Understanding Electronic Gaming Machine Players
Summary of Research Findings

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✓ The aim of the study was **to understand electronic gaming machine (i.e., EGM, pokies) customers** including their budgeting strategies, knowledge and perception of account-based "cashless" systems, and attitudes towards their membership tier-levels.

✓ **Account-based systems may incorporate cashless payment methods and offer opportunities for harm-minimisation** through features such as real-time messaging and access to tools for setting spending limits and accessing activity statements.

✓ We conducted a **survey** assessing electronic gaming machine play (n=204), as well as **focus group discussions** (n=18). **Behavioural account data was collected** for all venue members (n=11,389) and **was linked to their survey responses** to determine behavioural markers for EGM play.

Survey Participants Characteristics:

✦ **Respondent were 204 active customers** who have played in the EGM venue in the past-30 days prior to survey start date.

✦ Respondents had an average age of 50 years, were predominantly female (56%), working full time (62%) and getting by financially (45%).

✦ **8 out of 10 frequently visit clubs** for at least 1 to 5 days per month (57%) and around 1 to 3 different venues (73%).

✦ **One-third were members of two to three EGM venues** with half (50%) linking their loyalty cards when playing EGMs.

✦ **Besides EGMs, the most common gambling activity were lottery (33%) and keno (22%).**

✦ **Only 43% kept to their budget 'always' or 'almost always'**

✦ Most did not endorse using any budgeting strategies; the most common was to set informal spending limits (14%), limit how much money to take to the venue (10%), and play using low denomination (10%).
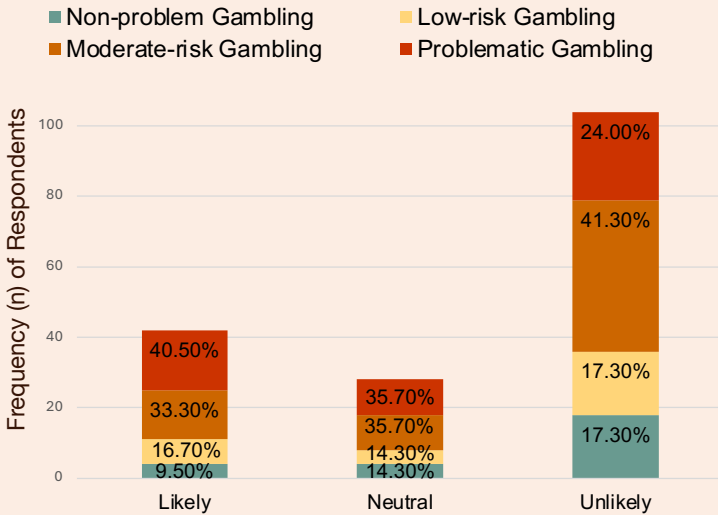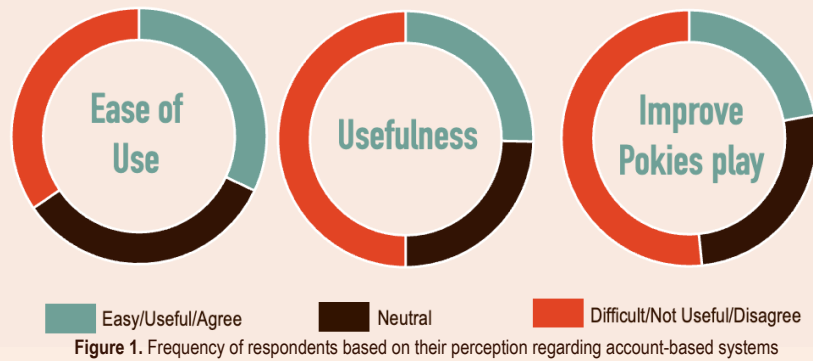

Figure 1. Frequency of respondents based on their perception regarding account-based systems

Legend: Easy/Useful/Agree — Neutral — Difficult/Not Useful/Disagree

Figure 2. Frequency (n) of respondents per intent-to-use account-based systems classified according to Problem Gambling Severity Index categories.

