. Yes – in the past
3. No – but have considered it
4. No – have not considered it
5. Don't know/not sure
6. Prefer not to say

ASK THOSE WHO HAVE SELF EXCLUDED (Q8 CODES 1-2)**Q8.b In your opinion, to what extent did self-exclusion help stop or limit your gambling?****REVERSE STATEMENTS SINGLE CODE**

1. To a great extent
2. To some extent
3. Hardly at all
4. Not at all
5. Don't know/can't remember

ASK THOSE WHO HAVE SELF EXCLUDED (Q8 CODES 1-2)**Q9. From which of the following, if any, types of gambling have you self-excluded from?**

1. Betting shops or bookies (including race tracks)
2. Online betting websites
3. Casino
4. Arcades
5. Bingo hall of which I am a member
6. Bingo hall of which I am not a member
7. None of these
8. Prefer not to say

Now I'd like to talk to you about Multi Operator Self Exclusion Schemes, where individuals can self-exclude from multiple companies in a specific type of gambling industry.

ASK ALL WHO HAVE HEARD OF SELF_EXCLUSION (Q6 CODES 1-4)**Q10. Before this interview, how much, if anything, would you say you know about the Multi Operator Self Exclusion Schemes such as SENSE or GAMSTOP?**

- 1) A great deal
- 2) A fair amount
- 3) Just a little
- 4) Heard of it, but know nothing about it
- 5) Never heard of it
- 6) Don't know

ASK IF HEARD OF MOSES (CODE 1-4 AT Q10)**Q11. How did you first hear or find out about Multi Operator Self Exclusion Schemes?****On premises**

1. Flyers/posters advertised in the gambling establishment
2. On a digital/video advertisement in a gambling establishment
3. Leaflet in the gambling establishment
4. Signposted to it by a member of staff

Online/phone

5. Saw it on a gambling / betting website
6. Saw it on a gambling support website (e.g. GambleAware.org / GAMSTOP)
7. Via a gambling support service (e.g. National Gambling Helpline)
8. Searched for it (e.g. google)
9. Read about it on social media (e.g. Facebook, Twitter, Instagram)
10. On an online advert/video (e.g. YouTube)

Other people

11. I know somebody who has self-excluded
12. friends/ family/colleagues/
13. Other people who gamble
14. Heard about it from a health professional

Other

15. Heard it on a TV / radio advert
16. Other (Type in)
17. Don't know / Not sure
18. Prefer not to say

ASK THOSE WHO HAVE SELF-EXCLUDED AND HEARD OF MOSES (Q8 CODES 1-2 AND Q10 1-4)

Q12. Earlier you mentioned that you have participated in a self-exclusion scheme within the gambling industry. Does this include a Multi-Operator Self-Exclusion Scheme?

1. Yes
2. No – but have considered it
3. No, have not considered it
4. Don't know
5. Prefer not to say

ASK THOSE WHO HAVE SELF-EXCLUDED USING MOSES (CODE 1 AT Q12)

Q13. Are you currently taking part in a Multi Operator Self-Exclusion Scheme, or was this in the past?

1. Currently taking part
2. In the past
3. Don't know
4. Prefer not to say

ASK THOSE WHO HAVE SELF-EXCLUDED USING MOSES (CODE 1 AT Q12)

Q14. And from which of the following types of gambling, if any, did you register to a multi operator self-exclusion scheme for?

1. Betting shops or bookies (including race tracks)
2. Online betting websites
3. Casino
4. Arcades
5. Bingo hall of which I am a member
6. Bingo hall of which I am not a member
7. None of these
8. Prefer not to say

BLOCK 4: ATTITUDES TOWARDS MOSES/ SELF EXCLUSION

ASK ALL LOW, MODERATE AND HIGH-RISK GAMBLERS (INDEX SCORE = 1-3) BUT NOT SELF-EXCLUDED (Q8 CODES 3-6). OPEN ENDED QUESTION ALLOW FOR DON'T KNOW. INTERVIEWER TO CODE TO PRE-CODE LIST

Q15. If you ever got to the point in which you had concerns about the amount of time or money you spent gambling, what, if anything, would prevent you from taking part in a self-exclusion scheme?

