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**SZERENCSEJÁTÉKOKHOZ VALÓ FOGYASZTÓI
VISZONYULÁS MAGYARORSZÁGON
EGY NAGYMINTÁS KUTATÁS SZEGMENS-KÉPZŐ
EREDMÉNYEI**

*ATTITUDE TO GAMBLING IN HUNGARY
SEGMENTS-FORMING RESULTS OF A LARGE-SCALE
SURVEY*

ABSTRACT

This paper focuses on presenting the attitudes of the adult Hungarian population toward games and playing, based on an online survey for Hungarian National Lotteries (Szerencsejáték Zrt.) conducted in late 2016, representative of the adult population, with a sample of 2000 people. Secondary analysis highlights that respondents spontaneously associate games firstly with entertainment, which most of them primarily associate with children, recreation and board games. The result that most people tend to imagine families playing games the most, and the elderly the least reflects models of social learning. The research also reveals the most important dimensions of „a good game”: it should be entertaining, exciting, relaxing, thought-provoking, engaging and also developmental. While more than half of respondents agreed that games should be fun and have a winner, they consider the presence of a prize and luck less important, and the need for physical abilities and the presence of a loser were considered least important. These results may encourage gambling providers to optimise their range of products and services, although they are restricted by often under-regulated competitions, as well as the responsible game organisation principles they voluntarily follow. An additional but crucial finding that the playfulness is missing from everyday activities, work and studying the most, which also implies a need for revision of the supply side of the market.

Kulcsszavak: játék, szerencsejáték, fogyasztói kereslet hajtóerői, marketing szegmentáció, K+F tevékenység

Keynotes: games, playing, gambling, drivers of consumer demands, marketing segmentation, product research and development

1. Introduction

Based on its differing regulatory environment and consequent fragmentation¹, as well as its outstanding profitability² – supported partially by new technology-driven products – the gambling industry is a key area of interest for business and the applied sciences. From an economic psychological perspective, the individual and aggregated social risk of games of chance means that gambling is in focus^{3, 4}, especially in Western-type civilisations. However, these are „merely” economic and psychological imprints, consequences of the – concealed or obvious – attraction of humans and mankind (as a group of social beings) to games during the last few millennia: games are continuously present at every stage of our life.

As the boxes of board games – which are considered somewhat obsolete and outdated by current standards – often read: for players aged from 0 to 99, i.e., practically throughout our life, from cradle to grave. This is true even though people typically associate games in the everyday sense with childhood⁵. Ellis⁶ captured the motivation for playing in a reference work using the following five theoretical frameworks: (i) energy surplus theory, (ii) instinct theory, (iii) theory of preparation, (iv) theory of repetition, and (v) theory of relaxation. Whatever we call this act pursued by humans, and whatever drives it, the impact is unquestionable. However, like many things in life, playing resembles a double-sided coin: numerous works of literature and music the tragic fates of many people and numerous pieces of social research support the claim that excessive gaming is harmful⁷. In the course of designing games, and primarily the structures thereof, gaming organisers can rely on multifarious findings from psychology to create the apparently most attractive and tempting offerings^{8,9}. Therefore, responsible game organisation can be considered a critical industry-specific factor, now¹⁰. Although market regulation and the handling of problematic players are also key topics in the emerging markets of the Far East – not at all unaffected by gambling¹¹ –, we focus on the latest research conducted in the „Old World”; i.e., Europe, so we outline below the current market impacts of inadequate market regulation, the handling of (problematic) players, and the motivations thereof. Regarding the French market, large sample size research from 2016 shows that after general regulation was introduced in 2010; a clearly identifiable, vulnerable (socially less stable) segment is now gambling using websites which require no licence¹². Meanwhile, in Italy the gambling sector has grown to become the third largest industry. A study by Talamo & Mnuguerra¹³ examines whether soaring revenues can offset the (negative) external social costs of gaming; i.e., what the overall social balance is after certain regulatory changes have taken place. While the aforementioned work of Talamo and Mnuguerra „merely” records the figures, research work conducted in Switzerland in 2016¹⁴ also puts forward recommendations regarding problematic gamblers: the researchers call for more coherent regulations and more efficient prevention in the domestic market. A paper by Sarti and Moris¹⁵ focuses on the individual-level drivers of gaming, rather than on regulatory, social and budgetary aspects. The authors reject a sole role for cognitive aspects in playing. Instead, their work highlights the key motivating role of other social dimensions and patterns. Meanwhile, Hungarian studies of the motivation of players primarily focus

