APPENDIX

WILLIAM HILL’S SUBMISSION TO THE LOCAL GOVERNMENT AND REGENERATION COMMITTEE.

AUGUST 2015
The industry funds research, education and treatment of problem gambling on a voluntary basis. A large percentage of this contribution funds the National Gambling Helpline and treatment providers like Gamcare and their regional partners.

Problem gambling levels in Scotland are low by international standards and possible falling (around 0.4% of population - source Scottish Health Survey). It is estimated that around 5% of regular bettors and gamers may engage in harmful behaviour (Scottish Health Survey 2015), but that 13% of multi-product gamblers are “at risk”. Nevertheless, and in addition to the existing regulation, the industry has been involved in an incremental improvement of its approach to responsible gambling in response to public concern. A summary is set out:

- The industry has made a step-change in progress on addressing responsible gambling concerns.
- It has now launched Senet Group – an independent body tasked with ensuring adherence to the new code on advertising. Commitments made and now in place include the removal of gaming machine advertising from shop windows; a ban on pre-watershed TV advertising of all offers that are exclusive to new customers, and dedicating 20% of shop window advertising to responsible gambling messages.
- In January 2015 the Senet Group launched a multi-million pound responsible gambling advertising campaign focussed around the central message, ‘When the Fun Stops, STOP’.
- Players are now able to set their own time and spend limits on machines and since January 2015 it has been a mandatory requirement for players to decide whether or not to set a limit before they start playing, resulting in an increase in the number of sessions where a limit is set.
- The industry continues to collect data to monitor the effectiveness of the range of measures in place, including on machines, where it is shown over 90% of those setting a limit stop playing before they reach it.
- The industry has committed to developing a cross-operator self-exclusion scheme by April 2016. An initial pilot was launched in Chatham, Kent in December 2014 and a second was launched earlier this week in Glasgow City Centre, building on lessons learned from the Chatham scheme. The Glasgow pilot forms a trial of the proposed final version of the national scheme that will be in place by April next year, in line with LCCP requirements.
In April 2015, the £50 staking measure was implemented aimed at increasing oversight and interaction with customers. Ahead of this all staff were re-trained and data on the impacts of the measures is being collected by industry and shared regularly with the Department for Culture, Media & Sport.

Operators all have trials underway of data algorithms, which build on the RGT research finding that markers of harm can be used to identify players at risk and support the earlier identification and interaction with such customers, using a tiered communications approach.

In September 2015 the ABB will be publishing its revised Code of Conduct (‘Code 2’) incorporating additional responsible gambling measures implemented by the industry, compliance with which is mandatory for all members.

The industry is committed to working proactively with Government, the regulator, and other stakeholders, to drive continued improvements in player protection with timelines for the implementation of such measures.
In March 2014, as part of the Code for Responsible Gambling, mandatory warnings were implemented for gaming machine customers for every £250 fed into the machine or 30 minutes of play. At the same time players were also enabled to set their own time and spend limits on gaming machines. This functionality was added to all machines across all betting shops.

In order to increase the take-up of the limit setting tool, and with a view to improving player control across the board, as of 26 January 2015 players have been required to make a conscious decision at the start of play as to whether they want to set a time or spend limit. On reaching a limit players now also have the automatic option to set a new limit.

Metrics are continuing to be collated and analysed on a weekly basis. This has shown a positive uptake in the number of player sessions where limits are set, now around 2.5% for both time and money – or 200,000 sessions – prior to this voluntary limits accounted for only around 0.03% (money) and 0.01% (time) of all sessions.

The evidence shows that setting limits is effective in helping players to stay in control with over 90% of those setting a limit stopping playing before they reach it. Of those that do reach their limit, the majority either stop playing or go on to set new limits.
Alongside the roll out of the new functionality, and as part of the industry’s ongoing commitment to promote responsible gambling, ABB members ran a responsible gambling ‘Gamble Aware Week’ from 26 January to 1 February to promote limit setting to customers and encourage all customers to only bet what they can afford to lose. All operators used identical posters in their full shop windows during the week, and the same leaflets inside shops, in order to maximise the impact.

As a result of the positive uptake in the number of responsible gambling interactions, and positive feedback from customers and stakeholders such as GamCare – who saw a 50% increase in calls to the National Gambling Helpline in January – a further Gamble Aware Week was held across Scotland from 22 to 28 June 2015.

**KEY GAMING STATISTICS**

The spin speed:

- B2 machines | 20 seconds between spins, one of the slowest internationally
- B3 machines | 2.5 Seconds

- The stakes: B2 maximum stake £100, B3 maximum stake £2
- Average stake in Scotland on B2 is £14.80, and £0.91 on B3
- Maximum single number stake on roulette is £13.85 (due to prize cap)
- Average loss per session £4 in Scotland
- Median stake in Scotland is £4.31 (lower than the UK median stake)
- Average gross win (stakes minus payouts-profit) per gaming machine per day in Scotland £77
- Average gross win (stakes minus payouts-profit) per gaming machine per week in Scotland £538
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<tr>
<th>TIMELINE</th>
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<td>MARCH 2014</td>
<td>Mandatory warnings at £250 cash-in and 30 minutes of play implemented on gaming machines across ABB members as part of Code for Responsible Gambling</td>
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<td>MARCH 2014</td>
<td>Players able to set their own time and spend limits on gaming machines</td>
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<td>JANUARY 2015</td>
<td>Customers must decide whether or not set a limit before they can start machine play</td>
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<td>JANUARY 2015</td>
<td>Industry launches nationwide Gamble Aware Week including the promotion of the setting limits function</td>
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<td>JUNE 2015</td>
<td>Gamble Aware Week Scotland promotes limit setting tools across Scotland</td>
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