

# How do machine gamblers feel about tracked play?

---

JANUARY 2018

Populus



# Background and Objectives

The Gambling Commission's primary role is to ensure that gambling is conducted in a fair and open way. As part of this role, the Gambling Commission has a responsibility to protect consumers from gambling-related harm. The Gambling Commission is considering whether to introduce a way of monitoring machine gambling with the aim of making sure machine gamblers are aware of their gambling activity and ultimately minimising any gambling-related harm.

This way of tracking play would mean gambling companies could link together information about a players' gambling activity on a machine across multiple visits to their premises. This means machine gamblers would be able to see how often they have played, how much they have spent and what games they played on whilst gambling. Companies would be better able to identify players who may be struggling with their gambling and offer them support. Currently companies know information about each individual time a customer plays on a machine, but this way of monitoring play would enable the operator to collect this information across multiple visits.

In order to better understand the impact tracked play would have on machine gamblers, the Gambling Commission has partnered with market research agency, Populus to conduct research targeting machine gamblers. This research looks to answer three key objectives which have been outlined below:

✓ To profile machine gamblers and understand machine gambling behaviours.

✓ To determine how machine gamblers feel about tracked play being introduced and how they think they would respond if tracked play was introduced into bookmakers, bingo halls, adult only arcades and casinos\*.

✓ To establish which considerations the Gambling Commission should take into account when deciding how to introduce tracked play to gaming machines.

\*This research did not explore the implementation of tracked play in pubs.

# Scope and Limitations of this Report

This piece of research is looking to understand how machine gamblers would react to tracked play. The findings outlined in this report explain how surveyed machine gamblers say they would react if tracked play were introduced to gaming machines. The Gambling Commission will use this as part of the evidence base when deciding whether to introduce tracked play.

**Scope Limitations:** this report only considered the implementation of tracked play in bookmakers, bingo clubs, adult only arcades and casinos. It did not explore consumer reaction to the scheme in pubs. However, it is important to note that 63% of machine gamblers play in pubs at least once a month and that focus group respondents did not draw a clear distinction between playing in pubs and in other locations. Therefore we recommend that future research and tracked play schemes seek to include pubs.

**Sample Limitations:** the report is based upon primary research with members of the UK general public who use gaming machines. **The research was not conducted on a nationally representative sample and therefore does not represent the views of the UK public at large.** However, it does give a steer on the responses amongst consumers who use gaming machines in bookmakers, bingo clubs, adult only arcades and casinos.

**Methodological Limitations:** the results are based upon the attitudes expressed by consumers when exposed to the concept of tracked play and their claimed response to the scheme if it were implemented. There may be a disparity between how consumers respond to the concept of tracked play and how they would respond to the scheme if it were live. The implicit response test was used as a method of accessing subconscious attitudes to the concept of tracked play.

**Recommendation:** due to the limitations of the methodologies used in this report we recommend running a pilot study of the scheme in order to fully understand how machine gamblers would respond to a scheme if it were implemented.

The quantitative portion of this research was completed online. In general, online respondents are more technically knowledgeable, slightly less brand loyal and are more likely to be early adopters of new technology products and services. Online survey respondents are also incentivised to complete surveys. To counter this, rigorous quality control procedures were implemented to maximise the attention paid by respondents when participating in the survey and avoid 'happy clicking' or rushing through surveys to reach the reward at the end. In addition to this, we employed advanced analytics in the form of a MaxDiff exercise to ensure that our results were as robust as possible. The MaxDiff was used to understand the appeal of tracked play in comparison to other features of a gaming machine.

# Methodology

A combined qualitative and quantitative approach was adopted in order to fully understand how machine gamblers feel about tracked play

## Qualitative

Populus conducted two focus groups on the 6<sup>th</sup> and 7<sup>th</sup> November in Birmingham and London alongside 15 x depth interviews in London, Birmingham & Scotland.

### Sample profile

The groups comprised of 7-9 individuals whereas the depth interviews were one-on-one and there was a mix of ages and gender across the whole sample.

Respondents for the groups and depths were non-problem gamblers using machines in bingo halls, casinos, betting shops and gaming centres or arcades. Discussions lasted between 60-90 minutes and were free-flowing, following a flexible guide developed by Populus and agreed by the Gambling Commission. Please see Annex at the end of the report for the full discussion guide.

## Quantitative

21 questions asked to a sample of 1,003 adults (aged 18+) who had played on gaming machines in the past four weeks in the UK via Populus online panel *PopulusLive* on 1<sup>st</sup> – 12<sup>th</sup> December 2017.

A MaxDiff exercise and Implicit Test were included as part of the survey.

On occasion this report refers to three types of gambler which were defined through claimed behaviour of respondents. These groups were chosen to align with groups identified by the Gambling Commission in prior research. Please note that they do not represent the entire sample (42%):

- **Casual gamblers:** machine gamblers who gamble on 3-6 activities, do not gamble online and play machine games no more than once a week. 11% of total sample (n=110).
- **Online engaged:** machine gamblers who gamble online and in person but do not play machine games more than once a week. 14% of total sample (n=137).
- **Highly engaged gamblers:** machine gamblers who gamble on 7 or more activities, play more than once a week and play online & in-person. 17% of total sample (n=172).

# Who are machine gamblers? Quantitative sample profile (i)



## Methodology

Online survey with machine gamblers

## Who they are...

### Gender



62%



38%



## Sample size

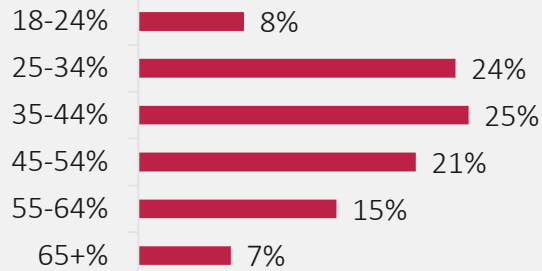
1,003 adults (18+) in the UK who have played on gaming machines in the last four weeks



## Fieldwork dates

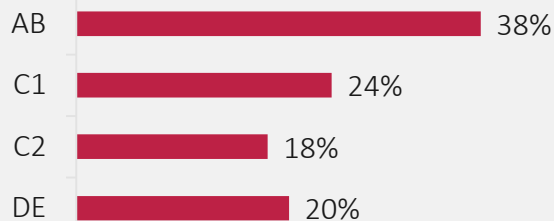
1<sup>st</sup> – 12<sup>th</sup> December 2017

### Age

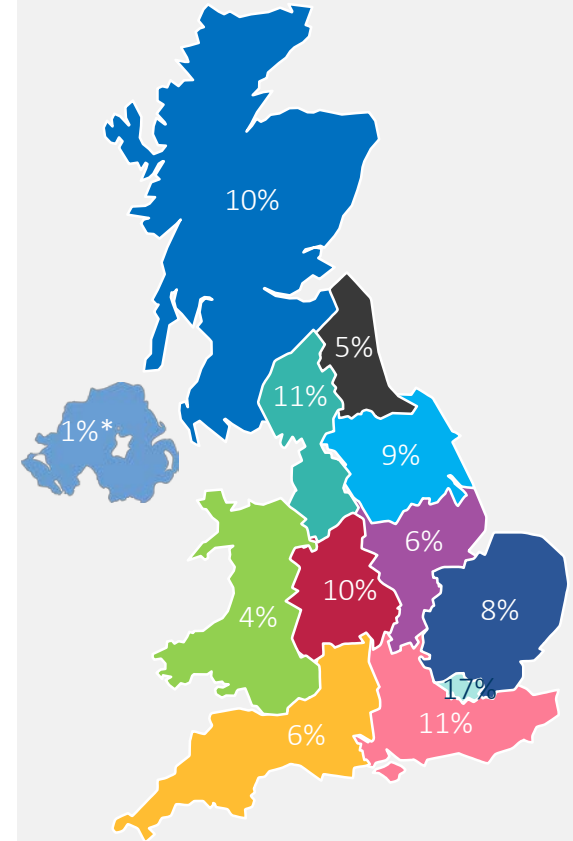


Mean: 43 years olds

### Social grade

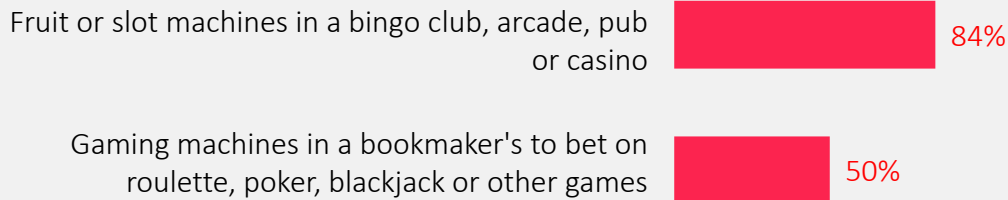


## Where they live...

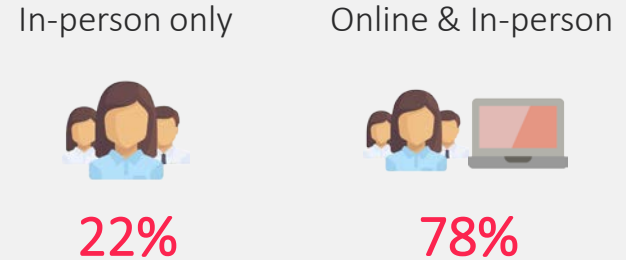


# Who are machine gamblers? Quantitative sample profile (ii)

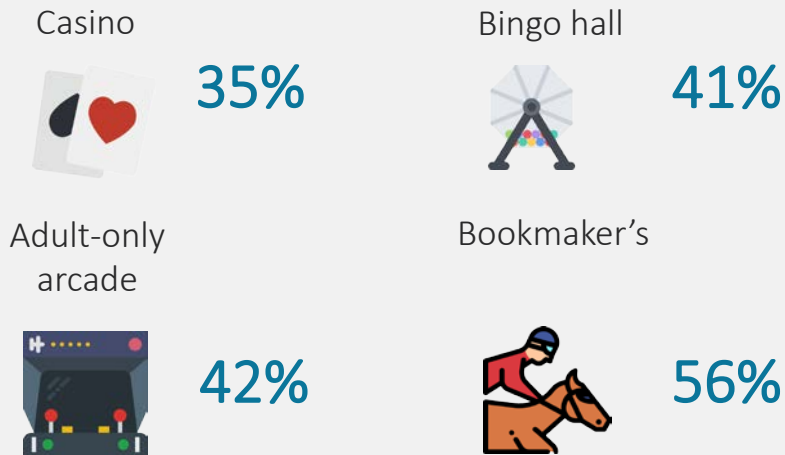
## The types of machine gambling they do...



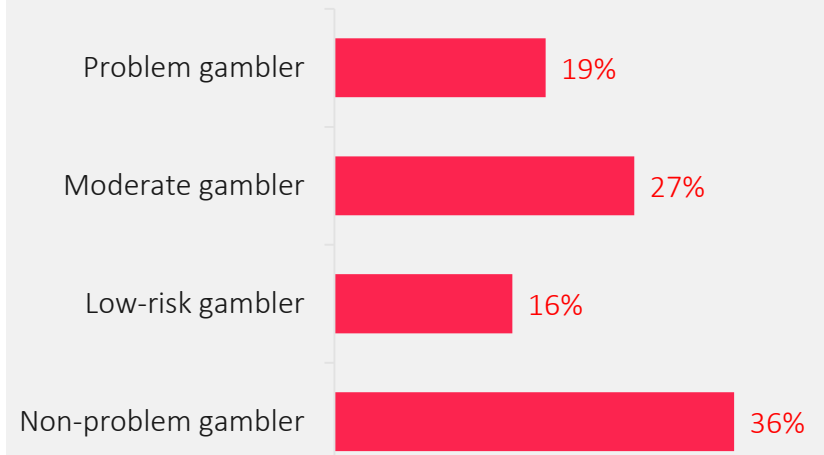
## How they gamble...



## Where they gamble at least once a month...



## Their gambling profile...\*



\*PGSI (Problem Gambling Severity Index)^

## Key Note Summary

### How do machine gamblers feel about tracked play?

Overall, machine gamblers believe tracked play would be a useful measure to help those whose play is becoming harmful. We recommend the Commission runs a live trial of the scheme and, if introduced, seeks to clearly communicate the details of the scheme in order to reassure machine gamblers.

### Evidence

#### The idea of tracked play is not negatively received by machine gamblers

- Machine gamblers think tracked play would be a useful and trustworthy measure
- They also think it would be fairly intrusive, however they are less certain of this.
- Problem gamblers are more likely than non-problem gamblers to perceive tracked play as useful.

#### Machine gamblers were neutral towards the addition of tracked play to machines, and can see that it may reduce harmful behaviour

- The appeal of tracked play on a gaming machine is fairly mid-ranking, suggesting it would neither act as an attraction nor be too off-putting in the context of other features
- Problem gamblers feel tracked play is even less intrusive than non-problem gamblers and only a limited number would avoid using a gaming machine if tracked play were to be introduced
- The majority who say they would gamble less if tracked play were introduced would not transfer that spend to another form of gambling.

#### There needs to be reassurance about how the tracked play scheme would work in practice

- Machine gamblers react slightly different to the idea of tracked play based on the level of knowledge given to them. The Gambling Commission should think carefully about the messaging related to tracked play
- Machine gamblers are concerned about the registration process, in particular the hassle of registering
- There are also concerns about how personal data would be stored once tracked play is introduced and signs that consumers may lack trust in gambling companies to handle this data.

# Executive Summary (i)

## Machine gambler profile

Of the four types of venues within the scope of this report (bookmakers, bingo clubs, adult only arcades and casinos), the majority of machine gamblers play across multiple venues each month (64%). Only a third stick to a single type of venue each month (36%). About a third use two types of venue (36%), a fifth use three (19%) and about a third use all four venue types (30%).

**Recommendation:** regular machine gamblers tend to use a range of locations, so if it is introduced it is important that any tracked play scheme is mandatory across locations.

## How do machine gamblers feel when they use a gaming machine?

On the whole, machine gamblers claim they generally feel positive when using a gaming machine, with around half feeling hopeful (54%) and excited (48%). Just one in twenty (5%) machine gamblers claim to feel sad or angry when using a gaming machine. This rises to one in ten (10%) feeling sad among problem gamblers and 14% who say they feel angry when using a gaming machine. Problem gamblers are also less likely than the total sample surveyed to claim to feel hopeful (41%) during play.

Those classified as 'highly engaged gamblers' are more likely to have positive feelings when using a gaming machine. Highly engaged gamblers are machine gamblers who gamble on 7 or more activities, play more than once a week and play both in-person and online.



## Executive Summary (ii)

### How do machine gamblers feel about tracked play?

Machine gamblers are receptive to the idea of tracked play, with half (51%) claiming they would find it useful to have access to information about their play history. Machine gamblers are particularly receptive to the idea when they think about the overall benefit it could have on people who experience problems with their gambling (66% agree it sounds like it would benefit these people). This was supported in the focus groups where non-problem gamblers felt more positive about tracked play once they had considered the potential impact monitoring play could have on those who really need help. More than two fifths (45%) of machine gamblers felt monitoring their machine play would encourage them personally to gamble more responsibly. This was significantly higher among problem gamblers (54%) and 25-34 year olds (58%).

Machine gamblers were asked to think about tracked play by reading a definition of the new concept. Respondents were then presented with a series of five pairs of adjectives and antonyms and asked to select which they feel best describes their feelings towards tracked play – as quickly as possible – using the ‘Z’ and ‘M’ key on their keyboard. Machine gamblers were shown the following definition of tracked play:

*“Imagine gambling companies can link together information about your gambling activity on a machine across multiple visits to their premises. This means you would be able to see how often you have played, how much you have spent, what games you played on, and gambling companies would also be able to identify players who may be struggling with their gambling and offer them support. Currently companies know information about each individual time an individual plays on a machine, but this new way of monitoring play would enable the operator to collect this information across multiple visits.”*

Respondents were then asked to select the adjective or antonym which they felt described the concept the best as quickly as possible. The quicker a player responds, the more certain they are that the adjective describes the concept\*.

Among all respondents surveyed, machine gamblers feel tracked play is a useful idea, it is trustworthy and also agree it makes them feel supported. These three positive adjectives were the three words machine gamblers were most in agreement with when they selected the descriptor they felt best describes their feeling towards tracked play. They were also the words which scored the quickest reaction times, confirming that machine gamblers were most certain of these three attributes (see slide 23).

Machine gamblers do also feel that tracked play is intrusive. However, we know they are not that certain of this because their average reaction time was slower than for ‘useful’, ‘trustworthy’ and ‘supportive’.

**Recommendations:** seek to further understand how a tracked play scheme could be useful and make machine gamblers feel supported by running a pilot programme. If launched, build trust amongst machine gamblers by explaining the scheme in detail.

## Executive Summary (iii)

### How do machine gamblers feel about tracked play? (continued)

Looking at the same test among problem gamblers and non-problem gamblers both groups think tracked play would be useful, trustworthy and a supportive concept. However, non-problem gamblers are more likely to think tracked play is intrusive in its nature, as demonstrated with a high agreement score and fast reaction time whereas problem gamblers think tracked play could be intrusive but are less certain of this (with a lower reaction time demonstrating they are less sure than non-problem gamblers are). Having said this, problem gamblers are slightly more likely to think tracked play could also be annoying in practice.

**Recommendation:** run a pilot programme to explore how the Commission can encourage machine gamblers to trust a tracked play scheme by recording thoughts and feelings of gamblers who are participating in the pilot programme.

### How do machine gamblers feel about tracked play when choosing a gaming machine game?

Following the results of the implicit test, respondents completed a MaxDiff exercise whereby they were presented with 4 machine characteristics at a time and asked to choose which were the most and least appealing features when choosing a gaming machine.

Among all respondents surveyed, the most appealing gaming machine features are games which offer a high chance of winning/the chance to win a large jackpot followed by in-game bonuses and game features. Tracked play has a fairly mid-ranking preference score, suggesting it would neither act as an attraction nor be too off-putting in the context of other features. Looking at the same test among problem gamblers and non-problem gamblers, problem gamblers are more likely to find tracked play appealing.

Looking at the three groups, highly engaged gamblers and online gamblers are significantly more likely to find tracked play to be an appealing feature when choosing a gaming machine game relative to the other 12 features tested. Casual gamblers are significantly less likely to find tracked play to be an appealing feature when choosing a gaming machine. By the four venues, the ranking of tracked play was very similar.

**Recommendation:** a live trial of a tracked play scheme would help validate the claimed responses of machine gamblers that were found in the MaxDiff exercise.

## Executive Summary (iv)

### How are machine players likely to react to tracked play?

3 in 5 machine gamblers (62%) who were introduced to tracked play at the start of the survey (and therefore less familiar with the concept), said they would gamble the same amount. Just 3 in 20 (15%) said they would gamble less. Machine gamblers who were asked how they would react to tracked play later in the survey (and therefore were more familiar with it), were more likely to say they would gamble less. This reaction was particularly prominent for problem gamblers.

Of those machine gamblers who would gamble less if tracked play were introduced, around 2 in 5 would spend their money on another gambling activity or something else. This is consistent across both machine gamblers who were exposed to tracked play and those who were not. Machine gamblers who would spend their money on another gambling activity said they would most likely spend it on football betting or tickets for the National Lottery. Those who would spend their money on something else would most likely save the money, spend it on holidays or eating / drinking out.

**Recommendation:** the results of this report are based upon claimed behaviour in response to the concept of tracked play scheme being introduced. In order to understand how consumers would react in further detail, it is recommended the Commission undertake a pilot programme.

## Executive Summary (v)

### What should the Gambling Commission take into consideration when it decides whether tracked play should be introduced?

