## Online gambling and Free-to-Play games in Canada: portrait and trends

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#### Declaration—conflict of interest

The speaker declare having no conflict of interest.







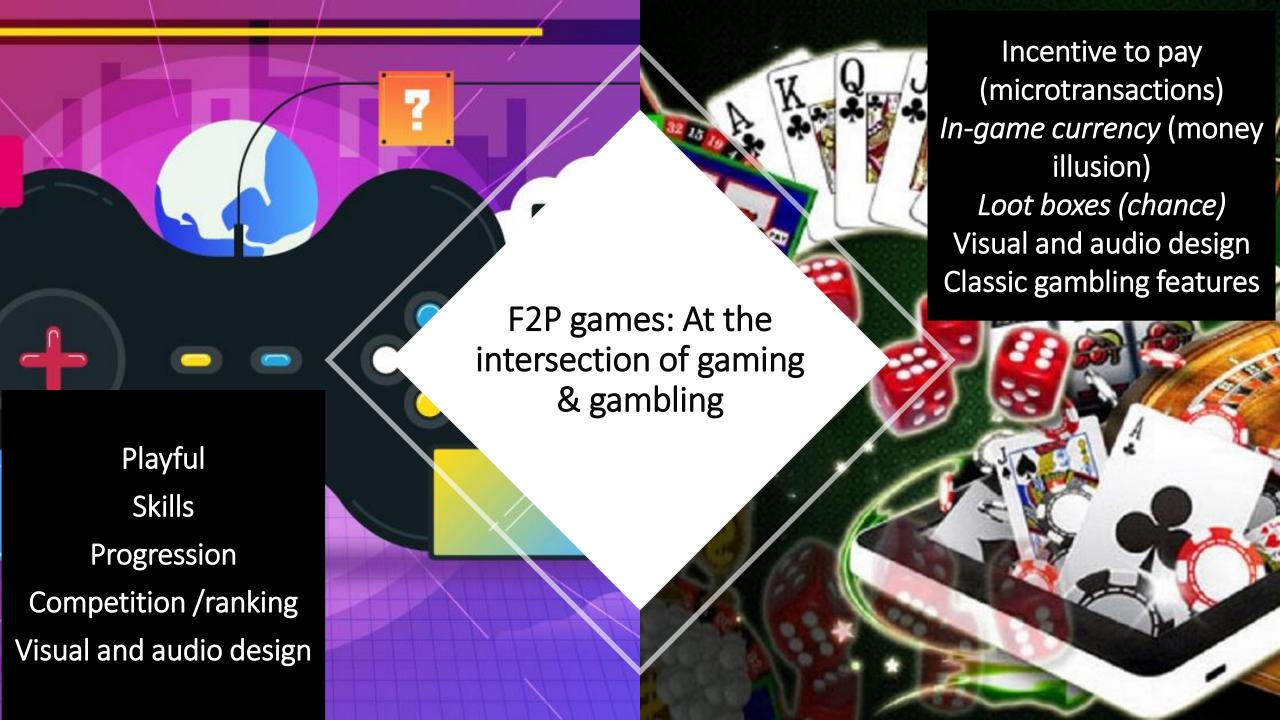
# Why F2P games and gambling games?



## New online gaming and gambling landscape

 Explosion and diversification of the supply and new products hybrid games

• Pandemic













# Hybrid games / Free-to-Play games (F2P)

Free-to-Play games cost nothing at the point of download—players do not have to pay money to play or acquire them.

These games are characterized by the ability to make in-game payments, or microtransactions, in order to increase the player's chances of winning, to help the player progress or advance more quickly in the game, or to obtain other forms of privileges or content.

## Objectives of the presentation

- To provide a portrait of F2P gaming and online gambling practices of the Canadian population during the pandemic;
- To contrast the groups of gamers and gamblers in terms of their patterns of play.

