

# e-GAMES

## Electronic Gam(bl)ing: Multinational Empirical Surveys

### Project overview

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This project initiated by the ODJ was designed and developed by three researchers:

- Jean-Michel Costes, French monitoring center on Gambling, Paris
- Sylvia Kairouz, Research Chair on the Study of Gambling, Concordia University, Montreal
- Ingo Fiedler, University of Hamburg, Hamburg

At this moment 6 countries participate: France, Canada, Germany, Italy, Switzerland, Poland. Other countries have expressed interest and may join the project.

### Context and project goals

Several national surveys on online gambling have been realized in recent years ensuring progress in the knowledge of online gamblers and their gambling patterns. But they are faced with major methodological challenges (investigating on the Internet), making choices that sometimes prevent them from comparing with other surveys, and lack statistical power to go deep into the analyzes.

With the digitalization of gambling and gaming, the lines of inquiry are more likely to cross over various systems raising questions about their distinctive natures and overlaps. The impact of the translation of gambling and gaming onto the Internet might be multiple, characterized by multiple links, points of convergence, and differences at the theoretical and methodological levels. Their digitalization might also impact on the parameters framing the supply and demand of online gambling and digital games, their structure, and the experience of the players.

This project aims to achieve three main goals:

#### **1) Establish or update a gambling status report for each participating country**

Implementation of a national survey on gambling could provide a national status report exploring several important issues and themes:

1. Demographic characteristics of online gamblers
2. Gambling patterns of online gamblers
3. Motivations for gambling on the Internet
4. Problem gambling among online gamblers (prevalence, risk factors)
5. Link between online gambling and online gaming, mainly PayToWin gaming

By using the same methodology and the same set of questions, comparisons between countries can be made regarding the landscape of online gamblers in each country. These results will be analyzed considering the different regulatory systems to derive conclusions about the effectiveness of each system.

## 2) To set up a much larger sample of Internet gamblers in order to explore several important issues and themes

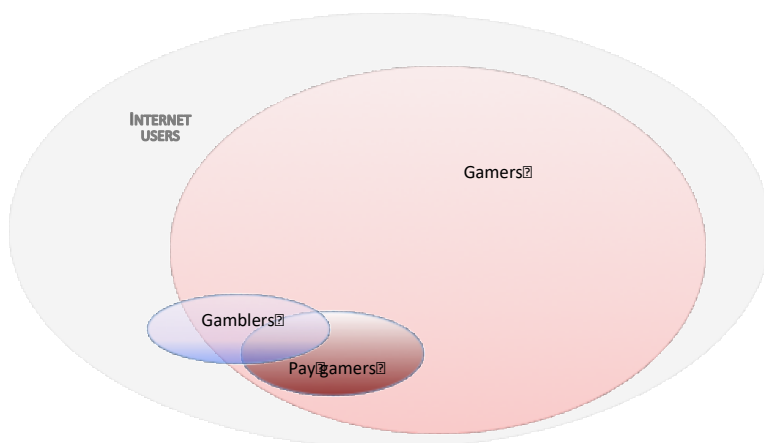
By merging the samples of the different countries, analyses of subsamples become possible for which otherwise the statistical power would be too low. For example, it will then be possible to study the share of pathological gamblers in each game form instead of for online gambling per se. Current surveys are too small, to answer these precise questions and have to stop on a lower level, for example, by determining the share of pathological online gamblers, without being able to distinguish between the different online gambling forms.

## 3) To explore an important area of overlapping between gambling and gaming

The third goal has a prospective research dimension, to analyse the experiences of gambling with real or play money and those associated with participation to the pay to win category of (social) games. The connection between gambling and pay to win games tap into the ambiguities around the meaning and value of spending as well the significance of gain, be it monetary or not.

## Study Design

The study purpose is to conduct a cross-national survey among a panel of Internet users. The study targets two Internet users' subgroups: gamblers and pay-to-win gamers. A core set of questions to assess participation, patterns of play and related problems is asked to individuals belonging to these subgroups. The core set of questions is identical in each country but each country could also add additional questions depending on their online gambling or gaming landscape.



The targeted study populations are defined as following:

(online) Gambling - concerns games for which you bet money online. Depending on the results, you can lose or win. This includes: Lottery, scratch card games, sports bets, horse racing bets, poker, casino games and slot machines. Chance is always present but is more or less important.

(online) PayToWin gaming - is characterized by the possibility to make payments during the game to significantly increase players' chances to win or to help players better progress or faster progress in the game compared to players not paying; that is, players do not have to spend money to stay in the game, but they can pay to get privileges to increase their chances to win or advance to higher levels in the game. For example, money can be spent to obtain a strong item, advance to a higher level, or increase the power of an avatar.

## Sampling

### Sample description

The survey aims at provide two samples in order to describe these populations:

- Gamblers
- Pay Gamers<sup>1</sup>

The sample should be large enough to allow detection of significative differences between these groups.

### Sampling method

A representative sample of gamblers and Paygamers is not achievable for mainly two reasons:

- Because the two populations targeted by the survey constitute a small part of the overall population.
- Because random sample are very expensive.

The only feasible alternative is building a sample drawn from a panel of Internet users.

Available data estimate that the proportion of basic study groups among Internet users is as follows

- Gamblers among internet users: 2 up to 5 % (Quebec, France).
- PayGamers » among internet users: probably the same.
- Gamers among internet users: 75 %

The introduction of quotas would reduce the divergence of the sample obtained compared to a random sample. Quotas would be based on the relative shares of Internet users population sub-groups broken down by sex and age.

To improve this methodological way, it would be useful to collect, prior to the survey, information on gaming and paygaming among the Internet users. This would allow to set as quotas the socio-demographic characteristics of these populations or to weight the sample post on these same characteristics. **A sample size of about N=1000 for each group** (gamblers and paygamers) seems to be a minimum for a statistical comparative analysis. For instance, with this sample size, for a proportion of around 10

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<sup>1</sup> PayToWin with a pejorative connotation is not used, but Paygamers means people who play to PayToWin games and spend money on this games.

% within these two groups, an OR of 1.5 would be significant. If the goal is to be able to carry out further analyzes in one of the two groups, the size will have to be greater.

### Limits and challenges of Internet users panel sampling

Internet users panel sampling leads to a significant limitation. Internet users who participate in panels are a tiny minority of all Internet users (nearly 2%); they are usually not representative of the all Internet users. For example, it is likely that the proportion of different groups targeted by our survey on the panel is greater than the proportion of these groups within the all Internet users. The panels consist of Internet users more active than the average Internet users.

Accordingly, the analyzes carried out on this Internet users panel based sample:

- do not permit generalize the prevalence of the sample to the entire population;
- allow, within certain limits (1) to compare the characteristics of two groups within the sample (e.g. gamblers vs. gamers) and (2) to analyze associations between factors within the sample.

A first short representative telephone survey focused on prevalence and practices of online gambling may enhance the quality of the survey. This could provide:

- Firstly, a first estimate of the prevalence among the general population of online gambling (and paygaming) participation.
- In addition, a representative picture of the age and sex structure of online gamblers (and paygamers) who could be compared to that of the e-GAMES survey sample, provide an indication of its deformation and thus better interpret the results specific to the population of this sample.