ASK ALL GAMBLERS WHO HAVE NOT USED SELF-EXCLUSION (Q8 CODES 3-6)

Q16. Which of the following, if any, have you done to help you cut down the amount of time or money you spend gambling?

1. Talked to or received advice and counselling from friends, family, colleagues or someone else you know
2. Talked to or received advice and counselling from a gambling related charity, helpline or other support organisation
3. Talked to or received advice and counselling from a charity or support organisation that is not specifically gambling related
4. Used tools to help limit your gambling e.g. deposit limits, timeouts, blocking software
5. Received treatment from a GP or health professional
6. Other (Please specify)
7. Nothing
8. Prefer not to say

ASK ALL WHO HAVE SELF-EXCLUDED (Q8 CODES 1-2)

Q16.b. Other than self-exclusion, which of the following, if any, have you done to help you cut down the amount of time or money you spend gambling?

1. Talked to or received advice and counselling from friends, family, colleagues or someone else you know

2. Talked to or received advice and counselling from a gambling related charity, helpline or other support organisation
3. Talked to or received advice and counselling from a charity or support organisation that is not specifically gambling related
4. Used tools to help limit your gambling e.g. deposit limits, timeouts, blocking software
5. Received treatment from a GP or health professional
6. Other (Please specify)
7. Nothing
8. Prefer not to say

Discussion guide for gamblers online focus groups

Introduction and warm up (5-10 mins)

My name is XXXX and I'll be moderating our online chat today on behalf of Ipsos MORI, the independent research company.

- The discussion will last up to an hour and a half.
- It's more an informal chat than a 'survey' or 'interview'. Please feel free to chip in with whatever you think, whenever you think it.
- I won't judge you on your spelling if you promise not to judge me on mine!
- There are no right or wrong answers.
- You can choose to not answer a question or leave the discussion completely at any point.
- Everything you say is completely confidential and information collected is anonymised.
- Only your [screen name] can be seen by the others in the chat, never your real name or email address.
- We will write a report at the end of this research project. We might use quotes, but we won't name anyone, identify you personally, or say who has said what.
- We will be talking about feeling in control of gambling, and what happens when people no-longer feel in control. If you would like to talk more about any of the things we raise in this group, you can find free, confidential support and advice about gambling by visiting the GamCare website at www.gamcare.org.uk or calling their freephone number 0808 802 0133. I'll repeat these details at the end of the group, or you can email me and I will send them to you.

Does anyone have any questions before we start?

SPEND UP TO 5 MINUTES ON THIS – ALLOW SUFFICIENT WARM UP/ICE BREAKER.

Ok. Let's kick off by talking a little bit about you.

We're here to talk about gambling in [SECTOR FOR PARTICULAR GROUP], so can everyone share a gambling experience that comes to mind?

Setting the scene (15 minutes)

Thanks for sharing that.

Now, I'd like to change the focus, and talk about where you gamble. Remember there are no right or wrong answers – we are simply interested in what you think. Everything you say here is completely confidential and anonymous.

We have invited you to this group, because you told us in the telephone survey that you sometimes gamble in [Shop/Casino/Online].

Do you have one or more favourite [Shop/Casino/Online], or do you go wherever?

- [Those who have a favourite] What makes a place your favourite?
- What do you like about the place(s) where you gamble?

- Anything you dislike or that puts you off?

Thinking about when you go in:

- What information are you looking for when you arrive at the [Shop/Casino/Online]?
 - o How is it presented to you? e.g. Odds, offers, options to bet

Thinking about other people you see while you are there:

- Who, if anyone, do you see when you're in there?
 - o [If needed] What about staff?
 - o [If needed] What about other customers?

What kinds of contact do you have with these people?

- Does this contact with others add to or take away from your experience of gambling?
 - o In what ways?

Needs for support (10 minutes)

People who use [Shop/Casino/Online] can sometimes develop gambling related problems.

- How do you know you are in control when you're gambling?
- Are there ever times when you think you might not be in control when you're gambling?
 - o What about after you gamble?
 - o Do you ever think you might have gambling related problems?
- What is it that makes you think you are not in control in relation to gambling?
- What about others you know or people you see / have contact with when you're gambling?
 - o What makes you think or feel that others are not in control?

