

Platform Gambling and the Redistribution of Wealth in the Land- Based Betting Industry: A Critical Realist Case Study.

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Submitted in Partial Fulfilment of the Requirements of the Degree of Doctor of
Philosophy, May 2021.

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Acknowledgements

Firstly, I would like to thank the participants who kindly agreed to take part in the data collection. Without the help and goodwill of thirty-eight individuals who were often very busy, this study would not have been possible.

I am grateful to Professor Chris Brady and Dr James Mulkeen who helped me to get started on my PhD journey, but I am also incredibly grateful for the advice from Dr David Kreps and Dr Gordon Fletcher which has shaped this thesis most of all.

Finally, however, I wish to say thank you to my family. To Kieran, Clarissa and Lucille, thank you for always listening to my ideas and providing your critiques. To my children, Lily and Harvey, thank you for giving me the energy to make this possible. To my wife, Cassie, I say the biggest thank you of all. Events have happened during this journey – whether good (such as the arrival of Harvey) or bad (a global pandemic which turned our world upside down) – which have made me wonder on several occasions if this PhD was even possible. Your unwavering love and support kept me going during the toughest of days. This thesis is for you.

List of Abbreviations

BGC	Betting and Gaming Council
BOG	Best odds guaranteed
CSR	Corporate Social Responsibility
CR	Critical Realism, Critical Realist
DCMS	Department for Digital, Culture, Media and Sport
EGM	Electronic gaming machine
FOBT	Fixed odds betting terminal
Gambling Harm APPG	Gambling Harm All-Party Parliamentary Group
GGY	Gross gambling yield
IoT	Internet of Things
IS	Information system(s)
LBO	Licensed Betting Office
NDB	New digital bettor
OTC	Over the counter
RNG	Random number generator
RTP	Return to player
SSBT	Self-service betting terminal
SIS	Satellite Information Services

Abstract

This qualitative study critically evaluates the development of platform gambling – the network of fixed odds betting terminals, self-service betting terminals and online gambling – within the United Kingdom’s land-based betting industry. The study specifically explores if platform gambling can be perceived as exacerbating the view that the industry relocates capital to its owners. The study’s Marxist, theoretical lens through which data are analysed consists of class antagonisms between the owners of betting shops and their customers and employees, whilst adopting platform capitalism as an extension of Marxism.

In accordance with a Critical Realist methodological approach, themes which were explicated from semi-structured interviews with thirty-five shop owners, customers and employees were firstly aggregated according to analytical generalisations, demonstrating the emergence of two mechanisms of platform gambling: the productivity of data and the omnipresence of platform gambling. These mechanisms were then theoretically redescribed through the theoretical lens, exploring how they interact to produce the industry’s class antagonisms. Finally, the study retroductively analysed emergent data to objectively explore the structure brought about by the development of platform gambling within betting shops. The structure’s key mechanism, the productivity of platform gambling, allows owners to deploy the situational and structural characteristics of platform gambling, alongside shop loyalty schemes, in order to co-ordinate shop and immaterial labour towards profitability. The retroductive structure was also contextualised against an external stratification of Marxist ontology, confirming the relationship between Marxism and the development of platform gambling.

The study consequently makes three theoretical contributions. Firstly, it contributes a Marxist understanding of the land-based industry whilst also demonstrating a perceived, detrimental socio-economic impact brought by an information system. Secondly, platform gambling is understood through the perceived affordances offered to its owners by its primary commodity, data. The study thirdly contributes a Critical Realist analysis of perceptions from within the land-based industry.

Chapter One: Introduction

1.1: Introduction

This study critically evaluates the development of platform gambling within the United Kingdom's (UK) land-based betting industry. Specifically, perceptions from within the industry are explored from a Critical Realist philosophical approach with the guiding theory that platform gambling – or the network of platforms (hardware or software) which shape exchange between the owners of licensed betting offices (LBOs. Colloquially known as betting shops) and their customers – exacerbates the redistribution of wealth from betting shop customers and employees to shop owners. This guiding theory is presented through a theoretical lens focusing on the class antagonisms of the industry as well as the development of platform capitalism. Qualitative data gathered from owners, employees and customers of betting shops were thematically analysed according to Critical Realist methodological principles - inspired by Wynn and Williams (2012), Iannacci (2014) and Bygstad (2010) - to explore the structures enacted by the development of platform gambling, giving rise to the industry's class antagonisms.

This introductory chapter outlines the main research question, the background context of the research within the land-based betting industry, and the theoretical contributions made by the study before exploring the definitions of betting, gaming and gambling and how these terms are used within the study. The chapter then outlines the aim of the study as well as the two key elements of the theoretical lens through which perceptions are analysed: class struggle and platform capitalism as an extension of Marxism. Finally, the research objectives are detailed, outlining how the aim of the study was fulfilled through a qualitative methodology guided by Critical Realist methodological and philosophical principles.

1.2: Research Question and Research Background

The research question critically evaluates the digital transformation of the UK's land-based betting industry.

Research Question: How can the digital transformation of the land-based betting industry be perceived by the industry's owners, employees and customers as sustaining the redistribution of wealth?

This study has been inspired by the researcher's own experience within the industry as well as Cohen's (2003) argument that 'there are few means more ruthlessly efficient [than the gambling industry] for redistributing wealth from the poor to the rich' (p. 20). Similarly, the existence of capitalism itself is reliant on the bourgeoisie's primitive accumulation of capital (Marx, 2013a). Importantly, however, all industries experience digital transformation (Griffiths et al., 2020) and the gambling industry is no different. The industry's digital transformation has resulted in its reliance upon a network of platform gambling, defined here as the use of platforms (hardware or software) which shape the exchange between betting shop owners and their customers.

Platform gambling manifests itself within betting shops through three digital platforms: online gambling, fixed odds betting terminals (FOBTs) and self-service betting terminals (SSBTs). The online gambling industry now generates £5.6 billion of annual gross gaming yield (GGY) – or the yield retained after the payment of winnings - for owners, representing almost forty percent of the gambling industry's total annual GGY (*Gambling Commission, 2020a*). FOBTs are gaming machines situated in betting shops which allow customers to gamble on casino- or slot-based games. Labelled as the 'crack cocaine' of gambling (Snowdon, 2013; Chapman, 2019), FOBTs were subjected to legislation in April 2019 reducing their maximum stake from £100 to £2 per spin (Woodhouse, 2019). Nonetheless, FOBTs – of which individual betting shops are permitted a maximum of four - still generate an annual GGY of £1.1 billion for the industry (*Gambling Commission, 2020a*). SSBTs are separate machines - also located in betting shops – which facilitate a wider range of betting opportunities than is ordinarily available over the counter (OTC). The wide range of sports may include table tennis, water polo, squash or football from lesser-known divisions around the world. There appears to be a lack of extant research on SSBTs, and the *Gambling Commission (2020a)* includes industry GGY from SSBTs as part of OTC betting's annual GGY of £1.2 billion. Depending on the outlook of each of the

shareholder groups under study, SSBTs are direct examples of self-service technology which reduces wage-based costs for shop owners (Kimes and Collier, 2015), or an opportunity to provide a service to customers with a higher level of readiness towards self-service technology (Doyle, 2006).

Platform gambling is not advertised as a separate binary from traditional, OTC betting. Platforms are interwoven with OTC betting within an omnichannel continuum where customers can interact with the UK's main land-based brands through multiple touchpoints (Coral, 2017; Ladbrokes, 2019a; William Hill, 2019a; Zajdel et al., 2020). The omnichannel integration of platforms is now the *modus operandi* for the UK's four most prevalent chains of betting shops: William Hill, Ladbrokes, Coral and Betfred. As this study explores, betting shops have evolved since their legalisation in 1961 from basic, unattractive offices to modern, digitalised shops with a range of products available for their customers. This development has been influenced by key legislation such as the Gambling Act 2005 (HM Government, 2005) or key technological developments such as commentary from the blower, the introduction of colour television into shops in 1984 (Chinn, 2004) and now, platform gambling. Platform gambling is reliant on data which – as well as being the key commodity of platform capitalism (Srnicsek, 2017a) – are now used by the industry to extract further spend.

Platform gambling sets into motion mechanisms which detrimentally impact both customers and employees alike. For example, shop employees may be rendered obsolete through the optimised production which occurs through digitalisation. The insertion of sensors into the production of risk - which is characteristic of the Internet of Things (Skilton and Hovsepian, 2018; Lüthje, 2019) - co-ordinates the workforce into either the maintenance of each platform or worse, redundancy. Whether through the requirement of employees to achieve targets related to the conversion of shop customers to online gambling (Davies, 2019a), or through the reduced costs implied with the use of platforms (Srnicsek, 2017a), shop employees find themselves alienated by the numerous responsibilities related to platform gambling (Jones, 2019).

Secondly, the digital nature of platform gambling has altered both the accessibility and the specific features of the industry. These are defined by Griffiths (1999. See also Griffiths et al., 2005) as the situational and structural characteristics of gambling, relating to the factors influencing the initial decision to gamble as well as those which reinforce further spend during the gambling itself. Each element of platform gambling alters these characteristics in different ways. Online gambling removes the spatio-temporal barriers of brick-and-mortar gambling (Griffiths et al., 2005; Gariban et al., 2013), whilst the growth of FOBTs has been associated with the prevalence of shops during recent years (*Gambling Commission, 2020a*). SSBTs, meanwhile, increase the accessibility of shops for those who prefer to avoid interaction with shop workers as well as provide a glimpse of the operator's online betting content (Jones et al., 2020). The structural characteristics of FOBTs which encourage continuous spend may include the nature of gameplay, the deployment of audio and visual characteristics and other features such as autoplay (Harris and Parke, 2016). Online gambling and SSBTs, meanwhile, all benefit from a wider range of frequent gambling opportunities (Griffiths and Auer, 2013; Newall et al., 2021), as well as additional features such as the ability to bet or cash out in-play (Lopez-Gonzalez et al., 2018a; Newall et al., 2019a), all designed to encourage further spend. In summary, as DeSanctis and Poole (1994) argue, the greater number of features available, the more actions a user can take or in this case, the greater number of features increases the amount of extractable spend.

Thirdly, platform gambling has altered the methods in which gambling is advertised. The most notable change for this study is the use of loyalty schemes which act as a gateway to online gambling and the surveillance afforded by the omnichannel continuum, providing the potentiality of surveillance of user data for profit (see Rossiter, 2016). This profit may be extracted either through targeted spending inducements (Rawat et al., 2020) or through the restriction of unprofitable customers (Cassidy, 2020). Platform gambling may also rely on the prevalence of marketing within mediums such as television, social media and sport itself. A total of £1.2 billion is spent annually by gambling operators on marketing (*GambleAware, 2018*). Social media has made gambling

more accessible (Gainsbury et al., 2015a; Lopez-Gonzalez et al., 2017; Houghton et al., 2019; Killick and Griffiths, 2019), whilst extant research also highlights the prevalence of marketing within sport with a particular focus on English football (Jones et al., 2019; Purves et al., 2020; Sharman, 2020). The industry received criticism for its televised marketing strategy prior to 2019 (Duncan et al., 2018; Ipsos MORI, 2020) and as a result implemented a 'whistle-to-whistle' ban – prohibiting televised gambling adverts during live sport – from August 2019 (IGRG, 2020). The *Betting and Gaming Council* (BGC, 2020a) claims that this ban has reduced the reach of televised gambling adverts from six million children per weekend to none within a year. On the other hand, organisations such as *Gambling With Lives* (2020) highlight the continued prevalence of gambling-related marketing within sport, thus underlining the futility of any whistle-to-whistle ban.

These are all mechanisms which are analysed through the study's theoretical lens, as will be discussed during Section 1.4. In answering the above research question, the study makes three theoretical contributions on the digital transformation of the land-based gambling industry. Firstly, the study contributes a unique, Marxist perspective of the industry as well as underlining the detrimental socio-economic impact of platform gambling upon its workers and customers, thus providing a theoretical perspective of the societal impact of an information system (IS). Specifically, the study evaluates how the onset of platform gambling may be perceived as exacerbating the flow of capital within the industry as previously highlighted by Cohen (2003). The negative effects of platform gambling are explored as an example of an adverse economic shift which Gimpel and Schmied (2019) argue is a risk or side effect of the implementation of an IS. The study demonstrates how data are used to optimise processes of production and extract further spend from a customer base. The study also contributes a unique, class-based view of the industry, adding to work by Cassidy et al. (2013) and Cassidy (2020), all of whom highlight the relationship between the expansion of capitalism and the growth of gambling industries.

Secondly, thanks to the application of Srnicek's (2017a) platform capitalism (also defined in Section 1.4) to the theoretical lens, the study also demonstrates how platform gambling facilitates profit to its owners through the affordances of data. Srnicek (2017a) argues that data afford five potentialities to platform owners: the enhanced competitiveness of platforms, the efficient co-ordination of the workforce, the cross-subsidisation of platforms and the diversification of the customer base, the transformation of services into a high-margin good, and the possibility of further data through further analysis. The deployment of platform gambling within the UK's betting shops represents an example of how betting shop owners accumulate capital through the deployment of competitive platforms, the optimisation of the shop workforce, improved profit margins, the cross-subsidisation of platforms, a more diverse range of customers and the ability to track customer spend.

Finally, the study answers a call made by Wynn and Williams (2020) for Critical Realist-based research in the field of IS as well as providing a Critical Realist analysis of perceptions within the land-based betting industry itself. Cassidy et al.'s (2013) extensive handbook on qualitative research carried out within the gambling industry contains numerous examples of ethnographic approaches towards the study of the consumption of risk. Yet, Critical Realism - which relies on the analysis of qualitative data (Zachariadis et al., 2013) – is omitted. The study's Critical Realist philosophical and methodological principles are briefly outlined in Section 1.5.

Although relevant themes may emerge during the data collection, the study does not build any bridge between platform and disordered gambling – or gambling which 'involves repeated problematic gambling behaviour that causes significant problems or distress' (*American Psychiatric Association*, 2018, online) – as attempted by other works in the field of psychology (Griffiths et al., 2005; Gainsbury et al., 2015b; Delfabbro et al., 2020; Williams et al., 2021). Rather, the study adopts a uniquely class-based view of the industry to explore how both workers and customers experience exploitation. To this end, the provision of technology in the industry is positioned as proliferating the

redistribution of wealth in the industry from its customers and employees to its owners. It would also be important here to consider how the current research is presented in light of the recent Covid-19 pandemic which saw the UK's betting shops closed for large parts of 2020 and 2021. Data collection took place before the commencement of lockdown measures, thus providing a natural context for the study to be placed as occurring before the pandemic. Data from the *Gambling Commission* (2020b) explore the evolution of customer spend both during and after lockdowns, whilst other research has begun to explore the outbreak's impact on gambling behaviours (Sharman et al., 2021; Wardle et al., 2021). However, more longitudinal data are required to fully assess the long-term impact of the pandemic upon betting shops. The current study evaluates how the outbreak may impact the processes discovered here within the concluding chapter.

1.3: Defining Betting, Gambling and Gaming

This study uses different terminology around the acts of betting and gambling, two terms which can appear interchangeable. Indeed, the UK's betting shops are regulated by the Gambling Act 2005 (HM Government, 2005), whilst the current study explores the role of platform gambling within betting shops. Clarification offered by Perkins (1950) classifies betting as a category of gambling. Perkins (1950) in fact divides gambling into four different categories.

- 1) Gaming – staking money on the outcome of a game (e.g., casino or slots games)
- 2) Betting – staking money on a future event (e.g., a football match)
- 3) Lotteries – the distribution of money by a draw (e.g., the National Lottery)
- 4) Speculation – gambling on stock markets (e.g., shares).

Gambling, therefore, consists of different types of wagering and as such, both OTC and platform gambling consist of the first three categories. For example, OTC transactions generally comprise sports betting or lottery gambling (i.e., betting on the numbers drawn in national lotteries). FOBTs, meanwhile, offer gaming products whilst SSBTs – like OTC betting – offer betting and lotteries on a wider range of events. Online gambling offers all gambling activities found within SSBTs, FOBTs and OTC betting alike.

Although these terms define a variety of gambling activities, they are all characterised by an exchange of capital, the nature of which is dependent on the outcome of a future event. Griffiths (1995) specifically underlines how they are all characterised by five key conditions of exchange.

- 1) The re-allocation of wealth (e.g., money or otherwise).
- 2) Winners gain at the sole expense of losers.
- 3) Exchange is determined by a future event, the outcome of which is unknown at the moment of wager.
- 4) The result is determined (at least, partly) by chance.
- 5) Losses can be avoided by not taking part in the transaction.

Therefore, although the study uses the terms of betting, gaming and gambling as part of the entrance of platform gambling into betting shops, they are all defined as profitable for betting shop owners. The evolution of betting shops is explored in more depth during Chapter Two.

1.4: Aim of the Study

The aim of the study is to explore the perceptions of platform gambling in the land-based sector from key stakeholders through a Marxist, theoretical lens. The key stakeholders under study are employees, customers, and owners (from a shareholder or boardroom position) of the very betting shops which have undergone digital transformation. The theoretical lens focuses on two key aspects of Marxism which are covered during Chapter Three: class and technology. Capitalism, according to Marx (2013a), is characterised by technological innovation occurring simultaneously with the exploitation of the workforce. As Marx (2013b) outlines in *Capital*, 'we must distinguish between the increased productivity due to the development of the social process of production, and that due to the capitalist exploitation of that process. In handicrafts and manufacture, the workman makes use of a tool, in the factory, *the machine makes use of him*' (p. 293, emphasis added). Marxism critiques economic developments through class struggles such as masters and slaves, nobility and serfs and finally, the bourgeoisie and the proletariat (Marx, 2013a). The class analysis explored during the current study is a unique adaptation of the Marxist class struggle to a specific economic setting (see Worsley, 1981). The capitalist class under study consists of the owners of betting shops,

either from a boardroom or shareholder level. The 'proletariat' class on the other hand consists of two groups: the employees and customers of betting shops. Employees find themselves exploited as they must maintain and promote the very platforms which are rendering them obsolete, similar to Marx's (2013b) analysis above. Customers, meanwhile, are exploited through the extraction of immaterial labour. Lazzarato (1996) and Hardt and Negri (2001) define immaterial labour as work or activities which would not be considered the same as traditional labour. Housework, care or consumerism are examples of immaterial labour which are commodified by capitalists as abstract labour. This study contends that customers' immaterial labour – the very act of gambling – is exploited to ensure the owners' growth of data and capital.