## Method

#### Method—Survey sample

- Pan-Canadian web panel
- Three types of players recruited into the study:
  - Online gamblers in the last 12 months
  - **F2P gamers** + monetization in the last 12 months (at least 1 microtransaction per month)
  - Mixed (F2P [at least 1 microtransaction in the last year] and online gambling) in the last 12 months







#### **Exclusive Online Gamblers**

Online gambling habits

### Sociodemographics

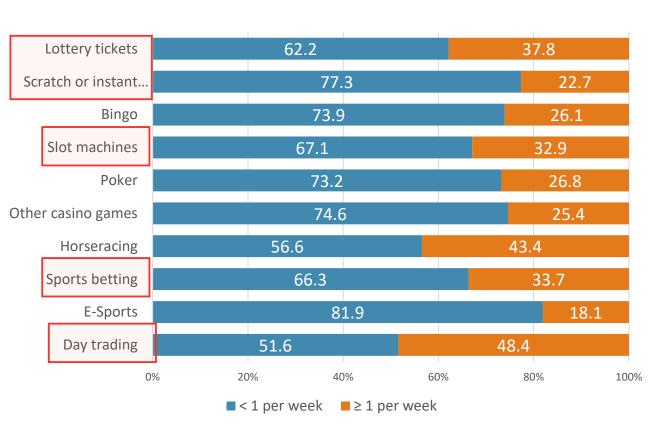
- Exclusive gamblers (n = 1,152)
- Men ++ (56.3%)
- Age: 25–44 years old (35%); Mean = 47.4 years old
- In a relationship (59.2%)
- Employed full time (44.4%)
- Household income is more than \$100,000 (28.2%)
- University certificate or degree (27.2%)

## Online Gambling Games

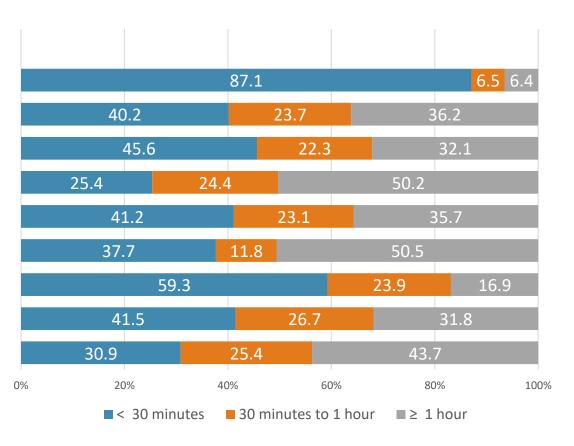
		Exclusive online gamblers (n = 1,152) %	
	Online	Offline	
Lottery tickets	73.0	68.1	
Scratch or instant lottery games	33.9	49.6	
Bingo	6.7	7.1	
Slot machines	19.8	5.4	
Poker	9.3	3.3	
Other casino games	8.0	2.8	
Horseracing	2.6	1.0	
Sports betting	11.5	6.4	
E-Sports	2.1	1.1	
Day trading	7.0	2.9	
Other gambling games	1.6	0.5	

### Frequency of online gambling

Frenquency - Exclusive online gamblers (n = 1,152)

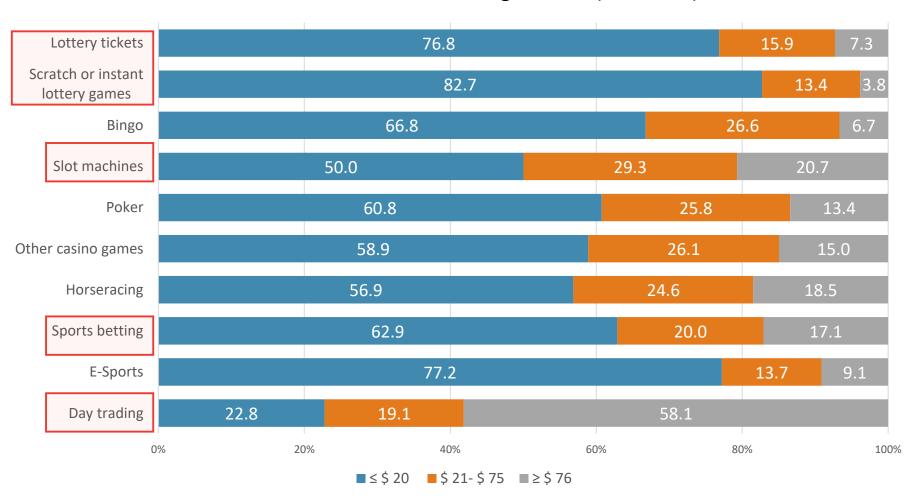


Time per session - Exclusive online gamblers (n = 1,152)



