

Discussion of findings with policy relevance

Findings of future policy interest

Features/free spins/alcohol. Findings of research with recreational gamblers suggest that features, free spins and alcohol consumption during play are fundamental in the recreational gambler EGM play experience and have significant potential to negatively impact consumer behaviour; if removed from play. Findings also show that these similarly hold great value to the higher risk segments.

This highlights that future policy changes which alter the fundamental characteristics of EGM design have great potential to affect the overall gaming experience and make EGMs less attractive to ALL players. This presents a very unsustainable commercial position for venues, given that features/free spins and alcohol are fundamental parts of a venue's product offering to consumer markets. Similar to the results above, recreational players were generally also quite against having only a single pay line on EGMs, a further indication that this is an important 'core' characteristic of the EGM play experience.

Expenditure limits. From a recreational gambler perspective, it is also quite apparent that the new policy decision of compulsory limits during play is not likely to adversely impact the gaming experience of recreational gamblers, as most indicate that this would only very marginally affect their play. Similarly, the same applies to the concept of having a compulsory set limit past a certain expenditure point - this was not seen as major issue for recreational gamblers and hardly affected play enjoyment.

EFTPOS withdrawals and ATM removal. Along a further current policy dimension, findings of the current research show that there may be a slight reaction of recreational gamblers to having to use EFTPOS for cash withdrawals, although based on the research, this is not likely to prove to be a major obstacle. In fact, given that 86% of non-problem gamblers and 75% of low risk gamblers thought ATM removal would have no impact on their play enjoyment, this is a reasonable indication that such a measure is fairly acceptable to the recreational player market. Most are also quite comfortable with limited EFTPOS withdrawals.

Reel spins. In relation to reel spins, there was an overarching theme for 'small changes' such as increasing reel spins to three seconds per spin (from the current 2.13 seconds) to not overly impact recreational gamblers in any major way. It is also notable that both groups - non-problem and low risk gamblers - did not feel that 3 second reel spins would at all impact their play enjoyment (with both rating 2.0 to indicate 'no change'). However, as reel spins increased in length, there was a very slight tendency for recreational gamblers to report slightly more of an impact on their play behaviour - although still only a small impact overall. It should be noted, however, that it is very difficult to assess consumer experiences with reel spins and that real-life trials of alternative reel spin speeds would be necessary to adequately assess impacts. Nevertheless, it does suggest that this would be worth trialling in future research in a real-world setting. In particular, it would be interesting to understand the precise point at which play becomes less satisfying from a reel spin perspective.

Changes to lines of play. Changing lines of play is also an interesting area for policy exploration. Findings generally suggest that changing lines to 50 lines maximum will affect recreational play more than changing lines to 25 lines maximum. While the reason for this is somewhat unclear, there seems to be an indication that recreational players would decrease frequency of play more with 50 lines, simply because of the fear that they may spend more. Although when their predicted play spending is viewed, it shows a similar impact on expenditure for both 25 and 50 lines. Accordingly, in future research, it would be interesting to ask players to give a rationale for their reported play behaviours and further investigate this result.

Credits per line. As far as changes to credit betting per line are concerned, the overall trend was for most changes to only very marginally impact the play behaviour of recreational gamblers. This was particularly the case for limiting bets to a single credit - it only marginally seemed to affect play behaviour. This could be a useful future area for policy consideration, given the known risk of multi-credit bets to problem gamblers. From this perspective, there is some evidence to suggest that a single credit limitation would not overly impact the recreational play experience, whilst provide some benefit and protection to problem gamblers. This would also be supported by the trend for problem gamblers to INCREASE their bets, if 10 credit bets were the maximum available.

Limiting access to linked jackpots. The concept of having linked jackpots on only certain gaming machines is also an interesting area for future policy exploration. While evidence relating to 'capping' is still very unclear (eg. limiting access to EGMs more generally), the benefit of having limited linked jackpots to allow venues to view 'at-risk' players in certain parts of a venue may offer some harm-minimisation benefits. This could also be worth exploring as the gaming industry moves towards card-based gaming and increasing identification of 'at-risk' gambling in venues. For instance, as recreational players do not seem overly affected by limited linked jackpot machines, such machines could form a point of visible 'focus' for venue managers to identify early signs of problem gambling. This would of course be based on the assumption that problem gamblers are highly attracted to linked jackpot EGMs.