Srnicek's (2017a) platform capitalism is an extension of Marxism. Srnicek (2017b) defines platform capitalism as a 'a newly predominant type of business model premised upon bringing different groups together. Facebook and Google connect advertisers, businesses, and everyday users; Uber connects riders and drivers; and Amazon and Siemens are building and renting the platform infrastructures that underlie the contemporary economy. Essential to all of these platform businesses – and indicative of a wider shift in capitalism – is the centrality of data. Data is the basic resource that drives these firms, and it is data that gives them their advantage over competitors. Platforms, in turn, are designed as a mechanism' (pp 255-256). Platform capitalism is positioned by Srnicek (2017a) as a natural evolution of capitalism after the financial crash of 2008 and is thus explored here as an evolution of an economic system which encourages technological innovation to the detriment of the workers. Platform capitalism is also an example of Cyber-Marxism, highlighting the class struggle which occurs through cyber-technologies (Dyer-Witheford, 1999). Data networks facilitate a capitalist system where 'the novelty of the new information infrastructure is the fact that it is embedded within and completely immanent to the new production processes' (Hardt and Negri, 2001, p. 298, emphasis removed). After all, it is difficult for an individual to avoid the establishment of an online presence when surrounded by smartphones, tablets and so on (Rossiter, 2016). According to this view, labour – whether traditional or immaterial – is subject to the new production processes which are exploited through the ownership of cyber-thoroughfares.

The critique of platform gambling based on these themes underlines how labour is abstracted both from the workforce of betting shops and their customers. This class-based approach is also an example of the use of reference and mid-range theories to assess the role of technology (Grover and Lyytinen, 2015). The mid-range theory – in this example, the class- and data-based analysis of the digital development – is a result of the relationship between technology and a broader reference theory such as sociology. This potentially impacts the trustworthiness of the study as ‘the borrowed theories make us blind to what truly happens’ (Grover and Lyytinen, 2015, p. 273). As the research objectives outline, however, these risks were mitigated by the adoption of Critical Realist philosophical and methodological principles.

1.5: Research Objectives

The study undertook five key objectives in order to fulfil its aim.

- 1: An extensive two-part literature review evaluating the development of platform gambling and the Marxist theoretical lens.**
- 2: The gathering of primary data through semi-structured interviews with betting shop owners, customers and employees.**
- 3: The explication of key themes through the thematic analysis of primary data.**
- 4: The aggregation of key themes as mechanisms and their theoretical redescription through the study’s theoretical lens.**
- 5: The retroductive analysis of the data to objectively explore the structure of platform gambling within betting shops.**

The first objective consisted of an extensive, two-part literature review not only to identify gaps within extant research but also to construct the study’s theoretical approach. The first part of the literature review briefly explores the development of the UK’s land-based betting industry as well as the onset of platform gambling. The second part evaluates Marxist approaches to class and technology and the relationship between class struggle and platform capitalism, whilst constructing the specific, theoretical application of class struggle and platform capitalism to platform gambling.

The second objective was the gathering of primary data. The researcher carried out semi-structured interviews to gather qualitative data from three key stakeholder groups of the sector – owners, customers and employees - based in the South West of England. Although participants on occasion may have fulfilled more than one of these roles, they were nonetheless categorised on their primary role. The researcher interviewed thirty-five participants (excluding pilots) between September 2019 and January 2020, totalling sixteen employees, fifteen customers and four owners. The numbers of employees and customers were based on recommendations by Guest et al. (2006) who argue that twelve interviews are the minimum required for data saturation to occur. Owners, conversely, were difficult to recruit. The researcher made initial contact with numerous senior-level individuals and whilst some demonstrated an initial interest, most felt that participation was not to their benefit despite assurances over their anonymity. A combination of availability and snowball sampling techniques were deployed, allowing the researcher to make use of existing contacts as well as word-of-mouth to encourage further participation. The interviews were audio-recorded and transcribed, allowing the researcher to return to each interview to ensure that all data were analysed (see Hayes and Mattimoe, 2004). This process also allowed the use of ‘rich and thick verbatim’ (Noble and Smith, 2015, p. 35) to demonstrate that the study’s findings were accurately reflected by the data.

The remaining objectives relate to the study’s adoption of Critical Realist philosophical and methodological principles. Inspired by Bhaskar (2008), Critical Realism critiques the ‘epistemic fallacy’ (p. 16) – or the conflation of ontology and epistemology – of scientific knowledge, as well as its empirical reductionism (Mingers, 2011). Critical Realist philosophy sees society as a network of open systems each divided into ‘hierarchies’ (Mingers, 2011, p. 306) of the real, actual and empirical, and is concerned with investigating the mechanisms of the ‘real’. These underlying mechanisms – whether perceptible or not - of the real strata give rise to ‘actual’ events which are known to occur and ‘empirical’ phenomena which are directly experienced (Bhaskar, 2008). Furthermore, as societal structures are open in nature, mechanisms and empirical phenomena can change, depending on how mechanisms may interact with those within other open

systems (Wynn and Williams, 2012). The current research therefore is focused on which conditions related to platform gambling can result in the perceived redistribution of wealth between the stakeholder groups, thus recognising that the presence of other mechanisms can result in a different empirical phenomenon. This is reflected in the wording of the main research question.

Critical Realist philosophical principles were translated during this study into methodological principles as inspired by Wynn and Williams (2012) and Iannacci (2014). The third research objective saw the insights from each participant subjected to a process of thematic analysis, a subset of narrative analysis (Riessman, 2005) which has been used in previous studies guided by a similar philosophical approach (Bygstad, 2010; Iannacci, 2014). The most emergent themes – or demi-regularities - represent the main tendencies of platform gambling based on participant experience (Danermark et al., 2002; Wynn and Williams, 2012). These themes were related to the productivity of platform gambling, surveillance capitalism, employee targets related to online customer acquisition, alterations to situational and structural characteristics of gambling and the prevalence of marketing. Fourthly, emergent themes were aggregated, as inspired by Iannacci (2014), grouping themes together according to the affordances of platform gambling which they best described. Subsequently, two aggregate themes emerged: the productivity of data and the omnipresence of platform gambling. The study then adopted Volkoff and Strong's (2013) view that the affordances of an IS act as the mechanisms within a structure, thus rendering the two aggregate themes as the mechanisms to be theoretically redescribed through the study's theoretical lens. Specifically, each aggregate theme was explored through their potentiality to each stakeholder group as part of the class struggle and evaluated against the affordances of data within a platform capitalist system. Furthermore, the abductive analysis also reflected Bhaskar's (2008) emphasis on the open nature of structures, demonstrating how each aggregate theme overlapped one another to produce the perceived redistribution of wealth.

The final objective was that of retroduction, a form of analysis which moved the argument 'from a description of some phenomenon to a description of something which produces it or is a condition for it' (Bhaskar, 2009, p. 29). In summary, the process of retroduction returns to the raw data to explore the structure under study in order to confirm or amend the initial theoretical lens. Retroductive analysis during the current study therefore explored the structure and subsequent mechanisms to emerge from the 'real' stratum of the development of platform gambling. Retroduction was carried out through the development of an analytical narrative (see Aaltonen and Tempini, 2014), along with the adoption of Bygstad's (2010) micro-macro approach. The researcher firstly explored the original, 'micro'-structure. The key difference between the retroductive model and the abductive model was the objective return to the study's most emergent theme, the productivity of platform gambling, and its presence as the main mechanism within the structure. Specifically, this mechanism emerged out of subthemes related to the reduced footfall within betting shops owing to online gambling, the technology readiness possessed by young customers and their failure to replace older customers and reduced production costs. An analytical narrative was then developed to produce the structure which eventually resulted in more profit for betting shop owners through their specific implementation of the situational and structural characteristics of gambling, loyalty schemes and the subsequent co-ordination of abstract labour. The retroductive model was then compared to a 'macro'-structure consisting of Fleetwood's (2002) Critical Realist stratification of Marxist socio-economic ontology, thus exploring the relevance of Marxism to the industry's digital transformation. The retroductive process also compared the micro-structure to theoretical viewpoints given by proponents of Marxism's main theoretical opponent, liberalism. However, the comparison between the micro-structure and analyses given by theorists such as Fukuyama (1992) and Hayek (1945) found that Marxism provided a more accurate contextualisation of the study's retroductive structure.

1.6: Conclusion

This opening chapter has detailed the research question of the study, its theoretical contributions to the fields of IS and gambling-related studies, its aim, and its objectives.

The study is structured according to its objectives. Chapter Two provides a brief history of land-based betting in the UK and explores the development of platform gambling within betting shops, whilst Chapter Three critically evaluates the themes of class struggle and platform capitalism. Chapter Four outlines the Critical Realist philosophical and methodological principles used during data analysis as well as the qualitative methodology used for data collection. Chapter Five fulfils two objectives. It firstly evaluates the main, emergent themes to have been explicated from the data before outlining the three policy recommendations according to participants' experiences. Specifically, these were the extension of the FOBT stake limits to online gaming products, the prohibition of *all* gambling-related marketing, and the greater emphasis of social responsibility (for example, the removal of all online-related targets and improvement of employee training) within betting shops. The first two of these recommendations have been made elsewhere (Gambling Related Harm APPG, 2019), and are also being considered as part of the review of the Gambling Act 2005 (*Department for Digital, Culture, Media and Sport*, 2020).

Chapter Six also fulfils two objectives. Firstly, it evaluates the thematic aggregation of the emergent themes according to generalisations about their affordances of platform gambling to form the two key mechanisms before secondly theoretically redescribing said mechanisms through the theoretical lens. Chapter Seven then returns to the raw data, objectively exploring the actual structure emerging from the development of platform gambling within betting shops, before comparing it to Fleetwood's (2002) stratification of Marxist ontology. The study concludes with Chapter Eight, summarising the findings of the study and its theoretical contributions as well as identifying future areas for research which have developed significantly in light of the Covid-19 pandemic.

Chapter Two: The Development of Platform Gambling

2.1: Introduction

'Anyone who bets has to be one of life's sufferers... They come in all shapes and sizes. They use different methods and want different things out of the experience of betting... There are certainly plenty of sufferers' (McCririck, 1991, p. 26). Indeed, gambling has always been prevalent within British society as evidenced by eighteenth century-literature advising on the odds of blood sports such as cock-fighting (Proctor, 1773). Fast forward to the twenty-first century and betting shops provide opportunities to gamble on many products (bloodsports not amongst them). This chapter evaluates the evolution of the industry towards an omnichannel continuum of platform gambling, linking OTC betting to FOBTs, SSBTs and online gambling, thus providing a consistent brand experience across a synergistic network of integrated touchpoints through a single loyalty scheme or account (Zajdel et al., 2020). Such accounts allow customers to deposit money OTC for online usage if more convenient, and *vice versa* to use in shop whether OTC, on FOBTs or SSBTs (Jones et al., 2020).

The operators of the brands with the biggest land-based presence in the UK - William Hill, Ladbrokes, Betfred and Coral – have all embraced platform gambling. Yet, as Table 2.1 demonstrates, the presence of betting shops in the UK has declined. This can be attributed to the implementation of a maximum stake on FOBTs enacted in April 2019, reducing the maximum possible stakes from £100 per spin to £2 (Woodhouse, 2019). The total number of betting shops shrunk by approximately an eighth in the first-year post-implementation (*Gambling Commission*, 2020a), whilst further results for the 2020 business year from individual companies signify further closures. *William Hill* (2021) closed 713 shops between 2019 and 2020, whilst *Entain* (2020b, 2021) – the owner of Ladbrokes and Coral - closed 633 shops during the same period. The latest available data from Betfred (Betfred Group Limited, 2019) indicate that it closed 72 shops between September 2018 and September 2019. However, the reduced number of shops could also be attributed to the growth of online spend which is indicative of a growth in online consumerism within the UK (*Office for National Statistics*, 2021). Yet, whilst the land-based industry is shrinking, Cohen's (2003) narrative of the capital-draining nature of

shops still exists. Gambling is ‘an industry that feasts on the poor and vulnerable to survive... they can’t go to buy a pint of milk without walking past a betting shop’ (Pidd, 2017, online). Indeed, Muggleton et al. (2021) conclude that gambling with even the smallest amounts is more likely to be associated with economic phenomena such as ‘financial distress, social exclusion, disability and unemployment’ (p. 5).

Table 2.1: Number of Betting Shops in the United Kingdom.							
Betting Shop	March 2014	March 2015	March 2016	March 2017	March 2018	March 2019	March 2020
William Hill	2,382	2,308	2,326	2,339	2,289	2,264	
Ladbrokes	2,271	2,190	2,149	1,945	1,894	1,828	
Betfred	1,383	1,375	1,366	1,680	1,667	1,620	
Coral	1,812	1,838	1,835	1,637	1,591	1,529	
Other Operators	1,263	1,284	1,239	1,199	1,118	1,079	
Total	9,111	8,995	8,915	8,800	8,559	8,320	7,681
Source: <i>Gambling Commission</i> (2019, 2020a)							
Note: A breakdown for individual shops is not given within the <i>Gambling Commission’s</i> (2020a) most recent industry data.							

This chapter evaluates how the digital transformation of shops may exacerbate the perceived exploitation described by Cohen (2003) and Pidd (2017). Firstly, the chapter briefly explores the evolution of the land-based industry from its early stages to the modern day, evaluating how the deregulation of the industry brought by the Gambling Act 2005 enabled the development of platform gambling and its role within betting shops. The chapter then draws on work by researchers within the field of gambling such as Griffiths (1999. See also Griffiths et al., 2005), Gainsbury (see Gainsbury et al., 2015a, 2015b, 2016, 2020a) and Newall (see Newall et al., 2019a, 2019b, 2020a, 2020b, 2021) to evaluate how platform gambling makes the sector more accessible with a greater level of features, before exploring how the features of platform gambling are advertised through strategies such as loyalty schemes, television and social media. The chapter ends by

highlighting the stakeholder groups under study and the themes to be explored within the data collection.

2.2: The Development of the Land-Based Betting Industry

Where there is sport or contest, there is an opportunity to gamble which is also generally opposed by anti-gambling lobbyists. This section briefly evaluates the development of the UK's gambling industry from the eighteenth century, through the interwar years and to the legalisation of the land-based industry in 1961. The growth of the UK's main land-based operators are then explored before evaluating how the industry experienced further change during the 1980s. Finally, this section evaluates the impact of the Gambling Act 2005 which fully liberalised the gambling industry at the time of its inception, as well as arguments for and against the review of the Act which commenced in December 2020.

Evidence of arguments for and against gambling can be found as early as the eighteenth century. The Georgian era saw all social classes engaged in gambling on sports or card games (Cock-Starkey, 2013). A counter-narrative characterised by the implied dishonesty of gambling (Collins and Butler, 1708) did little to prevent gambling. For example, the Duke of Cumberland lost £10,000 in 1750 on the outcome of a pugilism (now known as boxing) contest (Oxberry, 1812). Continuing into the nineteenth century, the Marquess of Hastings lost £100,000 during the 1867 Derby meeting and was forced to sell land to settle the subsequent debt (Pinfold, 2008). Such was the desire to combat the undesirable links between horse racing and betting, the Jockey Club portrayed gambling as an immoral activity linked with crime and dishonesty (Barrett, 1888). These narratives influenced decisions to discourage the working class from gambling, such as in 1853 when the British government outlawed 150 betting shops in London frequented by mainly the working class (Munting, 1989). Illegal, cash-based gambling still occurred nonetheless, supporting other industries around the UK, such as the fledgling pedestrianism industry in Lancashire during the Victorian era. Pedestrianism – walking and running races – helped to underpin a combined gambling and publican industry (Oldfield, 2014).

A further development in gambling activities to have emerged within the North of England during the nineteenth century was football coupon betting where newspaper readers submitted their predictions of chosen matches for a fee with a prize awarded to the winner (Clapson, 1992). The popularity of coupons saw gambling grow into the beginning of the twentieth century despite strong anti-gambling opposition. Efforts were made to rid football of coupon betting with campaigns to ban the circulation of football coupons (*The Observer*, 1913; *The Manchester Guardian*, 1917), eventually leading to the Ready Money Football Act 1920 which prohibited cash betting on football (Hansard, 2019). The Act, however, still permitted coupon betting on a credit system with subscription payments made after the weekend's fixtures. This facilitated pools betting - where customer money was pooled and shared amongst the winners - which became the most popular form of football betting during the 1920s (Clapson, 1992), and at least £20 million per year was being spent on football coupons during the mid-1930s (Huggins, 2007). The Football League responded in 1936 by refusing to print fixtures until the Friday before the weekend on which they were due to be played (*The Manchester Guardian*, 1936). The 1932/33 Royal Commission on Lotteries and Betting also argued for the prohibition of pools betting in the belief that the activity normalised unethical behaviour amongst young people, promoting the idea that income could be made purely through gambling as opposed to being earned through labour (HM Government, 1934).

Yet, gambling – and pools betting in particular – became a happy distraction for the British public during the Second World War (Huggins, 2015). On the other hand, even legal gambling was seen by objectors as diverting time and resources away from the war effort (Huggins, 2015). The prevalence of gambling during the Second World War, however, was inevitable. The 1932/33 Royal Commission estimated that at least £90 million per year was spent on gambling during the interwar years (HM Government, 1934). This vast spend was facilitated by a network of bookies' runners – employed from the 1920s by illegal bookmakers ensconced in offices, shops and factories alike - to accept wagers from surrounding homes or workplaces (Chinn, 2004). Wagers were often taken with the use of clock bags, or bags where betting slips were kept and then locked at the

time of the first race to prevent fraud (Chinn, 2004). Bookies' runners also facilitated the growth of the industry after the Second World War and were widely recruited either as runners, lookouts or even merely to be arrested by the police (Huggins, 2013). The networks of bookies' runners in the period up to 1960 meant that the working class – whether through bookmaking, being an employee of said bookmaker, or indeed as a bettor – were offered an escapism from daily life (Downs, 2015). Bookmakers went to great lengths to ensure a profit, but the extensive network of runners suggested that the gambling industry – although illegal – was a part of British society.

The legalisation of betting shops therefore appeared inevitable. Chinn (2004) labels the repression of betting as 'an impossible task' (p. 226), and the government thus sought to 'control cash betting off-course without encouraging it' (p. 239). The Betting and Gaming Act 1960 'begrudgingly' (Jones et al., 2000, p. 223) acknowledged the existence of cash betting in the UK and allowed for legal, cash betting within in licensed offices from 1961. Strict regulations, however, meant that no customer under the age of eighteen could gamble, shops were to close before 18:30 and stay closed on Sundays, whilst written matter except for legal notices were also prohibited (Chinn, 2004). The use of televisions or portable devices was also prohibited (Samuels, 2011). Horseracing odds were displayed on blackboards or marker sheets by a boardman or boardwoman (Samuels, 2011) who received information from radio commentary of the odds, racing and results provided by the Exchange Telegraph Company (Extel) from the racecourse (Hey, 2008). In summary, betting offices – although now licenced – were not to encourage passing trade or loitering.