In both the qualitative and quantitative elements of this research, machine gamblers were fairly sure that in order for tracked play to work it would need to be mandatory across all gambling operators. Around three fifths (57%) of respondents agreed this would need to be the case in the online survey conducted and this was a clear consensus in the groups held.

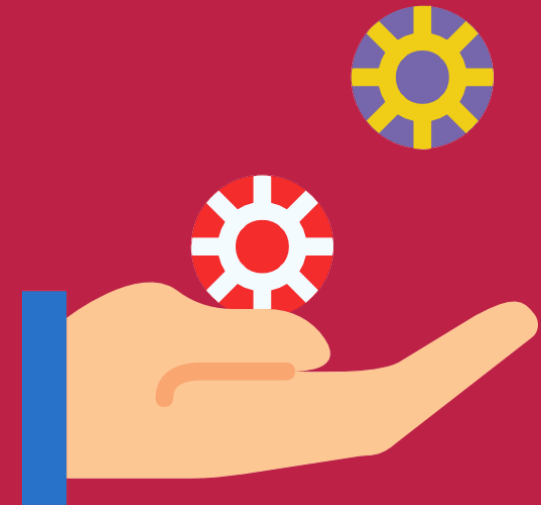
While machine gamblers on the whole do seem receptive to the idea of tracked play and the implicit and MaxDiff research pulled out some positive indications that it would be useful in practice, there are some concerns among machine gamblers around how their personal data would be used. The majority (71%) of machine gamblers would be concerned that the gambling operator would use their data to target marketing and advertising. Only around a third (31%) claim to trust the gambling operators to keep their data safe.

Similarly, 65% of machine gamblers would be concerned about what personal information they would need to provide during registration and two fifths (41%) assume it would be a hassle to register.

**Recommendation:** if a tracked play scheme were launched, the Commission should aim to fully explain to machine gamblers how their data would be stored and use messaging which assures them that their data would remain secure.

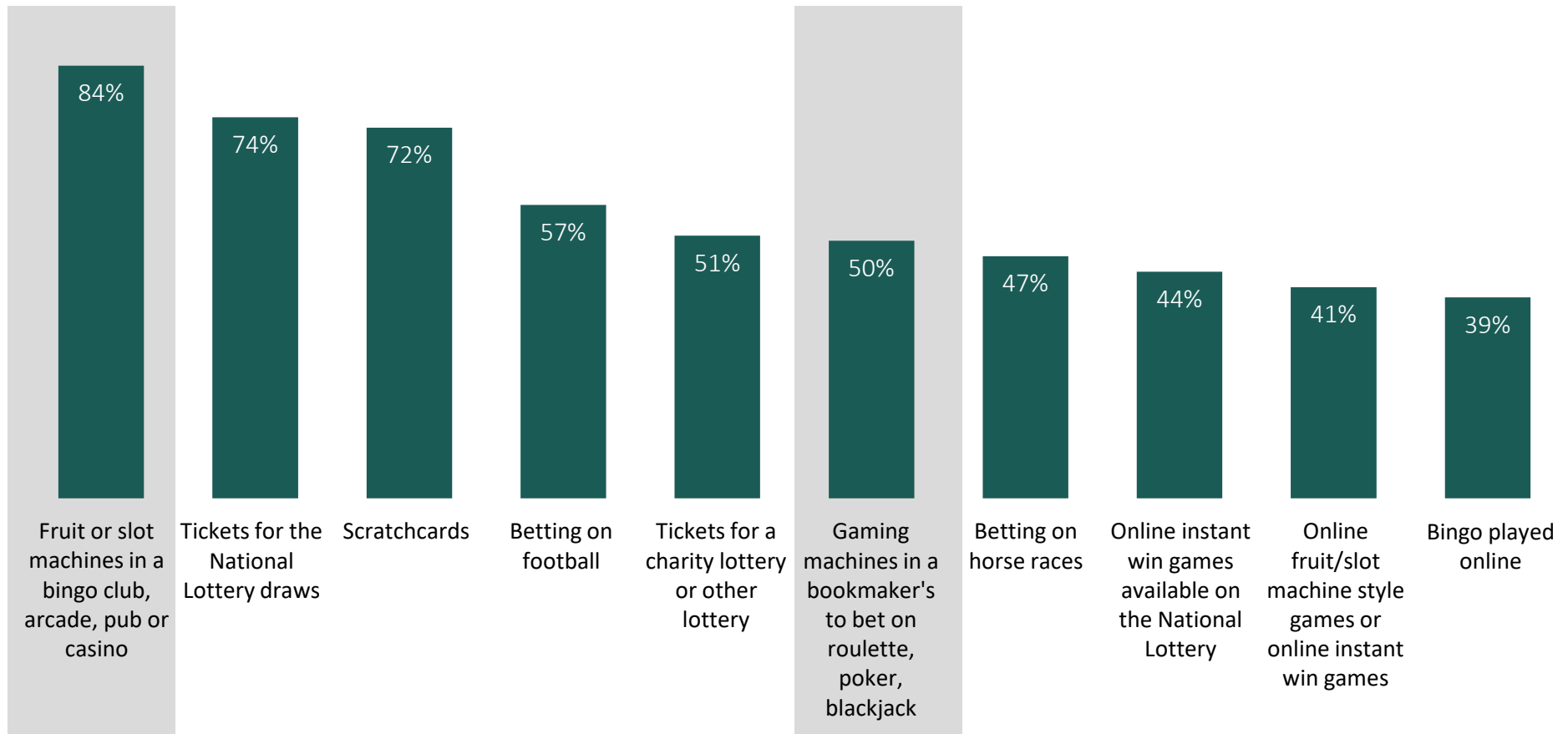
# Gambling behaviours

---



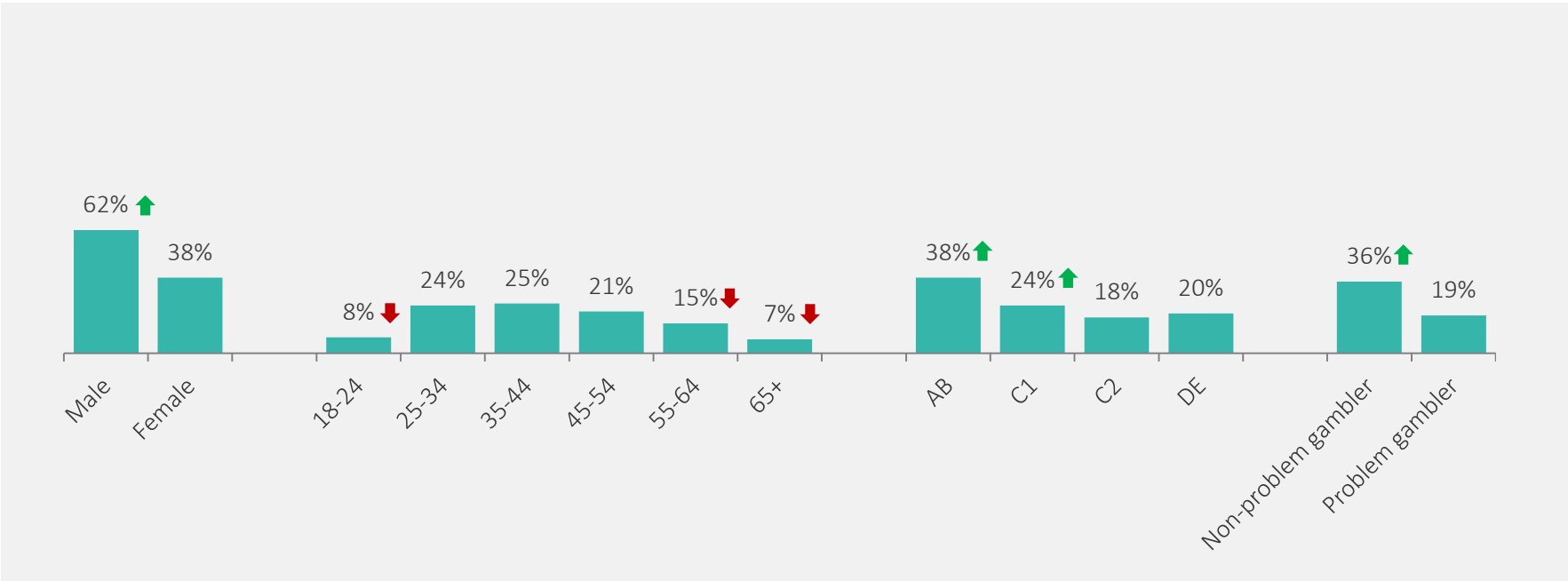
# Fruit or slot machines are the primary gambling activities of machine gamblers, although the National Lottery and scratch cards also feature strongly

Top 10 gambling activities Machine Gamblers spent money on in the last 4 weeks



# Males aged 25-54 of social grade AB and C1 are most likely to be machine gamblers

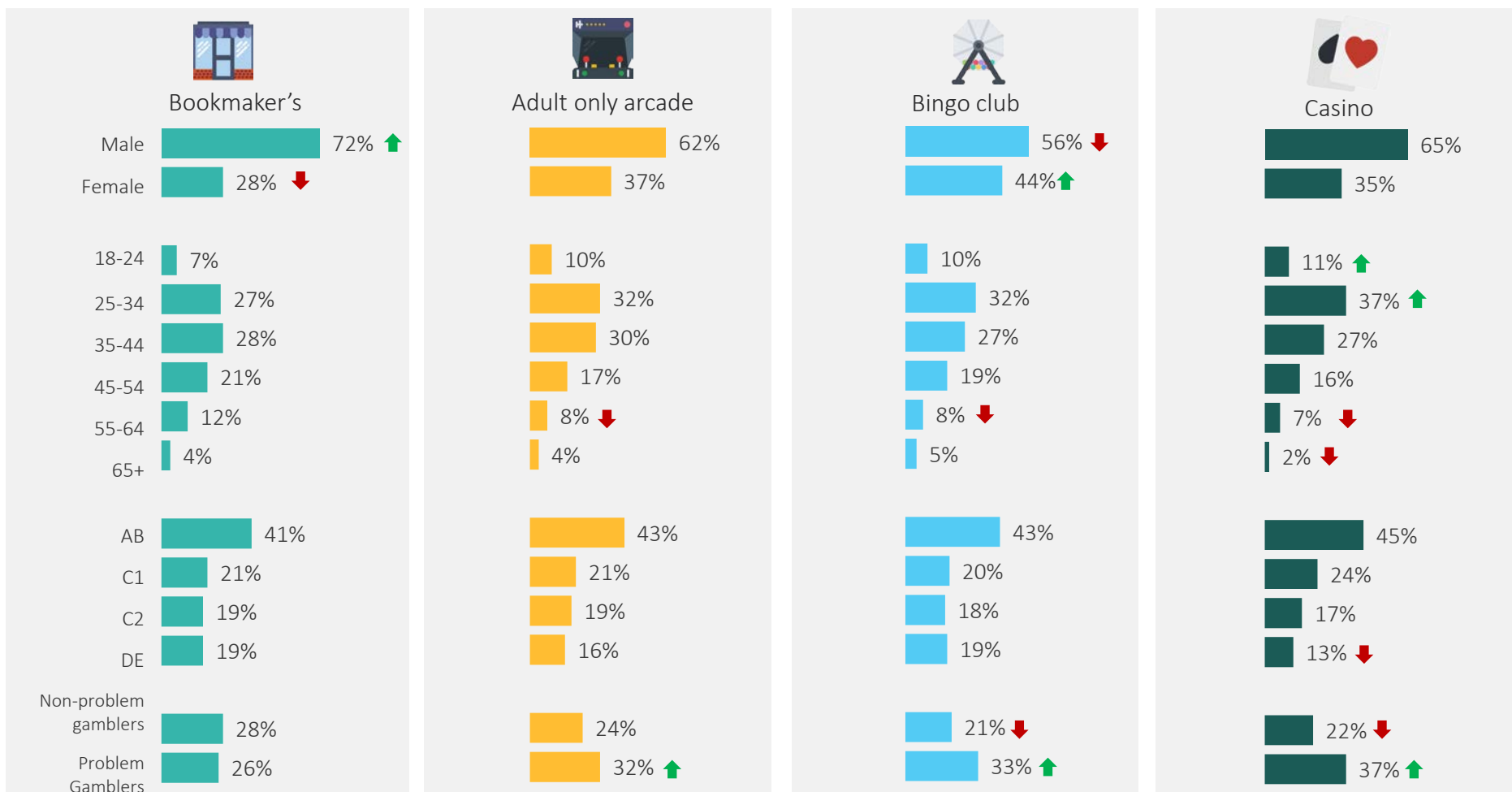
## Machine Gambler Profiles



↑ Indicates statistically significantly different  
↓ versus sub-group(s) at 95% confidence level

# Men tend to visit bookmakers whilst bingo clubs are the most common venue for women. Younger gamblers are more likely to visit casinos and problem gamblers are overrepresented in arcades, bingo clubs and casinos

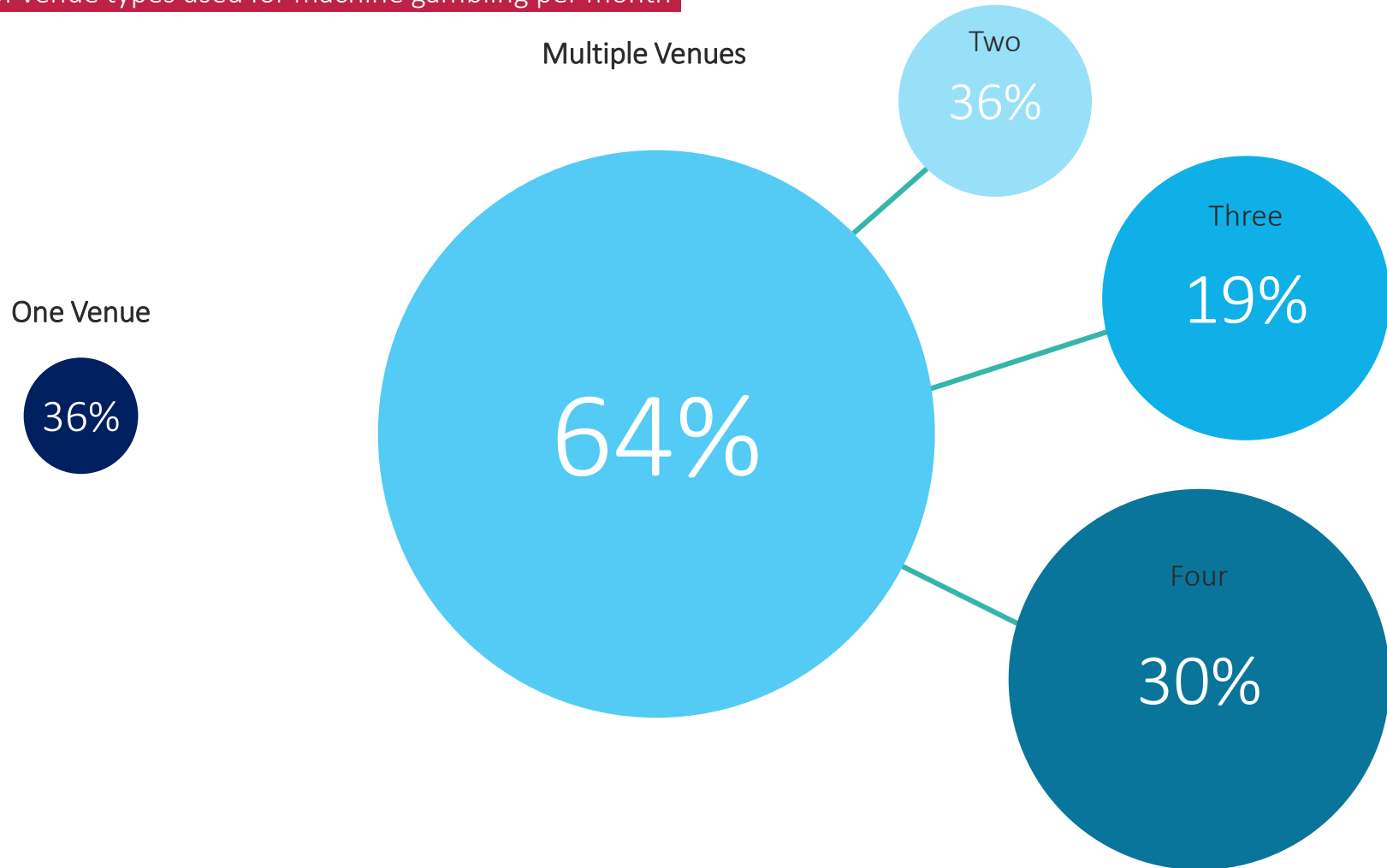
## Machine gamblers who visit the following locations at least once a month by demographics





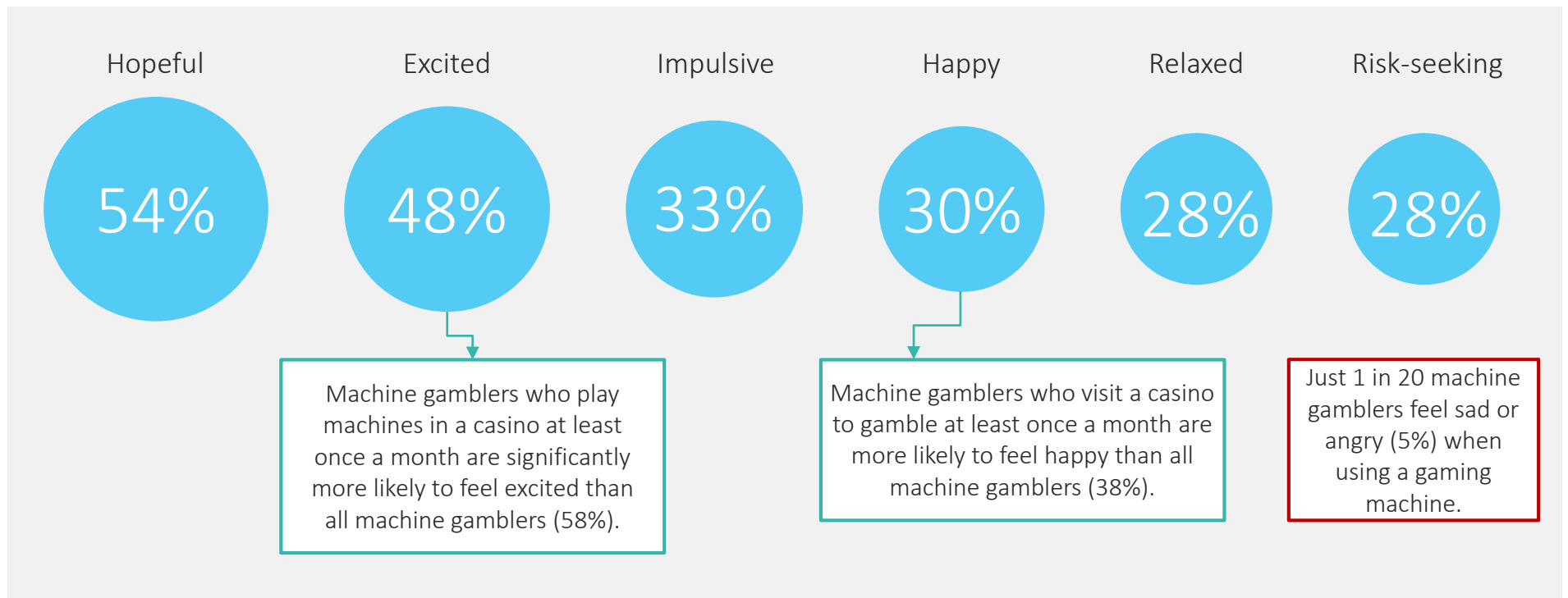
# The majority of machine gamblers play in multiple venues