on the social background of computer-based role-playing¹⁶. The authors underline that, based on an examination, it is proven that the virtual and real world are interlinked at many points – including the perspective of group dynamics – and therefore (at least for now), there is still life in ‘real’ spaces. However, research by Hankóczy¹⁷ has verified the existence of a correlation between the motivation for using computer games and individual self-esteem/anxiety, suggesting that attention should be paid to the deep association between computer games and personality development. In a scientific investigation, Germán¹⁸ examined the typical motivation and commitment factors of players that characteristically play a special type of poker which is very common in shared online spaces. Consideration of the lifestyles and attitudes of the new digital generation, as well as their demand related to digital devices (explicitly) in all aspects of life¹⁹, shows that it is clearly worthwhile surveying the perspective of the gambling market and the range of products it offers. According to a paper published in 2016²⁰, the gambling market will be impacted by crucial issues (which also have an effect on other industries) in the next few years: the coming-of-age of new generations, as well as the imminent – rather than distant – challenges of digitisation will require enormous efforts from licensed organisers who are presently operating on the legal market. These changes will possibly push them to constantly renew and optimise their range of services, while voluntary game organisation principles (undertaken with the purpose of minimising social risks) narrow their options for renewing services, as well as the communication and promotion thereof. The Hungarian gambling service provider (Szerencsejáték Zrt., website: <http://www.szerencsejatek.hu/>), a state-owned company and the Hungarian market leader, for example, does not currently offer players any products classified as „high-risk” according to the most widespread GAM-GaRD²¹ qualification system, which assesses gaming-associated risks. This system was developed by the International Responsible Gaming Organisation (IRGO) under the direction of an expert international panel of psychologists and researchers, and helps assess the level of risk a game poses to so-called „vulnerable groups” of society (according to 10 identified standard characteristics); i.e., whether it can contribute to the development of gaming addictions, and if so, to what extent. The term „vulnerable players” is applied to adults who have „biological, psychological or emotional susceptibility” to excessive gaming, or to those who live under personal circumstances that contribute to a higher risk of developing gaming addiction²².

2. Goals and methodology of study

The aim of the research described in this paper was to survey attitudes of the adult Hungarian population towards games/playing, including the opinions they form of games of chance, as well as players' habits and motivational drives. Related to this goal, we paid special attention to addressing the following questions in relation to the responses of the Hungarian sample (in the study, the research questions are marked from Q1 to Q6 and are referred to accordingly):

- Q1: How are games related to each other according to frequency and popularity?
- Q2: What is a good game like? What kind of qualities are associated with games and players?
- Q3: Do respondents' spontaneous answers which identify the criteria for a „good game” include the characteristic features of games of chance?
- Q4: What qualities do gamblers attribute to games? To what extent do they need games in their lives?
- Q5: What background is characteristic of each group (gamblers and players)?

With regard to particular questions and correlations, we conducted our research with the intention of establishing a model, so the focus of our scientific interest was to create a model-like map of playing frequency, popularity and games of chance. Importantly, gaming companies are continuously moved to address the question what kind of games they must offer to remain attractive in a market where competitors virtually outbid each other with their technological innovations. As a result, gaming companies which are legal and mainly state-owned but have a state concession in any way are required to make product and service developments which must be both competitive and comply with responsible gaming principles.

- Q6: Having processed the answers to the questions, we set out to evaluate what motivation-based game development opportunities might present themselves to a legally operating game organiser.

The online questionnaire research was made up of two parts. One part involved a research study representative of the adult Hungarian population, with a base sample of 8,000 people, composed of four distinct sub-samples, each covering 2,000 people and representative in itself. The four sub-samples