This period saw the growth of the UK's main operators within the land-based industry. William Hill, having operated a credit betting business since 1934, had already amassed a personal fortune totalling more than £10 million by 1962 (Chinn, 2004). Ladbrokes, meanwhile, was formed by two commission agents - Schwind and Pennington - in 1886 and was then transformed into a traditional bookmaking operation by Arthur Bendir in 1902 (Kaye, 1969). According to Kaye (1969), the owners of neither Ladbrokes nor

William Hill had any intention of opening LBOs after the Betting and Gaming Act 1960, yet Ladbrokes had opened 400 shops in London and the Isle of Wight by 1969 (Kaye, 1969), growing to 660 shops by 1972 (Chinn, 2004). Hill first purchased shops from other bookmakers during the late 1960s and had subsequently grown the business to 500 shops by the time of his death in 1972 (Chinn, 2004). As for Coral, 'By the 1930s, [bookmaker Joe] Coral boasted an open credit office in the West End of London, but the core of his business was based on a band of seventy to eighty agents who bought in cash bets. As he put it, "Where they took the bets wasn't my business"' (Chinn, 2004, p. 117). Post-legislation, Coral opened twenty-three shops by 1962 and experienced the same exponential growth as the rest of the industry thereafter (Chinn, 2004). Betfred, meanwhile, was founded out of a single shop in Salford in 1967 under the name of Done Bookmakers by Fred Done who had previously worked for his father's bookmaking business (Chinn, 2004; Hayler, 2011; *Betfred*, 2020). Unlike the darkened offices mandated by the legislation, Done opened attractive, carpeted shops with business levels allowing a second shop to open two years later (Hayler, 2011). Betfred's growth was slow in comparison to Hill, Ladbrokes and Coral, opening 100 shops by 1997 and 200 by 2002 (*Betfred*, 2020). Yet, *Betfred* (2020) today claims to be the country's biggest chain of independently owned shops with 1,578 shops as of September 2019 (Betfred Group Limited, 2019).

The constraints of the Betting and Gaming Act 1960 meant that the growth of these companies after 1961 did not signify an openly advertised industry. Televisions were not permitted within betting shops until the onset of the Betting, Gaming and Lotteries Act 1984, an act which also permitted refreshments for customers (HM Government, 1984). For Cassidy (2020), these developments - whilst also representing the development of Thatcherite capitalism - represented a significant development in the industry with parliamentary attitudes recognising the industry as respectable. Handwritten odds were replaced by sophisticated visuals and Extel commentary was now either supplemented or replaced altogether by televised racing. William Hill, Ladbrokes and Coral all bought shares in a betting shop television company named Satellite Information Services (SIS) and by 1987, every betting shop in the UK was subscribing to its service (Samuels, 2011).

This was a prime example of the betting companies' ability to use new technology to generate further revenue. However, the blueprint for further technological advancement was provided in the Gambling Act 2005.

The Gambling Act 2005 developed as a result of the *Gambling Review Report* (Gambling Review Body, 2001) – also known as the Budd Report - which Cassidy (2020) labels as the 'high water mark of gambling deregulation' (p. 28). The Budd Report recommended a deregulation of the land-based betting and casino industries as well as the formulation of a single regulatory body for the industry, the Gambling Commission. For betting shops, the recommendations were made for the maximum number of gaming machines per shop (up to four), a minimum age of entry (eighteen), and the relaxation of advertising restrictions in addition to the regulation and marketing of online sites (Gambling Review Body, 2001). As Cassidy (2020) also notes, the Budd Report made 176 recommendations, all but nine of which were adopted by the Government (Department for Digital, Culture, Media and Sport, 2002), whose response factored in its 'desire to see Britain become a world leader in the field of online gambling' (Department for Digital, Culture, Media and Sport, 2003, para. 133). The immediate response to the Government's intention to deregulate the industry was faced with criticism as 'all hell broke loose' (Cassidy, 2020, p. 29) within the UK's press. According to Cohen (2003) who argues that 'there are few means more ruthlessly efficient [than the gambling industry] for redistributing wealth from the poor to the rich' (p. 20), the Government had adopted the view that 'the sight of the elderly, the tired and poor spending their money wisely is a calamity' (p. 21). Nevertheless, the Gambling Act 2005 – despite treating gambling as morally neutral – transformed the industry from a sector which was tolerated into a sector which could now be openly advertised (Cassidy, 2020).

The deregulation of gambling brought by the Gambling Act 2005 simultaneously paved the way for the development of platform gambling whilst neglecting the digital transformation which would later be offered by smart devices. Indeed, FOBTs and online gambling were initially regulated under the Act whilst SSBTs and smartphones would

arrive later. A review of the Act – now deemed as outdated for the digital economy - began in December 2020 (*Department for Digital, Culture, Media and Sport, 2020*). This is no surprise; the Budd Report makes no reference to the use of smartphones or other personal devices on which gambling now often takes place (Gambling Review Body, 2001). The review encompasses areas such as marketing, the use of VIP schemes, protection for online customers, maximum stakes for online casino- and slot-based content, the powers of the Gambling Commission and age verification. This is in addition to the *Gambling Commission's (2020c)* consultation investigating the need for affordability checks in relation to online gambling. Those in favour of such measures – including parliamentary committees responsible for the scrutiny of the gambling industry - argue that the review is needed to bring regulation in line with the digital age (Gambling Related Harm APPG, 2019; House of Commons Public Accounts Committee, 2020). The review has also been backed by sports bettors on the provision that gaming be legislated differently to betting, along with the view that sports bettors should not be subjected to the same affordability checks as gaming customers (Barber, 2021a). This view is based on the potential harm caused by the structural characteristics of online gaming products, as evaluated later.

However, concerns have been raised by the Betting and Gaming Council (BGC) – the standards body which represents operators based in the UK - that onerous regulation may drive customers into gambling with unlicensed operators. 'If the Internet and smartphone era means anything, it means that gamblers online have got somewhere else to go other than safer, highly regulated operators. And if history teaches us anything, it is that appropriate regulation can be good for the industry as well as society as a whole' (Watts, 2021, online). The BGC claims that 460,000 people used illegal, offshore gambling sites in 2020, an increase from 250,000 between 2018 and 2019 (PwC, 2021). Other industry stakeholders contend that the review is the result of 'the rise of populism, the ascent of poor leadership, the acceptance of radical ideology and dogma, a rejection of liberal values such as a belief in scientific method and the need for evidence, and the freedom to do what you like without harming others' (Donoghue, 2020, pp. 56-57). The BGC also argues that the review may be unfairly influenced by 'prohibitionists' (Dugher,

2021, online), whilst organisations such as *Gambling With Lives* (2020) do not wish to prohibit gambling but seek legislative reform to minimise gambling-related harm. Although liberal viewpoints related to the freedom to gamble may be aligned with the spirit in which the Act was created, they fail to account for the potentially detrimental impacts brought by digital transformation.

2.3: The Onset of Platform Gambling and the Omnichannel Continuum

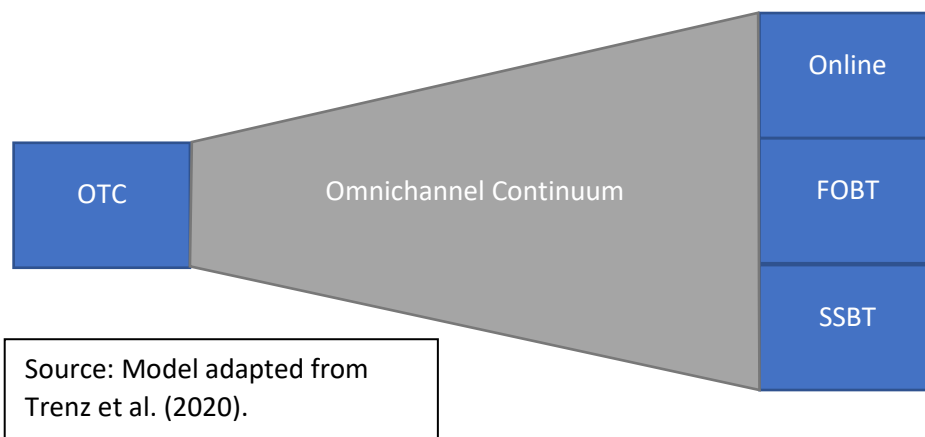
Platform gambling - defined here as the network of platforms (hardware or software) which shape the exchange between betting shop owners and their customers - has transformed the land-based betting industry. FOBTs, SSBTs and online gambling have all rendered gambling more accessible with more features, altered the marketing strategies of betting shop owners, and impacted the job roles of employees. Although these platforms maintain their own distinctive features, they all rely on data as part of their functionality. These data – whether they are user data or algorithms related to sports betting odds or the outcome of a slots game – form the very DNA of platform gambling, facilitating further spend as well as optimising the process of production.

Betting shop owners manage forms of platform gambling as interlinked with OTC betting through an omnichannel network (*Coral, 2017; Ladbrokes, 2019a; William Hill, 2019a*). Jones et al. (2020) describe the approach taken by betting shops as a ‘multi-channel solution’ (p. 10), yet the networks which are now found in betting shops are like those adopted by other retail companies in the face of the inevitable removal of barriers between online retailing and brick-and-mortar shops (see Hsia et al., 2020). The end result is an omnichannel solution, or ‘the synergetic management of the numerous available channels and customer touchpoints, in such a way that the customer experience across channels and the performance over channels is optimized’ (Verhoef et al., 2015, p. 176, emphasis removed). The transition to an omnichannel model brings challenges through the operational and logistical challenges faced when delivering products to customers or through the updating of existing brick-and-mortar fabric for omnichannel operations (Larke et al., 2018; Trenz et al., 2020). However, Hickman et al. (2020) argue

that omnichannel integration can be successful if it fulfils four key criteria: brand familiarity, customisation, perceived value and technology readiness. Tueanrat et al. (2021) also underline the importance of value to omnichannel customers, whilst Hsia et al. (2020) argue that personalised incentives can attract customers to such networks.

Verhoef et al.'s (2015) definition is reflected within the omnichannel approach which is pursued by the owners of the UK's betting shops. Zajdel et al. (2020) specifically refer to the purpose of the omnichannel approach within the industry as providing a consistent brand experience to the customer through a variety of touchpoints. The main benefit of the omnichannel approach, therefore, is the access to a single product and account offering whether through OTC betting, SSBTs, FOBTs or online. Figure 2.1 demonstrates how owners manage an 'omnichannel continuum' (similar to Trenz et al., 2020, p. 1227), with online gambling, FOBTs, SSBTs and OTC betting all interwoven within one network. Customers, after entering the continuum through an initial entry point, can then migrate to other touchpoints from within the continuum.

Figure 2.1: The Omnichannel Continuum.



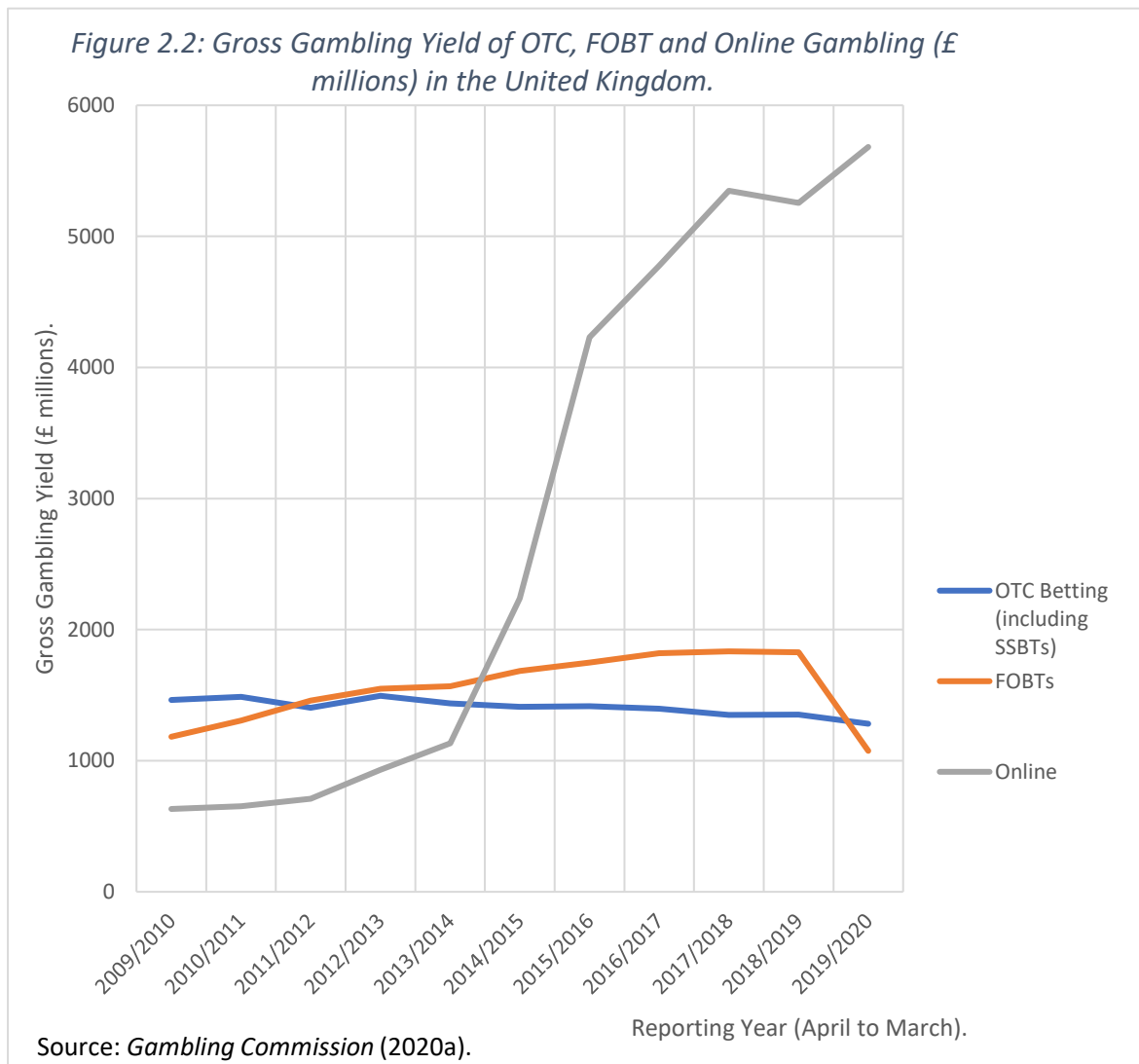
Platform gambling – thanks to its management within the omnichannel continuum - allows a greater degree of flexibility to both customers and owners. Each element of platform gambling has also transformed the industry through its own alterations to the situational and structural characteristics of gambling. These characteristics are defined by Griffiths (1999) and Griffiths et al. (2005) and relate specifically to the commencement

and continuation of gambling. Situational characteristics consist of factors which encourage the initial decision to gamble (for example, the location of the betting shop), whilst structural characteristics are defined by features (such as free spins, betting in-play or bigger volume of gambling opportunities) which encourage continuous spend. As DeSanctis and Poole (1994) argue, the greater the number of features embedded within a system, the more actions which are then available to the user. Platform gambling renders the industry as more accessible with more features available to its customers, making the omnichannel deployment of such platforms profitable for betting shop owners.

Finally, platform gambling has theoretically transformed the job role of the shop employee, comparable to the wider context of digital transformation rendering many job roles 'obsolete' (Griffiths et al., 2020, p. 73). Clarke and Critcher (1985) highlight the inevitable permeation of digital technology into leisure industries and in this instance, staff must maintain the technology which would theoretically threaten their own jobs. Moreover, the development of such technologies theoretically allows for the reduction of costs associated with brick-and-mortar units (Kimes and Collier, 2015) and self-service platforms may attract more customers who wish to avoid interaction with shop workers (Doyle, 2006). This appears to present a win-win for shop owners who benefit through the technology's dual cost-saving and accessibility benefits.

Figure 2.2 demonstrates the GGY generated within the UK's gambling industry by its OTC betting, FOBT and online channels according to the *Gambling Commission* (2020a). Sports betting within betting shops now accounts for fifty-three percent of shops' GGY, up from forty-one percent the year before. This is a direct result of the maximum stake implemented on FOBTs from April 2019. Shop owners saw GGY from FOBTs fall from £1.8 billion between April 2018 to March 2019 to £1.1 billion a year later. However, the collective GGY taken within betting shops is less than half of that taken online where £5.6 billion is now made by the industry. The following sections evaluate how FOBTs, online gambling and indeed, SSBTs – the GGY from which are included within Figure 2.2 as part

of OTC betting as per the *Gambling Commission (2020a)* – each provide their own gambling opportunities for the customer.



2.3.1: FOBTs

FOBTs first appeared within betting shops in 1999 and then grew significantly from 2002 when changes to taxation allowed owners to deploy low-margin games such as roulette (Cassidy, 2012; Woodhouse, 2019). Unlike conventional fruit machines, FOBTs – offering slot- and casino-based games as shown in Figure 2.3 – use a random number generator (RNG) to decide the outcome of games, all of which are based on a return to player (RTP) percentage geared towards the house edge (Snowdon, 2013). The category of FOBTs permitted within betting shops under the Gambling Act 2005 previously housed B2 and B3 category games (HM Government, 2005; Snowdon, 2013). Both game categories offer

maximum jackpots of £500 per spin but previously differed in terms of their maximum spend per spin when B2 games (such as roulette or blackjack) previously saw a maximum of £100 spent per spin every twenty seconds (Snowdon, 2013). B2 games were restricted by a stake limit in April 2019 which reduced the maximum stake possible on FOBTs from £100 to £2 per spin similar to B3 slots games (Gambling Commission, 2020a). Despite recommendations from the Gambling Commission of a less severe reduction to a maximum of £30 per spin, it was felt that ‘a reduction to £2 will reduce harm for the most vulnerable... we also think that a limit of £2 is likely to target the greatest proportion of problem gamblers and mitigate the impact on those most vulnerable to harm, such as

Figure 2.3: Fixed Odds Betting Terminal.