We've talked a bit about how you view being 'in control' when gambling. Just so we are talking about the same thing, when we talk about not being in control, we mean any of the following:

- Betting more than you could really afford to lose;
- Needing to gamble with larger amounts of money to get the same excitement;
- Going back another day to try and win back the money you lost;
- Borrowing money or selling things to get money to gamble;
- Feeling that you might have a problem with gambling;
- Gambling causing you mental health problems, including stress or anxiety;
- Having people criticise your betting or tell you that you had a gambling problem, regardless of whether or not you thought it was true;
- Gambling causing financial problems for you or your household;
- Feeling guilty about the way you gamble or what happens when you gamble.

Thinking again about the [Shop/Casino/Online] where you gamble, the information available to you there, and the people you have contact with when you are gambling:

- Do you feel supported to stay in control when you are gambling?
 - o How are you supported in the place(s) where you gamble?
- If you started to feel you needed more support to stay in control of your gambling, would you look for this support in the casino(s), or somewhere else?
 - o Why do you say that?

- Do you think staff in the [Shop/Casino/Online] where you gamble are able to help you and others find more support, if you need it?
 - o Why do you say this?
 - o What kind(s) of support can they help you and others find?

Awareness and experience (20 minutes)

If someone thinks they may be spending too much time or money gambling, they can use 'self-exclusion' schemes to help them stop gambling for a period of time.

- Has anyone heard of self-exclusion schemes before today?
- What do you know about self-exclusion schemes?
 - o Can you name any?
 - o How do you know about them?
- Has anyone in the group had experience of self-exclusion schemes? Either personally, or through others you know?
- In the casino(s), have you ever seen anyone be turned away because they have already self-excluded?
- There are two types of self-exclusion schemes:
- Single operator self-exclusion schemes, where you can self-exclude from one location, or all of the locations in a chain; and
- Multi-operator schemes, where you can self-exclude from multiple locations, across multiple chains. These are specific to one sector of gambling, e.g. betting shops, casinos, arcades, bingo, or online betting.
 - Is it useful to be able to exclude from just one location or just one provider?
 - Is it useful to be able to exclude from multiple locations or providers within a sector?
- With [Shop/Casino/Online], you must exclude from all land-based casinos, rather than selecting specific [Shop/Casino/Online] or a specific area to be excluded from.
 - o What are the pros and cons of this?
- What about the length of the exclusion? For casinos this is a minimum of 6 months from when you self-exclude, with no option to opt back in sooner. Is this too short, too long, about right?
 - o Do you think the length of the exclusion might put you off self-excluding through the scheme?
 - o Why do you say that?
- With the [Sector] self-exclusion scheme, you are not automatically able to gamble again after the six months is up, but remain excluded until you ask for the self-exclusion to be lifted.
 - o What do you think about this?

The existing multi-operator schemes are sector specific (e.g. just shops/casinos, just online gambling). Some people think it would be useful to have a scheme which allowed you to opt out across all sectors in one request.

- How useful or not do you think this would be for you personally? Why / why not?
- What about others you know? Why?
- Thinking generally, do you tend to gamble across more than one sector? The sectors for the purpose of this research are: Bookmakers, Casinos, Arcades, Bingo, and Online gambling?
 - o Thinking about how you gamble, do you tend to stick to one sector, or gamble across multiple sectors?

- Do you think you can be out of control when gambling in one sector, but in control of your gambling in other sectors? Why do you think this is?

Materials testing (15 minutes)

I'm now going to show you some information about a specific self-exclusion scheme. This relates to the [Shop/Casino/Online] scheme, which is known as [Scheme name] [SHOW LEAFLET, AND BRIEFLY OUTLINE THE SCHEME FOR THOSE NOT AWARE OF IT].

- Can everyone see that ok? Please can you spend a few minutes reading through?

[ALLOW A FEW MINUTES FOR PEOPLE TO READ THE MATERIALS]

- Have you seen this leaflet before? Where?
- Those who have not heard of [Scheme name], does this prompt any awareness?
- How clear and effective are the communications?
 - From reading this, are you clear on how you go about self-excluding?
 - Are you clear on how long self-exclusion is for?
 - What could be improved?
- The process for self-excluding is as follows:
 - [Specific scheme process explained here]
- Thinking about [Scheme name] and other self-exclusion schemes you are aware of, what are the differences?
- (How) Does [Scheme name] complement or compete with other self-exclusion systems?
- [THOSE WHO WERE NOT PREVIOUSLY AWARE OF THE SCHEME]
- Would you consider using this scheme?
 - Why? Why not?
 - In what context do you think you might consider self-excluding through SENSE?
- Do you think [Shop/Casino/Online] are meeting their obligations with respect to the self-exclusion scheme?
 - Why do you say that?