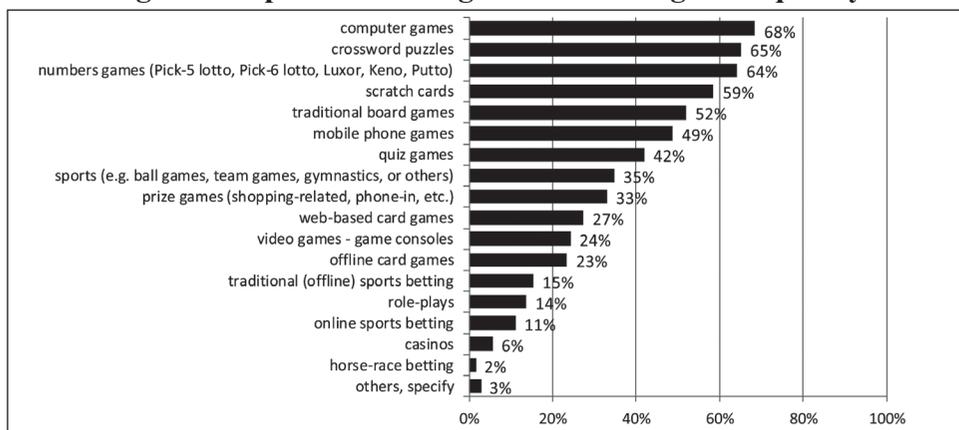
were separated along the following range of questions: players, responsible gaming, game organisers, and respondents' opinions of them. The other part, which we do not deal with in this paper, included some non-representative research that was implemented by using a link published on Szerencsejáték Zrt.'s own webpages. The list of questions asked in each module took 15 minutes to answer. The research was designed to survey attitudes to games/playing and, in particular, opinions about games of chance. We drew up the questionnaires with this in mind. When devising the surveying method, we paid special attention to making sure that questions pertaining to games of chance would not influence questions concerning playing in general. Therefore, we included them in the second part of the questionnaire, following the general questions.

3. Description of results

The following description of results is presented according to the research questions (Q1-Q5) contained in the second chapter of the study (Methods). Subsequently, our attempts to create models and the results thereof are summarized. Finally, we return in the Conclusions to addressing a comprehensive question (Q6) which is framed to help develop future opportunities.

- (i) Results with regard to Q1 (How are games related to each other according to frequency and popularity?):

Figure 1: Opinions about games according to frequency



(Question: Please indicate which of the games below you have played during the last year- with any regularity, N=8000)

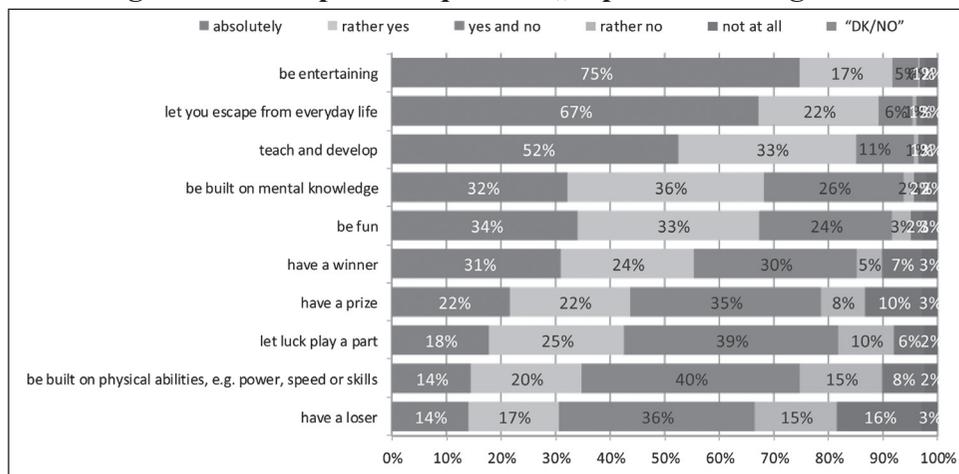
Source: Kutatópont, 2016.

Computer games proved to be the most popular games. Lagging slightly behind these in popularity are crossword puzzles and numbers games. As can be seen in Figure 1, scratch cards and traditional board games were mentioned at similar rates, namely by more than half of the respondents. These were followed by mobile phone games, (television) quiz games, sports and prize games, each of which was chosen by more than 30% of respondents. About one quarter of respondents play internet card games, video games and (traditional) offline card games.

(ii) Results with regard to Q2 (What is a good game like? What kind of qualities are connected with games and players?):

In first place, the respondents expect a game to be entertaining, to let them escape from everyday life and to teach them something. More than half of those questioned agree with the statements that a game should be built on mental knowledge, be fun, and have a winner. This can be seen in Figure 2. From the point of view of game organisers, it is interesting that respondents consider the presence of a prize and luck less important, and also that the need for physical abilities and the presence of a loser were the least often mentioned.