### Spending on online gambling

#### Exclusive online gamblers (n = 1,152)



#### Impacts of the pandemic on online gambling—Frequency of play



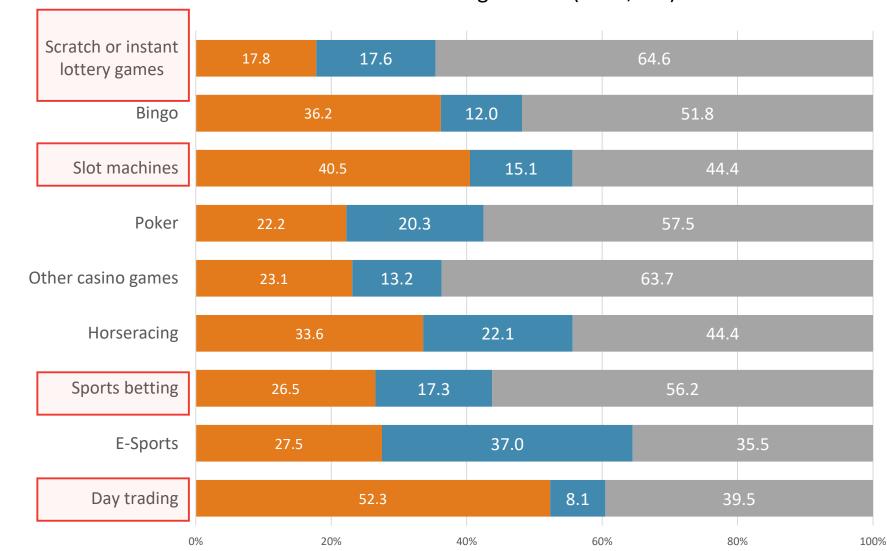
#### Impacts of the pandemic on online gambling—Time spent

Increased

Decreased

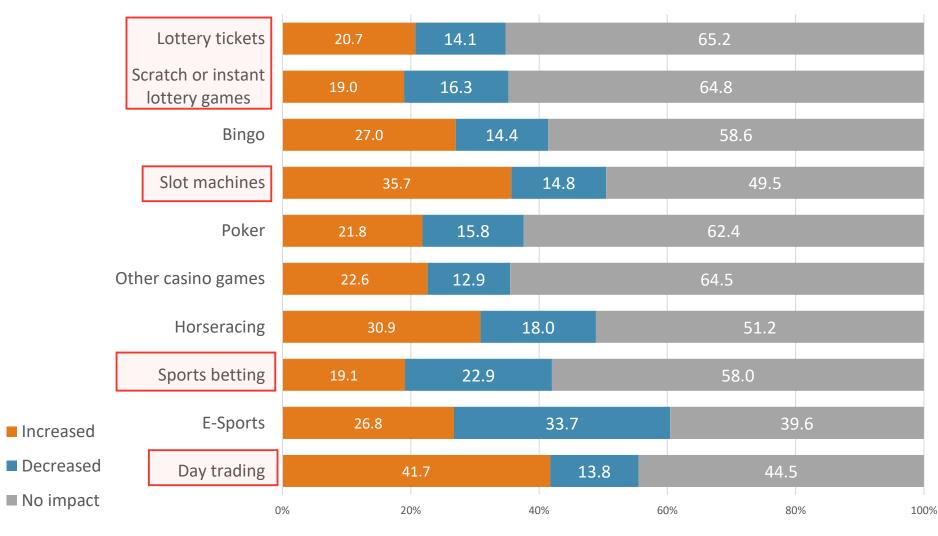
■ No impact





#### Impacts of the pandemic on online gambling—Spending





PGSI score

PGSI score	Exclusive gamblers (n = 1,152) %
0 : No problem	65.9
1 - 2 : Low risk	16.5
3 à 7 : Moderate risk	10.8
8 +: Possibly problematic	6.8