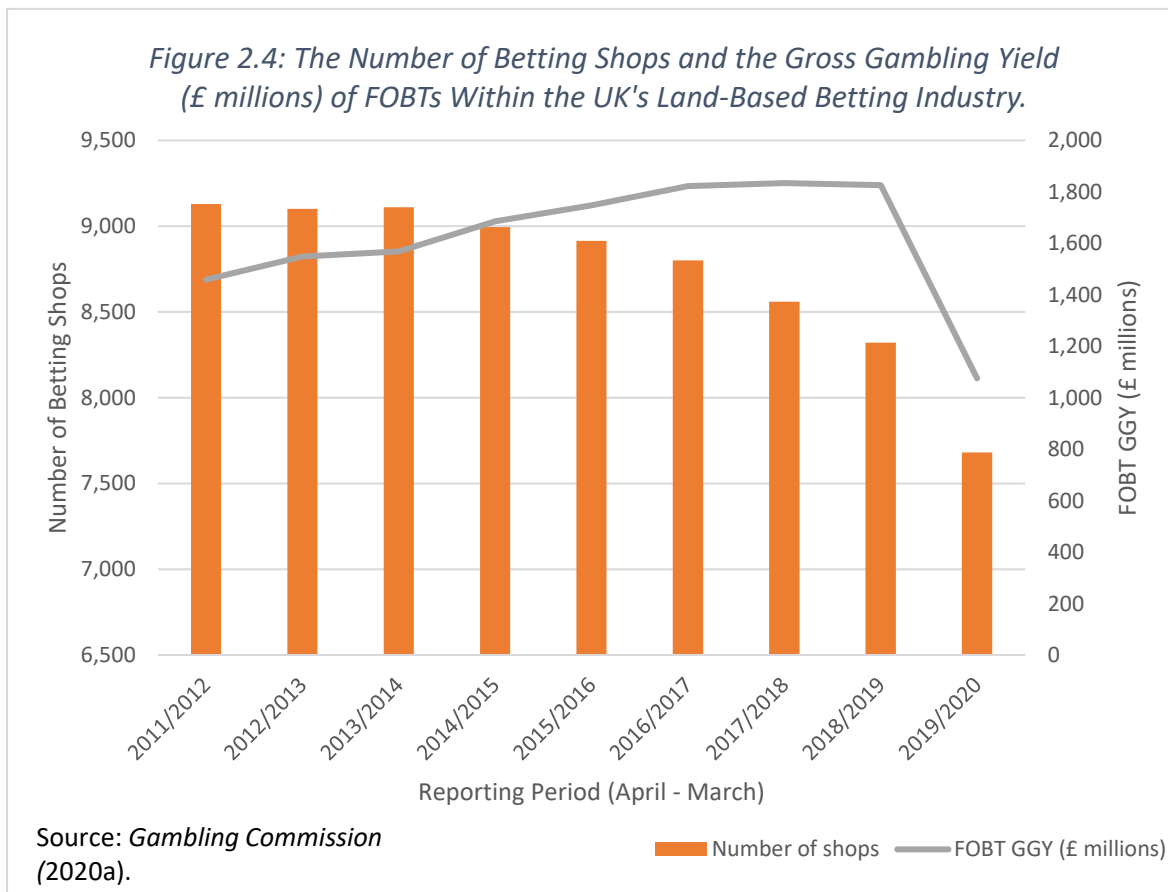
those in more deprived areas and those who are unemployed’ (Woodhouse, 2019, p. 28). Such a reduction in stakes followed a narrative based on the argument that FOBTs are a source of gambling harm.

FOBTs have attracted significant criticism since their introduction, being labelled as the ‘crack cocaine’ of gambling (Snowdon, 2013; Chapman, 2019). For Nevison (2008), betting shops provide “a licence to print money’, a description that, with the arrival of fixed odds betting terminals, could be applied again in recent years’ (p. 83). Indeed, 12.7 percent of FOBT players are likely to suffer from disordered gambling, compared to lower percentages of online sports bettors (3.7 percent) or online gaming customers (8.5 percent, *NHS Digital*, 2019). Data from the National Gambling Treatment Service (2020) show that 20.3 percent of customers seeking treatment for disordered gambling between April 2019 and March 2020 played on FOBTs whilst 26.4 percent played slot-based games online. Meanwhile, Delfabbro et al. (2020) underline the correlation between electronic gaming machine (EGM) players and the prevalence of disordered gambling, whilst Philander and Gainsbury (2021) argue that EGMs are systematically misunderstood by their players who may be characterised by overconfidence. In Canada, research by Williams et al. (2021) also underlines the higher prevalence of disordered gambling within areas with a greater number of EGMs.

On the other hand, Leyland (2019) warns that rhetoric describing FOBTs as the ‘crack cocaine’ of gambling is excessive, suggesting that they are no more harmful than other products within the sector. Snowdon (2013) contends that the term ‘crack cocaine’ has been used to pejoratively describe new gambling products since the 1980s. Operators have underlined the risks of the maximum stake to the industry, arguing that stake cuts would result in job losses (Meddings, 2019). Figure 2.4 demonstrates the link between the number of shops and the GGY of FOBTs, with both significantly decreasing between April 2019 and March 2020 (*Gambling Commission*, 2020a). Indeed, the GGY derived from FOBTs totalled £1.1 billion, down from £1.8 billion derived during the 2018/2019 reporting year, whilst the number of betting shops subsequently decreased to 7,681

during 2019/2020 from 8,320 the previous year. The enforcement of a maximum stake on FOBTs has therefore underlined how shop owners may have previously relied on GGY earned from FOBTs to maintain shop profitability. Furthermore, the data displayed in Figure 2.4 are from March 2020, in accordance with the *Gambling Commission's* (2020a) reporting periods, and thus may not account for the total number of closures highlighted by *William Hill* (2021) and *Entain* (2020b, 2021) earlier.

There is also an argument that FOBTs worsen working conditions and create divisions within betting shops. One former betting shop manager argues that regulation on FOBTs was deserved in light of the greed they encourage from shop owners (Rees, 2019), whilst Jones (2019) describes FOBTs as ‘the devil’s own playthings... A modern-day plague sent to wreak havoc and bring misery to the masses’ (p. 7). Studies by Hing and Nuske (2012) and Beckett et al. (2020) underline the issues faced by land-based employees who lack the training required to identify and interact with disordered gamblers. Cassidy (2012) also contends that OTC bettors may perceive FOBT gaming as a lesser skilled form of gambling, with luck depending solely on gameplay as opposed to the perceived skill and



studying of sports form. This creates a division within shops between OTC and FOBT customers.

The structural characteristics of FOBTs can be aligned to those of the fruit machine. Parke and Griffiths (2006) highlight the structural nature of the actual play mechanism or, for example, the need to align three or more logos (such as lemons) as well as the importance of bonus games – such as the ability to gamble for greater winnings or bonus spins – to encourage further play. Meanwhile, the short time between spins is underlined by Griffiths (1999) and Parke and Griffiths (2006) as a structural characteristic specifically enforced by FOBTs, whilst other structural characteristics including audio, visual and the use of features such as autoplay (Griffiths, 1999; Parke and Griffiths, 2006; Parke and Parke, 2013) also encourage continuous spend. FOBTs ‘possess inherent structural features that facilitate rapid and continuous play, as well as adopt variable ratio schedules of reinforcement that subject a player to addictive patterns of gambling behaviour’ (Harris and Parke, 2018, p. 598). Schüll’s (2012) study on the deployment of EGMs in Las Vegas finds that the structural features of such machines are addictive by design thanks to the competition forced by content providers. Similarly, the features of FOBTs ensure that customers can experience prolonged periods of continuous spend.

2.3.2: Online Gambling

Bull (2009) argues that online gambling is open to criticism for its absence of corporate social responsibility (CSR), defined by Brown and Dacin (1997) as reflecting an ‘organization’s status and activities with respect to its perceived societal obligations’ (p. 68). Specifically, the digital interactivity, anonymity and accessibility all facilitate growth to the online gambling industry which in turn fails in its CSR towards the Gambling Act 2005’s three objectives: the protection of children and vulnerable persons from gambling, the maintenance of gambling as free from crime, and the conduction of gambling in a fair and open way (HM Government, 2005). Yani-de-Soriano et al. (2012) opine that it is unrealistic to replace profit maximisation as a priority with harm minimisation as operators are in business to make a profit. Online gambling – which is more prevalent in

deprived areas of the UK (Forrest and McHale, 2021) - has overtaken the betting shop in recent years, as demonstrated earlier in Figure 2.2. In contrast to the betting shop, the annual GGY of online gambling has increased exponentially from £632 million in 2010 to £5.6 billion in 2020 (*Gambling Commission, 2020a*).

The companies under study here form a considerable fraction of remote sector's GGY yet the development of their online channels has not been without struggle (Cassidy, 2020). William Hill launched its online sports betting product in 1998 but had fallen behind in the market until 2008 when it agreed to use software from a third-party supplier, whilst Ladbrokes launched its online service in 2000 through its own software, yet its digital profits halved in 2012 (Cassidy, 2020). *Betfred* (2020) launched its online platform in 2004 with its retail growth occurring simultaneously, opening its 500th shop in 2005. Coral traded as Coral Eurobet from 2002 giving it some online presence (Samuels, 2011; *Entain, 2020a*), before launching its own online service from 2012. The ownership of each company has also evolved. Ladbrokes and Coral are now owned by *Entain* (2020a), an operator which primarily focuses on online gambling, whilst William Hill merged its online and retail operations in 2020 (Barber, 2020) before being acquired by Caesar's Entertainment in 2021 after the data collection process had concluded (Barber, 2021b). Table 2.2 demonstrates the breakdown between online and shop-based GGY for William Hill, Ladbrokes and Coral since 2014. However, there are some caveats to be considered with the data given in the table. The most recent GGY from 2018 to 2020 for Ladbrokes and Coral is given by *Entain* (2019a, 2020b, 2021). Accurate data for GGY from these two firms are not available from 2017 thanks to the firms undergoing a merger at that time. Data for Ladbrokes and Coral before 2017 consist of revenues given by the two individual legacy firms (*Gala Coral Group, 2015; Ladbrokes, 2016*). Furthermore, there is an exponential growth in the online GGY for Ladbrokes Coral between 2016 and 2018 thanks to its acquisition by *Entain* (2019a). Revenues from *Betfred* are omitted as although *Betfred* raised a gross profit of £475 million during the period to September 2019 (the most recent business reports available), there is no up-to-date breakdown between its retail and online channels (*Betfred Group Limited, 2019*). Nonetheless, data from Ladbrokes, Coral and William Hill all indicate a growth in online gambling compared to

that within betting shops. Table 2.2 also demonstrates the impact of the Covid-19 pandemic upon land-based GGY, an aspect which is explored in more detail during Chapter Eight.

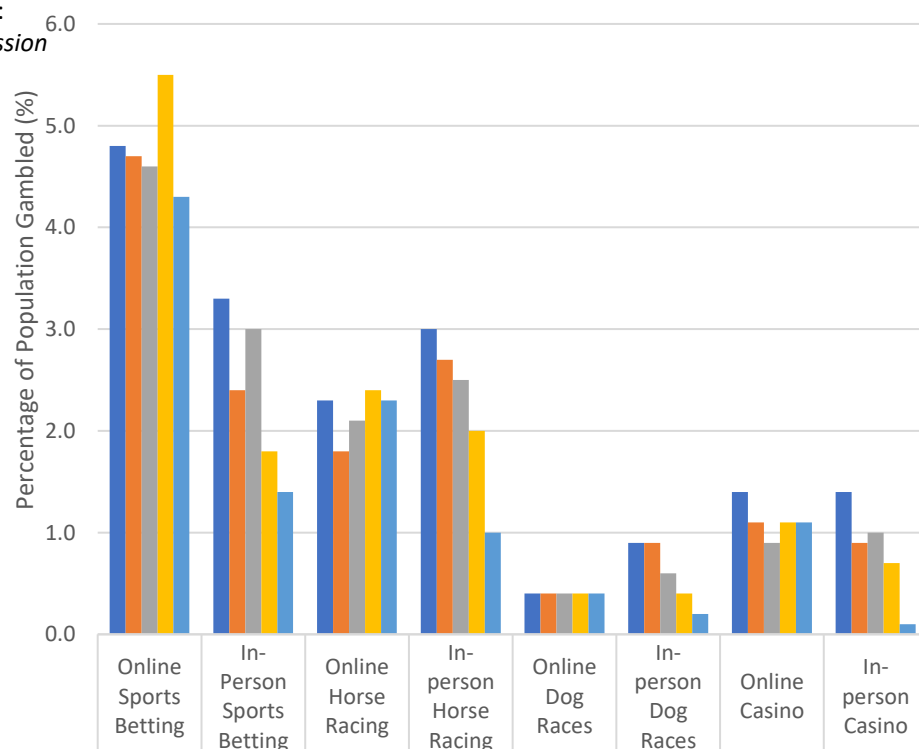
Table 2.2: A Breakdown of Online and Land-Based Gross Gambling Yield Raised by Ladbrokes Coral and William Hill (£ millions) between 2014 and 2020.							
	2014	2015	2016	2017	2018	2019	2020*
Ladbrokes Coral							
Land-Based GGY (£ millions)	1,338.9	1,342.4	1,454.4		725.7	817.7	497.3
Online GGY (£ millions)	427.2	483.3	460.8		1,134.9	1,367.8	1,707.7
William Hill							
Land-Based GGY (£ millions)	701.5	666.7	666.9	679.5	668.6	554.8	278.2
Online GGY (£ millions)	476.4	424.6	424.7	472.3	480.3	535.9	572.4
Sources: <i>Gala Coral Group</i> (2015), <i>Entain</i> (2019a, 2020b, 2021), <i>Ladbrokes</i> (2016), <i>Ladbrokes Coral Group</i> (2017), <i>William Hill</i> (2015, 2016, 2017, 2018, 2019b, 2020, 2021).							
*Note: Data for 2020 impacted by Covid-19 lockdowns.							

Online gambling removes the spatio-temporal restrictions associated with land-based betting (Gariban et al., 2013). According to the *Gambling Commission* (2021a), 23.6 percent of the UK's population gambled online in the four weeks leading to their gambling participation survey in December 2020, further demonstrating the growth of online gambling. Figure 2.5 contains further data from the *Gambling Commission* (2021a) which demonstrate the higher prevalence of online gambling within the UK compared to in-person gambling in relation to activities which are available in betting shops, namely sports betting, horse racing, dog racing and casino-based gambling. In particular, 2019 saw an increase in online sports and horserace betting and casino gambling accompanied with a decrease in land-based participation on the same products. Data for 2020 may have been impacted by Covid-19 lockdowns, as discussed during Chapter Eight.

Nonetheless, these data indicate the alteration in situational characteristics caused by online gambling, theoretically rendering the industry as omnipresent and thus giving the owners an opportunity to grow its customer base (Griffiths et al., 2005). The prevalence of online gambling is demonstrated by further data from the Gambling Commission (2020d) on the most common setting as evidenced within Table 2.3. During 2019 (no such data was given by the *Gambling Commission, 2021a, for 2020*), ninety-five percent of respondents stated they had gambled online whilst at home during the previous four weeks whilst the second most common setting was in the workplace. This further demonstrates how online gambling alters the initial decision to gamble as customers no longer need to leave the workplace to gamble. There is also a similarity between the reach of platform gambling and the use of bookies' runners. Although both signify a different era of the industry, they have been used by owners to extend the availability of gambling into the workplace.

Figure 2.5: Online and In-person Participation in Selected Gambling Activities in the United Kingdom.

N = 4,007. Source: *Gambling Commission (2021a)*.



	Online Sports Betting	In-Person Sports Betting	Online Horse Racing	In-person Horse Racing	Online Dog Races	In-person Dog Races	Online Casino	In-person Casino
Year to December 2016	4.8	3.3	2.3	3.0	0.4	0.9	1.4	1.4
Year to December 2017	4.7	2.4	1.8	2.7	0.4	0.9	1.1	0.9
Year to December 2018	4.6	3.0	2.1	2.5	0.4	0.6	0.9	1.0
Year to December 2019	5.5	1.8	2.4	2.0	0.4	0.4	1.1	0.7
Year to December 2020	4.3	1.4	2.3	1.0	0.4	0.2	1.1	0.1

Table 2.3: Most Prevalent Settings for Online Gambling in 2019.	
Location	Percentage of Online Customers
Home	95%
Work	15%
Commute	12%
Pub or Club	7%
Sports Venue	4%
<p><i>n</i> = 1,814. Source: Gambling Commission (2020d).</p> <p>Note: Prevalence of locations of online gambling not included in data for 2020 by <i>Gambling Commission</i> (2021a).</p>	

Online gambling makes a bigger alteration to the structural features of gambling, providing customers with a wide range of gambling products in the palm of one’s hand (Deans et al., 2016). Customers can access sports markets, e-sports (betting on the outcome of computer team-sports) markets, casino games, slots games, bingo and lotteries. Indeed, the sheer volume of gambling products occurring at a rapid rate is a key, structural feature (Auer and Griffiths, 2021). The more gambling products available to the customer, the greater opportunity for them to spend their money. Extant research in the field of psychology attempts to construct the link between online gambling and disordered gambling (Griffiths et al., 2005; Griffiths and Barnes, 2008; McCormack and Griffiths, 2012; Gainsbury et al., 2015b; Lopez-Gonzalez et al., 2018a; Auer and Griffiths, 2021), whilst Lynch and O’Reilly (2019) anecdotally detail how disordered gambling is exacerbated by the availability of online gambling. Lopez-Gonzalez et al. (2018a) also underline that disordered gamblers are more likely to use their mobile or tablet device to bet online than on a computer or indeed travelling to a shop.

Betting and cashing out in-play are key structural characteristics of online, sports betting (Lopez-Gonzalez et al., 2018a), allowing the opportunity for customers to gamble whilst in-play or to settle bets early to lock in a profit or mitigate losses. Moreover, online betting now allows customers to create custom sports bets based on their own

knowledge or judgements (Newall et al., 2020a). One senior trader within the industry argues that the digital transformation of the industry has helped to meet customer demand for a wider range of betting opportunities (*Spotlight Sports Group, 2020*). For example, betting in-play can be conducted on a football match in terms of the match winner, the first goalscorer, a player to score two or more goals, a team to score in 90 minutes or other complex markets (Newall et al., 2019a). Owners certainly benefit from the increased trading within novel markets which are easily accessible in-play (Killick and Griffiths, 2021). Research by Gainsbury et al. (2020a) and Newall et al. (2020a) supports a relationship between features such as in-play betting or custom sports betting and disordered gambling, whilst also arguing that younger, male customers are most likely to use such features. It is in fact men who are more likely to engage in online gambling altogether (Forrest and McHale, 2021).

Whilst FOBTs have been restricted to £2 per spin, online gaming is currently unrestricted and moreover, the maximum stake on online games far exceeds the original £100 maximum stake of B2 machines. This is compounded by a lack of social cues than would occur in-person within a betting shop (Griffiths and Barnes, 2008). Data from *NHS Digital* (2019) report that online gaming is more likely to sustain disordered gambling than online sports betting. Recommendations from the Gambling Harm APPG (2019) seek to extend the £2 maximum stake of FOBTs to online gaming, whilst Bradford (2019) argues that the lack of similar regulation of online gaming is detrimental to efforts which minimise exploitation. Indeed, 'there is no justification for the same content [as FOBTs] online to not be subject to stake limits' (Select Committee on the Social and Economic Impact of the Gambling Industry, 2020, p. 51). The possibility of the categorisation and maximum stakes of online gaming products will be explored during the review of the Gambling Act (*Department for Digital, Culture, Media and Sport, 2020*). Whilst stake limits have yet to be implemented, regulatory action taken by the *Gambling Commission* (2021b) will see online gaming restricted from October 2021 through a mandatory, minimum spin time of 2.5 seconds, the removal of autoplay, and the removal of graphics which champion returns lower than the original stake as winnings.