Figure 2: Description of qualities „expected” from games



Source: Kutatópont, 2016.

(iii) Results with regard to Q3 (Do respondents' spontaneous answers include the characteristic features of games of chance?):

Prior to the above questions – right at the beginning of the questionnaire – we asked the open questions: „What are the three things you first associate with (playing) a game?” and „What makes a good game?” Analysis of the answers shows that respondents unanimously associate (1) „entertainment” with playing/games, followed by the words (2) „children”, (3) „relaxation”, (4) „cards”, and finally (5) „board games”. Accordingly, on the basis of the research it is clear that the most important expectation is that a game should be entertaining, be exciting, relaxing, thought-provoking, engaging and also help people develop. It is also interesting that the classic expressions closely linked to games of chance, such as „luck” or „lottery (game)”, were mentioned, but not at high frequencies. Nevertheless, expressions such as „prize” or „winning” help define the distinctive features of a „good game”. It is remarkable that „card games” and „board games” were very often mentioned when it came to specifying associations with playing/games. These are the games that were the most mentioned from the specified types of games, although they do not top the list of games actually played. This leads us to conclude that social experiences that are learnt and passed down through generations prove stronger than our current playing habits and preferences.

(iv) Answers to Q4 and Q5:

The answers to the following two questions, Q4 (What qualities do gamblers attribute to games? To what extent do they need games in their lives?) and Q5 (What background is characteristic of each group?) are logically related and are thus edited and described together. The relationship between the game qualities that were examined is clearly reflected in the Spearman correlation values, as shown in Figure 3. Even though these values mostly indicate significant positive relationships between particular qualities, a latent structure is implied in thinking about „good games”. The strongest relationship is found in the need to have a „winner” and a „loser”, which is followed by expectations related to the two qualities specified as „be entertaining” and „let you escape from everyday life”.

Figure 3: Correlation matrix of game qualities, based on Spearman correlation coefficients (N=1915)

	be built on mental knowledge	have a winner	have a prize	be built on physical abilities	be entertaining	be fun	teach and develop	let you escape from everyday life	have a loser	let luck play a part
be built on mental knowledge	1,00	0,24	0,22	0,35	0,22	0,28	0,49	0,20	0,17	0,26
have a winner	0,24	1,00	0,46	0,25	0,18	0,20	0,20	0,09	0,57	0,37
have a prize	0,22	0,46	1,00	0,31	0,05	0,18	0,15	0,01	0,30	0,44
be built on physical abilities	0,35	0,25	0,31	1,00	0,04	0,16	0,28	0,03	0,20	0,33
be entertaining	0,22	0,18	0,05	0,04	1,00	0,38	0,32	0,51	0,06	0,09
be fun	0,28	0,20	0,18	0,16	0,38	1,00	0,38	0,26	0,13	0,30
teach and develop	0,49	0,20	0,15	0,28	0,32	0,38	1,00	0,31	0,12	0,19
let you escape from everyday life	0,20	0,09	0,01	0,03	0,51	0,26	0,31	1,00	-0,01	0,08
have a loser	0,17	0,57	0,30	0,20	0,06	0,13	0,12	-0,01	1,00	0,26
let luck play a part	0,26	0,37	0,44	0,33	0,09	0,30	0,19	0,08	0,26	1,00

Source: Authors' construction, 2016

The qualities „let luck play a part” and „have a prize”, which are the most characteristic of games of chance, appear to be most closely related. The relationship of „luck” with each of the examined factors is significant, whereas „the need for a prize” is independent of the qualities „be entertaining” and „let you escape from everyday life”.

The so-called „Maximum Likelihood” method was applied in carrying out factor analysis to examine the above qualities, from which three apparently characteristic factors, which can also be seen in Figure 4, emerged.