#### Preliminary observations

- A majority of participants do not report no impact of the pandemic on their gambling habits
- The pandemic disruption of daily life seems to have had an impact on how some people have integrated gambling games, more specifically:
- Lottery and scratch cards migration to online gambling through lottery and diversification on state monopoly website;
- Online scratch cards and slot machine mecanicsms?
- Slot machines the impact of the pandemic on slot machine gambling is of concern given the harms associated with this gambling activity - long-term impact?
- Sports betting The growth of gambling habits associated with sport betting is of concern in a context where publicity surrounding this activity explode during the pandemic in Quebec.

### Exclusive F2P Gamers

F2P gaming habits

### Sociodemographics

- **Exclusive F2P gamers** (n = 1,267)
- Women (58.6%)
- Age: 25–44 years old (44.3%);
   Mean = 40.2 years old
- In a relationship (50.9%)
- Employed full time (40.5%)
- Household income more than \$100,000 (25.1%)
- University certificate or degree (22.4%)

- **Online gamblers** (n = 1,152)
- Men ++ (56.3%)
- Age: 25–44 years old (35%);
   Mean = 47.4 years old
- In a relationship (59.2%)
- Employed full time (44.4%)
- Household income is more than \$100,000 (28.2%)
- University certificate or degree (27.2%)

Reasons for making microtransactions (12 months)

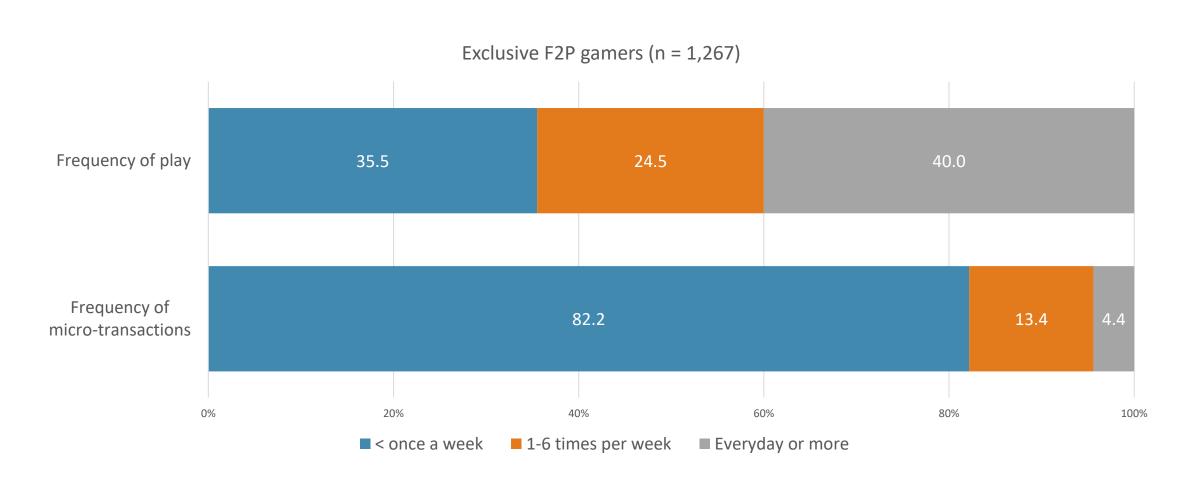
	Exclusive F2P gamers (n=1267) %
To increase your winning odds	23.4
To get more game time	21.3
To be able to continue playing	36.0
To get the most out of the game	41.8
To take advantage of special offers	45.0
For aesthetic reasons	12.7
To support a gaming community	6.7
To encourage gaming companies	3.5
To invest in a pastime	16.1
To avoid advertising	10.5
For other reasons	2.7