The insular, asocial nature of online gambling also acts as a structural characteristic. McCormack and Griffiths' (2012) grounded approach finds that online gambling encourages continuous spend through aspects which reduce the realism of gambling. Lynch and O'Reilly (2019) provide an example of this loneliness, portrayed through the separate personalities maintained by the disordered gambler within his gambling activities and a separate personality within everyday life. Additionally, digital transactions and the negation of the exchange of physical money may leave customers detached from their spend and more likely to make further deposits (Parke et al., 2016). Digital payments through means such as debit cards, Paypal, Google Pay and Apple Pay ensure that cashless gambling occurs through frictionless transactions (Gainsbury and Blaszczynski, 2020), thus facilitating further spend from customers.

Whilst inhibiting factors such as these may be linked to continued spend and furthermore, disordered gambling (McCormack and Griffiths, 2012), there are tools offered online which allow customers to monitor their spend. Extant research argues that tools such as self-tracking budget reporting, self-exclusions and deposit limits are perceived as useful (Griffiths et al., 2009; Gainsbury et al., 2020b). According to Forrest and McHale (2021), the uptake of some tools from customers is likely to be low; 21.5 percent of accounts within their study had used deposit limits, whilst 2.3 percent had self-excluded. Nonetheless, online gambling operators in the UK were prohibited from April 2020 from accepting credit card deposits from customers as well as being required to join *Gamstop* (2021), an online database which enables customers to self-exclude from multiple operators at once (*Gambling Commission*, 2020e). These restrictions, in addition to those recently introduced by the *Gambling Commission* (2021b) indicate a strengthening in player protection mechanisms ahead of the review of the Gambling Act 2005.

2.3.3: SSBTs

SSBTs are machines – as seen in Figure 2.6 - located in betting shops which offer a wider range of betting opportunities than would ordinarily be available OTC. First introduced in 2013 (*G3 Newswire*, 2013), the growth of SSBTs can be contextualised as part of the

spread of self-service technologies within other retail industries. The number of self-service tills within other retail settings was expected to grow globally from 191,000 terminals in 2013 to 325,000 in 2019 (NCR, 2014). There appears to be a lack of research on SSBTs. Newall et al. (2021) underline the similarities in structural characteristics maintained by both SSBTs and FOBTs, although data from the *Gambling Commission* (2020a) only include the GGY of SSBTs as part of OTC betting's annual GGY of £1.2 billion. Viewpoints, however, can be narrowed down into two separate arguments, the first of which highlights the novelty of SSBTs and the wide range of products they offer. SSBTs

Figure 2.6: Self-Service Betting Terminal.



'now offer prices on more than 700 leagues in more than 100 nations. Vietnamese Third Division, anyone?... Forget FOBTs; today's high-street action increasingly revolves around SSBTs' (Davies, 2016, online). They have also been praised by industry leaders for facilitating access to growing markets (for example, e-sports) which had increased in popularity during the Covid-19 pandemic in 2020 (Massey, 2020). Jones et al. (2020) highlight the importance of SSBTs in allowing betting shops to offer a digital, sustainable sports betting product to their customers, as well as the possibility that they may attract customers into online gambling. SSBTs, therefore, should be understood as similar to online sports betting. Indeed, they offer the same structural characteristics, with customers able to cash out and bet in-play just as they would be able to online (Newall et al., 2021). SSBTs therefore offer a bridge to online betting whilst providing all the features which reinforce further spend.

The second viewpoint voices concern over the automation of the consumption of risk. Jones (2019), a betting shop employee whose book voices concerns from within the industry, points out the cheaper production costs and increased productivity of the SSBT compared to that of the hourly-paid worker. This negation of interaction theoretically reduces the need for labour costs (Kimes and Collier, 2015), although Hilton et al. (2013) argue that employees are needed to train customers on such technologies. The onset of the SSBT is a specific, shop-based example of consumptive labour, defined by Koeber (2011) as a process which 'engages consumers in the opposite activity – as *participants* in the labour process who contribute to the production of something' (p. 207). Although all forms of platform gambling produce a level of consumptive labour, the SSBT is a clear example of the worker being removed from sports betting transactions within the betting shop itself.

On the other hand, the SSBT owes its increased productivity to its unique situational characteristics in relation to land-based sports betting. Self-service technology offers an alternative platform for customers with a higher degree of technology readiness (Liljander et al., 2006; Doyle, 2006). The SSBT is a specific example of technology which

gives the customer a choice of carrying out a transaction as opposed to an interaction, with increased comfort for customers who wish to avoid staff interaction and keep their betting as a private activity. Shop owners therefore benefit from the increased revenue from customers who enjoy offline sports betting but also prefer avoiding interaction. Owners are increasingly reliant on SSBTs. *William Hill* (2021) currently deploys an average of 2.5 SSBTs per shop and found that twenty-six percent of its retail sports betting was placed on SSBTs during 2020. Meanwhile, *Entain* (2020b) planned to install another 9,000 SSBTs into a total of 3,222 Ladbrokes and Coral betting shops during 2020. SSBTs – similarly to the other two forms of platform gambling – are reliant upon data. These may be data related to the quantification of sporting events (whether through odds or in-play statistics) as well as user activity, transforming the SSBT into a self-service entrance into the omnichannel continuum.

2.4: Gambling Marketing

According to *GambleAware* (2018), £1.2 billion per year is spent by operators on their marketing, most of which (£747 million) is spent on direct online advertising such as banner advertisements, paid searches, and social media. £301 million is spent on affiliate advertising, £234 million is spent on televised advertisements and a further £60 million is spent on sponsorship within sporting events. As this section highlights, these strategies have all drawn criticism for exposing the industry to children and individuals at risk of suffering from disordered gambling. Although such marketing strategies are pursued by a multitude of operators and not only the shops under study, they impact the land-based sector as they highlight the structural characteristics of online gambling. Loyalty cards offered by the companies under study are also key advertising strategies, acting as the gateway to an online account and the omnichannel continuum. This section evaluates the importance of loyalty schemes before the use of other strategies such as the Internet, television and sports.

2.4.1: Loyalty Schemes

The platform gambling-based, omnichannel experience advertised by betting companies are all delivered in shop through a loyalty card (Jones et al., 2020). *Coral* (2017),

Ladbrokes (2019a) and *William Hill* (2019a) all deploy loyalty card schemes in their shops. However, these loyalty schemes also act as an online account, allowing the customer to migrate from shop-based gambling to online from a single wallet. The loyalty card theoretically represents an example of a logistical network (see Rossiter, 2016) which tracks – and then coordinates - the gambling of its customers to extract further profit. Within betting shops, this extra profit may be drawn through special offers (Hing et al., 2019a, 2019b; Rawat et al., 2020) and a seamless transition between channels encouraged through the owner’s analysis of its customers’ data. Additionally, data related to customer spend may be harvested to allow owners to restrict the business of winning customers, a practice which Cassidy (2020) argues – however unfair – is a *modus operandi* of the betting shop owner.

Similar tactics also form the basis of VIP schemes, giving special services to the industry’s largest gamblers. VIP schemes form a significant proportion of the industry’s income; 1.4 percent of *Entain’s* customers as of 2020 were classed as ‘VIPs’, contributing thirty-eight percent of total deposits (Select Committee on the Social and Economic Impact of the Gambling Industry, 2020). As the Select Committee on the Social and Economic Impact of the Gambling Industry (2020) outlines, these VIP schemes have been accused of enticing large spend from customers despite concerns around affordability. Cassidy (2020) also highlights how personnel working on VIP schemes play an active role of friendship in the lives of their customers with the goal of enticing further spend. Loyalty schemes deployed by owners can therefore theoretically lead to VIP membership should a customer become highly valuable in terms of spend, although subsequent concerns have led the *Gambling Commission* (2020f) to issue strict guidance on the management of VIP schemes. Customers must be aged at least twenty-five and also pass thorough affordability checks to be classed as a VIP.

FOBTs may also be perceived as extracting spend through their relationship with the loyalty scheme. Wardle’s (2016) study on loyalty customers and their FOBT-based activity highlights a relationship between disordered gambling and loyalty schemes. Almost one

quarter of loyalty card-holding FOBT players were disordered gamblers, and they were accountable for twenty-six percent of losses on FOBTs during the duration of Wardle's (2016) study. As Wohl (2018) argues, 'loyalty programmes may generate harms in vulnerable individuals. Specifically, loyalty programmes provide rewards to players who gamble frequently... thus linking reinforcement to the amount of money gambled (i.e., money spent gambling) rather than the outcome of each game played' (p. 496). The deployment of spend-based rewards can be linked back to casinos in Las Vegas which reward customers with gifts ranging from free lunches to free holidays in order to entice spend (Greenstein, 2012). Loyalty programmes, rather than promoting responsible behaviours through awareness of spend, are designed to encourage continuous spend (Wohl, 2018). Schüll (2012) highlights the ability of EGMs to track spend even without the use of a loyalty scheme. Unlike the Internet, however, FOBTs have at least been restricted in terms of their maximum stake.

As before, there appears to be little research on the SSBT and its use as part of a loyalty scheme. Jones et al. (2020) highlight the potential maintained by the SSBT, offering an online product to customers within the land setting and the role of loyalty schemes in facilitating migration across channels. As such, *William Hill* (2019a) promotes its loyalty card (the Plus Card) as a key benefit when betting on its SSBTs. Nonetheless, the omnichannel nature of the loyalty scheme allows customers to log in to SSBTs to access their online funds to wager and *vice versa*, just as they would be able to do so OTC. The deployment of SSBTs as part of the omnichannel continuum accessed through a loyalty scheme means that – although they specifically offer an online product in-shop – they can facilitate access to an online market either through the flexibility around the use of account funds or as an advertisement for online gambling itself.

In summary, loyalty schemes – and online accounts – are a key marketing strategy deployed within shops. These accounts allow owners to simultaneously harvest data relating to spend as well as open doors to forms of gambling which are otherwise more productive and cheaper than OTC betting. They also help to realise the customer benefits

of the omnichannel continuum, with owners using accounts to provide their brand experience through each platform. Loyalty cards are nonetheless reinforced by marketing strategies away from the betting shop which may highlight the benefits of platform gambling as well as maintain brand awareness.

2.4.2: Televised Marketing

According to *GambleAware* (2018), £234 million per year is spent on televised gambling advertisements. Televised advertisements are an important part of betting companies' advertising strategies (Ipsos MORI, 2020). Media analysis has levelled accusations towards the televised advertising campaigns of betting operators as being too aggressive, claiming that young people are 'bombarded' (Duncan et al., 2018, online; Poulter, 2018, online) by gambling adverts. Extant research provides some evidence towards the prevalence of televised advertisements. For example, one out of every six minutes' worth of advertising aired in the UK during the FIFA World Cup in 2018 consisted of a gambling advert (Duncan et al., 2018). A further survey by *Populus* (2018) found that 675 out of 1,025 participants aged eighteen and under felt that there were too many gambling adverts advertised during live sporting events, whilst other research highlights how such adverts may normalise gambling for children (McMullan et al., 2012; Nyemcsok et al., 2018).

Televised adverts highlight the flexibility offered by platform gambling. For example, betting in-play has formed a key part of owners' determination to promote online gambling, with televised advertisements deployed during sporting events to display live odds (Newall et al., 2019a). The use of 'in-game TV advertising to "place bets now" are designed to elicit immediate action' (Ipsos MORI, 2020, p. 54), whilst young people - aged between sixteen and twenty-four - are also more likely to recall televised gambling adverts which contain bright colours (Ipsos MORI, 2020). Such methods have led to arguments that operators should be compelled to restrict advertising in the same fashion as tobacco advertising (Jones et al., 2019). In response, the BGC announced a voluntary, whistle-to-whistle ban - beginning in August 2019 - on televised adverts during live sporting events before the 9pm watershed (*IGRG*, 2020). Analysis from the *BGC* (2020a)

claims to demonstrate the efficacy of the ban since its implementation with the ban reducing the reach of televised gambling adverts from six million children per weekend to none within a year, with a reduction of 109 million advertising views overall. However, the ban does not cover adverts for online bingo which are still permitted before the watershed (*IGRG, 2020*), and can still include characters which may prove memorable for children (*Ipsos MORI, 2020*). On the other hand, analysis by the Advertising Standards Authority (*ASA, 2020*) argues that the exposure to children from televised adverts has stabilised at a low number. Yet, this stabilisation is a small drop from an average of 2.7 adverts per week in 2009 to 2.5 in 2019 (*ASA, 2020*).

A further strategy deployed by the *BGC (2020a)* to counteract criticisms is the requirement that a minimum of twenty percent of marketing displays responsible gambling messages. Responsible gambling messages form an approach which *Blaszczynski et al. (2011)* argue – along with the limiting of marketing available to vulnerable groups – is a minimum requirement for a socially responsible approach. On the other hand, *Lole et al. (2019)* and *Newall et al. (2019b)* all suggest that such messages are ineffective and are thus unlikely to impact gambling behaviour. *Lole et al. (2019)* highlight two important aspects in relation to responsible gambling messages. Firstly, that only fifty percent of fixations on adverts are placed on safer gambling messages and secondly, that they are most likely to be read by non-gamblers. *Newall et al. (2019b)* contend that responsible gambling messages fail to achieve their stated objective of discouraging harmful gambling behaviours. Well-intentioned campaigns, therefore, do little to counteract what the aggressive marketing techniques which have been driven by the digital development of the industry. One strategy to counteract these tactics is the use of emotionally stimulating messages, such as the use of emotive language to encourage second thoughts around the repercussions of gambling on a customer's personal life (*Harris et al., 2018*). Yet, any restriction placed on televised marketing may be deemed as futile whilst online and sports marketing are deployed.

2.4.3: Online Advertising

The largest share of the industry's marketing budget is spent on online marketing (*GambleAware*, 2018). Online advertisements from betting companies may entice spend through free bets or spins subject to regularly observed spending requirements (Hing et al., 2019a). Indeed, twenty-nine percent of online gamblers in the UK were tempted by such offers in 2019 (Gambling Commission, 2020d). Hing et al. (2019b) underline the lack of customer perception of the terms and conditions of wagering inducements which often carry a play-through requirement (requiring the customer to spend extra funds), finding that only a minority of customers fully understand the true cost of inducements. Furthermore, the use of free bets could lead to a greater perception of a natural link between betting and sport with the reward contributing to the fun of sports betting (Lopez-Gonzalez and Griffiths, 2018). Research by Ipsos MORI (2019) also found that over 550,000,000 banner advertising impressions from 1,000 websites were made in the UK during 2018. Such advertising has not always been conducted responsibly with adverts found on the children's sections of websites belonging to English and Scottish football clubs (Robinson, 2018).

On the other hand, the removal of direct marketing would not prevent children or vulnerable individuals from seeing gambling-related marketing on social media (Ipsos MORI, 2019). The Twitter accounts of British betting companies send an average of at least eighty-nine tweets a day to their followers (Bradley and James, 2019). Houghton et al. (2019) highlight how betting companies advertise on platforms such as Twitter to a set strategy, whilst a separate study by Killick and Griffiths (2019) found that ninety percent of tweets originating from the Twitter accounts of betting operators contained no information related to responsible gambling. The outreach of Twitter has also been effective in letting customers 'request-a-bet' (Newall et al., 2020b, p. 1). Using Twitter hashtags such as '#MyOdds' (Newall et al., 2020b, p. 2), customers can request odds for custom bets on Twitter which are then provided by operators who benefit from advertising custom odds that are disproportionate to the likelihood of the selection winning. The growth of social media in recent years has clearly facilitated a further channel for betting advertising and has made the industry more accessible (Gainsbury et

al., 2015a). Furthermore, one example of exploitative marketing was reprimanded by the ASA in 2019 when William Hill linked sexual success to gambling by inviting users of dating app Tinder to gamble their way out of the 'friend zone' (Davies, 2019b, online). This is an irresponsible approach considering that those suffering from disordered gambling are more likely to recall gambling advertisements on social media (Gainsbury et al., 2016).

The BGC has responded by implementing stricter criteria for social media-based marketing. Specifically, marketing on social media must not be aimed at anyone under the age of twenty-five and that content from betting operators should periodically contain information related to safer gambling (IGRG, 2020). This is reinforced by regulations set by the *Committee of Advertising Practice (CAP, 2020)* which states that anyone (whether famous or otherwise) under the age of twenty-five is also forbidden from appearing in adverts on social media in which they appear to be gambling. They can, however, be portrayed as gambling within adverts on gambling websites themselves (CAP, 2020). The BGC (2021) also implemented guidelines in March 2021 which discourage English football clubs from displaying gambling content on their social media feeds. Whilst these measures may reduce the temptation of gambling to young people within the content of the marketing itself, the BGC does at least admit that it is reliant on the ability of social media networks to screen the age of its users (IGRG, 2020). Such measures therefore are not guaranteed to be effective.

The final element of spend on online marketing is through affiliates, or third-party websites designed to direct customer traffic to a gambling website (*GambleAware, 2018; Ipsos MORI, 2019, 2020*). The main methodology of affiliate marketing centres around the use of 'tipsters' who develop a wide social media presence, advertising odds related to predicted results with links to a specific betting company which then pays a percentage of profit earned through subsequent Internet traffic as well as an additional fraction of subsequent spend, depending on product type (Houghton et al., 2020). However, as Houghton et al. (2020) argue, the narrative used by affiliates suggests an

expertise in the bets being struck, leading customers to believe they are betting wisely whereas affiliates operate on a pay-per-click link. This holds obvious implications for the responsible operation of online gambling and subsequent extraction of spend and the use of affiliate sites has been subject to criticism. An investigation by the Select Committee on the Social and Economic Impact of the Gambling Industry (2020) contains details of an individual who – whilst suffering from disordered gambling - routinely received more communications from affiliate sites than the operators themselves in a bid to entice further spend. The investigation subsequently recommended that affiliate sites were to become regulated by the Gambling Commission, a principle which found agreement from the body for affiliate sites, the *Responsible Affiliates in Gambling (RAiG, 2020)* group.

2.4.4: Sports Advertising

Although money spent on advertisements through the sponsorship of sport is considerably less than online marketing, extant research highlights the close-knit relationship between the prevalence of gambling-related marketing and sporting events (Houghton et al., 2019; Jones et al., 2019; Purves et al., 2020). English football, for example, benefits significantly from sponsorship provided by the gambling industry (Jones et al., 2019), including by overseas operators who advertise to customers outside of the UK (D’Urso, 2021). During the 2019/20 football season which was underway during the time of the data collection, ten of the twenty clubs in the English Premier League used betting companies as their primary kit sponsor (Sharman, 2020), shrinking to eight out of twenty during the 2020/21 season (*Score and Change, 2020*). Meanwhile, the three divisions of the English Football League (Championship, League One and League Two) all use a gambling operator as their title sponsor (*EFL, 2020*). Matchday programmes in English soccer – again easily accessible to children and vulnerable groups – on average contain 2.3 gambling adverts per programme with only one reference to responsible gambling, thus increasing brand recognition (Sharman et al., 2020). Football televised in the UK contains on average a reference to betting companies every twenty-one seconds, with pitchside advertising being the most prevalent form of advertising (Purves et al., 2020). Purves et al. (2020) also underline how gambling adverts are seen every thirteen seconds within boxing, every 109 seconds in rugby union matches and

every 545 seconds in tennis matches. The prevalence of marketing within sport has been criticised for normalising sports betting amongst its viewers with organisations such as *Gambling with Lives* (2020) and *Coalition Against Gambling Ads* (2021) campaigning for the removal of marketing to protect children. Djohari et al.'s (2019) study found that seventy-eight percent of children aged between eight and sixteen and eighty-six percent of adults thought that betting had become a normal part of sport due to the prevalence of marketing.