Number of venue types used for machine gambling per month



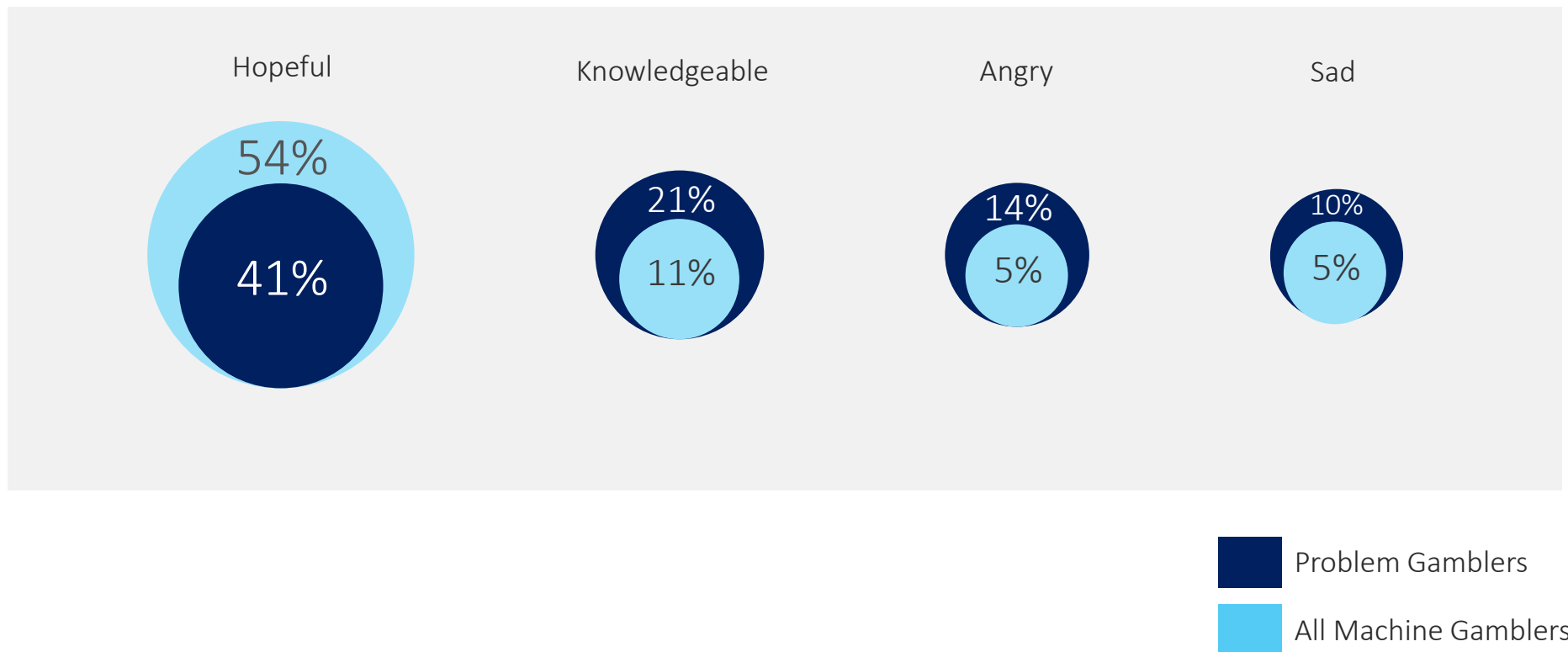
# Machine gamblers generally feel positive when using a gaming machine, with around half feeling hopeful and excited

## Top 6 feelings when using a gaming machine



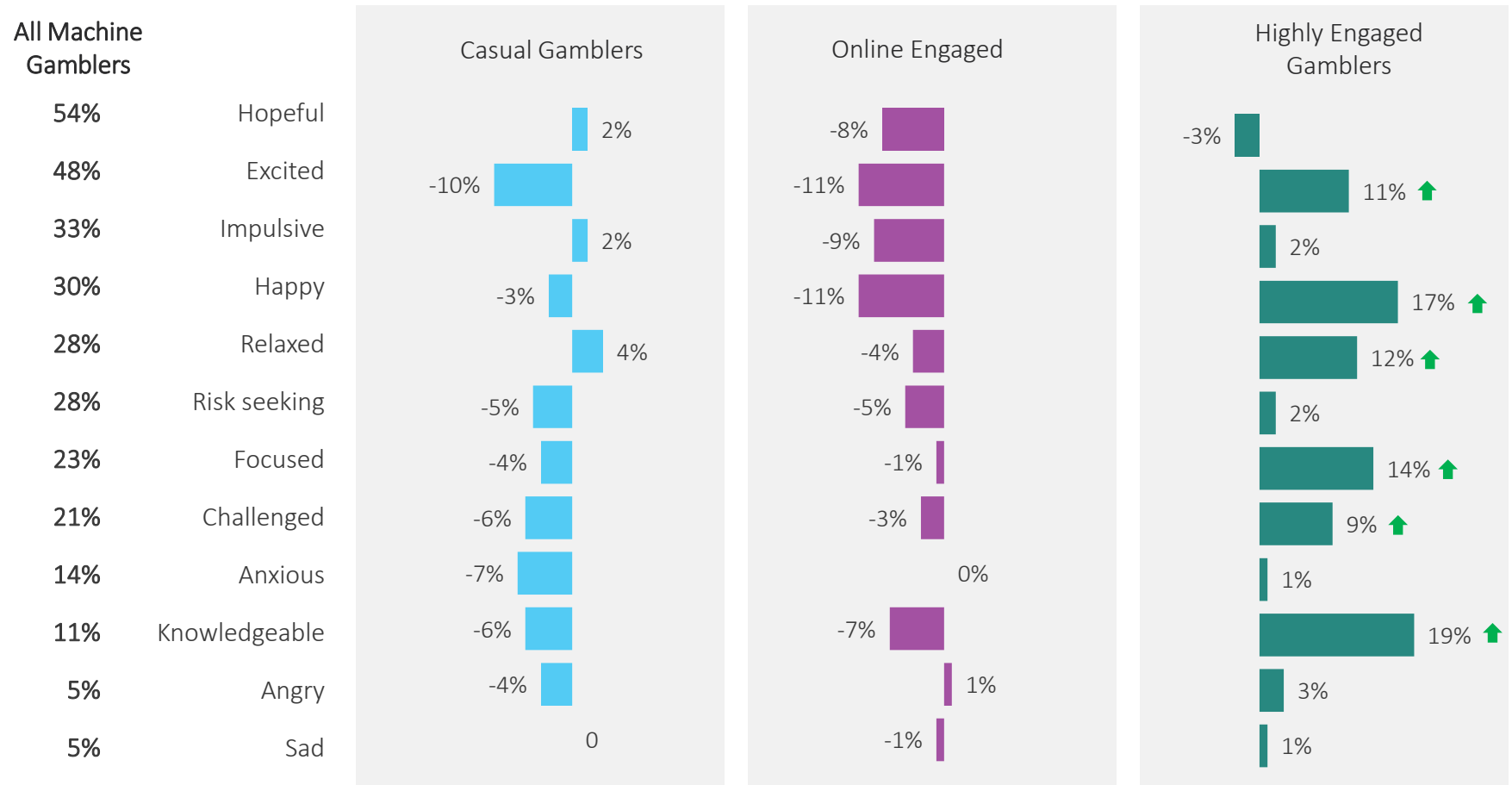
# Problem gamblers are more likely to feel knowledgeable, angry and sad but less likely to feel hopeful when gambling on a machine

Feelings with significant differences between problem gamblers and all machine gamblers



# Highly engaged machine gamblers are significantly more likely to have positive feelings when using a gaming machine

## Feelings when using a gaming machine by group



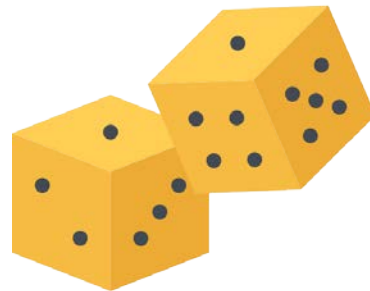
↑ Indicates statistically significantly different versus the total sample at 95% confidence level

## In the qualitative work non-problem gamblers told us that they saw machine gambling as a fun distraction, often part of socialising

- Gambling is seen as an enjoyable hobby by all and a welcome distraction from the pressures of daily life
- For some it was associated with childhood holidays and happy memories
- And most had close family members (often spanning generations) and friends who also enjoyed gambling
- Participants engaged in gambling to various degrees depending on their lifestyle and amount able to spend
- The majority saw gambling (on machines) as a social exercise in all venues but particularly in casinos and bingo halls
- They usually went with their friends or partners to the venues and often engage in using the machines together
- Gambling in this way is often the central part of a “night out”

*“Going to Wales on holiday – I started young”*

*“I wouldn’t go chasing my money. It’s just a tenner”*



*“We’ll go out for a meal and some drinks, then head to the casino”*

What do machine gamblers think of tracked play?

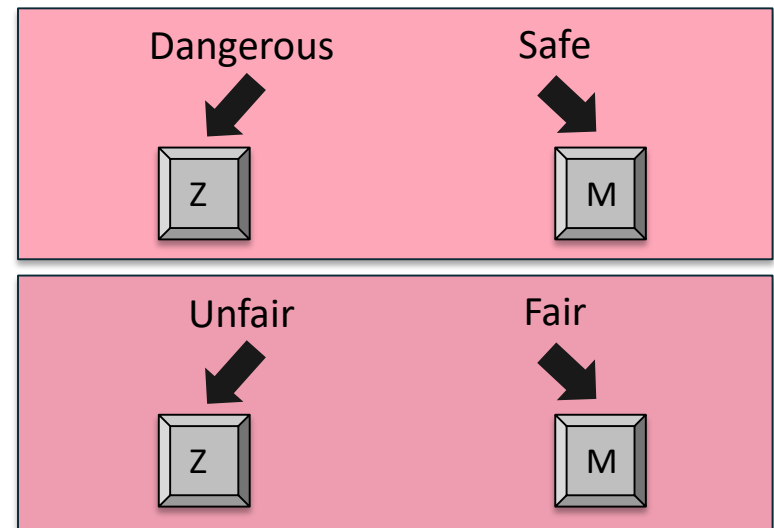
---

Populus

# Implicit Response Test – An overview

The Implicit Response Test (IRT) is a key technique in understanding how to **tap into subconscious respondent reactions and engage with how they really feel** about something. The principle behind implicit research is that we ask respondents to give their immediate reactions to an idea and the speed of their response indicates the strength of their implicit reaction.

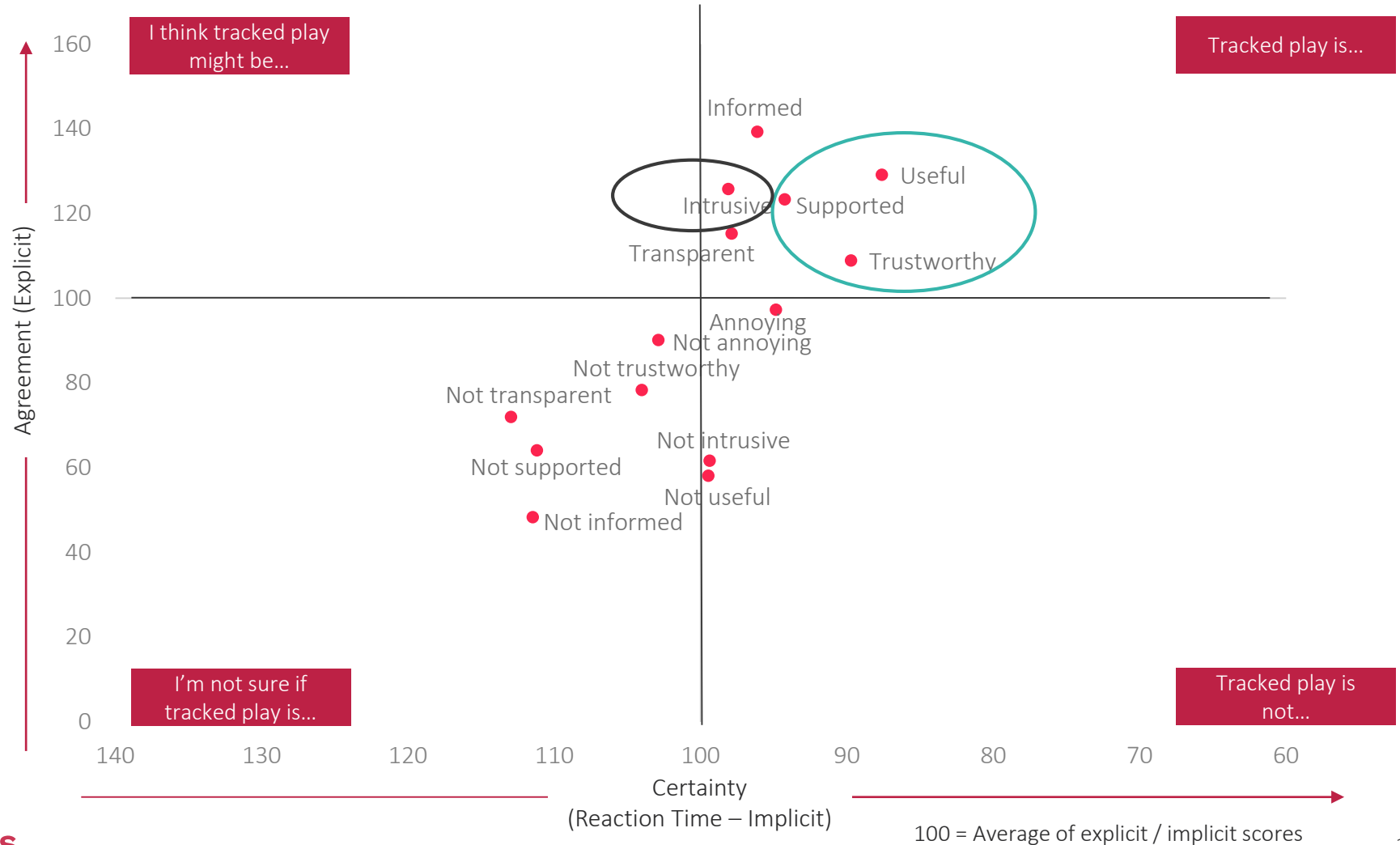
First of all we ask respondents to think about tracked play after being asked to read a definition of the concept. We then cycle through a series of adjectives and its antonym and ask the respondent to select which they feel best describes their feelings towards tracked play (as quickly as possible) using the 'Z' and 'M' key on their keyboard.



The following charts show the scale of consumers unconscious automatic associations towards tracked play compared to rational, conscious deliberation.

Overall, tracked play gets a positive response as it is perceived to be useful, transparent and informed. There is a sense that it may be intrusive though, suggesting a need for gambling companies to be transparent

Sub-conscious Implicit Test: All machine gamblers





# There is little difference in reactions to tracked play between gambling venues

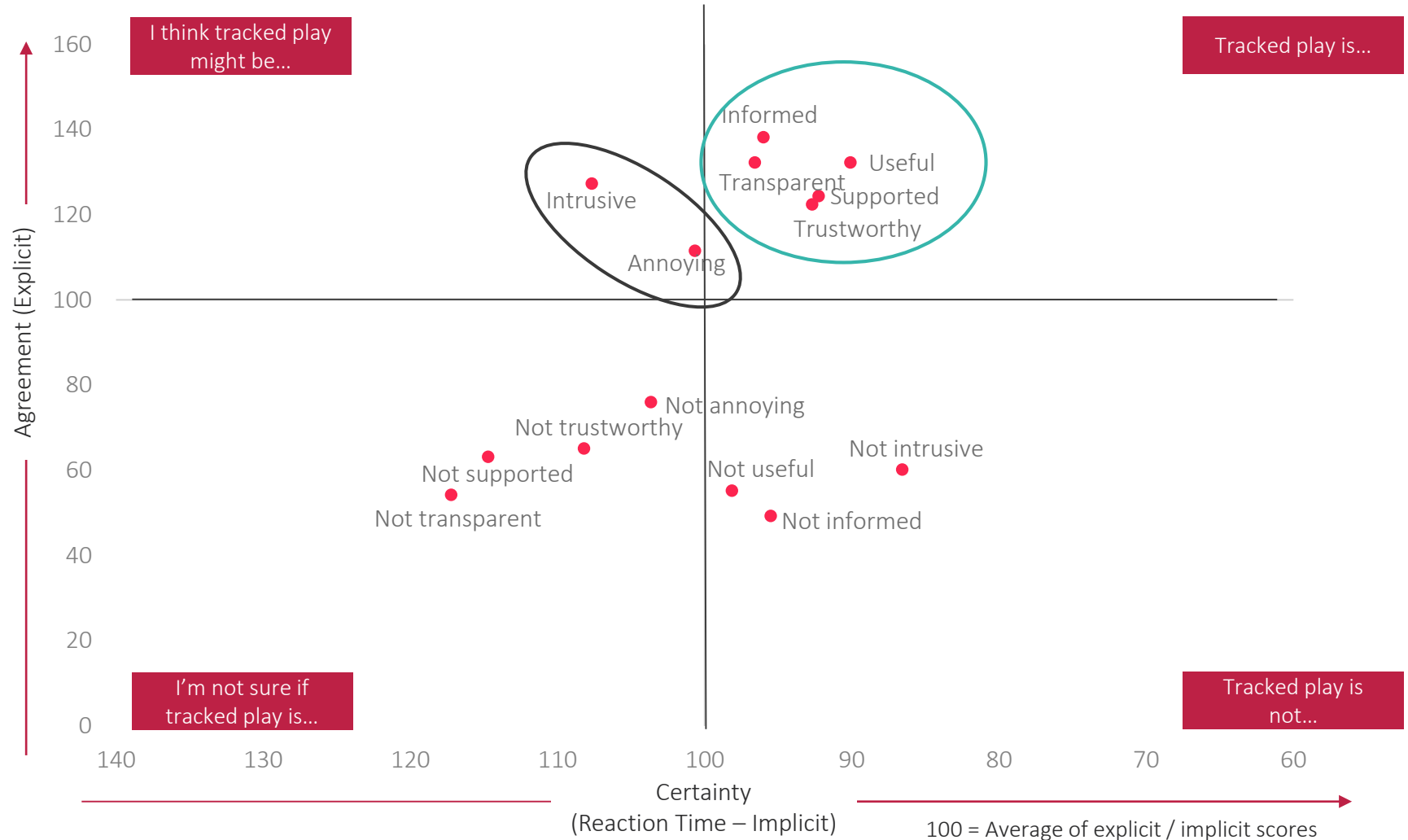
Overview of implicit results by machine gamblers who visit the following locations at least once a month

Description	Bookmaker's	Arcades	Bingo Clubs	Casinos
Informed	80%	84%	85%	86%
Useful	84%	85%	83%	89%
Supported	74%	75%	77%	79%
Transparent	68%	73%	71%	70%
Intrusive	63%	56%	58%	58%
Trustworthy	72%	75%	74%	75%
Annoying	54%	55%	56%	56%
Not annoying	44%	47%	48%	51%
Not trustworthy	30%	35%	27%	28%
Not transparent	25%	17%	24%	18%
Not intrusive	40%	36%	37%	38%
Not supported	20%	22%	21%	19%
Not useful	31%	28%	32%	22%
Not informed	15%	11%	8%	9%

The composite score is the weighted agreement score with an adjustment (which can be up or down) based on the implicit response time. So if an explicit score is, say, 70% but it has a slow response time, then this might be adjusted down to 67%. The amount it is adjusted is proportional to the difference between the response time for that statement and the overall mean response time.