Figure 4: Factors and components explored with the first factor analysis (N=1892)

	experience-oriented	result-oriented	process-oriented
be based on mental knowledge	0,32	0,17	0,54
have a winner	0,17	0,93	0,11
have a prize	0,02	0,47	0,36
be built on physical abilities	0,05	0,19	0,58
be entertaining	0,80	0,09	0,06
be fun	0,44	0,10	0,30
teach and develop	0,51	0,08	0,46
let you escape from everyday life	0,67	0,02	0,05
have a loser	0,03	0,61	0,16
let luck play a part	0,09	0,37	0,43

Source: Authors' construction, 2017

- A. Experience-oriented factor – the most important components of this are „entertainment”, „relaxation”, „development” and „humour”. Thus, a good game lets you escape from everyday life and teaches you while providing entertainment and experiences.
- B. Result-oriented factor – It slowly manifests that a „good game” has a prize, it definitely has a winner, and it may also have a loser, but not necessarily. The factor centred on the need for a „result” is distinct from the need for „experience”. This indicates that those who demonstrate result-oriented attitudes do not seek relaxation in gaming, but play for victory and/or for prizes.
- C. Process-oriented factor – the factor that concentrates on the process characterizes a „good game” as being built on „mental knowledge”, „physical abilities, and „luck”.

Although the above-described „trifactorial structure” can also be interpreted in terms of business, in strict statistical terms it is not completely stable (the weak correlations and factor scores also argue for the rejection of the model). Consequently, after testing diverse model variations we identified a bi-factorial model as the most stable. Among the ten variables

in the original model, five variables which can be considered statistically adequate remained. The first factor accounts for 27 per cent of total variance, and the model for 52 per cent in total. The goodness of fit of the model is acceptable (Chi: 2,345; df.: 1; sig.: 0,126). There is room left for the experience-seeking factor in this newly formed structure too, whereas a kind of merging of the result-oriented and process-oriented factors occurs in the newly created „gamblers” factor (Figure 5). This basically means that – with regard to playing / games – the significant qualities of games of chance are separate from experience-seeking and help to identify the distinct character of a gambler.

Figure 5: Factors and components explored with the second factor analysis (N=1892)

	gamblers	experience-oriented
be entertaining	0,11	0,95
let you escape from everyday life	0,07	0,56
let luck play a part	0,60	0,08
have a prize	0,74	0,01
have a winner	0,64	0,16

Source: Authors’ construction, 2017

Examination of the two above-mentioned factors according to socio-demographic attributes (see Figure 6) indicates that, regarding gamblers’ attitudes, there is no significant difference between men and women, whereas having an experience while playing a game is much more important for women than for men. As far as age groups are concerned, significant positive correlation only exists in the case of the „gamblers” factor and the age groups 30-39-year-olds and over 50-year-olds.

In the case of level of education, both factors also showed a significant statistical relationship. Those with higher qualifications seek the gaming „experience” more often than average, whereas it is more characteristic of those with lower qualifications to expect luck to play a part in gaming, and for games to have a winner as well as a prize.

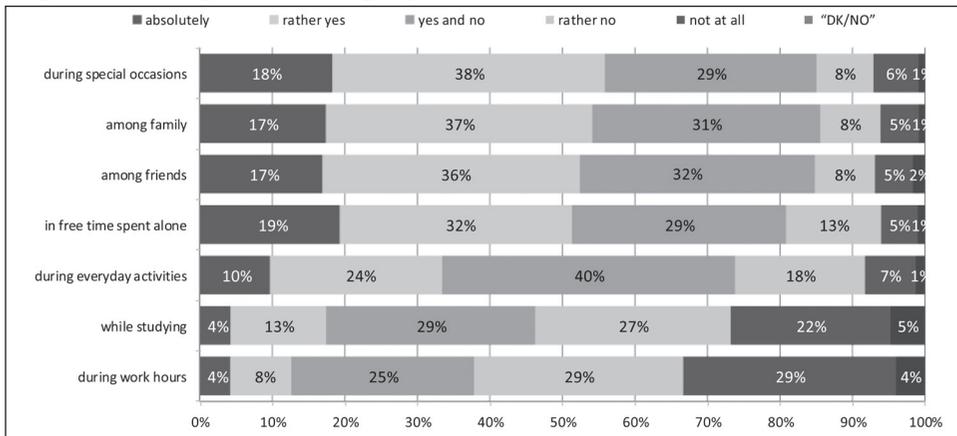
Figure 6: Socio-demographic characteristics of factors „gamblers” and „experience-oriented” (N=1892)

		gamblers	experience-oriented
gender	male	-0,03	-0,09
	female	0,02	0,08
age groups	18-29	-0,15	-0,05
	30-39	0,06	-0,06
	40-49	-0,10	-0,01
	50-59	0,06	0,04
	60+	0,06	0,04
educational level	primary	0,06	-0,13
	secondary	-0,03	0,12
	tertiary	-0,13	0,14
total		0,00	0,00

Source: Authors' construction, 2017

Respondents link playfulness to special social occasions, family, friends, and free time spent alone, as indicated in Figure 7. ‘During everyday activities’ is ranked medium in importance concerning times for playing. However, respondents see little playfulness the in the fields of work and studying.