In response, *Entain* (2019b) donated its portfolio of football shirt sponsorships to gambling charity GambleAware at the start of the 2019/2020 football season to promote safer gambling whilst also ceasing all pitchside advertising. Another online operator – BetVictor – ceased its sponsorship of English non-league football in 2020 after only a year in order to protect its reputation from criticism of the relationship between sport and gambling (Poole, 2020). According to the *Gambling Commission* (2020g), 1.9 percent of 11–16-year-olds within England and Scotland (their latest research was impacted by Covid-19 and therefore did not include Wales) are classed as disordered gamblers. The relevance of disordered gambling within children to the prevalence of marketing within sport is important when considering the whistle-to-whistle ban which was designed in response to children's exposure to televised gambling adverts. Whilst the *BGC* (2020a) promotes the efficacy of the ban, it would be disingenuous to suggest this ban has removed all exposure to gambling marketing given its inability to prevent marketing within sports (Purves et al., 2020). Furthermore, sports-based marketing maintains a direct relationship to platform gambling through its advertising of structural characteristics of the wide choice of in-play markets (Newall et al., 2019a), thus encouraging individuals to gamble on impulse.

Sports-based marketing is an area which was explored by the review of the Gambling Act 2005 (*Department for Digital, Culture, Media and Sport*, 2020), thanks to concerns that it may encourage disordered gambling through readily accessible platforms. Reports recently revealed that the Government is considering a ban of gambling sponsors from all

professional sportswear (Collins, 2021). Such a ban on advertising would take place alongside other measures possibly arising from the review such as stake limits and affordability checks (Davies, 2021). Nevertheless, it is important here to note that gambling-related marketing was still permitted both on kits and pitchside during the data collection process.

2.5: Themes for Analysis

This section evaluates the key themes of the relationship between platform gambling and betting shops which are investigated during the data collection and the key stakeholders under study. The chapter begins by defining the key stakeholders – customers, employees and owners – before outlining their relationship to the key themes of the onset of platform gambling, the deployment of the omnichannel approach, the digital transformation of the situational and structural characteristics of gambling, marketing and the change to working conditions. As a reminder, each of the stakeholder groups are derived from the four chains under study: William Hill, Ladbrokes, Coral and Betfred.

2.5.1: Customers

This study contends that the customer is one part of a proletarian group which is exploited by betting shop owners. Previous research on the perceptions of betting shop customers conducted by Neal (1998) before the onset of platform betting found that customers perceived themselves as treated fairly by the industry, accepting that they were going to lose over time. McCririck (1991) adopts an affectionate tone when arguing that any customer ‘who bets has to be one of life’s sufferers. Fate conspires with diabolical perversity to deprive them of rightful gain. Anything that can go wrong does go wrong for inveterate punters’ (p. 26). For McCririck (1991), this bad luck was part of betting with little blame attributed to exploitation from the owners of the industry.

Works by McCririck (1991) and Neal (1998) were published some years before the industry’s digital transformation. Cassidy (2012, 2014), on the other hand, argues that modern betting shops are masculine settings, characterised by a division between sports

bettors and FOBT users, the latter of whom are perceived as losing money to an RNG as opposed to betting with skill or knowledge of sports. Other journalistic arguments criticise the industry for restricting winning customers (*The Economist*, 2017; *Nick Luck Daily*, 2020), or the use of odds which are forever stacked against a customer base which is unaware of their disproportionate nature against the actual probability of the selection winning for the customer (Wood, 2018). Cassidy (2020) also highlights how owners may 'pull the plug' (p. 117) on customers whose profit over time may amount from anything between £38,000 to £6. The current study makes an addition to the above works by assessing whether the introduction of such machinery and technologies have changed the attitudes found by Neal (1998). As Chapter Three evaluates, this analysis builds on Schüll's (2005) previous research which focused solely on the exploitation which occurs from the digitalisation of the fruit machine. This study contends that customers may be exploited by the network of platform gambling as a whole.

2.5.2: Employees

The second proletarian group, the employees, is of equal importance to the study. As Table 2.4 demonstrates, just over 50,000 people worked in betting shops as of March 2019. Data on betting shop employment were not included within the latest industry statistics released by the *Gambling Commission* (2020a), meaning that the data within Table 2.4 do not account for the 1,100 William Hill, Ladbrokes and Coral shops which have closed as a result of the maximum FOBT stake limits (*Entain*, 2021; *William Hill*, 2021). Job losses, however, may also be caused by the general self-service nature of platform gambling and its increased productivity. As mentioned earlier, job roles are altered or rendered obsolete by evolving technology (Clarke and Critcher, 1985; Griffiths et al., 2020). For example, employees for Ladbrokes and Coral were recently judged against redundancy with criteria related to performance against targets related to online customer acquisition (Davies, 2019a). This may be an inevitable evolution of betting shop employment, given the need to measure the efficacy of the brick-and-mortar unit as an entry point into the omnichannel network (see Zhang et al., 2010). Employees are therefore expected to maintain the very technology which expropriates their skillset and possibly render them obsolete.

The group of employees also includes betting shop managers as well as middle management (for example, area managers). Jones (2019) provides a perspective of an area manager who feels as exploited as those under her management. The onset of platform gambling, however, comes in addition to other concerns around betting shop employment such as the safety and training of employees when confronted with customers who may be suffering from disordered gambling (Hing and Nuske, 2012; Beckett et al., 2020). The areas for research therefore include aspects of betting shop employment related to the level of training and pay, given that employees may be required to interact with customers suffering from disordered gambling which, as seen in section 2.3.1, was more likely to arise from FOBT usage.

Table 2.4: Number of Betting Shop Employees in the United Kingdom.								
	March 2012	March 2013	March 2014	March 2015	March 2016	March 2017	March 2018	March 2019
Number of employees	55,882	55,332	52,543	51,509	53,303	52,536	53,500	50,065
Source: <i>Gambling Commission</i> (2019).								

2.5.3: Owners

This study contends that betting shop owners are the controllers of the land-based industry who theoretically benefit from the deployment of platform gambling. This group includes both shareholders and individuals which direct betting shops from a boardroom level, taking into account individuals with the most control over their respective betting shops. For example, Ladbrokes and Coral are both owned by *Entain* (2020b), a company owned by shareholders, whilst *William Hill* (2020) was a singular, share-owned business during the period of data collection. *Betfred* (2020) is still owned by one private individual, Fred Done. In addition to the shareholders of Entain and William Hill as well as the owner of Betfred, the study has taken into consideration that each of these companies will benefit from individuals who work at a boardroom level to make decisions relating to the deployment of platform gambling. Boardroom-level management is therefore included along with shareholders in order to widen a group which may have been difficult to locate and recruit, as explored during Chapter Four. Owners are

therefore asked for their perceptions on their company's deployment of platform gambling and the surrounding marketing strategies which accompanies it. They are also asked if their employees are sufficiently trained and if their customers are fairly treated.

2.5.4: Areas for Research

Table 2.5 demonstrates the themes of the industry under investigation as well as breaking them down by individual stakeholder group. As a reminder, the research question of this study is: how can the digital transformation of the land-based betting industry result in the perception of its owners, employees and customers as sustaining the redistribution of wealth? Themes relating to Marxism and platform capitalism are detailed during Chapter Three whilst the data collection process is explored in greater detail during Chapter Four. The areas below are themes which are explored during the self-structured interviews. Most of the questions remain similar for each of these three groups but some are tailored to gauge their own perception into specific themes. For example, questions to customers may differ in relation to employees on working conditions.

Table 2.5: Themes To Be Explicated by Stakeholder Group.

	Customers	Employees	Owners
Onset of Platform Gambling	<p>Customers are asked:</p> <ul style="list-style-type: none"> - How platform gambling has impacted betting shops, and their relationship with their betting shop. - Their perception of the structural features of platform gambling. - If they use platform gambling and why. - Their opinions and experiences on the industry's omnichannel continuum. 	<p>Employees are asked:</p> <ul style="list-style-type: none"> - How platform gambling has impacted betting shops, and their shop's relationship with their customers. - Their perception of the structural features of platform gambling. - How platform gambling has impacted their job role. - The evolution of working conditions. - Their experiences of the interoperability of the omnichannel continuum. 	<p>Owners are asked:</p> <ul style="list-style-type: none"> - How platform gambling has impacted betting shops, and their relationship with their customers. - How they benefit from the productivity of platform gambling and its structural characteristics. - The impact of platform gambling on working conditions. - The success which has arisen from the omnichannel continuum.
Loyalty Schemes	<p>Customers are asked:</p> <ul style="list-style-type: none"> - Whether they are part of a loyalty scheme. - What are the main benefits of loyalty schemes? - What do they perceive as the benefits for the betting companies? - The role of the loyalty scheme as a gateway to an online account and within the omnichannel continuum. - Who benefits the most from their membership – the customers or owners? 	<p>Employees are asked:</p> <ul style="list-style-type: none"> - What are the main benefits of their company's loyalty schemes? - What do they perceive as the benefits for the betting companies? - The role of the loyalty scheme as a gateway to an online account and within the omnichannel continuum. - Who benefits the most from membership – the customers or owners? 	<p>Owners are asked:</p> <ul style="list-style-type: none"> - What are the main benefits of their company's loyalty schemes? - What do they perceive as the benefits from customer membership? - The role of the loyalty scheme as a gateway to an online account and within the omnichannel continuum. - Who benefits the most from their membership – the customers or owners?
Marketing	<p>Customers are asked:</p> <ul style="list-style-type: none"> - How they perceive the prevalence of marketing online, on television and in sport. - Has the prevalence of marketing changed in their experience? - Does said marketing advertise any type of platform gambling in general? 	<p>Employees are asked:</p> <ul style="list-style-type: none"> - How they perceive the prevalence of marketing both online, on television and in sport. - Has the prevalence of marketing changed in their experience? - Does said marketing advertise any type of platform gambling in general? 	<p>Owners are asked:</p> <ul style="list-style-type: none"> - How they perceive the prevalence of marketing online, on television and in sport. - Has the prevalence of marketing changed in their experience? - Does said marketing advertise any type of platform gambling in general?
Others	<p>All participants are asked how long they have been involved within the industry as well as questions related to any pertinent topic which may arise during data collection.</p>		

2.6: Conclusion

This chapter has evaluated the development of platform gambling within the UK's betting shops. All forms of platform gambling rely on the use of data and as such, have different potentialities for each of the stakeholders under study. Chapter Three studies these potentialities in greater depth but as a summary, platform gambling makes the industry more accessible to the customer with a greater number of features and removes the need for the employee through the optimisation of production thus improving productivity and profitability for owners. The owners, therefore, would be the key beneficiaries from the onset of platform gambling. Marketing strategies are thus deployed with a focus on platform gambling, whether through a loyalty scheme acting as a gateway to online gambling, or through televised or online adverts promoting features such as betting or cashing out in-play. The focus of the industry is clearly shifting towards platform gambling and the omnichannel approach is a strategy towards forms of gambling which – according to the *Gambling Commission* (2020a) – generate more GGY than OTC betting.

As with products within the previous epochs of the industry, platform gambling operates in the face of opposition. The ongoing review of the Gambling Act 2005 will have taken this into account and may place tighter restrictions on forms of platform gambling. Nonetheless, the omnichannel approach of the industry highlights how online gambling has not only grown but has become interwoven with platforms within brick-and-mortar units. The development of platform gambling may be compared to other industries which encounter digitalisation, but the overriding importance of platform gambling in this study is related back to the central question based on Cohen's (2003) argument that the industry is geared towards the natural movement of capital from the lower classes to the capitalist class of the industry. The theoretical lens through which this capital flows - and the development of platform gambling is analysed - is evaluated during Chapter Three.

Chapter Three: The Theoretical Lens

3.1: Introduction

Just as the land-based betting sector may be a vehicle for the redistribution of wealth, the bourgeois, primitive accumulation of wealth, according to Marx (2013a), acts as the very foundation of capitalism. Yet, there appears to be a scarcity in research connecting Marxism to gambling. Cassidy et al. (2013) and Cassidy (2020) argue that the proliferation of gambling is synonymous with the expansion of capitalism, but do not go as far to apply a Marxist analysis. After all, Marxism is a critique of capitalism, and the two will always co-exist (Eagleton, 2011). Extant research which does link Marxism and gambling appears to focus on the exploitation of disordered gambling (Schüll, 2005; Bjerg, 2009; Scimecca, 2015; Young and Markham, 2017), thus failing to address how gambling as a leisure activity is exploited as immaterial labour. This chapter evaluates how a unique Marxist critique can be extended to the digital development of the UK's land-based betting industry, with class antagonisms existing between bourgeois betting shop owners and a proletariat class consisting of their customers and employees.

Specifically, the chapter demonstrates the two constituent parts of the study's theoretical lens: class analysis and platform capitalism. These two mutually constitutive parts of the lens mirror the relationship between class and technological innovation according to Marxist thought. Whilst the development of technology initially benefits the bourgeois owner of production, it is the same development that is underlined by Marx (2013a) as well as other contemporary works (Srnicek and Williams, 2016; Bastani, 2019) as leading capitalism to its end. However, following the financial crash of 2008, platform capitalism has become the default form of exchange with data now the sought-after commodity (Srnicek, 2017a). As the founder of the Tesco Clubcard declared in 2006, 'data is the new oil' (Arthur, 2013, online). Data afford to platform owners the potential for competitive platforms, outsourced labour, the cross-subsidisation of platforms, the transformation of low-margin services to high-margin goods and the possibility of further data through analysis. Platform capitalism is viewed here as an extension of Marxism with data being used to subsume immaterial labour - activities such as consumerism, art and culture, housework (Lazzarato, 1996) or in this case, gambling - into the capitalist system.

Srnicek's (2017a) definition of platform capitalism and the commodification of data allow the study to critique the exploitation of both work-based and immaterial labour within betting shops as a result of the transformation offered by platform gambling.

This chapter starts by evaluating the concept of class as the central unit of analysis for Marxism before evaluating its views on the role of technology. Secondly, the chapter explores the predicted fall of capitalism before underlining how the opposite has occurred with technology now exploiting labour – whether immaterial or otherwise – to continue bourgeois ownership. The theoretical class struggle within betting shops is then presented within Figure 3.1, demonstrating how employees and customers may be exploited by owners. Fourthly, the chapter explores Srnicek's (2017a) platform capitalism as a natural extension of Marxist exploitation, whilst also evaluating the affordances offered to platform owners by the use of data. A summary of the theoretical relationship between these affordances of data and platform gambling are offered within Table 3.1, whilst the role of platform capitalism within the theoretical lens is detailed within Figure 3.2, adopting Gimpel and Schmieid's (2019) view that technology can lead to detrimental socio-economic outcomes. Finally, criticisms of the approach are evaluated, such as those presented by liberalism, Gramsci's (1999) notion of cultural hegemony, Harris' (1979) cultural materialist model and finally by evolutionary economists. The most significant critique of the theoretical lens, posed by Critical Realism, is considered during Chapter Four thanks to its implications for the study's methodological and philosophical approach.

3.2: The Marxist Approach

Extant research on the relationship between gambling and Marxism focuses above all on disordered gambling. Bjerg (2009), for example, contends that the 'de-sublimation' (p. 48) of money for the disordered gambler becomes permanent as a result of coming too close to money (presented in the form of winnings) which is traded for no apparent object. Instead, the money which is exchanged flitters between the abstract (the possible outcome of the gamble) and reality (winning or losing) during the consumption of risk. Similarly, Scimecca (2015) argues that disordered gambling can be understood as

occurring due to the proliferation of capitalism and the alienation of labour, or in this case the gambler becoming alienated from their own surroundings. Young and Markham (2017), meanwhile, highlight the coercion faced by customers through the akratic consumption of gambling against their own free will. Although they do highlight the exploitative disproportionality between odds and the chance of a selection winning, Young and Markham (2017) contend that exploitation is drawn mainly from customers who gamble despite knowing that it is contrary to their own best interests. On the other hand, Young (2010) argues that the gambling industry has emerged from a dialectical process where the state relies on taxes harvested from gambling due to it being an aleatory subject of a risk-taking society. Research by Muggleton et al. (2021), based on the banking data of 102,195 customers, draws a link between gambling and the exploitative nature of capitalism by highlighting links between gambling and financial distress, ill health, and unemployment. These findings inadvertently build a link between Marxism and gambling without aiming to do so.

Whilst these views account for the growth of the industry – and any subsequent, disordered gambling – as part of the growth of capitalism, they do not explore the dual function of capitalism (class exploitation and technological innovation) and its role in the exploitation of both customers and employees alike. Schüll (2005) highlights the exploitation of EGM players in Las Vegas by portraying the player as alienated by the digital technology which accelerates their rate of spend. Although Schüll's (2005) argument may be relevant to FOBT players within the current study, exploitation may occur as a result of the implementation of all three elements of platform gambling. Furthermore, such exploitation may occur through the productivity of immaterial labour which co-exists within the UK's betting shops with that of shop labour. The analysis of this dual exploitation leads the study to focus on Marx's (1973, 2013a, 2013b) approach towards two themes as explored below: class and technology.

3.2.1: The Bourgeoisie and Proletariat

Class is the central unit of analysis for Marxism. Marx (2013a) famously argues in *The Communist Manifesto* that 'The history of all hitherto existing society is the history of class struggles' (p. 60). Marxism is a 'worldview claiming that a foundational mode of production governs in the last instance the economy and much else, too' (Resnick and Wolff, 2013, pp. 155-156). Marxism is also, above all, a critique of the duality of capitalism which simultaneously proliferates technological development and class inequality (Marx, 2013a). Inspired by technological developments during the Industrial Revolution, Marx (2013a) points out that 'steam and machinery revolutionised industrial production. The place of manufacture was taken by the giant' and controlled 'by industrial millionaires, the leaders of whole industrial armies, the modern bourgeois' (p. 62). The very foundation of capitalist industry is based on the transformation of production as factory owners sought improved productivity from their workforce.