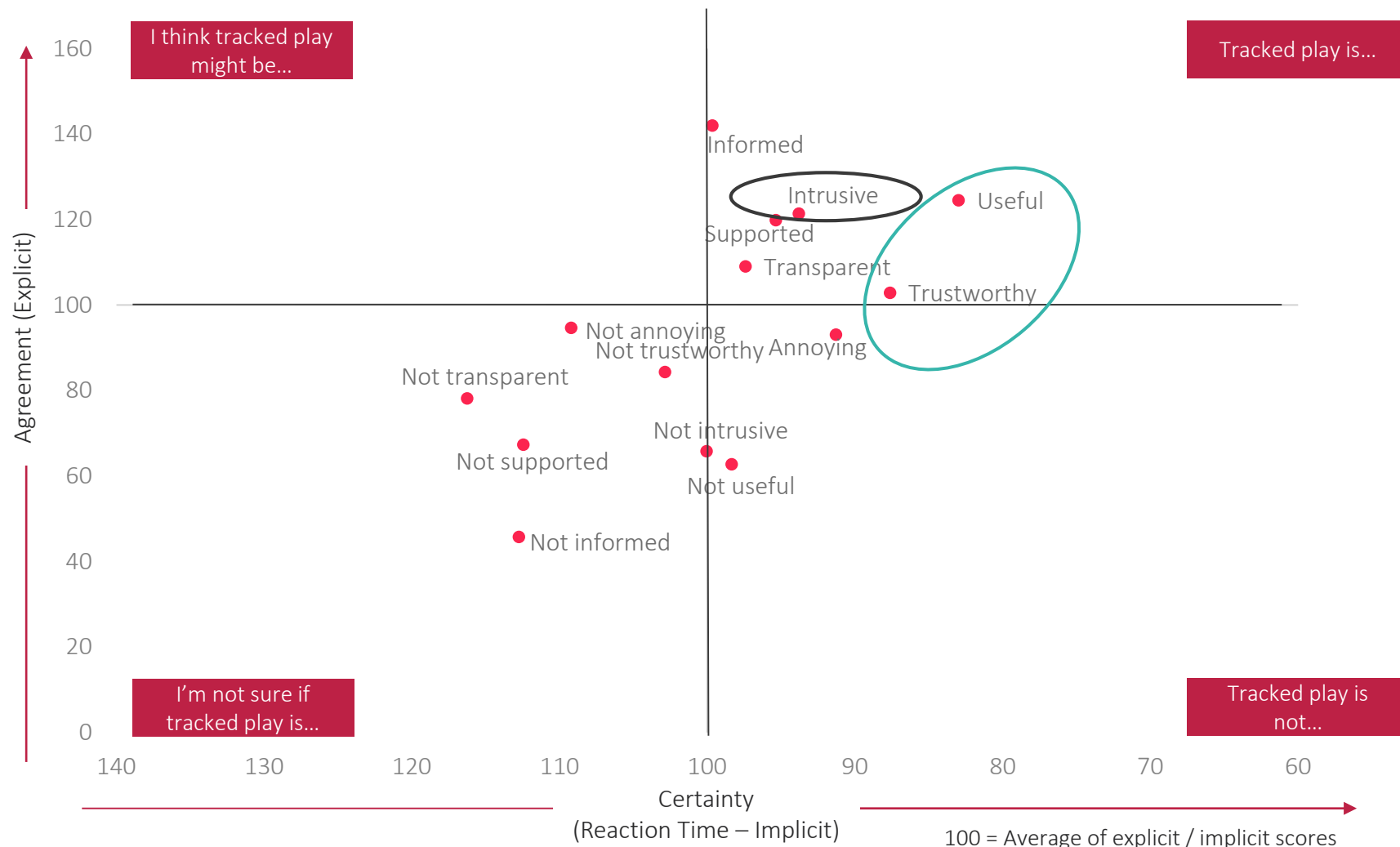
# Problem gamblers are less certain about how intrusive tracked play would be and also think it would be useful, supportive and trustworthy, which suggests it would be well received by this group

Sub-conscious Implicit Test: Problem gamblers



# Non-problem gamblers believe tracked play would be useful and trustworthy. However, they are also more certain that it would be intrusive suggesting that gambling companies should adopt transparency when using customer data

Sub-conscious Implicit Test: Non-problem gamblers



# Using MaxDiff to understand how appealing tracked play is when choosing a gaming machine

## What is MaxDiff?

- Maximum Difference Scaling (MaxDiff) is a way of evaluating the importance (or preference) of a number of alternatives. It is a discrete choice technique where respondents are asked to make simple best/worst choices.

## How does MaxDiff work?

- Respondents completed a series of exercises. In each exercise they were presented with 4 items at a time and asked to choose which were the most and least appealing features when choosing a gaming machine.
- Statistical analysis at the data analysis stage was conducted to generate preference scores; providing a reliable ordering of attributes in terms of appeal.
- The preference scores for all 13 tested features of a gaming machine have been presented on a vertical bar to demonstrate the relative appeal of tracked play.
- A score of 100 or more indicates that the feature is appealing. The higher the score, the higher the feature was ranked for appeal relative to other features. A score lower than 100 indicates that a feature is unappealing.

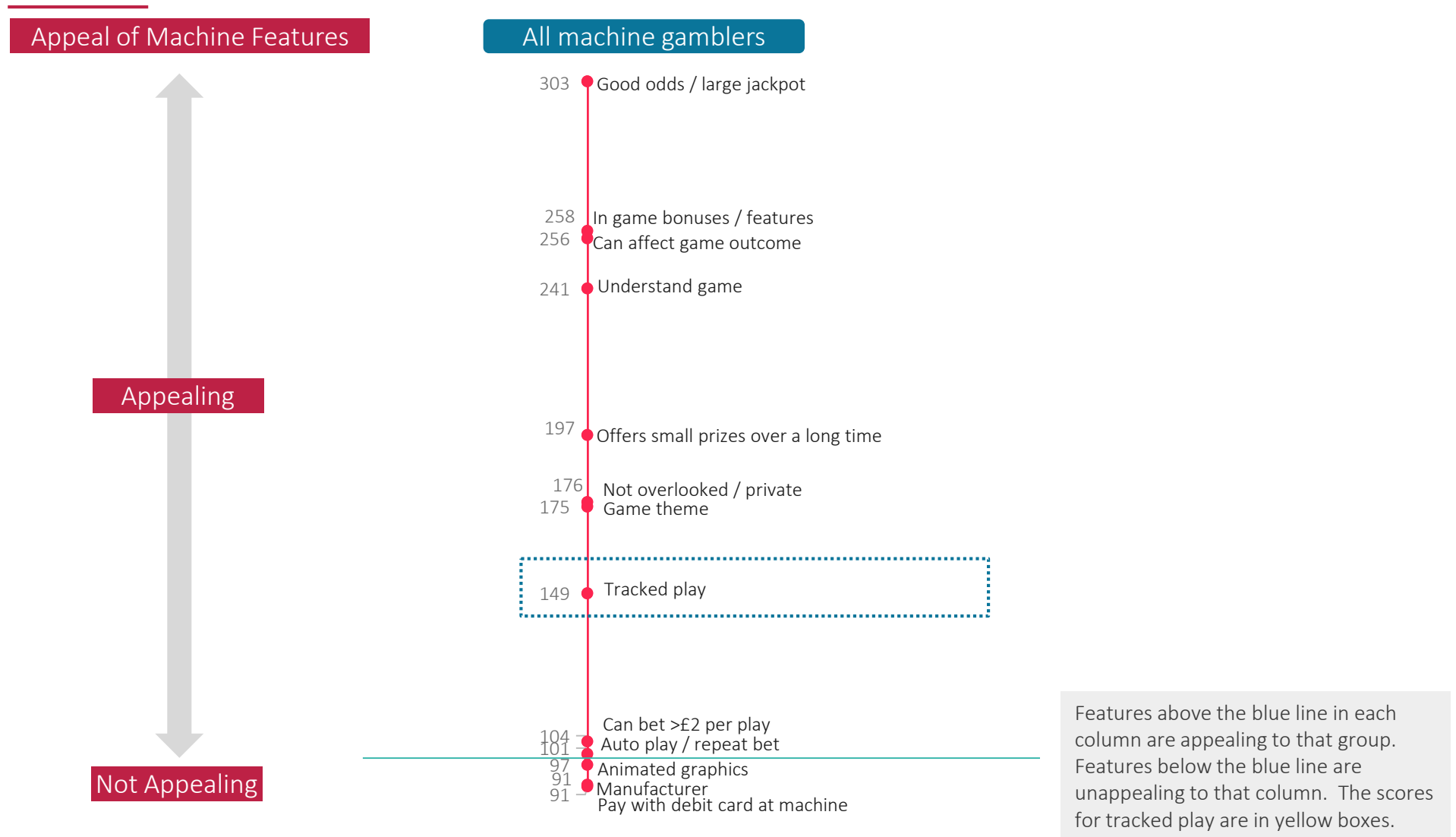


# MaxDiff Statements

For clarity of reading we have included shortened versions of the statements in the report. The following slide shows the original statement viewed by respondents and how it has been shortened for this report.

Original Statement Seen by respondents	Shortened Statement Used in this report
The machine tells me what games I've played on previously, how much I've spent and how often I've played	Tracked play
There are in game bonuses / game features	In game bonuses / features
The manufacturer of the game (e.g. Bellfruit)	Manufacturer
The theme of the game (e.g. Deal or No Deal) is one I like	Game theme
The machine has auto play or a repeat bet button	Auto play / repeat bet
Game offers a high chance of winning / large jackpot	Good odds / large jackpot
I understand the rules and features of the game	Understand game
I can bet more than £2 with one play	Can bet >£2 per play
I could pay directly at the machine with a debit card	Pay with debit card at machine
I can make decisions that might affect the outcome of the game	Can affect game outcome
The game pays small prizes but allows me to play for a long time	Offers small prizes over a long time
The machine is not overlooked / I can play in privacy	Not overlooked / private
It has animated graphics	Animated graphics

# The most appealing gaming machine features are large jackpots and in-game bonuses. However, machine gamblers are not averse to tracked play

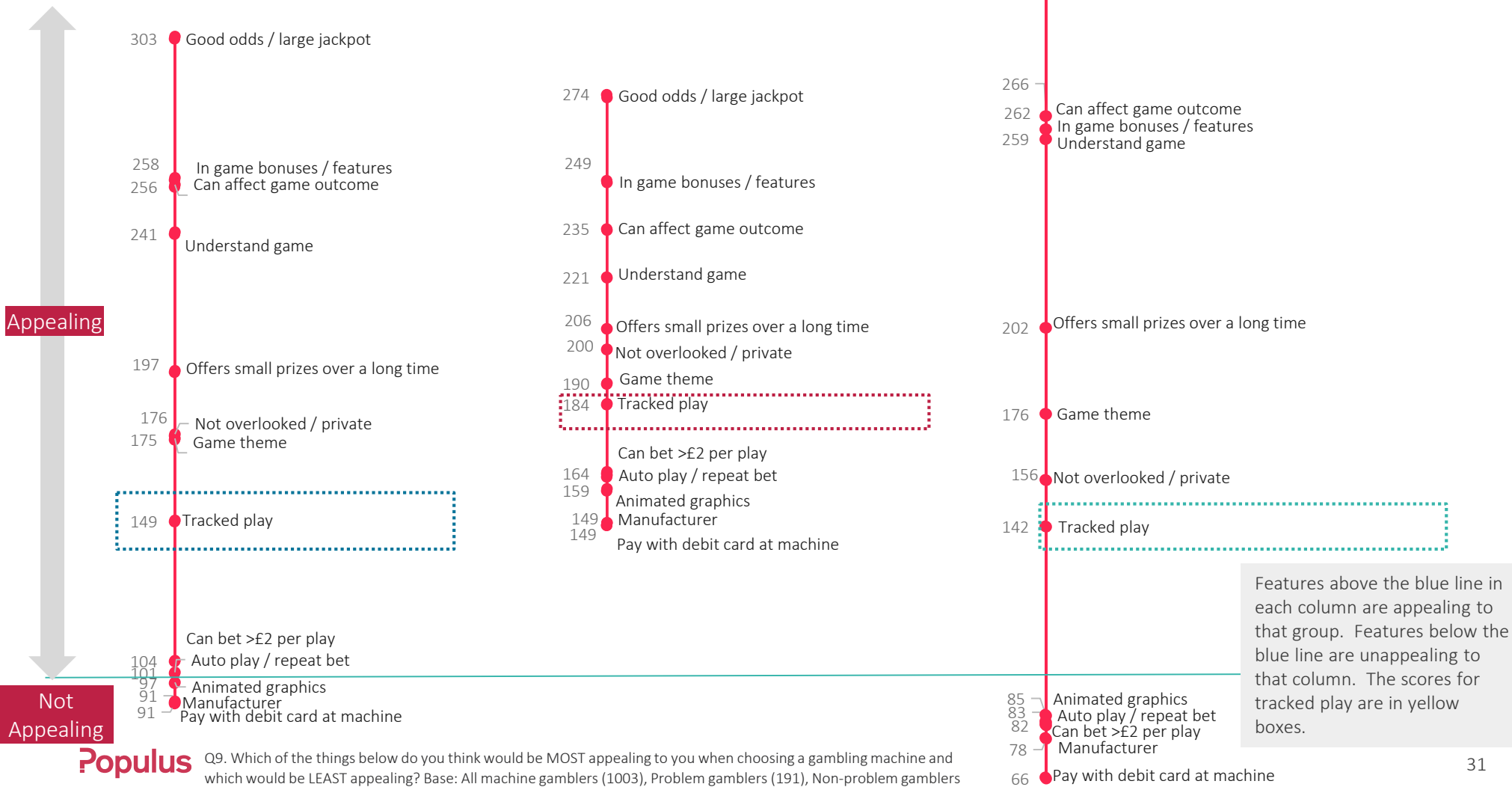


# Problem gamblers are more likely to find tracked play appealing when choosing a gaming machine than non-problem gamblers

## All machine gamblers

## Problem gamblers

## Non-problem gamblers



# Highly engaged gamblers are significantly more likely to find tracked play appealing than machine gamblers in general, whereas casual gamblers find tracked play slightly unappealing when choosing a gaming machine

	Total Population	Casual gamblers	Highly engaged gambling	Online engaged
Good odds / large jackpot	303	302	304	294
In game bonuses / game features	258	252	262	237 ↓
Can affect game outcome	256	254	258	226 ↓
Understand game	241	256	238	215 ↓
Offers small prizes over a long time	197	215	211	175
Not overlooked / private	176	151	201 ↑	170
Game theme	175	157	191	158
<b>Tracked play</b>	<b>149</b>	<b>97 ↓</b>	<b>199 ↑</b>	<b>140</b>
Can bet >£2 per play	104	53 ↓	161 ↑	91
Auto play / repeat bet	101	62 ↓	152	92
Animated graphics	97	73 ↓	135 ↑	85
Pay with debit card at machine	91	33 ↓	160 ↑	95
Manufacturer	91	60 ↓	139	79

Features above the blue line in each column are appealing to that group. Features below the blue line are unappealing to that column. The scores for tracked play are in yellow boxes.



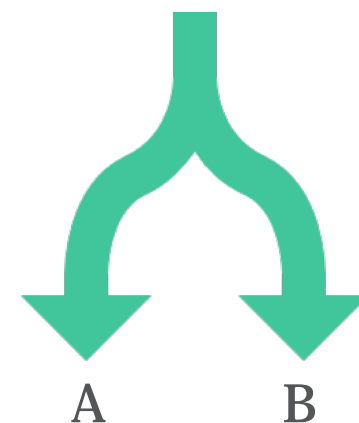
# Pre & post exposure to tracked play: Split cell methodology

## What is a Split cell methodology?

- Split cell methodology is a way of randomly dividing sample into cells in order to see different questions or take different routing. In this case we split respondents into two cells (cell A and cell B). Both cells saw the same questions, but at different times during the survey.

## How does it work?

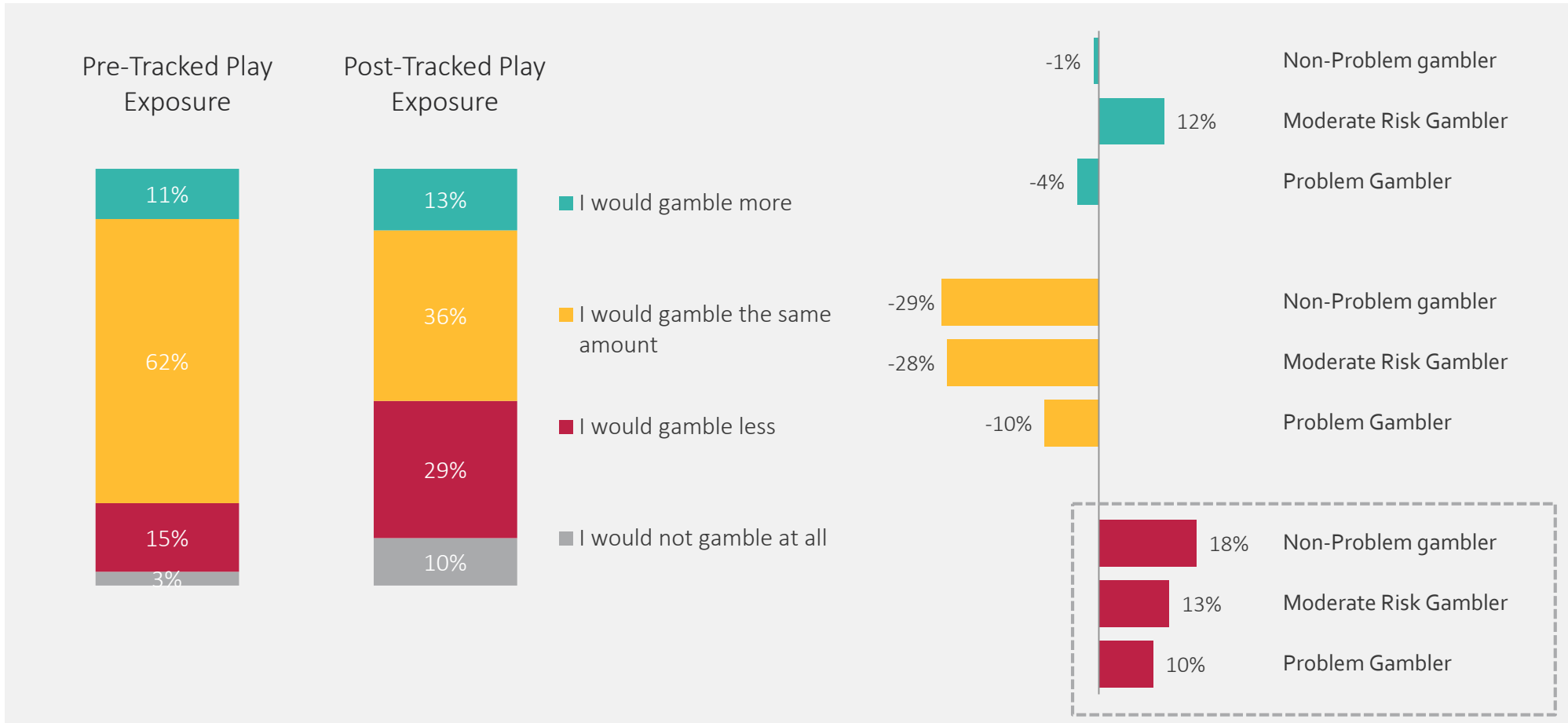
- Respondents allocated to cell A were asked three questions about their response to tracked play **before** being exposed to the implicit test, MaxDiff exercise and question about data privacy. The three questions were:
  - *We would like you to continue to imagine that gambling companies have started to collect information about your machine play across multiple visits and they can now monitor how much time and money you spend playing on gambling machines. How would you react if this was introduced?*
  - *[IF MACHINE GAMBLE LESS] You said that you would play on gambling machines less if gambling companies could monitor the amount of time and money you spend playing on gambling machines across multiple visits to a gambling venue. Would you spend the money you would save on another activity instead?*
  - *[IF SPEND MONEY ON ANOTHER FORM OF GAMBLING] Which gambling activity/ies would you play instead of fruit or slot machines or gaming machines?*
- Respondents allocated to cell B were asked the same three questions **after** the implicit test, MaxDiff exercise and question about data privacy.
- The rationale for splitting into cells is to understand how consumers may respond if given different levels of understanding about tracked play. Those in cell A gave their response 'pre-tracked play exposure' to the full concept, where as those in cell B gave their predicted behaviour 'post-tracked play exposure'.