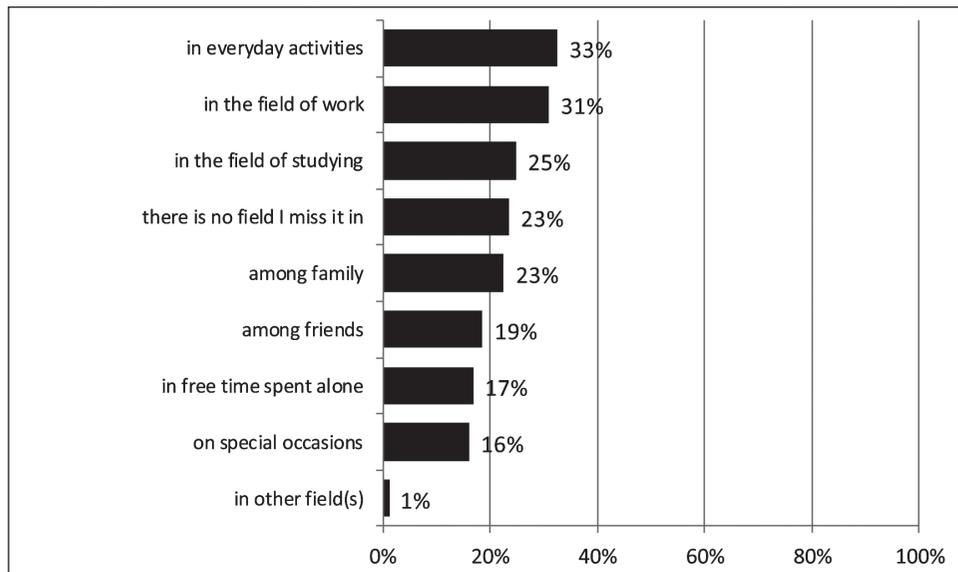
Figure 7: The presence of playfulness in various fields of life (N=2000)



Source: Kutatópont, 2016

According to the above, respondents miss a feeling of playfulness in everyday activities, work and studying the most (see Figure 8). A quarter of those who filled in the questionnaire did not identify a single field in which playfulness occurs in their lives, and the proportion of those who experience a shortage of playfulness in their private lives (family, friends, free time spent alone, special occasions) remained below twenty per cent.

Figure 8: Lack of playfulness in various fields of life (N=2000)



Source: Kutatópont, 2016

The two factors defined above („experience-oriented” and „gamblers”) are not related to the listed fields in most cases, which means that those who seek experience in gaming generally lack playfulness during special occasions, in the free time they spend with their family, and alone, as well as in the world of work and studying to the same extent as those who tend to seek out luck in games. The following two fields are exceptions: „everyday activities” and „among friends”. Those who are experience-oriented tend to miss playfulness in everyday activities, whereas with gamblers a positive relationship exists in the case of friends.

A question of fundamental importance to the present research is whether the characteristic features of a „good game” markedly differentiate those who play games of chance from homo ludens, man the player playing man. During the research, we had the opportunity to ask respondents about expe-

rience and playing intensity related to many kinds of games. Computer games, crossword puzzles and numbers games proved to be most popular. Scratch cards and board games were very often mentioned, namely by more than half of all respondents. Generally, it can be stated that in the case of virtually all the opportunities for playing games, experience-seekers as well as luck-seekers are overrepresented among those who play. Nevertheless, in the case of role-plays and particularly two games of chance (online sports betting and casinos), there is no significant difference between those who play and those who do not play in that they both seek experience or luck from a good game.