Further help (10 minutes)

Thinking about if you or others you know ever chose to use the [Scheme name] scheme:

- What help might someone need alongside self-exclusion?
- PROBE IF NECESSARY: What about support and treatment? Blocking bank transactions? Gambling Blocking Software?
 - Who should tell you where to find this help?
 - Who should provide this help?
 - Can you think of anything that might get in the way of someone taking-up help of this kind, if it were offered?
 - How do you think people could get around this barrier?
- What help do you think those who self-exclude are pointed to?
 - How do you know this?
- How are they helped or encouraged to take up this help?

- How do you know this?
- What about after the exclusion term ends, what help might someone need then?
 - Who should tell you where to find this help?
 - Who should provide this help?
 - Can you think of anything that might get in the way of someone taking-up help of this kind, if it were offered?
 - How do you think people could get around this barrier?

Wrap up (5 mins)

Thank you very much for your time today – we are almost done!

Do you have anything else that you you'd like to say about anything we've discussed today?

We wanted to thank you for taking part, and remind you that what you told us today will remain confidential and anonymous. You will receive an email with your Amazon voucher within the next week.

If there's anything else you think of, or if you have any reflections after today's group ends, please feel free to email me at [xxxxx].

Lastly, if you'd like to learn more about anything we discussed, you can find free, confidential support and advice about gambling by visiting the GamCare website at www.gamcare.org.uk or calling their freephone number 0808 802 0133. An advisor would be happy to help you. This includes help to self-exclude if you feel this would be useful to you.

Thank you for your time.

Discussion guide for scheme user interviews

Introduction (3 mins)

My name is [xxxxx] and I'll be talking with you today on behalf of Ipsos MORI, the independent research company.

- The interview will last up to forty-five minutes
- It's more a discussion than a 'survey' with 'yes' or 'no' answers.
- There are no right or wrong answers, we just want to know about your experiences, and hear what you think.
- You can choose to not answer a question or end the interview completely at any point.
- Everything you say is completely confidential and information collected is anonymised.
- We will write a report at the end of this research project. We might use quotes, but we won't name you or give any information that might identify you personally.

Are you happy to proceed with the interview? Yes / No

IF NECESSARY: If you would like to read the Privacy Notice I can email it to you. I will ask you again at the end of the interview.

We will be talking about feeling in control of gambling, and what happens when people no-longer feel in control. If you would like to talk more about any of the things we raise in this interview, you can find free, confidential support and advice about gambling by visiting the GamCare website at www.gamcare.org.uk or calling their freephone number 0808 802 0133.

I'll repeat these details at the end of the interview and email them to you after we finish.

I would like to record the interview, this is just to help me with my notes. I won't pass the recording on to anyone else. Are you happy for me to record? Yes / No

Do you have any questions before we start?

Gambling journey – pre-self-exclusion (5 minutes)

1. Through these interviews, we're going to try to 'map out' each person's 'gambling journey'. You can think of it as a timeline, from your first experiences of gambling through to today. Together we'll work out the different steps on the journey, then I'll ask you to tell me a bit more about some of them. Does that sound ok?

Yes / no

2. I'd like you to think back to your first experiences of gambling. Do you remember other people around you gambling before you started gambling yourself? [RECORD ON TIMELINE]
3. Can you remember your first experiences of gambling? [RECORD ON TIMELINE]
- What sort of gambling?
4. When did you first start to think you might have gambling-related problems? [RECORD ON TIMELINE]
- What made you think that?
 - What sort of problems were they?
5. When did you first try to do something about gambling-related problems? [RECORD ON TIMELINE, BE PREPARED TO REPLAY THESE ANSWERS AT Q10]
- What did you do? ALLOW SPONTANEOUS RECALL, BUT PROBE IF NECESSARY ON:
 - Cooling off periods / timeouts
 - Bank account blocks
 - Deleting accounts
 - Maximum spend limits
 - GAMBLOCK
 - Professional Treatment
 - Talking to GAMCARE

- Support or advice from others
- Single operator self-exclusion schemes
- Any other harm minimisation tools or actions?