# Machine gamblers more familiar with tracked play (exposed to tracked play later in the survey) would gamble less if it was introduced, particularly non-problem gamblers. The Gambling Commission should offer clarity on tracked play

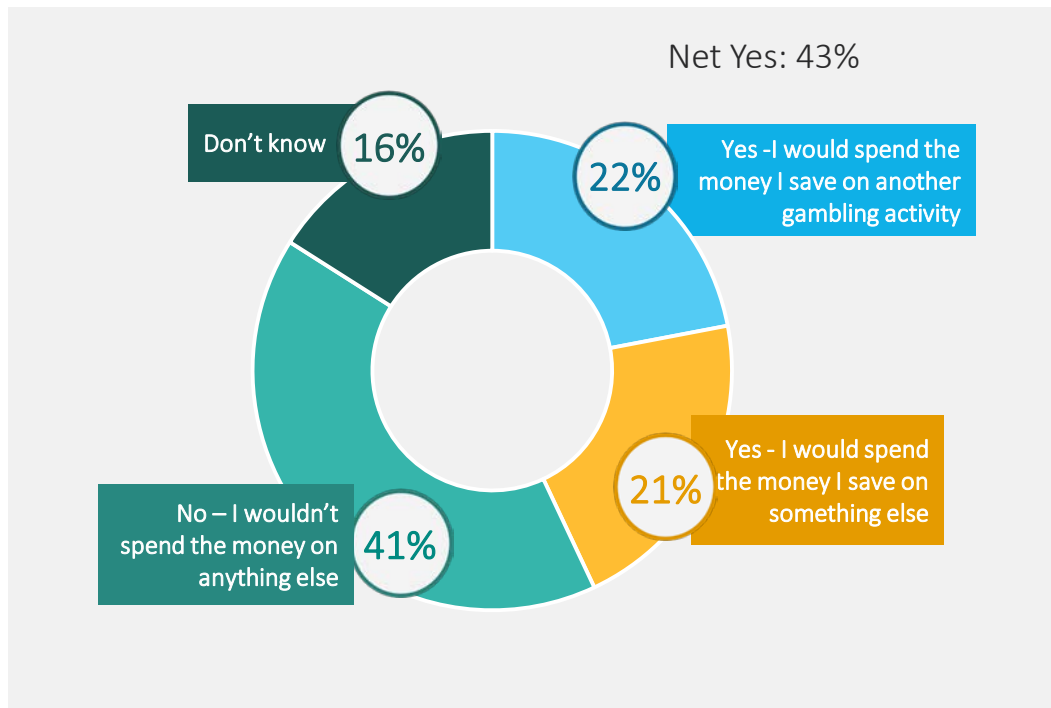
## Reaction to Tracked Play

Difference in reactions to tracked play pre and post-exposure



# Just under half would spend the money they save. Of those, around half would spend the money on something other than gambling

Would Machine Gamblers (who would spend less on gambling if Tracked Play were introduced) spend their money on another gambling activity?



Those who would spend the money they save on another gambling activity are most likely to spend it on betting on football or tickets for the National Lottery.\*

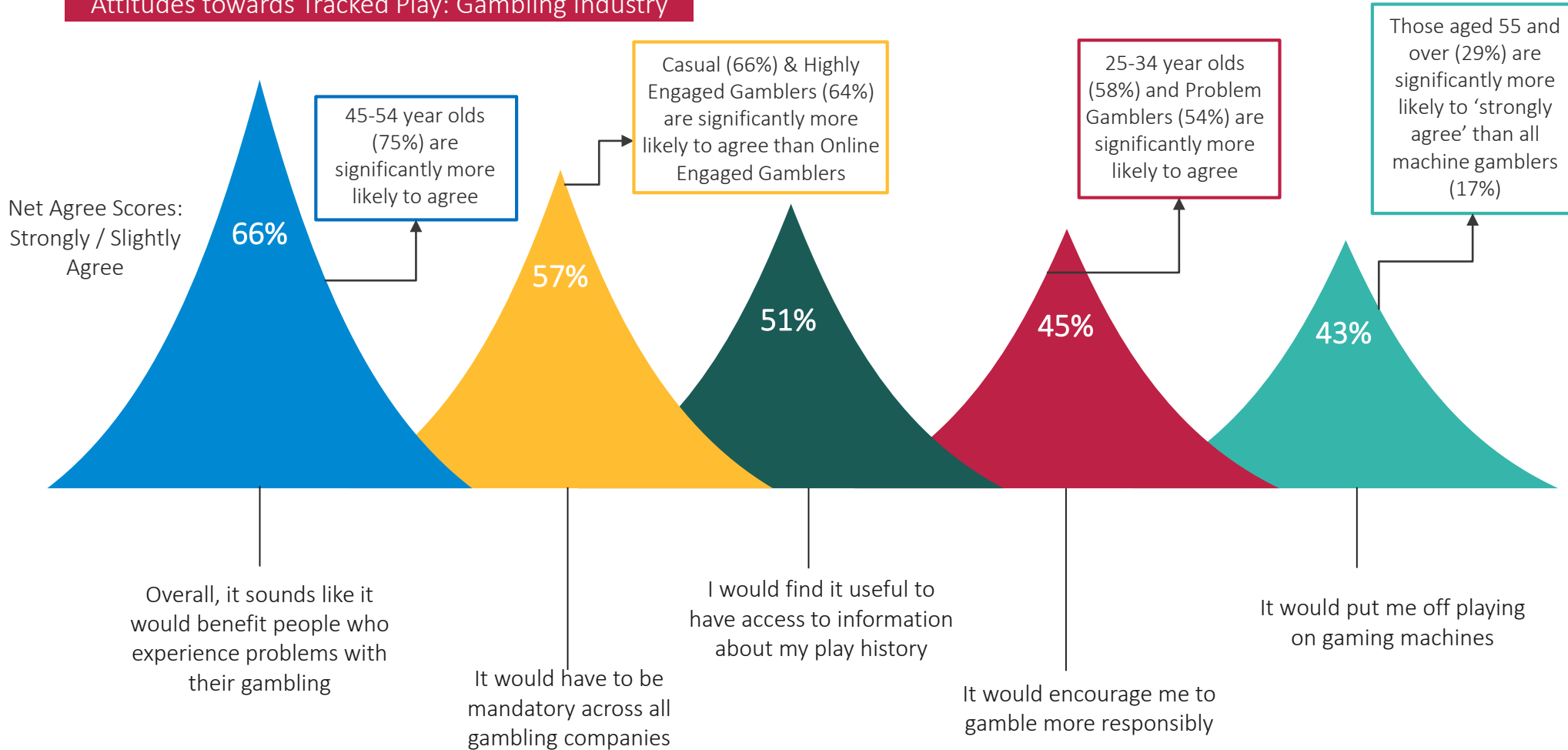
Those who would spend the money on something else mention holidays, eating out, savings, and leisure activities.\*

Q6/Q12. You said that you would play on gambling machines less if gambling companies could monitor the amount of time and money you are spending on gambling machines across multiple visits to a gambling venue. Would you spend the money you save on another activity instead? Base sizes: Those who say they would play on gaming machines less if tracked play was introduced. Base size: Machine Gamblers n=221

Q7a / Q13. Which gambling activities would you play instead of fruit or slot machines or gaming machines? Base size: Pre-tracked play exposure n=16\*, Post-tracked play exposure n=32\* \*Caution: Low Base

# The majority feel tracked play would be beneficial for people with gambling problems, although 2 in 5 would be put off playing on gaming machines. Clarity and reassurance around use of their data could prevent this

## Attitudes towards Tracked Play: Gambling Industry



# Non problem gamblers in the qualitative work often felt that this scheme was not aimed at/ for them

- Non problem gamblers struggled to see how this scheme would benefit them directly as they thought they didn't need an outside body to monitor their behaviour
- This could be due in part to the fact that they feel they are in control of their behaviour as they use personal strategies to ensure they don't develop a problem
- As they didn't think the scheme would benefit them the majority would be unlikely to sign up voluntarily
- And the most casual gamblers felt it would be enough to put them off playing altogether – preferring to swap to another casual / fun activity such as playing another line of bingo or having another drink instead

*“To help those with problem sometimes it effects those who haven't got a problem. Not fair”*

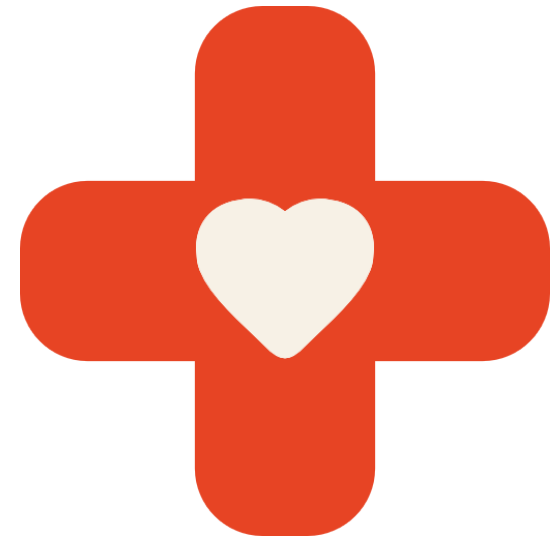
*“I think you should be given a choice. Let me just pop in when I fancy and have a go rather than signing up”*

*“A good idea for the big gambler and people who really struggle with it”*

*“Not for me, I'm not a heavy gambler”*

# But they did welcome the idea of a regulatory scheme aimed at helping moderate to severe problem gamblers

- The majority of participants were positive about the concept if it was for the use of “other” types of gamblers
- This may be due in part to the fact that several of them directly knew PGs or had seen their behaviour and so understand how personally destructive such a habit can be first hand
- Further to this, a lot of participants told anecdotal stories about the issues facing PGs they knew and so were well aware of the specific consequences of being a PG
- Interestingly some participants felt that this concept would better help those who were *becoming* PGs rather than those who were *established* PGs as they felt this cohort would be more receptive to the idea of being helped



# They also had reservations about how tracked play would work in practice

- Participants struggled to see how an outside body could...



Participants would need to know the answers to these questions before they would sign up

# And they also felt that determined problem gamblers would find ways to circumvent the system

- Ultimately participants felt that the most severe problem gamblers would try to find ways to gamble outside of the restrictions

They thought they'd do this by;

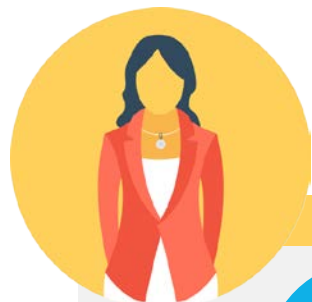
- Either visiting other venues that aren't involved
- Getting others to gamble for them
- Choosing machines that didn't use this technology

*“There's that many places it would be very hard to keep track of”*

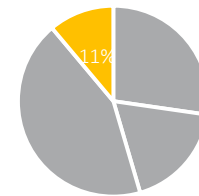


*“They're going to gamble anyway. If they're not allowed to do it they'll go somewhere else and do it there. It's like alcohol, if you're going to drink you're going to drink. It's an addiction”*

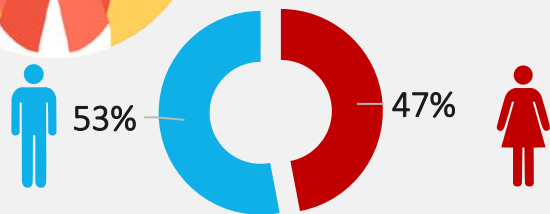




**Casual Gamblers:** These are people who only take part in 3-6 activities, don't gamble online and play on gaming machines no more than once a week



### Profile



Aged between: **45-64**



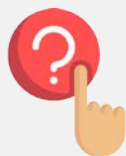
### Opinion of tracked play (Qualitative)

- I see gambling as a fun and entertaining activity so I'm worried that if tracked play was introduced it would become a more sombre, serious affair
- Tracked play might put me off gambling, as I'm not that invested in it as an activity and because I don't think it would be as fun anymore
- I think tracked play would help more engaged gamblers (than me) as it might make them gamble less and think more about their habits
- Ultimately I feel that all gamblers would need to be involved in the scheme for it to work, even if it makes the experience less fun for people like me

### Attitudes



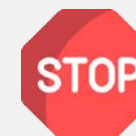
**66%** think tracked play would have to be mandatory across all gambling companies



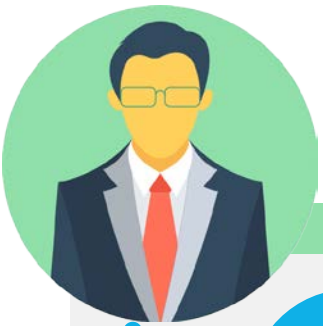
Only **21%** trust the gambling industry to keep their data safe



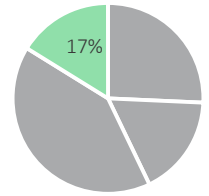
**37%** felt that tracked play would encourage them to gamble more responsibly



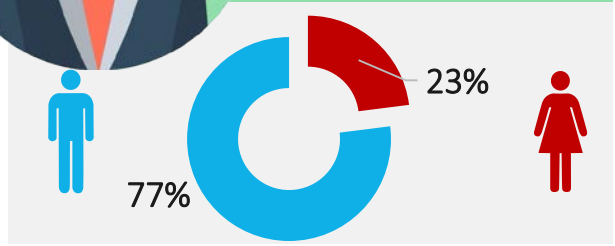
**12%** claim they would not gamble at all if tracked play were introduced and **41%** would be put off gaming machines



**Highly Engaged Gamblers:** These are people who take part in 7 or more gambling activities and play more than once a week online and in-person



Profile



Aged between: **25 -54**

Opinion of tracked play (Qualitative)

- I'm not concerned about handing over data to the gambling companies and I'm used to doing this for/ with other companies
- But I am a bit worried about who would see my tracked play data, ideally only myself and the gambling companies would have access to it
- I'm also concerned about how the system would decide whether my gambling habits are problematic, I guess it would be about the amount of time or how much I'm spending?
- However it might be quite good for me to see what I'm doing as I'm sure I'd be a bit shocked about how quickly it all adds up, maybe I could have gone on a holiday or bought a car instead!

Attitudes

**64%** think tracked play would have to be mandatory across all gambling companies

**49%** trust the gambling industry to keep their data safe

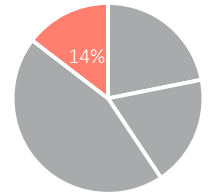
**58%** felt that tracked play would encourage them to gamble more responsibly

**3%** claim they would not gamble at all if tracked play were introduced and **45%** would be put off gaming machines

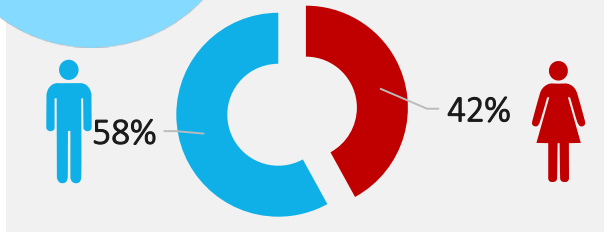


## Online Engaged Gamblers:

These are people who gamble online and in person but do not play machine games more than once a week



### Profile



Aged between: **25 -44**



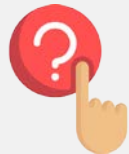
### Opinion of tracked play (Quantitative\*)

- When choosing a gaming machine, I feel tracked play has a similar level of appeal to other types of gamblers.
- However, I think in game bonuses, game features, the ability to affect the outcome of the game and understanding the game is less appealing features in a gaming machine than other types of gamblers.
- I am more split on whether tracked play needs to be mandatory (50%).

### Attitudes



**50%** think tracked play would have to be mandatory across all gambling companies



**26%** trust the gambling industry to keep their data safe



**46%** felt that tracked play would encourage them to gamble more responsibly



**8%** claim they would not gamble at all if tracked play were introduced and **45%** would be put off gaming machines

Gender/ Age/ Q14. Still thinking about if gambling companies started to collect information about your machine play across multiple visits, to what extent do you agree or disagree with each of the following statements?/ Q5/Q11. We would like you to continue to imagine that gambling companies have started to collect information about your machine play across multiple visits and they can now monitor how much time and money you spend playing on gambling machines. How would you react if this was introduced? Bases: Online engaged, n=137/ \* Online engaged gamblers were not featured in the Qualitative Focus Groups & Depth Interviews.