The antagonisms between the bourgeoisie (owners of the means of production) and the proletariat (the workforce) are a continuation of those which existed during the epochs of slavery and feudalism. 'Freeman and slave, patrician and plebeian, lord and serf... in a word, oppressor and oppressed' (Marx, 2013a, p. 61). Capitalism is presented as a system of exchange and distribution which emerged from a process based on the transformation of less sophisticated epochs of slavery and feudalism (Marx, 1973). A key aspect of Marx's (2013b) critique of capitalism is the labour theory of value, argue that commodities are valued according to the labour time taken to produce them. As such, Marx (2013a) argues that proletarians are exploited through the commodification of labour time which they must exchange to earn their subsistence. Capitalism thus facilitates the primitive accumulation of capital through the surplus value of labour from proletarians who – due to competition - are forced to sell labour at a price lower than its actual worth, driving down the cost of said labour and thus increasing productivity and capital (Marx, 1971; Marx and Engels, 1974). 'Wages are determined through the antagonistic struggle between capitalist and worker. Victory goes necessarily to the capitalist. The capitalist can live longer without the worker than can the worker without the capitalist' (Marx, 2000, p. 3).

As Eagleton (2011) argues, the idea of class struggle does not originate from Marxism; the French Revolution, for example, took place at the end of the eighteenth century before Marx was born. What is revolutionary about Marxism, however, is its teleological approach used to describe how every event sends capitalism to its inevitable end (Eagleton, 2011). Indeed, 'philosophers have only *interpreted* the world, in various ways; the point is to change it' (see Marx and Engels, 1974, p. 123). The end of capitalism will arrive thanks to the developing forces of production outgrowing the ownership of the means of production. 'At a certain stage of the development, the material forces of production come into conflict with the existing relations of production, or – what is but a legal expression for the same thing – with the property relations within which they had been at work before. From forms of development of the forces of production these relations turn into their fetters. Then comes the period of social revolution' (Marx, 1904, p. 12). Marx (2013a) vividly predicts this end within *The Communist Manifesto*. 'The weapons with which the bourgeoisie felled feudalism to the ground are now turned against the bourgeoisie itself. But not only has the bourgeoisie forged the weapons that bring death to itself; it has also called into existence the men who are to wield those weapons – the modern working class – the proletarians' (Marx, 2013a, p. 67). In summary, capitalism's simultaneous subversion of the lower class and the improvement of technology will eventually result in communism and equality for all.

This teleological sequence is inspired by Hegel (2010) whose dialectic underlines the interaction between a thesis – the *status quo* – and its antithesis, an alternative to the *status quo*. Their interaction results in a synthesis, or a sublation of the thesis and antithesis. For Hegel (2010), the opposing categories of '*being*' and '*nothing*' (p. 20) – representative of self and other - demonstrate their 'dialectical immanent nature... which is *becoming*, as their truth' (p. 80). Furthermore, 'the progression of this subject matter', according to Hegel (2010, p. 10), is representative of 'all natural and spiritual life'. This is also comparable from a Marxist viewpoint to an economic setting with the worker evolving through the dialectical antagonisms between the ownership and the means of

production (Resnick and Wolff, 2013). The dialectic process is thus adaptable to the epochs of slavery, feudalism and capitalism. For example, the *status quo* of masters was challenged by the antithesis of slaves, giving rise to the feudal system where the interaction of lords and serfs eventually gave rise to capitalism. However, rather than continue the trend of class oppression, the sublation of the bourgeoisie and proletariat classes according to Marx (1904) will result in complete emancipation. No longer will the worker need to sell labour from which he is alienated; he can choose to work in whatever role that pleases him (Marx and Engels, 1974).

Contrary to Marx's (2013a) forecast, the capitalist system is yet to be overthrown and class antagonisms persist. Piketty (2014) contends that the inequality of wealth is still the basis of today's capitalist system. 'The overall importance of capital today... is not very different from what it was in the eighteenth century. Only its form has changed: capital was once mainly land but it is now industrial, financial and real estate' (Piketty, 2014, p. 476). Bastani (2019) argues that capitalism is portrayed through society as anti-utopian, yet better than the alternatives. 'Flat wages, falling home ownership and a warming planet might be bad, granted, but at least we have iPhones. And, yes, you may not be able to access the things your parents took for granted, like affordable homes or free higher education, but you should still be grateful – at least it's not the sixteenth century' (Bastani, 2019, p. 18). The end of history then - whether defined by Marx (2013a) or by Fukuyama (1992) through the success of neo-liberal capitalism over Soviet communism (evaluated further in section 3.6.1) – is yet to occur. Whilst technological developments should be edging capitalism closer to its end, capitalism is still portrayed as the most efficient economic system.

Class analysis is underlined by Worsley's (1981) definition of Marxism as adaptable to a variety of economic phenomena. 'Most definitions of Marxism assert what Marxism 'really' is, i.e., which of the innumerable versions is the "true" one. For me, there is no such thing as Marxism, for Marxism is not a thing, an essence, it is a process – a series of

linked historical emergences – Marxisms. Marxism is a plural phenomenon... In making a class analysis, for instance, quite different criteria can be invoked in defining a proletarian, a peasant or a bourgeois, and in allocating people to those categories. The end-results will be different interpretations of the class system' (Worsley, 1981, p. 103). As the next section evaluates, digital transformation means that class analyses can be drawn from an array of economic phenomena, resulting in the growth of a heterogenous cyber-proletariat (Dyer-Witheford, 2015).

3.2.2: Digital Transformation and Immaterial Labour

The technological transformations which have seen the global economy transformed into today's capitalist system appear to be classifiable into different stages. For example, Skilton and Hovsepian (2018) frame technological advancements into four industrial revolutions. The first industrial revolution is characterised by the invention of steam-powered engines – improved by James Watt in the eighteenth century - which Marx (2013a) argues is the origin of the capitalist struggle. The second is characterised by the electrification of processes and the combustion of petrol, facilitating mass production. The third industrial revolution began in the 1950s and, as Skilton and Hovsepian (2018) argue, connected actors on an unprecedented scale. The development of micro-electronics saw the combination of transistors into a single microchip, facilitating the transition from analogue machinery to digital technology. Automated processes and production grew with competition between providers such as IBM and Microsoft, whilst the creation of the World Wide Web transformed communication between machine and operator. The fourth industrial revolution, or Industry 4.0 (see Lüthje, 2018), is characterised by the Internet of Things (IoT) and its interaction both with users and its environment (Skilton and Hovsepian, 2018). Bastani (2019), meanwhile, provides an alternative, three-staged view of technological and societal development starting before and finishing later than that of Skilton and Hovsepian (2018). Bastani's (2019) first disruption is marked by the development from hunter-gatherer society to agriculture, whilst the second is characterised by the industrial revolution and the rise of capitalism associated with the invention of steam-powered machinery. The third disruption for Bastani (2019) is the development of technology into cognitive and memory systems

which enable post-capitalist society. These are two different framings of the history of technological development. However, from a Marxist viewpoint, each technological revolution or disruption – regardless of how its framed - theoretically plays its own part in sending capitalism towards its end.

As already discussed above, the development of technology ensures that capitalist owners benefit from enhanced productivity and thus increased profitability. Marx (2013b) highlights the cost to the worker in *Capital*. 'Machinery is put to a wrong use, with the object of transforming the workman, from his very childhood, into a part of a detail-machine... Here, as everywhere else, we must distinguish between the increased productivity due to the development of the social process of production, and that due to the capitalist exploitation of that process. In handicrafts and manufacture, the workman makes use of a tool, in the factory, *the machine makes use of him*' (Marx, 2013b, p. 292, emphasis added). In *Grundrisse*, Marx (1973) highlights the need for cheaper production in the face of competitive forces. 'Capital employs machinery, rather, only to the extent that it enables the worker to work a larger part of his time for capital, to relate to a larger part of his time as time which does not belong to him, to work longer for another. Through this process, the amount of labour necessary for the production of a given object is indeed reduced to a minimum, but only in order to realize a maximum of labour in the maximum number of such objects. The first aspect is important, because capital here -- quite unintentionally -- reduces human labour, expenditure of energy, to a minimum' (Marx, 1973, p. 701). Lukács (2017) also highlights the dual outcomes from the development of technology, with the productivity of new machinery accompanied by the alienation of the worker as well as the elimination of their 'qualitative, human and individual attributes' (p. 69). The intense competition imposed by capitalism leads the bourgeoisie into employing machinery to improve productivity whilst also expropriating the skill of the workforce.

Despite the pessimistic view of the role of technology, there is optimism that post-capitalist emancipation is within reach. Srnicek and Williams (2016) use post-capitalism as

the end destination for the blueprint to improve folk political movements based on four key points: the full automation of labour, the reduction of the working week where automation is not possible, the provision of a universal basic income and the diminishment of the work ethic. The full automation of labour for Srnicek and Williams (2016) should be regarded here not only as an economic inevitability, but also as a political demand which would 'aim to liberate humanity from the drudgery of work while *simultaneously* producing increasing amounts of wealth' (p. 109). The main challenge is political as the plan towards post-capitalism is reliant upon the masses turning on capitalism. Bastani (2019) describes this as an epiphany in the form of a distrust generated by events such as the 2008 financial crisis or other tragedies such as the Grenfell Fire. The revolution against inequality, according to Bastani (2019), has already begun and should continue through the relocalisation of economies, the deployment of a network of social banks, and the introduction of universal basic services. Such universal services would be facilitated by the automation of labour, the harnessing of solar energy opposed to fossil fuels, the mining of asteroids for resources, the development of gene therapies to provide abundance in healthcare, and the use of technology to produce synthetic meat.

However, rather than furnish the proletariat with the tools to achieve post-capitalism, technology has widened the gap between the bourgeoisie and the proletariat. 'Our creations – the machines installed in every factory, field, office and shop – have helped produce a great many products and have changed our lives utterly, but they have not eradicated poverty, hunger, inequality, chores or the anxiety about our future basic needs... In important ways, we resemble hamsters on their spinning wheels: no matter how fast we run, we are not really going anywhere. We might well conclude that the machines aren't slaving away for our benefit; at times it even seems like we're working furiously to maintain *them*' (Varoufakis, 2019, p. 113). Just as Marx (2013b) elucidates in *Capital*, Varoufakis (2019) underlines how digital transformations do not revolutionise the living standards of the working class. Dean (2018) also argues that digital technologies associated with neo-liberalism force the workforce into idleness. 'Capitalism no longer requires a skilled, educated middle class... It doesn't take as many people as we have to

service the top 1 percent, so most of us are not needed any more... In a setting that reduces education to knowledge, knowledge to information, and information to data, we are told that we can find out anything we want to know by googling it. In a nutshell: things do it for us so that we don't have to' (Dean, 2018, pp. 150-151). Indeed, even according to contemporary analyses, the workforce finds itself replaced by technology.

The issue of technology is where the Marxist dialectic can be criticised by theorists within other Marxist schools of thought. The Frankfurt School rejects the notion that the sublation of the *status quo* and its antithesis results in an improved outcome, instead arguing that the dialectic is a negative process which results in a structure more exploitative than the original (Adorno, 1990). 'The positive which, to his [Hegel's] mind, is due to result from the negation has more than its name in common with the positivity he fought in his youth. To equate the negation of negation with positivity is the quintessence of identification; it is the formal principle in its purest form. What thus wins out in the inmost core of dialectics is the anti-dialectical principle: that traditional logic, *more arithmetico*, takes minus times minus for a plus. It was borrowed from mathematics to which Hegel reacts so idiosyncratically elsewhere. If the whole is the spell, if it is the negative, a negation of particularities – epitomized in that whole – remains negative. Its only positive side would be criticism, definite negation; it would not be a circumventing result with a happy grasp on affirmation' (Adorno, 1990, pp. 158-159). Adorno (1990) argues that the negation of the *status quo* does not result in the positive outcome as projected by Hegel (2010) or Marx (1904). Although the phrase negative dialectic 'flouts tradition' (Adorno, 1990, p. xix), it reflects what Adorno (1990) sees as the dialectic's true nature.

This pessimistic approach to Marx's dialectic is not inaccurate. Horkheimer (1993) highlights that past revolutions such as those in Europe between the sixteenth and eighteenth centuries had not resulted in the abolition of class antagonisms as intended. Instead, the ultimate victor of those revolutions was the 'urban bourgeoisie' (Horkheimer, 1993, p. 59), or the most affluent within urban, proletariat communities

who would then foster an updated version of previous antagonisms. Furthermore, ‘the more heavily the process of self-preservation is based on the bourgeois division of labour, the more it enforces the self-alienation of individuals, who must mould themselves to the technical apparatus body and soul’ (Horkheimer and Adorno, 2002, p. 23). This links to Adorno’s (1990) argument underlining the dialectic’s revolution in producing negative outcomes. The way of life that emerges from the dialectic, rather than being a communist revolution, is a society more oppressive than its predecessor.

Therefore, the ‘Marxism’ under study here, as defined in the spirit of Worsley (1981, p. 103), does not seek to establish how the end of exploitation would occur within the land-based betting industry as technology has not yet resulted in the communism which Marx (2013a) envisages. Technology has evolved to ensure that it is not only work-based labour which can be exploited through capitalist exchange. Digital transformations have ensured the construction of a global bourgeoisie which allows the subsumption of immaterial labour into capitalist system, whilst also giving rise to Cyber-Marxism.

3.2.2.1: Empire and the Subsumption of Immaterial Labour

Technology has not liberated the proletariat. Rather, the proliferation of digital technology has transformed the class struggle into a global phenomenon, forming the central argument made by Hardt and Negri (2001) in the preface to *Empire*. ‘Empire is materialising before our very eyes. Over the past several decades, as colonial regimes were overthrown and then precipitously after the Soviet barriers to the capitalist world market collapsed, we have witnessed an irresistible and irreversible globalization of economic and cultural exchanges. Along with the global market and global circuits of production has emerged a global order, a new logic and structure of rule – in short, a new form of sovereignty. Empire is the political subject that effectively regulates these global exchanges, the sovereign power that governs the world’ (Hardt and Negri, 2001, p. xi). This empire transcends borders, thus reducing the ability of the state to control the primary factors of capitalist exchange. Digital transformations have allowed a global bourgeoisie to become sovereign over a ‘multitude’ (Hardt and Negri, 2001, p. 60) of

global networks, feedback loops and emergent formations brought about by the self-transformation of the proletariat. The term, 'multitude', however, does not sufficiently emphasise the exploitation faced by the proletariat (Dean, 2018). This modern empire is better understood as constructed upon 'proletarianization' (Dean, 2018, p. 75), a process which allows the bourgeoisie to construct and discard labour at its own discretion. This process also helps to understand how the modern empire incorporates all labour – work-based or otherwise - into the capitalist system. Alongside Lazzarato (1996), Hardt and Negri (2001) form part of the Autonomous Marxist school of thought which highlights the labour extracted from activities such as housework or consumerism.

Immaterial labour is a term defined by Lazzarato (1996) as 'a series of activities that are not normally recognized as "work" — in other words, the kinds of activities involved in defining and fixing cultural and artistic standards, fashions, tastes, consumer norms, and, more strategically, public opinion' (p. 132). The concept of immaterial labour therefore questions traditional definitions of work and the workforce. Immaterial labour itself comprises intellectual skill to form cultural-informational content, manual skills to combine creativity and intellect, and entrepreneurial skills to define the structure of social relations in which immaterial labour plays a part (Lazzarato, 1996). Hardt and Negri (2001) underline the heterogenous nature of immaterial labour, comprising industrial industries, entertainment, leisure and housework. Non-work activities such as consumerism and culture are now subsumed into the capitalist economy and extracted as labour. 'Culture and economy are identical and non-identical at the same time. All culture is produced in specific work processes' (Fuchs, 2019, p. 9). Immaterial labour therefore plays a key part in any industry based on consumerism. Not only is profit drawn from shop labour, but leisure activity is subsumed into the capitalist economy. 'Capitalism tries to turn all aspects of our life into a huge shopping mall' (Fuchs, 2014, online). Digital transformations have seen the subsumption of digital consumerism within the UK into the capitalist system. For example, the proportion of retail sales generated online has increased from 7.9 percent in February 2011 to 34.5 percent in February 2021 (*Office for National Statistics, 2021*), thanks to platforms such as Amazon, Google and eBay.

The inclusion of immaterial labour within the theoretical analysis outlines the heterogenous exploitation which occurs within betting shops. The heterogeneity of abstract labour is inspired by an argument made by Marx (2013b) in *Capital*. 'If then we leave out of consideration the use value of commodities, they have only one common property left, that of being products of labour. But even the product of labour itself has undergone a change in our hands. If we make abstraction from its use value, we make abstraction at the same time from the material elements and shapes that make the product a use value; we see in it no longer a table, a house, yarn, or any other useful thing. Its existence as a material thing is put out of sight. Neither can it any longer be regarded as the product of the labour of the joiner, the mason, the spinner, or of any other definite kind of productive labour. Along with the useful qualities of the products themselves, we put out of sight both the useful character of the various kinds of labour embodied in them, and the concrete forms of that labour; there is nothing left but what is common to them all; all are reduced to one and the same sort of labour, human labour in the abstract' (Marx, 2013b, p. 19). All types of labour, whether immaterial or work-based are therefore translated into abstract labour, the value of which is homogenous to the capitalist class (Hardt and Negri, 2001). The globalised, capitalist empire ensures that a heterogenous, abstract labour is extracted whether through labour or leisure activities. The development of Internet 4.0 also ensures that bourgeois owners – to remain competitive – must seek to maintain productivity by developing new workflows and processes through digital technologies. This gives rise to the Cyber-Marxist school of thought.

3.2.2.2: Cyber-Marxism

'The management dream of cybernetic extension into the vicissitudes of daily life is now well and truly a reality' (Rossiter, 2016, p. xiii). The capitalist management of cyber-networks is a key tenet of Cyber-Marxism, posited by Dyer-Witheford (1999) as a critique of Internet-based economies prior to the 'dot.com boom' (Srnicek, 2017, p. 19) of the 2000s. Cyber-Marxism explores 'how the information age, far from transcending the historic conflict between capital and its laboring subjects, constitutes the latest battleground in their encounter, how the new high technologies - computers,

telecommunications, and genetic engineering - are shaped and deployed as instruments of an unprecedented worldwide order of general commodification' (Dyer-Witthford, 1999, p. 2). As Hardt and Negri (2001) describe, 'The anthropology of cyberspace is really a recognition of the new human condition' (p. 282), and that '*The novelty of the new information infrastructure is the fact that it is embedded within and completely immanent to the new production processes*' (p. 298). Cyber-Marxism critiques the capitalist exploitation of data as embedded within the modern, global empire, thus portraying the Internet as a continuation of capitalist society.

Dyer-Witthford's (2015) *Cyber-Proletariat* depicts the heterogeneous nature of the population who may be exploited by Internet 4.0 technologies. The diversity of Dyer-Witthford's (2015) cyber-proletariat is characterised by groups such as South American, indigenous miners extracting materials required for production; underpaid, Indonesian assembly line workers; those subjected to the omnipresent economy of commodities such as phone credit in Jamaica or Pakistan; workers who are exploited from the outsourcing of call centre work; or groups living in poor conditions in the outskirts of Ghanaian 'e-dumps'. The 'oppressed' (Marx, 2013a, p. 61) therefore consists of a multitude of groups who are subjected to the direct use of technology or from the environmental consequences. The exploitation of several groups within the population also highlights the presence of Hardt and Negri's (2001) *Empire*.