Legend: Non-problem Gambling · Low-risk Gambling · Moderate-risk Gambling · Problematic Gambling

Perception of and Intention to use Account-based Systems:

✦ There was ambiguity for all attitudes towards account-based systems, particularly ease of use.

✦ **Around 50% of respondents perceived that account-based systems were not useful and would not improve their EGM play.** (Figure 1)

✦ **More than half (59%) were unlikely to use the system, although one quarter (25.6%) were likely to use a voluntary account-based system.**

✦ Account-based system was perceived as advantageous in terms of tracking gambling spend (51%), setting binding spending (50%) and time limits (37%), and locking gambling accounts temporarily (45%).

✦ Half (49%) perceived not being able to use cash as a disadvantage. Linking personal and bank details were perceived as disadvantages.

✦ For those who perceived account-based systems as useful, 8 out of 10 (81%) engage in moderate-risk or problematic gambling.

✦ **Two-fifths of respondents (41%) who were likely to use the system engage in problematic gambling followed by one-third (33%) who engage in moderate-risk gambling. (Figure 2)**

✦ Intention to use account-based systems did not vary across age cohorts, gender, financial well-being and language spoken at home.

✦ Those who perceived account-based systems as easy-to-use and those who intend to use it had higher technology literacy scores.

Focus Group Discussion Results:

✦ Participants saw benefits in account-based systems including identifying and assisting customers who might be experiencing gambling problems as well as providing ability to set binding limits and easily track outcomes and spend.

✦ Perceived barriers to account-based system uptake included potential overspending through easy access to digital funds, inconvenience of account registration, privacy concerns, and preferences for using cash.

✦ There were contradicting views regarding account-based systems being linked with membership points and loyalty systems. Some indicated that it would motivate them to use the system, but some deemed it as encouraging gambling and spending more than intended.

✦ Venue staff indicated favourable attitudes towards account-based systems including assisting customers to be aware of their spend and spend within their limits, and assisting with identifying risky gambling and self-excluded individuals.

Behavioural Account Data:

✦ This is the first Australian study to link EGM account data with survey data to enable in-depth analysis of gambling behaviour.

✦ When individuals who completed the survey were compared to those who did not, few notable differences were observed, suggesting that **the survey sample is a good representative of the venue players cohort.**

✦ **Higher total spend from 12AM to 2AM and 2AM to 6AM was observed among those engaging in moderate-to-high risk gambling.**

✦ Gambling risk level increases as the level of financial wellbeing or combined household income decreases.

✦ **Visiting more EGM venues was associated with higher gambling risk levels.**

✦ EGM patrons with lower net outcomes and less variation in their gambling spend were more likely to engage in higher risk gambling.

Recommendations:

✦ Account-based systems which include strong harm-minimisation features (binding limits, summary statements, time-outs) should be introduced as mandatory with a simple registration process which clarifies the privacy protocols to reduce customer concern.

✦ Electronic funds payments must be optional and be accompanied by mandatory delays and pop-up notifications to reduce excessive spend.

✦ Account-based systems are a tool to minimise gambling harm. Systemic change is necessary to achieve meaningful gambling harm reduction including automated risk monitoring with detection and intervention, breaks in play, and reduced hours of EGM availability.

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Conclusion:

✦ People experiencing financial difficulties and with lowest net outcomes were at highest risk of engaging in problematic gambling.

✦ Individuals classified as at moderate or high risk for problematic gambling spent more after midnight and in early morning hours than lower-risk EGM customers.

✦ Regular EGM consumers had mixed views towards an account-based system, noting they were unfamiliar with these, and were unlikely to engage in a voluntary capacity.

✦ More involved EGM customers, including those with higher membership tiers and those with moderate-to-severe gambling problems, were more likely to perceive account-based system as useful and be likely to use these. This demonstrates that the target audience sees the benefits of the system.

✦ The main advantages of account-based systems were tracking gambling spend, setting binding spend and time limits, and locking gambling accounts temporarily.

✦ The most notable barrier to uptake of account-based gambling is fear of privacy breach and banks/governments/operators having visibility of gambling activity.