# Considerations for introducing tracked play to machine gamblers

---

# Non problem gamblers, in the qualitative work, discussed how they hoped for a “hassle free” registration process

- If non problem gamblers were to sign up for the scheme they hoped the process would be as painless as possible. The registration needs to be:
  - Quick and easy
  - Ideally only happen once
- They favoured an online process that they could do at their convenience
- They imagined they would need to share their
  - Name, phone no. and email address and potentially DOB
- On reflection some thought there might be a requirement for income and bank details so that companies could judge what a person could afford to spend, however they were less comfortable with supplying these



# And they recommended having as little interaction during this process with the staff as possible

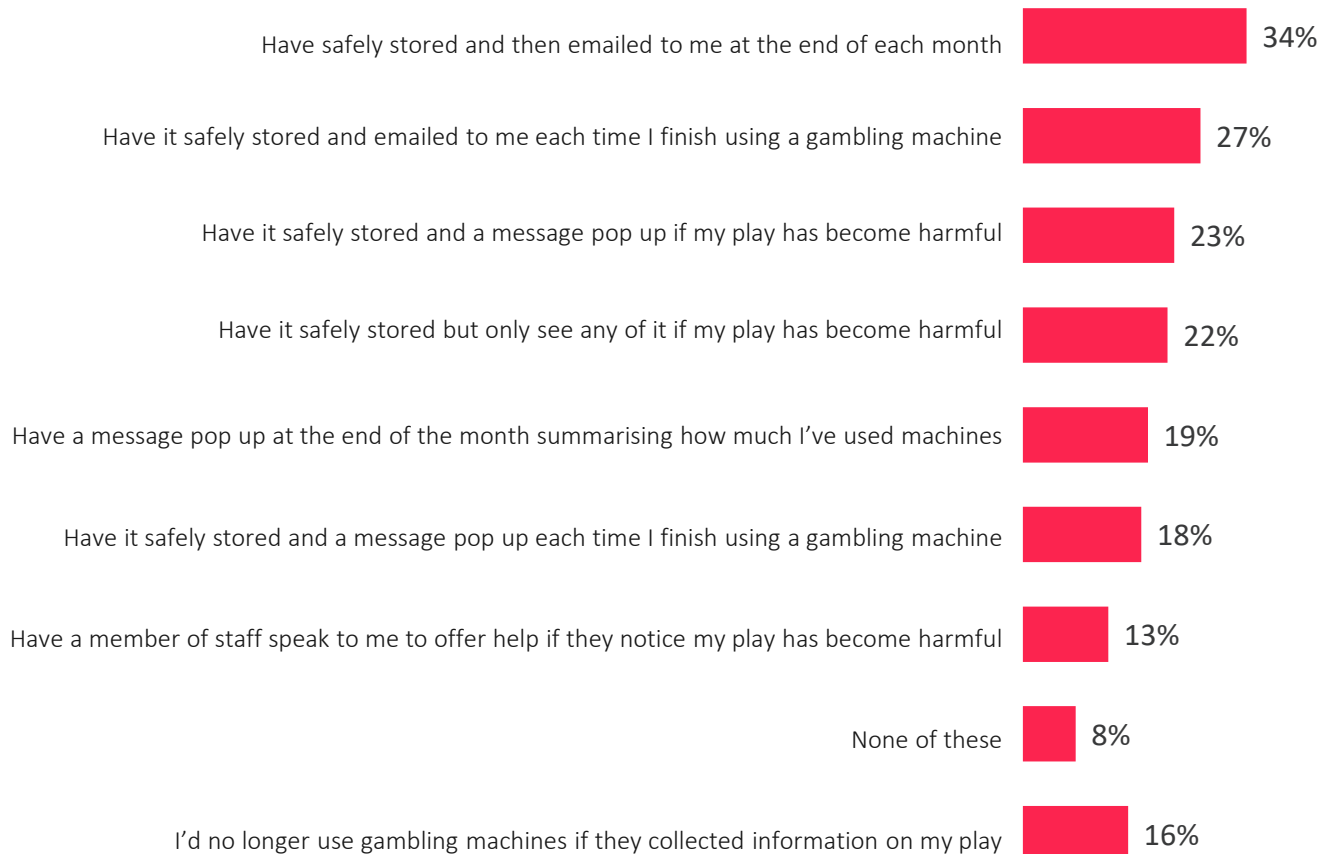
- Non problem gamblers felt that interacting with a staff member upon registration could potentially be embarrassing for players – especially if it was an “opt in” scheme
- Further to this a lot of players have personal relationships with staff and would worry about being judged or about staff telling others of their involvement in the scheme
- They were also cynical about the ability for this process to route out underage players as they believe these players have ways of being undetected

*“I wouldn’t enjoy doing it. It’s a lot of personal information. You could intimidate or offend the customer”*

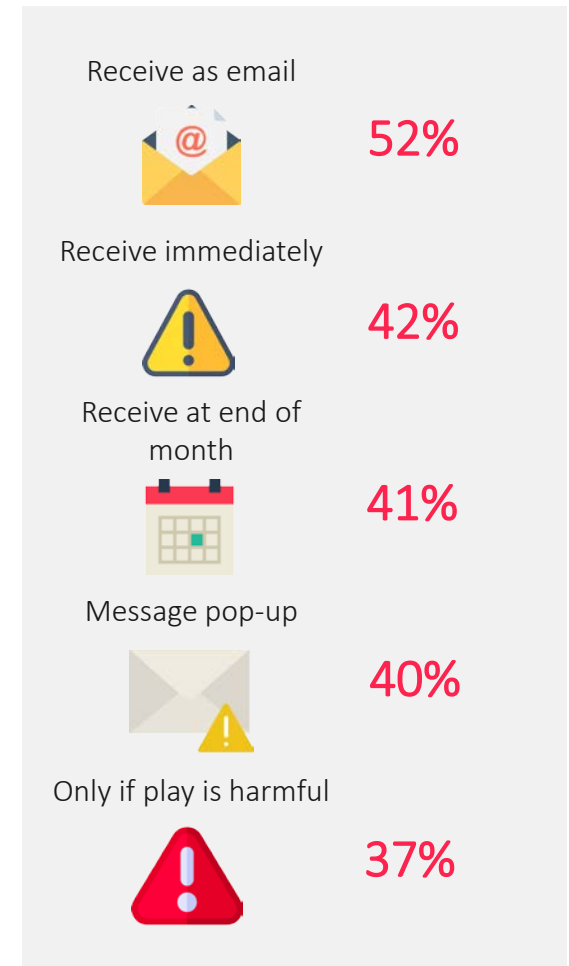
*“Underage, already got schemes in place, excluded they’ll just go elsewhere”*

# Machine gamblers would like to receive the information collected by tracked play immediately by email and also at the end of the month, plus pop ups

## Preferences for receiving information about machine play



## NET Results



# Non-problem gamblers discussed how receiving personal information about their play could be helpful

- Although none of them are PGs some felt they might get a “wake up call” by seeing their behaviour – for instance if they could see their weekly, monthly or yearly spend
- They also felt this information might help to bring those players who might be straying into the grey area between “normal” and “problem” gambling back from the brink - in this way they saw it as being quite a preventative tool
- Ultimately they felt this sort of data could help them evaluate their habit and decide whether or not they needed to cut down their playing

*“It could shock a lot of people if they see what’s going in and out of their bank. When it’s broken down into £10 a day they don’t realize it. You could have went on holiday, bought a car”*

*“Sometimes people don’t know how much they’ve lost. Do you realize this month you’ve lost £90? In the long run the bookie always wins”*

*“That’s a fantastic idea. It’s not always easy to recognize when someone’s got a problem. Showing them how much they’ve spent it can be a trigger for them”*



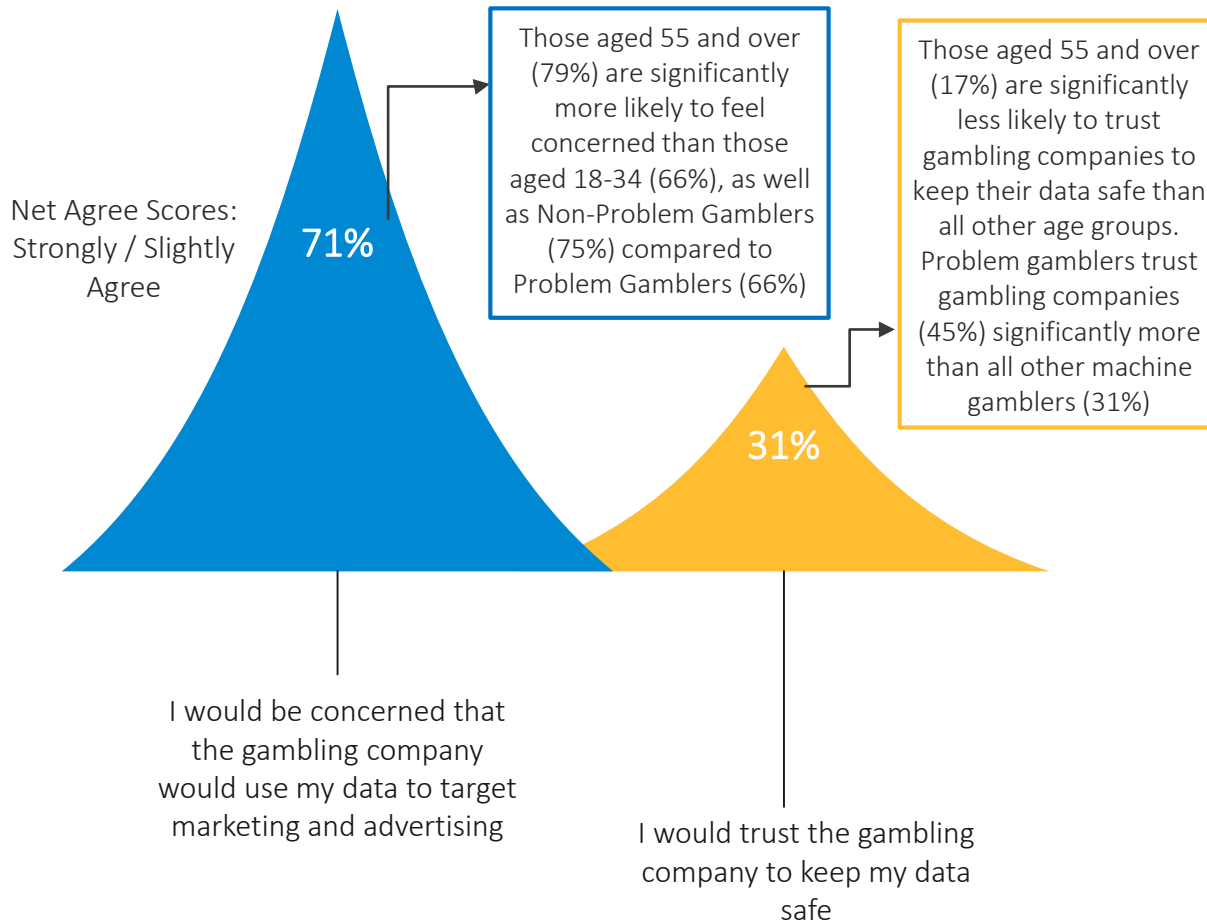
## They also recommended against staff interacting with players as they felt this could negatively escalate the situation

- Ultimately non problem gamblers felt it could be dangerous for staff to step in at this point as they felt players in this situation are likely to be in a volatile state and so become unpredictable
- They recommended a “virtual intervention” i.e. the machine stops or notifies them about their behaviour – re-routing their frustrations towards the game instead of the staff
- They felt support should be given / behaviour handled *after* the event *not* at the time
- Questions were also raised about what this support would include and participants struggled to spontaneously suggest any course of action



# Reassurance that customer data will be protected and not for marketing purposes would reduce concerns around tracked play and help to build trust

## Attitudes towards Tracked Play: Registration Process

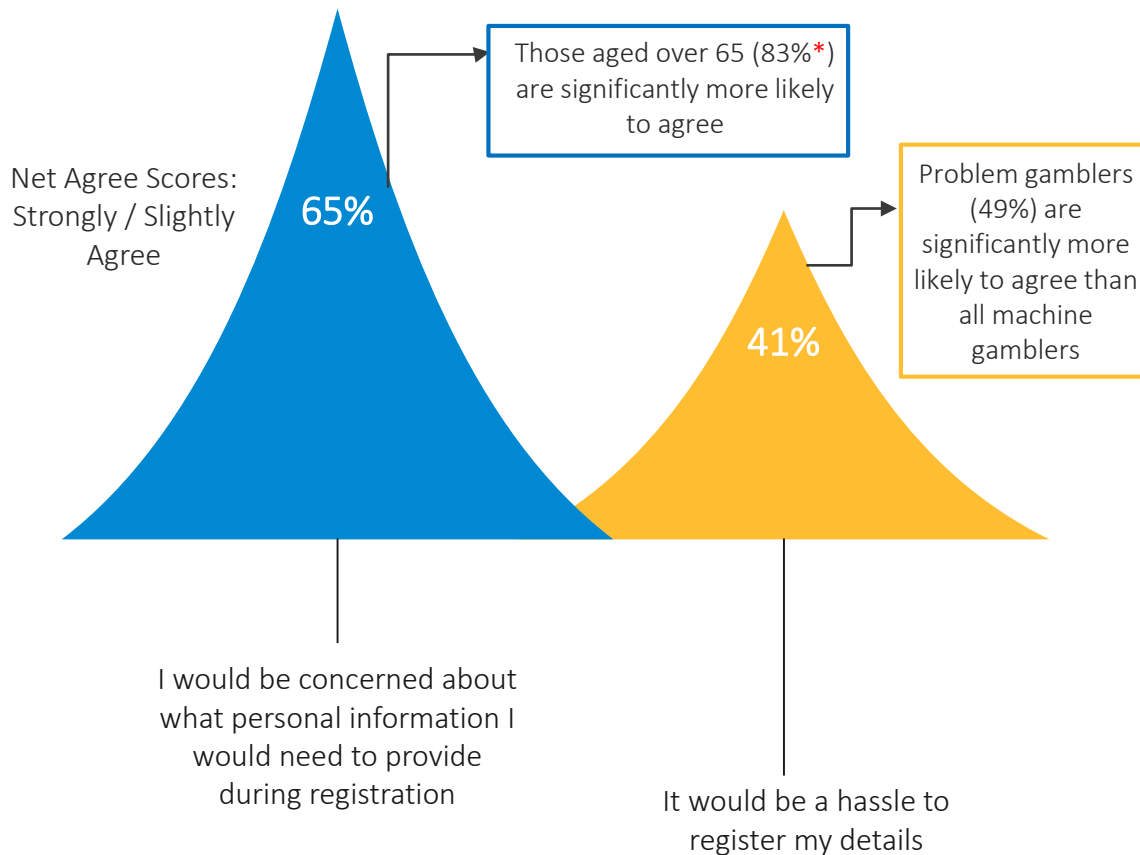


- In the qual work, many felt very dubious about sharing data with the gambling industry as
  - They don't trust the industry to use the data in their best interest
  - They naturally don't like the idea of having their behaviour "monitored"
- Participants worried that the industry would *have* to have access to their play data (in order for this concept to work) and would use it to fine tune their marketing comms – hence trying to make them play more
- The Commission needs to make it very clear which companies or organisations will have access to their play data and how they will be permitted to use it as this would build much needed trust in the scheme

*"I see it as kind of a Big Brother watch. I moved away from my parents and I've been independent since so for someone to kind of take those actions and use them it would feel intruding... It might be the not knowing. I don't know what they're doing with it"*

# Machine gamblers require assurance their personal information is protected when registering for tracked play

## Attitudes towards Tracked Play: Registration Process



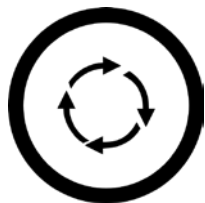
- Qualitative participants engage with sharing personal data with companies on a regular basis, including name and personal information i.e. email and home addresses and contact info
- In fact, sharing data has become such a part of normal life that they tend not to think about it and some struggled to spontaneously talk about the subject
- However it becomes top of mind when something “goes wrong” for them i.e. they start receiving nuisance calls or unwanted emails from 3<sup>rd</sup> party suppliers
- In the qualitative work, non problem gamblers’ most significant worry was that their partners might have access to their play history
- This was seen as potentially intrusive and non problem gamblers felt this information should remain private
- This could also stretch to staff members knowing specific playing habits as often they have close relationships with them

*“I wouldn’t fancy it. Mates don’t want the missus knowing how much they’ve bet”*

# Around three fifths of machine gamblers believe tracked play would have to be mandatory across all gambling companies to be successful

57%

Agree tracked play would have to be mandatory across all gambling companies



Casual gamblers

66%

Highly engaged

64%

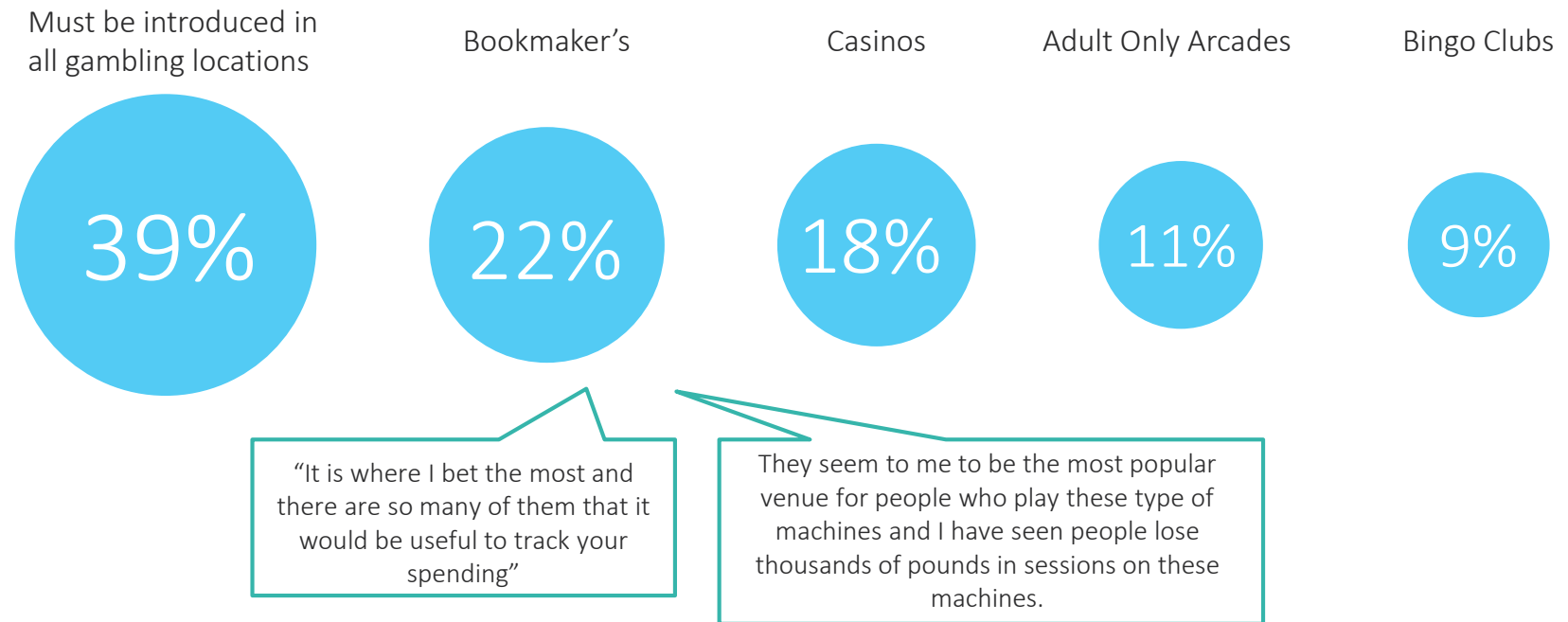
Online engaged

50%

- Qualitative participants felt the only way to reach problem gamblers with this idea would be to make it a mandatory practice
- There were two main reasons for this
  1. Non problem gamblers generally don't think they *need* to be told about their behaviour as they don't have a problem
  2. And they believe that problem gamblers don't *want* to be told their behaviour is problematic
- However although non problem gamblers did not feel this scheme was for them they did agree that their participation would be necessary so as not to stigmatise problem gamblers further
- Ultimately the majority would agree to use the scheme if it was mandatory (instead of stopping all together) as they feel they their behaviour is not problematic and so "have nothing to hide"

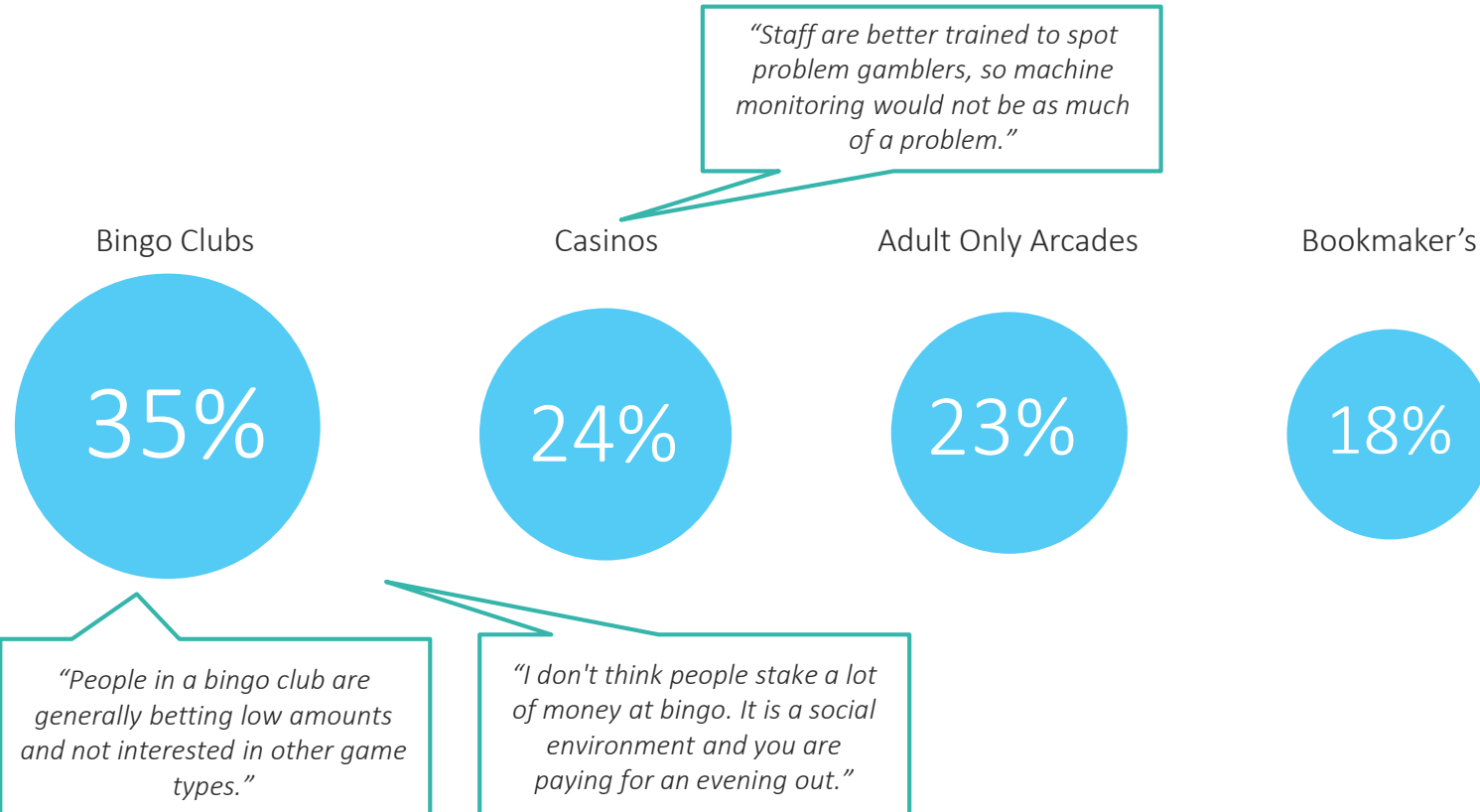
# The Gambling Commission should look to introduce tracked play in all gambling locations

Locations Tracked Play would be MOST successful



# Introducing tracked play in bingo clubs would be least successful according to 1 in 3 machine gamblers

Locations Tracked Play would be LEAST successful



# Recommendations

---

## Recommendations

In conclusion, having considered both the qualitative and quantitative elements of this research we recommend the following areas for action:

✓ If introduced, then tracked play should be a mandatory measure in all gambling operators. The findings from the quantitative and qualitative research found that machine gamblers were certain that the scheme would need to be mandatory in order for it to be successful.