#### Categories of F2P games with microtransactions

	F2P gamers (n=1,267) %
Puzzles	45.7
Management	23.8
Brain games (Scrabble)	17.7
Strategy	14.2
Augmented reality	13.1
Action and adventure games	11.1
Battle Royale	8.8
Shooter	8.2
MMO	8.1
Sports and racing	6.4
MOBA	4.6
Collectible cards	4.3
Other	11.2



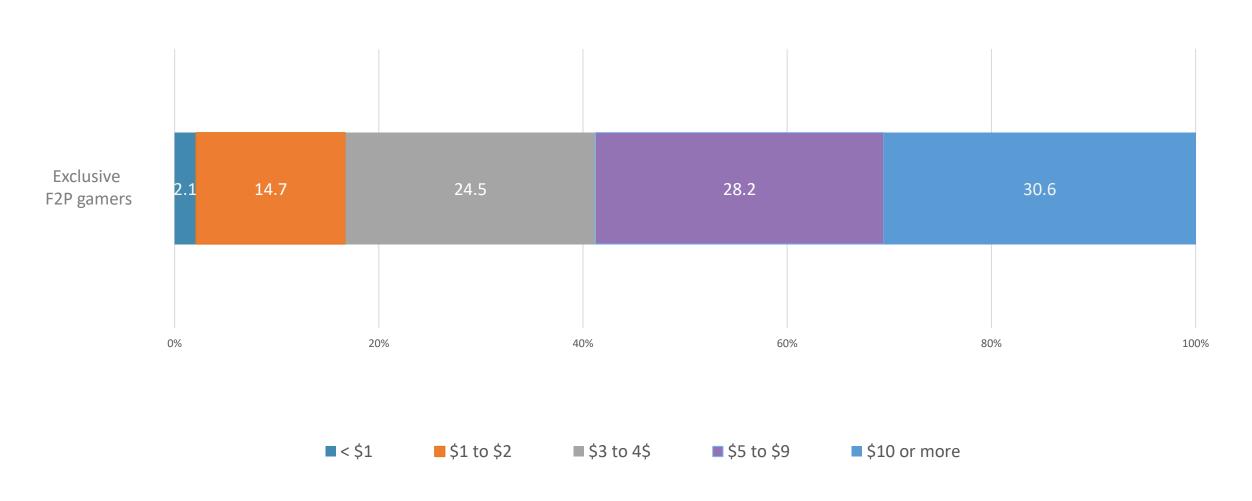
#### F2P games—Playing frequency with monetization



#### F2P gaming patterns with monetization

Exclusive F2P gamers (n = 1,267)

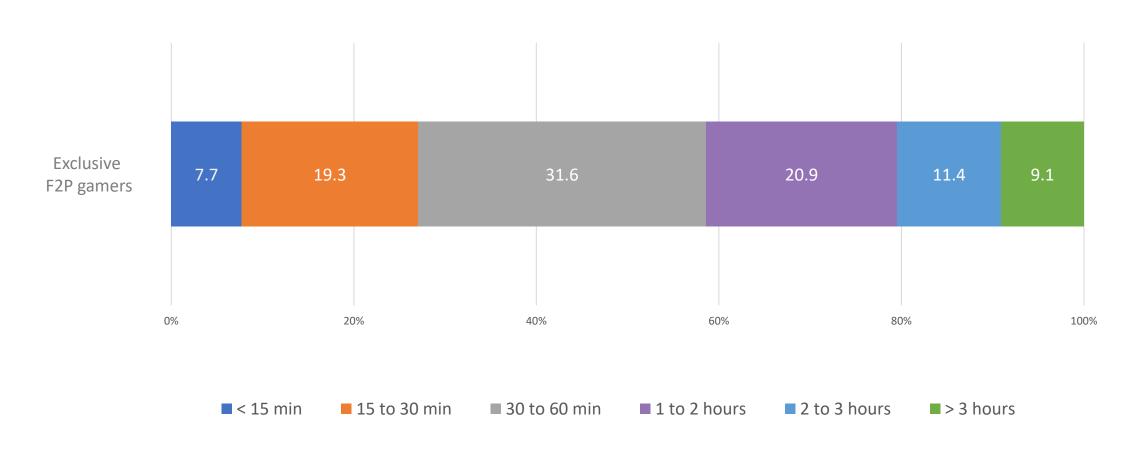
#### **Typical spending/microtransaction (n = 1267) - last 12 months**