What made you decide to do something?

How did you find out where to go for help?

Experiences of self-exclusion (10 minutes)

6. [IF NOT ALREADY COVERED IN 5] **When did you first hear about multi-operator self-exclusion as an option?**

[RECORD ON TIMELINE – NOTE THIS MIGHT COME BEFORE THEY DEVELOPED GAMBLING-RELATED PROBLEMS]

How and where did you hear about it? [INTERVIEWER TO PROBE FOR MULTIPLE EXPOSURES, NOT JUST ONE]

What made you think self-exclusion might be useful to you?

7. **When did you self-exclude through** [NAME OF MULTI-OPERATOR SCHEME FROM SAMPLE]? [RECORD ON TIMELINE]

Is this your first self-exclusion?

Is this your only self-exclusion [PROBE ON SINGLE AND MULTI-OPERATOR SCHEMES. RECORD ALL ON GRID]?

[IF NOT] How many have you done and through what schemes?

Name of scheme	Approximate date of self-exclusion	Ongoing?

QUESTIONS WHICH FOLLOW SHOULD FOCUS ON THE SCHEME FROM WHICH THE INTERVIEWEE WAS SAMPLED, UNLESS THEY ARE ALSO CURRENTLY PARTICIPATING IN ANOTHER SCHEME FOR WHICH WE DO NOT HAVE SAMPLE.

8. Could you talk me through the process you went through to self-exclude through [SCHEME NAME] [IF NECESSARY: this time around]? AT EACH STAGE PROBE ON: How easy or difficult was it? Anything you found helpful or unhelpful at this stage? Anything that encouraged you or made you pause / put you off? How were the personnel involved?

- Getting contact details
- Making first contact
- Providing information, in writing, verbally or face-to-face
- What choices you had to make
 - Length of exclusion
 - Locality or locations for exclusion
 - Anything else?
- Were you pointed to any other support or other organisations who could help you with your gambling-related problems?
 - Help to control gambling behaviour
 - Help to deal with problems resulting from gambling
- Notification about the self-exclusion coming into effect

- Any further contact

During the self-exclusion (5 minutes)

In this section of the interview, I'm going to ask you about how effective the self-exclusion has been for you. This is so we can understand the effectiveness of the scheme. To remind you, this interview is completely anonymous and we will not pass any information that identifies you back to the scheme or to anyone else. Please be as honest as possible

9. To what extent has the [SCHEME NAME] self-exclusion scheme helped you to manage your gambling in [RELEVANT SECTOR / LOCATION(S)]?

- In what ways has it been helpful?
- In what ways has it not been helpful?
- Have you reduced the amount of time you spend on gambling in [RELEVANT SECTOR / LOCATION(S)]?
- Have you reduced the amount of money you spend on gambling in [RELEVANT SECTOR / LOCATION(S)]?
- What could be changed about the scheme to make it more effective in reducing the amount of time / money you spend gambling in [RELEVANT SECTOR / LOCATION(S)]??

10. [IF APPLICABLE: We talked earlier about other things you have tried to do about gambling-related problems [RECAP ANSWERS TO Q5]. Has the scheme worked with other things you have tried to do about gambling-related problems? If so, how? [REPLAY ANSWERS FROM Q5 HERE]

- What about specific harm-minimization tools?
- What about other single operator self-exclusion schemes?
- What about other multi-operator self-exclusion schemes?

11. Since you self-excluded through [SCHEME NAME], have you tried to gamble in any of the places you self-excluded from? [RECORD ON TIMELINE]

- What happened? [PROBE IF MULTIPLE TIMES / LOCATIONS]
- [IF STAFF WERE INVOLVED] How well do you think it was handled? What was good, what was less good?
- [IF STAFF WERE INVOLVED] Did anyone point you to further help at this point?
- Why do you think

- How did/do you feel about it afterwards?
- [IF THEY HAVE NOT TRIED TO BREACH] What do you think has kept you from trying to gamble in these places?