✓ The Gambling Commission should ensure the process of tracked play is explained in full to machine gamblers. Machine gamblers need to be assured that their personal data will be stored safely and used appropriately, and that gambling operators can be trusted.

✓ The Gambling Commission should conduct a follow-up piece of research in the form of a tracked play trial. The trial would give a sample of machine gamblers the opportunity to register for tracked play and record how their thoughts and feelings about the new scheme.

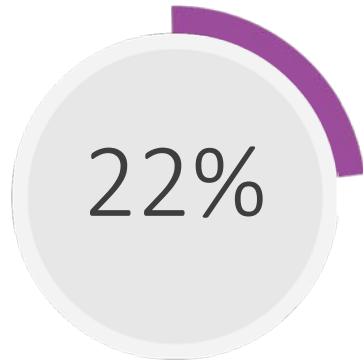


# Appendix

---

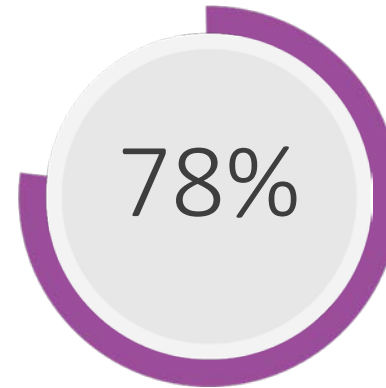
# The majority of machine gamblers gamble both online and in-person

## Methods of gambling



In-person only

Machine gamblers aged over 45 (34%), women (27%) and non-problem gamblers (32%) are significantly more likely to only gamble in-person.

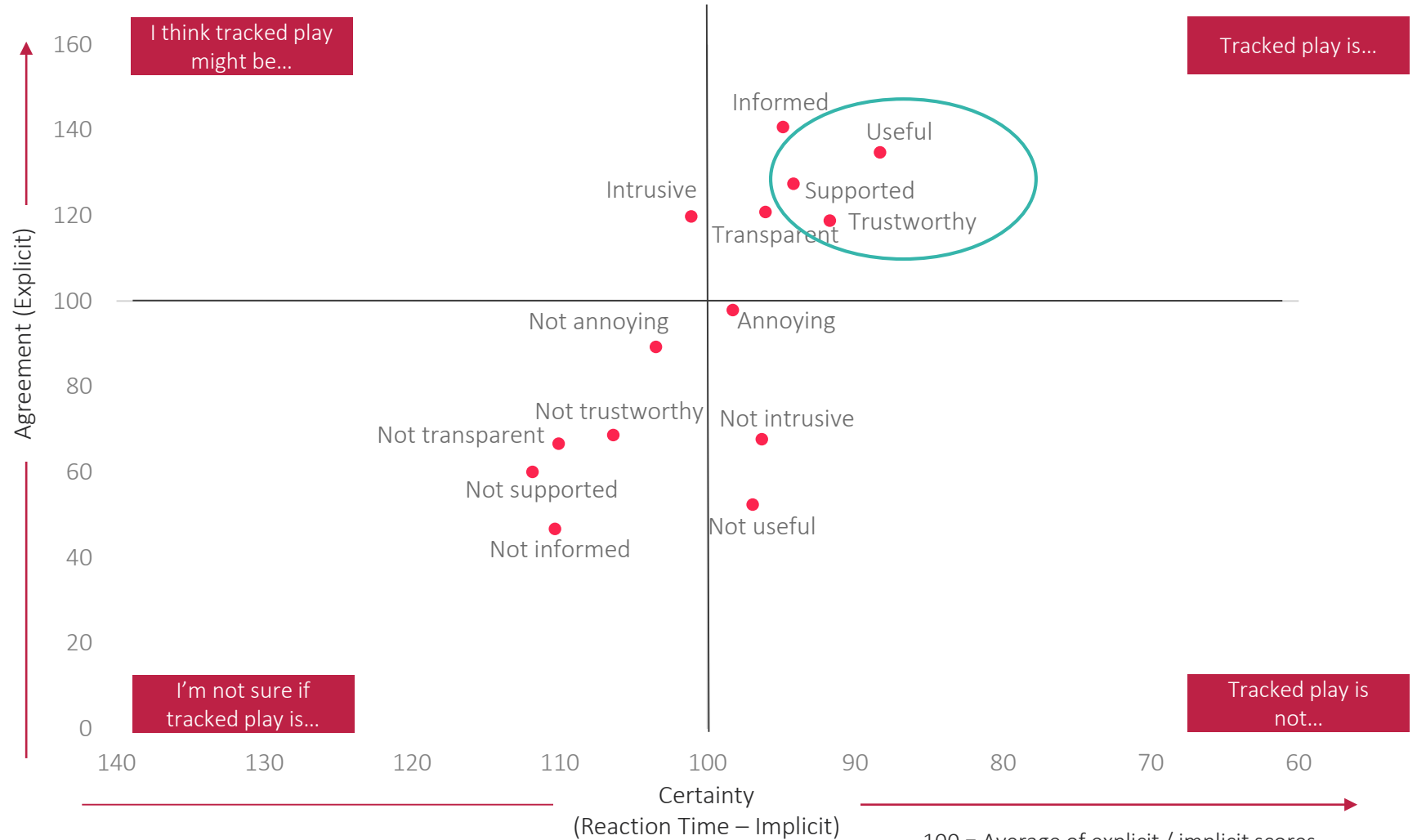


Both In-person and Online

Machine gamblers who are male (82%), aged 18-44 years old (86%), of social grade AB (82%) and problem gamblers (92%) are significantly more likely to gamble both online and in-person.

# Machine gamblers who visit a bookmaker's at least once a month perceive tracked play to be a positive concept. They are not certain of how intrusive it is

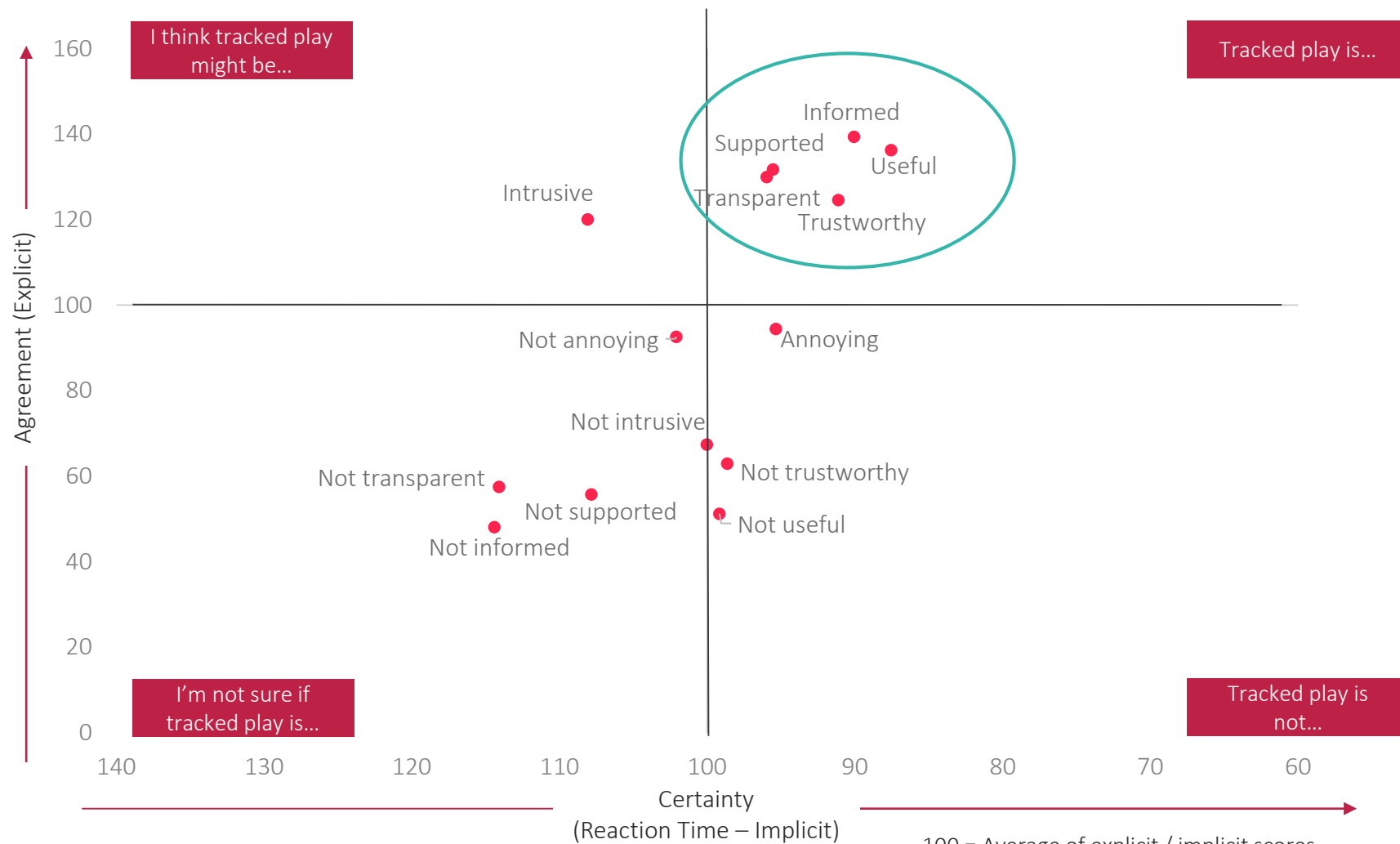
Sub-conscious Implicit Test: Visit a bookmaker's at least once a month



# Machine gamblers who visit an arcade at least once a month are generally more positive about tracked play, and more likely to perceive it as transparent. Although they believe it to be intrusive, they are not certain this is the case

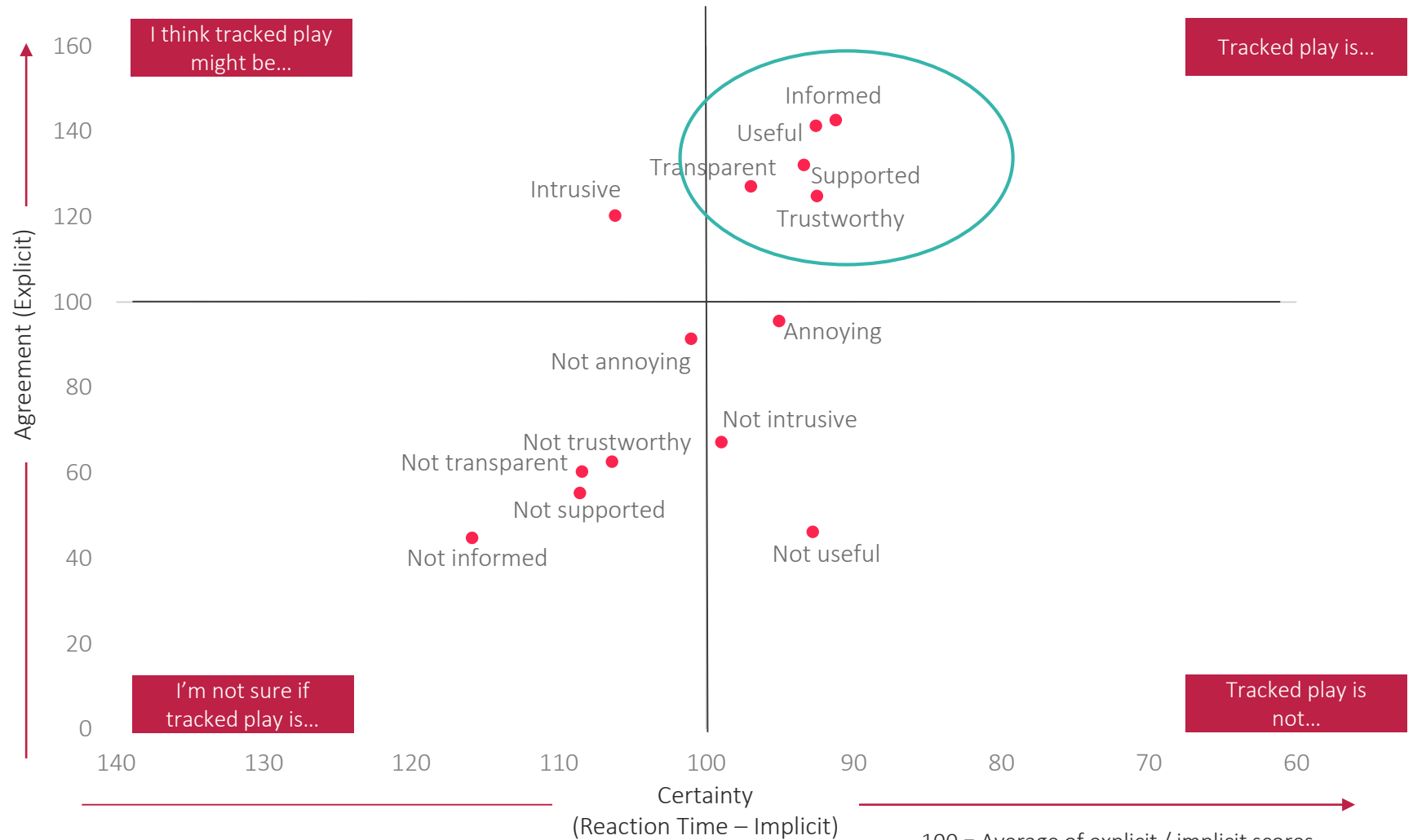


Sub-conscious Implicit Test: Visit an arcade at least once a month



# Machine gamblers who visit a bingo hall at least once a month perceive tracked play as useful

Sub-conscious Implicit Test: Visit a bingo club at least once a month



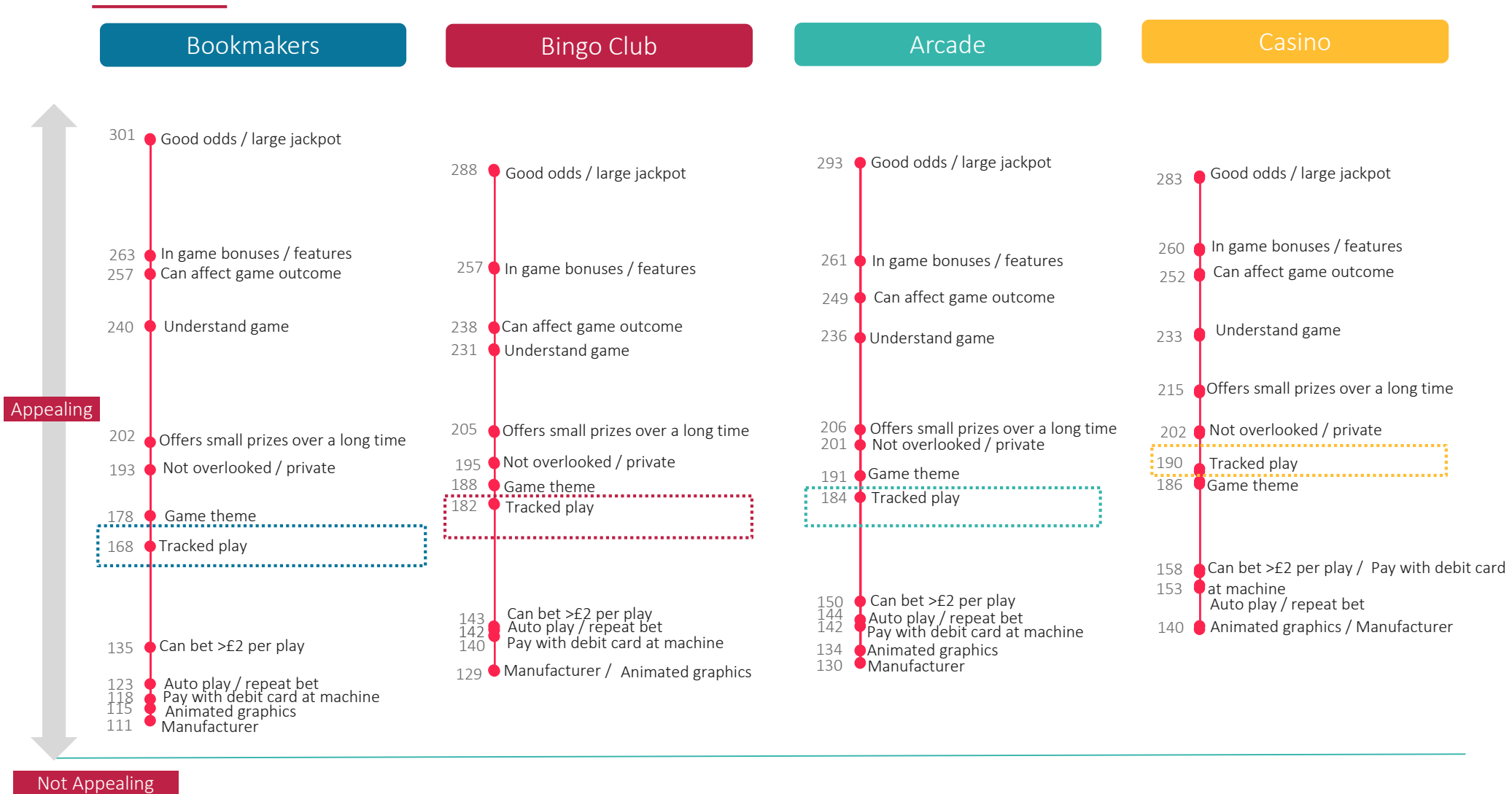
# Machine gamblers who visit a casino at least once a month would find tracked play useful and they are more certain than for other descriptors this is the case



Sub-conscious Implicit Test: Visit a casino at least once a month



# The tracked play feature has appeal in all locations which supports implementation across each of the venues



# What proportion of machine gamblers would stop using machines if tracked play were introduced?: A cross-question comparison (i)

The quantitative survey captured the percentage of machine gamblers who claimed they may reduce gambling behaviour if tracked play were introduced within three questions. These were:

Q5/Q11. Imagine gambling companies could monitor the amount of time and money you are spending on gambling machines across more than one visit to a gambling venue. How would you react, if at all?