#### F2P gaming patterns with monetization

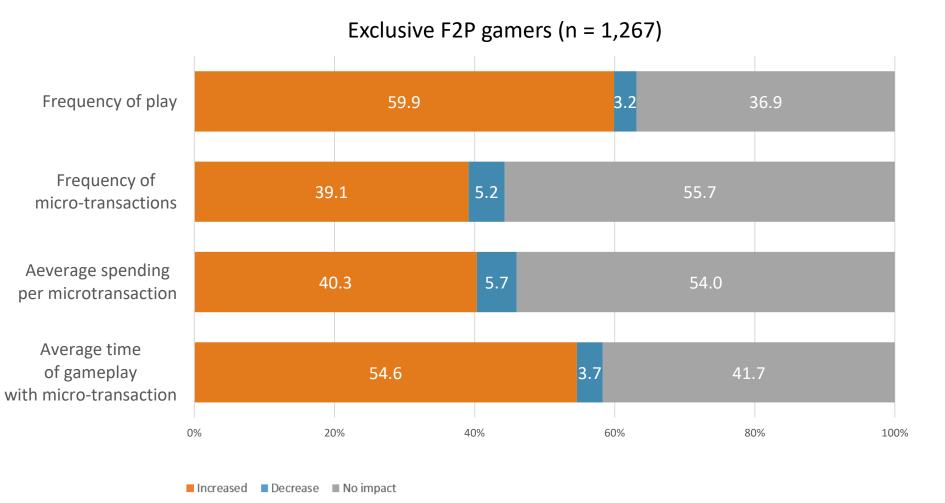
Exclusive F2P gamers (n = 1,267)

#### Average length of game session (n = 1266) - last 12 months



#### Impacts of the pandemic on F2P\$

Exclusive F2P gamers (n = 1,267)





# Why did F2P gaming habits change during the pandemic?

A matter of time, routine and accessibility

#### Decreasing play during the pandemic

• No more dead time...

"Well, sure, working from home, <u>I don't take public</u>
<u>transportation anymore</u></u>. But often, I used to play on public
transportation, things like that. [...] Well, I would say that I
play at least like 10 minutes a day, especially in the morning.
And it's for sure since that I'm at home more often, with the
pandemic, all that, it's for sure that I have <u>fewer</u>
<u>opportunities to be waiting elsewhere</u> (George)."

#### Increasing play during the pandemic

- Less social life
- Coping strategy—stress, anxiety
- Changes in family routine
- Changes in [remote] work routine

"Well, sure, and then when remote work started, because then we were not allowed to have our cell phones with us for confidentiality reasons. [...]. But when we're at home, between two calls, what do you think I was doing? I would take my cell phone and play." (Jen).

Are you concerned?

### Concerns about F2P gaming habits

- Money
- Time +++

"Well, I don't have time, I spent 3 hours on my cell phone in my day. What could I have done in those three hours? I would have had time to finish my load of laundry, I would have had time to prepare my dinner, I would have had time to train, and then I would have had time to even wash my hair. Why didn't I do it? Because I wasted time playing, trying to pass my tables, being like 'Damn! I'm sick of not passing, I'll pay a little \$3 and then I'll pass" (Joan).

#### Preliminary observations

- The pandemic disruption of daily life seems to have transformed how people have integrated games into their everyday routines;
- Time, mobility and accessibility seem to be important concerns in regard of F2P games;
- The mechanics of getting players to pay, and the multitude and aggressiveness of the strategies deployed to do so, also remain an important concern.

## Conclusion

#### Conclusions

• Time vs money

Addiction?

Need for regulation...

## Thank you!

## Questions