12. Thinking about places you have not self-excluded from, have you gambled in any other way during your self-exclusion period? [RECORD ON TIMELINE] EXPLORE HOW OFTEN, AND PROBE ON:

- Gambling in other sectors
- Outside of the designated radius
- Online if have land-based self-exclusion
- Land based gambling if signed up to GAMSTOP

13. How do you feel about this gambling?

- Is it problematic, or is it different to what is covered by your self-exclusion?
- How?

14. Have there been any other changes to your life have happened (in whole or in part) because of your self-exclusion? BE AWARE THAT THERE MAY BE POSITIVE AND NEGATIVE CONSEQUENCES FROM SELF-EXCLUSION, AND THAT GAMBLING MAY HAVE BEEN REPLACED BY OTHER HARMFUL BEHAVIOURS. PROBE ON:

- Things you do instead of gambling that you enjoy or feel are positive?
- Things that you do instead of gambling that you don't enjoy or that you feel are negative or harmful?

After the self-exclusion ends (5 minutes)

15. You told me that your self-exclusion is due to end in [month]. Have you thought about what you will do when it ends?

[BE CAREFUL NOT TO MENTION GOING BACK TO GAMBLING. FOCUS ON WHETHER THEY WILL RENEW THE SELF-EXCLUSION OR BE ABLE TO STAY AWAY WITH DIFFERENT SUPPORT / NO SUPPORT] [IF NECESSARY, DESCRIBE SCHEME SPECIFIC OPTIONS AFTER THE SELF-EXCLUSION TERM ENDS]. [RECORD ON TIMELINE]

- How do you feel about the length of your self-exclusion? Too long/not long enough?
- What, if anything, do you think will be different as a result of the self-exclusion?

- What, if anything, will be different as a result of other factors (other help, friends and family, change of circumstances)?

16. [ONLY IF PARTICIPANTS SPONTANEOUSLY MENTIONS THEY WILL GO BACK TO GAMBLING] Why do you think you will go back to gambling / gambling in these venues / online?

- [IF YOU PLAN TO CONTINUE GAMBLING] How, if at all, will your gambling be different?
- Do you feel ready to go back to gambling on [SECTOR]
- What other support, if any, do you think you might need to stay in control of your gambling?
- To what extent do you think you have now tackled your gambling-related problems?
 - How much of this is down to the [SCHEME] self-exclusion?
 - How much is down to other factors?

17. What, if anything, do you think [scheme name] could have done differently, that would have improved your experience or helped you (more)?

- What makes you say that?
- [IF NECESSARY] If you could change one thing about the scheme, what would it be?

Looking ahead and final thoughts (2 minutes)

We are coming to the end of the interview. Is there anything else you would like to mention that we haven't already talked about?

If there's anything else you think of, or if you have any reflections after today's group ends, please feel free to email me at [email address], or call me on [telephone number].

Ipsos or another evaluation partner appointed by Gamble Aware may wish to carry out some follow-up research relating to this study within the next two years. Would it be ok to contact you again?

Yes / No

Thank you for taking the time to participate in this study. Before we finish I need to inform you that you can access the privacy notice online at <www.xxx> This explains the purposes for processing your personal data as well as your rights under data protection regulations to access your personal data, withdraw consent, object to processing of your personal data and other required information. OFFER TO SEND PRIVACY NOTICE BY EMAIL IF REQUESTED

If you'd like to learn more about anything we discussed, you can find free, confidential support and advice about gambling by visiting the GamCare website at www.gamcare.org.uk or calling their freephone number 0808 802 0133. An advisor would be happy to help you. This includes help to self-exclude from further sectors if you feel this would be useful to you.

Lastly, we wanted to thank you for taking part, and remind you that what you told us today will remain confidential and anonymous. You will receive an email with your Amazon voucher within the next week.

[THANK AND CLOSE]

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About Ipsos MORI's Social Research Institute

The Social Research Institute works closely with national governments, local public services and the not-for-profit sector. Its c.200 research staff focus on public service and policy issues. Each has expertise in a particular part of the public sector, ensuring we have a detailed understanding of specific sectors and policy challenges. This, combined with our methods and communications expertise, helps ensure that our research makes a difference for decision makers and communities.