Limits on note acceptors. Findings of the research highlight some policy value in exploring the idea of reducing notes accepted by gaming machines, given that recreational gamblers generally report very limited impacts of such changes. In particular, limiting note acceptors to \$20 or \$10 maximum appears to be very acceptable and while even the impact of coins is somewhat larger, there is still not a great indication that it overly impacts the recreational gambler play experience. However, the policy value of such a change also needs to be considered in the context of player convenience and inflation, which may eventually make it untenable to use small notes or coins. Similarly, as other jurisdictions move towards card and cashless gaming as a delivery mechanism for precommitment, the concept of any note acceptors may eventually become untenable.

Breaks in play. Findings show that recreational gamblers are similarly not significantly affected by a compulsory 20 minute break in play, nor find that this adversely affects their enjoyment of gaming. This is arguably because most recreational gamblers would not play for such a length of time. From a policy perspective, however, such a measure may be difficult for venues to easily enforce without a technology such as card-based gaming. There may also be concern about litigation if players are left to play with a break and subsequently lose a large sum of money. However, with card-based technologies, such a measure is much easier to monitor and hence could be considered in a future policy environment where precommitment card technologies are available.

Responsible gambling measures and messaging. Perhaps one of the most interesting findings of the current study is that responsible gambling measures and messaging don't seem to have an overly negative impact on recreational players. However, this contrasts significantly with a much higher impact on problem gamblers. Accordingly, from a policy viewpoint, this would be a worthy area for future consideration, given that most recreational players would not be negatively impacted. In fact, there appears to be high merit in measures such as on-screen warnings (eg. think of what you are really gambling with), a diagnostic survey to identify problem gambling and on-screen displays of nett loss. The concept of having venues approach players 'sensitively' if problem gambling is suspected is also worth considering, given that this measure does not affect the recreational player market. In contrast, however, it does seem to have a very positive effect on higher risk segments and particularly problem gamblers. While such a measure is challenging for venues from an implementation perspective, a non-regulatory measure for Government to 'encourage and support' such a practice may be worthy of future exploration.

Conclusion

In conclusion, findings of the recreational player study clearly highlight that most changes to EGM design have a negligible impact on non-problem and low risk gamblers as 'recreational' EGM players. However, it is apparent that the impact on low risk gamblers of most measures is generally higher and this highlights the need to continue to view low risk gamblers as an 'at-risk' gambling segment. In many respects, this also challenges the assumption that low risk gamblers are 'recreational players'.

Indeed, as apparent in reviewing research findings, there were often differences between non-problem and low risk players in their reactions to EGM design characteristics and larger differences were apparent in relation to certain design features. Particularly worthy of mention is the difference between non-problem and low risk gamblers in relation to (removal of) free spins, as it was quite apparent that low risk gamblers would decrease their spending on EGMs more if free spins were no longer awarded (compared to non-problem gamblers). This may suggest that free spins, while a 'fun' feature of EGM play, are also a design feature which are more admired by higher risk segments.

Indirectly, this also highlights the need to consider other findings of research pertaining to higher risk segments, given that group comparisons often provide the greatest insight into the effects of EGM design. For instance, a review of problem gambler findings (see final section of the report), clearly highlights the value of responsible gambling features in the context of EGM play as potential harm-minimisation measures and also shows that implementation of such measures is likely to have a limited impact on the non-problem gambler segment (but a slightly higher impact on all at-risk gamblers - including low risk gamblers).

It is similarly interesting that even measures such as having to use EFTPOS for access to cash and on-screen display of nett loss have a larger impact on lower risk gamblers than non-problem gamblers. In this respect, there may be a set of 'EGM characteristics' that hold the answer to understanding why 'at-risk' segments exhibit higher risk play behaviour.

This would undoubtedly be the most interesting area for future research and would require a real-life evaluation to ensure that study findings are relevant to real gaming situations. This may involve negotiating access with a venue and establishing a small number of 'trial' gaming machines for players to evaluate with associated research evaluation. Based on findings of the current study, some research issues for future 'in-venue' exploration could include:

- further examining EGM design characteristics that lead to continued play in higher-risk gamblers, compared to recreational gamblers - including identification of underlying mechanisms (ie. how this occurs)
- exploring the types of responsible gambling messaging that could be incorporated into EGM design to have the most impact on higher-risk players and to encourage continued responsible gambling in non-problem gamblers (eg. which messages and how should they be displayed?)
- exploring the type of information that gamblers generally would find useful to allow informed decisions about gambling expenditure limits (including how such information should be presented and what type of information) - this is now particularly relevant in the context of precommitment
- exploring whether slowing of reel spin speed would have a protective effect on higher risk gamblers in a real-world situation (given its negligible effect on recreational players)
- research to identify algorithms to target 'at-risk' gambling behaviours in the context of future technologies which allow precommitment
- identification of EGM design factors which generally have the greatest potential to migrate people from a 'no risk' or 'low risk' category to a higher risk status (and underlying mechanisms).