*[SINGLE CHOICE]*

1. I would continue to spend the same amount of time or money on gambling machines
2. I would change the amount of time or money I spend on gambling machines – I would gamble more
3. I would change the amount of time or money I spend on gambling machines – I would gamble less
4. I would not gamble at all
5. Don't know

Q10. Imagine this process has been introduced and you have to register and login to gambling machines before you can use them in casinos, bingo halls, adult only arcades and betting shops, so that gambling companies can collect information on your play across multiple visits to their premises. What would you like done with the information that is collected?

*[MULTI CHOICE]*

1. Have it safely stored and then emailed each time I finish using a gambling machine
2. Have safely stored and then emailed to me at the end of each month so I can see how much I've used gambling machines
3. Have it safely stored, but only see any of it unless my play has become harmful
4. Have it safely stored and a message pop up each time I finish using a gambling machine
5. Have it safely stored and a message pop up at the end of the month summarising how much I've used gambling machines
6. Have it safely stored and a message pop up if my play has become harmful
7. Have it safely stored and have a member of staff speak to me to offer help if they noticed my play has become harmful
8. None of these *[EXCLUSIVE]*
9. I'd no longer use gambling machines if they collected information on my play *[EXCLUSIVE]*

Q14. Still thinking about if gambling companies started to collect information about your machine play across multiple visits, to what extent do you agree or disagree with each of the following statements?

*[GRID, SINGLE CHOICE PER ROW]*

*[COLUMNS]:* Strongly disagree, Disagree, Neither agree nor disagree, Agree, Strongly agree

*[ROWS, ROTATING]*

1. It would be a hassle to register my details
2. It would have to be mandatory across all gambling companies
3. I would be concerned about what personal information I would need to provide during registration
4. I would trust the gambling company to keep my data safe
5. I would be concerned that the gambling company would use my data to target marketing and advertising
6. It would put me off playing on gambling machines
7. It would encourage me to gamble more responsibly
8. Overall, it sounds like it would benefit people who experience problems with their gambling
9. I would find it useful to have access to information about my play history

Q.5 / Q.11 Imagine gambling companies could monitor the amount of time and money you are spending on gambling machines across more than one visit to a gambling venue. How would you react, if at all? Base sizes: Pre-Tracked play exposure n=502, Post-tracked play exposure n=501./ Q14. Still thinking about if gambling companies started to collect information about your machine play across multiple visits, to what extent do you agree or disagree with each of the following statements?/ Q10. Imagine this process has been introduced and you have to register and login to gambling machines before you can use them in casinos, bingo halls, adult only arcades and betting shops, so that gambling companies can collect information on your play across multiple visits to their premises. What would you like done with the information that is collected? Q14/Q10 Base: Machine gamblers n= 1,003.



# What proportion of machine gamblers would stop using machines if tracked play were introduced?: A cross-question comparison (ii)

In addition, each of the questions came at slightly different points in the survey. This means that respondents will have different knowledge levels of tracked play and this could have influenced their answers. Each question yields slightly different results. However, this is not a concern because they are **not directly comparable**:

	Q5/Q11	Q10	Q14
<b>Aim of question</b>	Capture how consumers will respond to tracked play	Understand how consumers want their tracked play data to be stored and used	Assess agreement with a range of attitudinal statements about tracked play
<b>Question Type</b>	Single choice	Multi choice, with the below key answer option as exclusive	Grid with a five point agreement scale per statement
<b>Key answer option</b>	<i>'I would not gamble at all'</i>	<i>'I'd no longer use gambling machines if they collected information on my play'</i>	Statement <i>'It would put me off playing on gambling machines'</i>
<b>Results</b>	 6%	 16%	 25%      17%
<b>Conclusions</b>	This is a direct measure, but is not wholly comparable to the Q10/Q14 responses because it assesses how many claim they <b>would not gamble at all</b> , not just on gaming machines.	Q10 is <b>not primarily a measure of whether consumers would give up using gaming machines</b> as it is asked in the context of understanding how data should be stored and used. Therefore it is not directly comparable with Q5/Q11 or Q14.	Q14 is not directly comparable with Q5/Q11 because it asks whether they would be <b>'put off' rather than stop</b> . It also allows degrees of agreement, whereas the other questions were binary. When, in fact, only 'Strongly agree' is viewed it shows remarkable consistency with Q10 despite the differing contexts.

Q.5 / Q.11 Imagine gambling companies could monitor the amount of time and money you are spending on gambling machines across more than one visit to a gambling venue. How would you react, if at all? Base sizes: Pre-Tracked play exposure n=502, Post-tracked play exposure n=501./ Q14. Still thinking about if gambling companies started to collect information about your machine play across multiple visits, to what extent do you agree or disagree with each of the following statements?/ Q10. Imagine this process has been introduced and you have to register and login to gambling machines before you can use them in casinos, bingo halls, adult only arcades and betting shops, so that gambling companies can collect information on your play across multiple visits to their premises. What would you like done with the information that is collected? Q14/Q10 Base: Machine gamblers n= 1,003.

# Problem gamblers are significantly less likely to feel hopeful than other machine gamblers. They are more likely to have negative feelings when gambling

## Feelings when using a gambling machine by PGSI

Feeling	Total	Low Risk Gambler	Moderate Risk Gambler	Problem Gambler
Hopeful	54%	64%	57%	41%
Excited	48%	55%	54%	45%
Impulsive	33%	30%	40%	32%
Happy	30%	34%	29%	31%
Relaxed	28%	23%	22%	26%
Risk seeking	28%	32%	37%	26%
Focused	23%	27%	25%	27%
Challenged	21%	26%	24%	26%
Anxious	14%	16%	20%	19%
Knowledgeable	11%	12%	8%	21%
Angry	5%	5%	7%	14%
Sad	5%	2%	8%	10%

# PGSI Index: Mini-Screen Methodology

The short-form Problem Gambling Severity Index (PGSI mini-screen) was developed for the Commission from the full 9-item PGSI by Dr. Rachel Volberg (Developing a Short Form of the PGSI, 2012). This instrument is formed of three questions from the PGSI, which are scored on a 4-point scale from never to almost always, asked to all participants who have gambled at least once in the last 12 months. The questions were administered in the following grid format:

*In the last 12 months...*

## **[ROWS]**

1. *Have you bet more than you can afford to lose?*
2. *Have people criticised your betting or told you that you have a gambling problem?*
3. *Have you felt guilty about the way you gamble or what happens when you gamble?*

## **[COLUMNS]**

*Almost always (3)*

*Most of the time (2)*

*Sometimes (1)*

*Never (0)*

*Don't know (excluded from calculation)*

Responses are scored from 0 - 3 resulting in a total possible score of 9. Respondents are then categorised by their total score, as follows:

0	Non-problem gambler
1	Low-risk gambler
2-3	Moderate risk gambler
4+	Problem gambler

The scores are analysed to provide overall problem gambling rates, as well as by gender and age. As advised following the development of the PGSI mini-screen, it is not used to report or track changes in any further sociodemographic characteristics or gambling behaviour, and due to small base sizes in the above surveys the data should be treated with caution. The screen has been validated against the full PGSI screen.

# Annex

---

Populus

# Questionnaire

**Q1.** We'd like you to think about gambling activities. By gambling we mean spending money on games of chance where you can win money or money's worth. We are not talking about free to play games or games where you cannot win a real prize. In the past four weeks, have you spent money on any of the following?

**Q2.** How often do you play fruit or slot machines or gaming machines in each of the following places?

**Q4.** We would like you to think about using fruit machines, slot machines and/or gaming machines to gamble in a casino, bingo club, adult only arcade or betting shop. Which of the following best describes how you tend to feel when using a gambling machine in one of those locations?

**Q5.** Imagine gambling companies could monitor the amount of time and money you are spending on gambling machines across more than one visit to a gambling venue. How would you react, if at all?

**Q6.** You said that you would play on gambling machines less if gambling companies could monitor the amount of time and money you are spending on gambling machines across multiple visits to a gambling venue. Would you spend the money you would save on another activity instead?

**Q7.** Which gambling activity/ies would you play instead of fruit or slot machines or gaming machines?

**Q8.** Now we would like to understand your thoughts on a new idea which would monitor your play on gambling machines in betting shops, bingo clubs, adult only arcades and casinos.

We would now like to present you with a concept for how this would work in practice. For this exercise, we'd like to know how strong an emotional reaction the idea provokes in you. We would like you to read the description in full. You will then be presented with pairs of adjectives and antonyms (opposite to the adjective) and asked to select which descriptor best describes your feelings towards the concept.

You must use the 'Z' and 'M' key on your keyboard to select which descriptor best describes your feelings towards the concept. You must select each letter as quickly as possible.

**Q9.** Which of the things below do you think would be MOST appealing to you when choosing a gambling machine and which would be LEAST appealing?

**Q10.** Imagine this process has been introduced and you have to register and login to gambling machines before you can use them in casinos, bingo halls, adult only arcades and betting shops, so that gambling companies can collect information on your play across multiple visits to their premises. What would you like done with the information that is collected?

**Q11.** We would like you to continue to imagine that gambling companies have started to collect information about your machine play across multiple visits and they can now monitor how much time and money you spend playing on gambling machines. How would you react if this was introduced?

**Q12.** You said that you would play on gambling machines less if gambling companies could monitor the amount of time and money you spend playing on gambling machines across multiple visits to a gambling venue. Would you spend the money you would save on another activity instead?

**Q13.** Which gambling activity/ies would you play instead of fruit or slot machines or gaming machines?

**Q14.** Still thinking about if gambling companies started to collect information about your machine play across multiple visits, to what extent do you agree or disagree with each of the following statements?

**Q15.** Earlier you mentioned that you play machine gambling in [INSERT LOCATIONS SELECTED AT Q2]. Imagine gambling companies can now monitor how much time and money you spend playing on gambling machines across multiple visits to a gambling venue. In which of the following locations do you think introducing this kind of machine play monitoring would be MOST successful?

**Q15A.** Why do you think machine play monitoring would be most successful in a [INSERT LOCATIONS SELECTED AT Q2]?

**Q16.** In which of the following locations do you think introducing this kind of machine play monitoring would be LEAST successful?

**Q16A.** Why do you think machine play monitoring would be least successful in a [INSERT LOCATIONS SELECTED AT Q2]?

**D1.** Please select which age band you fall into

**D2.** Are you male or female?

**D3.** Where in the UK do you live?

**D4.** Can you please tell me the occupation of the Chief Income Earner?

**D5.** In the last 12 months...

# Discussion guide

---

## Introduction to session

“Thanks for taking part in this project today – my name is Andy and I work for a market research company called Populus. Basically what we do is go around the country and sometimes abroad and talk to people like yourselves about loads of different things so I’ve done things for companies like Disney and Groupon but also things like loo roll and toothpaste etc. so a lot of variety!

But the most important thing about our role is that we’re completely independent so we don’t work directly for any of the brands that we talk about with you or make/ create any of the things that we’re going to show you and it’s important to remember that in our session and just be as honest as possible as you’re not going to offend me with anything you say!

This session is completely confidential and anonymous so we’ll never use your name on any of the report we write or anything like that, I’m recording the session (show recorder) which again is just for me to listen back to and we also have some colleagues of mine watching in the other room today and probably towards the end of the session I’ll just pop out and see if they have anything else they want to ask as well.

Ok so this session will be 2 hours long today and I don’t want to keep you any longer than I’ve said so if I interrupt you or move the session on its not because what you’re saying isn’t great it’s in order to let you go on time!”

Does anyone have any questions before we start? – if respondents ask who the research is for at this point we’ll say we can tell them at the end of the session

So today we’re going to be talking about playing machine games in a casino, arcade, bingo hall and betting shop’, to start off lets go around the room and can you tell me a little bit about yourself, your family, if you’re working what you are doing and any hobbies you may have, and what’s your favourite machine game to play and why?

I’d now like everyone to get their homework task out and I’d like us to talk about what everyone put for each section

Discuss each section in turn – gambling habits and behaviour and probe on why they do each

## Gambling Behaviours

So can you tell me about the games you play on machines in venues such as arcades, bingo halls, betting shops etc.? Can you give me some examples? – *moderator to capture on flipchart*

What do you enjoy about playing these games ?– *moderator to capture each reason on flipchart and probe on reasoning for each*

Is there anything you don’t enjoy about playing these games? If so what and why? – *moderator to repeat capture exercise*

So why do you play these games?

How do you feel when you play these games? Why?

Do you feel different when playing different types of games, say for instance playing roulette or slot style games? If so how and why?

*Moderator to probe around*

*Slots vs non slots machines (i.e. those with rotational bars vs something like roulette)*

*Digital vs Non digital machines (i.e. those with screens that look like mobile phone games vs upright machines similar to those in pubs)*

*What type of games in term of cost i.e. £2 per play etc.*

*Venue location of game play*

Do you play some games more than others? If so which ones and why?

What about in different venues? Does this effect which games you play? If so how and why?

# Discussion guide

---

## 'Tracked Play'

So I'd like to talk about an idea with you in a second to do with how you play games in the venues we've spoken about but I'd first like to talk about data, and more specifically sharing your information with companies

Can anyone give me an example of a time that a company uses information that they have about you and how you've been interacting with them?

And can you tell me how you feel about that?

Ok so what if... *Companies could collect information about your gambling every time you play on a machine in one of their venues, and link it together. This would mean the company would know how often you played, how much you spent, whether you won or lost, and what games you played on. Currently they are able to collect this information for individual sessions on a machine, but cannot link them together.*

So what are your first impressions of this idea? What stands out to you?

Do you have any concerns? If so what are these?

Are there any companies that you would feel more or less comfortable with, if they were to do this?

I'm going to read the statement again and this time I'd like you to think about what sort of person you think this idea would appeal to? – *Personification exercise moderator to capture on flipchart. Probe on - What is this person like? Where do they work? Would it be a man or a woman saying it?*

## Concept specifics

Ok so now I want to give you a bit more information about how the idea could work and some of the specifics so...

"It would enable companies to be better at identifying players that might need help to manage their gambling. This is because the company would know how the player has been gambling over a longer period of time.

Once companies have spotted players who might need help to manage their gambling then they would be able to provide targeted support to these players. This could involve players being sent personalised information showing their play history or offering them tools they could use to help them control their gambling. It could also involve a member of staff offering them advice and support.

The information gathered could also be used to work out the impact of measures that companies have put in place to help players. Being able to do this will benefit all players as it means that the industry will learn the most effective ways of helping to protect their players

There would need to be some type of registration the first time you played on a machine, potentially between the player and a member of staff. This will help companies to identify underage players or players that have self-excluded and prevent them from playing."

What stands out to you from this

Would this impact how you play? If so how and why?

Would it make you, for example;

Carry on playing on the machine, and be reassured that the company is keeping an eye on my play

Switch games?

Leave the venue?

Stop playing all together?

Do another activity all together?

# Discussion guide

---

If this idea was to be implemented what sort of personal information do you imagine you would need to give for it to work? – *Gather spontaneous answers first then probe - would it be your name, an email address you home address, a phone number etc.?*

Would collecting personal information affect how you feel about the idea? Or whether you'd use the service? If so why and how?

Would you be happy to share this information? If so why / why not?

Do you currently share this type of information with any other companies?

How do you think this information might be used?

What would be the general benefits of an idea like this? *Moderator to clarify that we're talking about the idea in general not just the sharing of data*

What about specific benefits for you and people like you?

Is there a certain type of person it could help? What about those who are more vulnerable players?

And how would you see this working in practice? – *moderator to split the group into pairs (according to the types of venues we know they play in from the venue) and capture on paper their journey from when they enter the venue to when they finish playing and exit the venue then groups will feed back and moderator will capture ideas and feelings at each stage of play journey*

Ok now I want to look at certain elements in detail – *re read first aspect*

*"Once companies have spotted players who might need help to manage their gambling then they would be able to provide targeted support to these players. This could involve players being sent personalised information showing their play history or offering them tools they could use to help them control their gambling. It could also involve a member of staff offering them advice and support."*

So how do you feel about this?

What sort of personalised information do you think would be useful for them to receive?

What should "targeted support" include? What does it mean to you?

How / would it impact how you play?

How would you improve this aspect?

Ok so I'd like to re –read the next aspect now

*"The information gathered could also be used to work out the impact of measures that companies have put in place to help players. Being able to do this will benefit all players as it means that the industry will learn the most effective ways of helping to protect their players"*

Any thoughts on this?

What do you think this means / will be in practice?

Can you imagine what an outcome might be if this was to happen?

And finally –

*There would need to be some type of registration the first time you played on a machine, potentially between the player and a member of staff. This will help companies to identify underage players or players that have self-excluded and prevent them from playing."*

How do you feel about the involvement of a member of staff? Why?

What do you imagine this interaction to be like?

How / would it impact how you play? *Moderator to probe around how they think it would impact other players as well*

How would you improve this aspect?



# Discussion guide

## Contextual Exploration – other ways customers engage with tracking

Aim to understand how players feel about the idea of data tracking in everyday life and how they interact with this in other categories/ areas in their lives

So I'd like us to take some time now and think about notifications – what other categories do you receive notifications or messages from? – moderator to capture on flipchart and also suggest categories such as health apps etc. if nothing spontaneously mentioned

Moderator must ensure that online gambling is part of the mix as tracked play already happens in this area – questions for online tracked play – if any respondent is aware of it

Do any of you play online?

If so are there any similar practices to the one we've been talking about today that you're aware of?

What's your opinion on this?

How about the fact that this is online whereas the idea we've been talking about would apply to physical machine games?

Moderator to pick 3-4 from list and ask questions in turn–

So how do this work in practice then?

Does the <insert example from list> require you to share any data with it in order to work? If so what?

How do you feel about this? What can we learn from these examples?

So now we've thought about other areas that we share data in our daily lives does this have any impact on how you feel about the idea we spoke about earlier? Or do you feel the same?

Could we use any of the things we've talked about in order to enhance the idea?

What other improvements would you make?

Do you think you would benefit from an idea like this? Would you use it? Do you think others would use it?

So now I would like you to imagine that you are about to play a game on a machine. I have a list of things that I'd like us to look at and sort into which aspects we feel are the most important when deciding to play a game and which are the least important? Some of them may be hypothetical. Moderator to hand out scoring sheets for each respondent – they will do the task individually and then feedback as a whole – probing on the reasons for their decisions

1. The machine has a system which keeps track of my play
2. There are in game bonuses / game features
3. The manufacturer of the game
4. The theme of the game (e.g. Deal or No Deal)
5. The machine has auto play or a repeat bet button
6. Game offers good opportunity to win the jackpot
7. I recognise and understand the game
8. I can bet more than £2 with one play
9. I can pay directly at the machine with a debit card
10. I can make decisions about how the game progresses
11. The game pays small prizes but allows me to play for a long time
12. The machine is not overlooked / I can play in privacy
13. It has animated graphics

## Conclusions and Wrap up

Before we go, I'd like us to go around the room and for each of you to list the 3 things you think are vital for the idea to work in practice – these might be your ideas or ones that have been shared by others in the group

Northburgh House  
10 Northburgh Street  
London EC1V 0AT

T +44 [0]20 7253 9900  
F +44 [0]20 7253 9911

[info@populus.co.uk](mailto:info@populus.co.uk)  
[www.populus.co.uk](http://www.populus.co.uk)

---

**Populus**