Figure 9: Factors „gamblers” and „experience-oriented” according to those who play particular games (N=1892)

games	proportion of those playing (%)	gamblers (who play a game)	experience-oriented (who play a game)
computer games	68	0,03	0,05
crossword puzzles	65	0,01	0,06
numbers games	64	0,04	0,05
scratch cards	59	0,07	-0,03
traditional board games	52	-0,06	0,10
mobile phone games	49	-0,01	0,06
quiz games	42	0,02	0,08
sports games	35	-0,10	0,05
prize games	33	0,08	0,09
web-based card games	27	0,10	0,09
video games – game consoles	24	0,06	0,05
offline card games	23	-0,07	0,14
traditional (offline) sports betting	15	0,09	0,04
role-plays	14	-0,02	0,05
online sports betting	11	0,08	-0,05
casinos	6	-0,07	-0,06
horse-race betting	2	0,02	-0,54

Source: Authors' construction, 2017

This underlines the fact that those who play (i.e. those who are open to gaming, whatever motivation they have) join in particular game-playing events primarily for the sake of playing itself, and are not influenced by their orientation towards experience or luck. Among games of chance, the gambling factor was most strongly positively correlated with traditional (offline) sports betting, scratch cards, numbers games and web-based card games. We can also identify positive attitudes towards prize games, video and computer games, and negative ones towards sports or traditional board games as well as card games. Those identified by an experience-orientation are somewhat differentiated from the „gamblers” with regard to the games they play; however, several similarities can be observed. Evaluation of the differences between the average values for this factor (see Figure 9) shows that the strongest negative relationship exists with classic games of chance and betting on horse races. In the case of other games of chance that are examined here, there is no significant relationship. A positive relationship only exists in only one case: in that of numbers games. In the case of other games – whether traditional or online – a positive relationship is typical.

4. Conclusion

Secondary analysis of the large-sample research confirms that people primarily consider playing to be a form of entertainment and associate it with the lives of children. With the help of factor analysis, we identified two typical forms of motivation that impact the thinking of players: one involves the characteristics of gambling, and the other the experience of playing. We stated that the latter is more characteristic of women and better-paid individuals, while from the viewpoint of game organisers it is important to note that the desire to win is stronger in relation to the former factor, where those who earn less are in the majority. Results of a comparison of the two factors indicate that although luck-seeking and experience-seeking can be justifiably separated from a statistical perspective when defining what makes a „good game”, the two groups are not separate in the reality of playing practice. The nature of motivation related to games of chance tends to be very similar to with other games. This duality is manifested mostly in the case of numbers games, since these are sought out by players both for the playing experience and in terms of players trying their luck. In this, tradition is assumed to play a great role, and it may even overwrite individual playing preferences, although not consciously. The research uncovered that a „good game” can do everything: it can entertain, it is exciting, it has relaxing and

thought-provoking characteristics, it also engages one's attention, and at the same time it is developmental. More than half of those surveyed agree that a game should be fun and should also have a winner, whereas they consider the presence of a prize and luck less important; moreover, the need for physical abilities and the presence of a loser were the factors least mentioned. In line with the aforementioned, what the general findings of the research underline is that when looking at the entirety of the population, the „pursuit” of riskier and „harder” gambling dimensions is not typical; people need to play (games) and are open to playing, but they do not regard life as a playground for gambling, and they remain at the level of *homo ludens*, driven by a natural but sober instinct for playing^{23,24,25}. In evaluating the results, we call attention to the nature of the Hungarian language, which expresses „play” and „game” (i.e. game of chance) using the same primary word, and note that, in general, the idea of „playing” as an activity originates from this root and has no negative connotations. As far as responsible game development opportunities (Q6) are concerned, the findings permit us to conclude that there is room for developing and adopting primarily digital products and services which do not involve risky gambling decisions (compare with the GAMGARD evaluation criteria), but involve gambling merely for the sake of playing games (albeit not necessarily without prizes and an element of luck). The evaluation also highlights the tradition-based positioning of existing numbers games which are less risky and make a good contribution as a form of responsible sales activity. The feeling that respondents have of lacking an opportunity to play mostly in everyday activities, at work (or during breaks) and while studying, suggests directions for further development. Since learning is a lifelong activity, according to theories of modernism, this open path of development highlights responsible market opportunities for legal game organisers in terms of new brands. This conclusion also reflects on the range of topics discussed by Michael which focuses on educational, instructional and informative games²⁶.

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