Dyer-Witthford (2015) argues that the digital transformation of industries is a deliberate process to break the wherewithal of the working class whose skills and labour suffer as a result of the developing technology. Advanced machinery records data through continuous interaction with the worker which then informs subsequent work processes, improving productivity (Briken, 2020). Whilst machine learning indicates a greater level of efficiency, this is not dissimilar to Marx's (2013b) argument in *Capital* which claims that machinery makes use of the worker. In *Grundrisse*, Marx (1973) argues that the 'worker's activity, reduced to a mere abstraction of activity, is determined and regulated on all sides by the movement of machinery, and not the opposite. The science which compels

the inanimate limbs of the machinery, by their construction, to act purposefully, as an automaton, does not exist in the worker's consciousness, but rather acts upon him through the machine as an alien power, as the power of the machine itself' (p. 693). Briken (2020) describes a scenario where the machine – through its advanced learning of the user process – gradually negates the need for employee input. The worker is therefore expropriated of their skill and is instead merely required to maintain the machine itself.

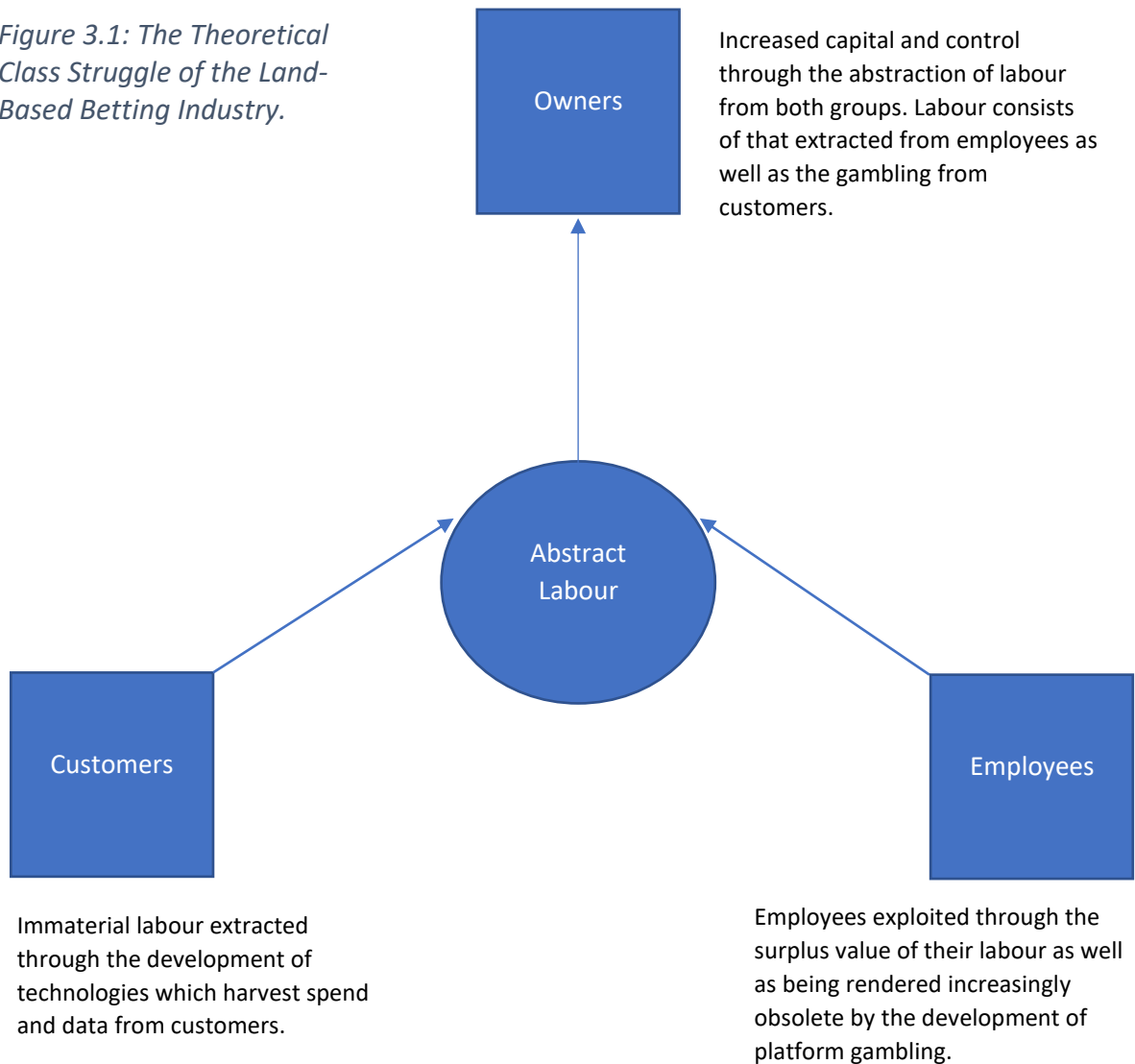
Cyber-Marxism importantly highlights the dialectical nature of the Internet with a focus on platforms which provide access to free knowledge. Google, for example, embodies the clash between commons-based knowledge and the capitalist capacity for surveillance capitalism through the storage of user search data and preferences (Fuchs and Dyer-Witheford, 2012). A dialectical view of the Internet would naturally see it heading towards a Marxist emancipation of commons-based knowledge without capitalist benefits of data analysis. The presence of Cyber-Marxism as a school of thought, therefore, is a further critique of Fukuyama's (1992) end of history, highlighting how the bourgeoisie maintains its ownership of production. The means through which this ownership occurs is platform capitalism, the second element of the theoretical lens which is evaluated in section 3.4.

3.3: The Theoretical Class Struggle of Betting Shops

The Marxist analyses of class and technology allow the study to explore how employees and customers form a heterogenous proletariat. Inspired by Worsley's (1981) view of Marxism as an adaptable process to multiple phenomena, the labour which is abstracted by the bourgeois owners of betting shops is understood through a synthesis of a traditional Marxist analysis of labour with the inclusion of immaterial labour into the capitalist economy. The immaterial labour in this case is represented by the consumerism of risk. The development of platform gambling facilitates tactics which encourage immaterial labour through channels which are more productive for betting shop owners. The omnichannel continuum, allowing customers to access products through multiple touchpoints (Zajdel et al., 2020), theoretically allows flexibility to both customers and

owners alike. Figure 3.1 demonstrates the homogenous value of the abstract labour which is extracted from the respective activities of employees and customers. This theoretical lens is applied during Chapter Six, exploring how class antagonisms may arise from the mechanisms of platform gambling. The process from which these mechanisms arise is explored further within Chapter Four.

Figure 3.1: The Theoretical Class Struggle of the Land-Based Betting Industry.



Similar to Marx's (1973, 2013a, 2013b) criticism of technological innovation, the employees of betting shops are theoretically either alienated or rendered obsolete from their work through the growth of platform gambling. Not only may employees face the prospect of redundancy through the automation of gambling through these platforms, but they are also expected to maintain them whether through promotion of online

gambling (Davies, 2019a) in-shop or through the maintenance of machines which again, remove the need for interaction. This is, however, a necessity for betting shop owners; the bourgeois class must innovate to remain competitive (Marx, 1973). Shop employees thus may suffer as a result of capitalism's natural tendency for technological transformation. Therefore, owners – according to the theoretical lens - theoretically extract labour and thus capital from customers through each platform whilst simultaneously extracting more surplus value from employees who in turn, are rendered increasingly obsolete. These are achieved through the control of cyber-thoroughfares in which they exploit a precious commodity: data. The methodology through which platform gambling exploits said data is based on Srnicek's (2017a) platform capitalism.

3.4: Platform Capitalism

Srnicek (2017a, 2017b) highlights platform capitalism as the natural evolution of exchange after the financial crash of 2008. This continuation of capitalism post-financial crash highlights platform capitalism's natural relationship with Marxism. Rather than herald the end of capitalism, the financial crash has transformed capitalism into a new, digital epoch. The class antagonisms are still as clear as elucidated by Marx (2013a), but they exist globally as per Hardt and Negri's (2001) *Empire*, thanks to the use of platforms. This section defines platform capitalism, explores the range of platforms over which it manifests itself before evaluating the main commodity of data and the potentialities it affords to platform owners before linking these affordances to the case of platform gambling.

Platforms 'are a newly predominant type of business model premised upon bringing different groups together. Facebook and Google connect advertisers, businesses, and everyday users; Uber connects riders and drivers; and Amazon and Siemens are building and renting the platform infrastructures that underlie the contemporary economy' (Srnicek, 2017b, p. 254). Platform capitalism is the system of exchange which occurs thanks to the provision of technology – either hardware or software – which brings actors together (Srnicek, 2017a; Langley and Leyshon, 2017). This relationship can be understood according to Markus and Rowe's (2018) view of the causal autonomy of

technology and its role in society. This study contends that platforms are interactants where their relationship with actors sees 'causal effects move back and forth between people... and technology' (Markus and Rowe, 2018, p. 1260). Platform capitalism embeds itself within – and the shapes the nature of – the future economic decisions made by individual actors. Platform gambling, therefore, shapes the exchange of risk between owners and customers.

Data are the 'DNA of platform capital' (Manokha, 2018, p. 891). The reliance on data is further evidence of platform capitalism's relationship with Marxism. Data are the raw material which must be extracted from its natural source: user activity (Srnicsek, 2017a). A similar analysis of raw materials is made by Marx (2013b) in *Capital*. 'All those things which labour merely separates from immediate connection with their environment, are subjects of labour spontaneously provided by Nature. Such are fish we catch and take from their element, water, timber which we fell in the virgin forest, and ores which we extract from their veins. If, on the other hand, the subject of labour has, so to say, filtered through previous labour, we call it raw material' (Marx, 2013b, p. 121). After their extraction from user activity, data require labour through manual processing or sensors to be shaped into a usable format for platform owners (Srnicsek, 2017a). Yet, whilst platform capitalism represents a natural evolution to the reliance on data, it is one part of a 'differentiated dialectical unity of diverse capitalisms. We do not have to decide between information capitalism or finance capitalism... but rather have to see capitalism's manifold dimensions that mutually encroach each other' (Fuchs, 2019, p. 7).

Platform capitalism also demonstrates clear links with Marx's (1971) surplus value. In the same way a capitalist benefits from the surplus value of a labourer's work, they also benefit from the surplus value of data (Zuboff, 2019). Data are material capital (Srnicsek, 2017a), the accumulation of which leads to bourgeois control over cyber-thoroughfares. Sixteen percent of the world's largest corporations as of 2020 were information technology companies (Murphy et al., 2020), demonstrating the power and importance of controlling digital technologies. 'Knowledge that is produced, transmitted and

communicated with the help of technologies influences human thinking and decisions. Hence, the existing agglomeration of economic capital by knowledge corporations gives them a tremendous power for influencing human thinking and decisions' (Fuchs, 2009, p. 78). The profitability of the relationship between platform and agency demonstrates the role of platforms as interactants, shaping societal norms through data gathered from their users.

Platforms, according to Srnicek (2017a), exist in five forms - advertising, cloud, industrial, product and lean – all of which are reliant upon data to function and extract labour from their users to increase productivity. The diverse nature of these platforms demonstrates the heterogenous nature of data in relation to the ways in which production can be optimised. Advertising, cloud and industrial platforms have a particular link to betting shops, whilst product and lean platforms are present elsewhere in the gambling industry. Advertising platforms are the very platforms designed to maintain the harvesting of data from the surveillance of user behaviour. Platforms such as Facebook or Google have the ability to monitor and record interactions to improve algorithms and raise revenue (or surplus value) through advertising (Srnicek, 2017a; Zuboff, 2019). Facebook itself is a social media platform with a marketplace function which shapes exchange and the accumulation of capital (Roy, 2021). In addition to media such as loyalty cards which allow for the tracking of user behaviour for further profit (Rossiter, 2016), betting shop owners may track their own social media platforms or search engine metrics. Such surveillance enables the sending of targeted promotions to customers (such as those explored by Rawat et al., 2020) based on user behaviour or to interact directly with the customer and provide a wider range of products (Newall et al., 2019a, 2020a, 2020b).

Cloud platforms, on the other hand, are hardware or software which allow the outsourcing of the functions of IT departments. For example, Srnicek (2017a) argues that the use of a cloud such as Amazon Web Services was initially developed to maintain the myriad of Amazon's services, but Amazon soon profited from the rental of its cloud platform to external corporations. Betting shops benefit from cloud platforms which

outsource many functions of platform gambling. Clouds from companies such as *Scientific Games* (2020) or *Playtech* (2020) manage algorithms related to the RNG and the RTP rate of games as well as the odds of sporting events available on their respective platforms (Jones et al., 2020). This use of data theoretically outsources the exchange which would normally be taken by betting shop employees thus improving productivity for the owners of betting shops.

Industrial platforms relate to the insertion of sensors into the production line with data used to ensure the interoperability of automated aspects of production (Srnicek, 2017a; Manokha, 2018). Technology requires sensors to form the IoT which interacts with – and harvests information from – its environment to provide services, communication and data analytics (Gubbi et al., 2013). The IoT exists both within the household as a network of household electrical goods (West, 2019; Zuboff, 2019) and within the workplace, through the digitalisation of production systems (Geng, 2017; Lüthje, 2019) The examples of IoT-based production used by Srnicek (2017a) include General Electric and Siemens, two manufacturing powerhouses which benefit from the swift processing of user data and machine learning, similar to the argument made by Briken (2020). Just like manufacturing, any omnichannel approach consists of touchpoints (Verhoef et al., 2015) which rely on the harvesting and processing of data to optimise production. In this case, the more efficient the interoperability between each touchpoint, the higher the level of productivity for the betting shop owner.

The final two platform types are of less relevance to betting shops. Product platforms, for example, restore profits on a zero-margin cost to goods on a subscription or rental basis (Srnicek, 2017a). Examples of this are represented by music platforms such as Spotify or Apple iMusic, both of which generate a profit for subscription to music. Products related to the gambling industry may take the appearance of a product platform. For example, platforms such as the *Racing Post* (2020) allow for the subscription to digitalised, gambling-related publications. Yet, although it theoretically enhances the product margin of gambling as will be discussed in section 3.4.1, platform gambling itself is not a subscription platform. Finally, the lean platform is a virtual asset owned by assetless

companies, reducing costs through its mere existence of a simple app, such as Uber or Airbnb (Srnicek, 2017a). Uber owns no cars and Airbnb owns no hotel rooms; the growth of these platforms has been based on independent contractors and freelancers. These lean platforms, according to Cole (2017), have provided the biggest digital transformations within the platform capitalist system. They could also be considered exploitative if only for their use of a contractor who must set wages low enough to defeat competition (Mirani, 2017), whilst lean platforms themselves benefit from the data harvested from contractors (Van Doorn and Badger, 2020). However, a recent ruling made by the UK Supreme Court that Uber drivers should be treated as employees has ensured the provision of a minimum wage and holiday pay (BBC, 2021). Betting shops naturally are not reliant on lean platforms. Nonetheless, app-only sites have emerged within the gambling industry with examples such as *Kwiff* (2020) and *Betbull* (2020). The selling point of lean platforms is the competition provided through higher odds thanks to the lack of costs associated with the management of betting shops.

Platforms, therefore, manifest themselves in a variety of ways, some of which benefit the development of platform gambling. Platform gambling relies on a process formed by the harvesting of data, the interoperability of the omnichannel continuum, and its ability to store algorithms within a cloud. This process can be understood in more depth through Srnicek's (2017a) affordances of data, all of which can be explored to understand the benefits of the platform capitalist economy to the capitalist class.

3.4.1: The Affordances of Data

The evolution to platform capitalism benefits owners as data offer potentialities to the controllers of platforms or cyber-thoroughfares. These benefits are understood here as affordances, inspired by Gibson (1986) who argues in the biological sense that 'affordances of the environment are what it offers the animal, what it provides or furnishes, either for good or ill' (p. 127). Similarly, the affordance of the IT artefact or IS refers to its potentiality to the end user. In this sense, the use of data as a commodity when extracted through platforms offers five potentialities:

1. Data educate and give competitive advantage to algorithms.
2. Data enable the coordination and outsourcing of workers.
3. Data allow the optimisation and cross-subsidisation of productive processes.
4. Data make possible the transformation of low-margin goods to high-margin services.
5. Data generates more data as part of a cycle of data analysis (Srnicsek, 2017a).

These five affordances reflect the role of data in enhancing the efficiency – and thus, profitability – of productive processes. The ownership rationale for harvesting data is clear as ‘the companies that most effectively use big data to gain insight into their customers and act on that data will win’ (Glass and Calahan, 2015, p. x).

The affordances of data provide a framework to understand how platforms exploit the abstract labour of the theoretical lens. Table 3.1 demonstrates a summary of how each affordance of data is represented within the development of platform gambling as well as their theoretical implications for the class antagonisms within betting shops. Data afford the same affordances to betting shop owners, whether through the development of situational and structural characteristics, the cross-subsidisation between the platforms of the omnichannel continuum, or the reduction of production costs. The theoretical relationship between the affordances of data and the themes in Chapter Two is explored in more detail below.

Table 3.1: A Summary of the Theoretical Relationship Between Srnicek's (2017a) Affordances of Data and Platform Gambling.	
Affordance	Summary
The Competitiveness of Algorithms	<p>Increased data afford a more competitive platform thanks to generated network effects and the subsequent refining of relevant algorithms. Increased quantities of data also imply increased usage.</p> <p><i>Customer data provide feedback to enable a customised gambling experience with reinforcement of structural characteristics.</i></p> <p><i>Quantification of sport provides wider range of sport betting markets.</i></p> <p><i>Data optimise the algorithms informing the RNG and long-term RTP within casino- and slot-based games.</i></p>
Coordination and Outsourcing of Workers	<p>Data allow platforms to outsource labour to cloud platforms.</p> <p><i>Betting shop employment is either outsourced to the cloud functions offered by the omnichannel continuum, to the customer through consumptive labour, or redeployed to advertising and maintaining each element of platform gambling.</i></p>
The Cross-Subsidisation of Platforms	<p>Data enable the cross-subsidisation of platforms as well as the diversification of the customer base.</p> <p><i>Data enable the cross-subsidisation within the omnichannel continuum of individual platforms. For example, digital platforms may cross-subsidise the existence of OTC betting. The continuum also attracts a diverse customer base through the different products offered within each platform.</i></p>
The Transformation of Low-Margin Services into High-Margin Goods	<p>Platforms remove the costs associated with the production of risk, thus improving the margins made by owners.</p> <p><i>Higher margins arising out of the reduced costs of production manifest themselves in improved odds and offers for the customers on digital platforms.</i></p>
Virtuous Data Cycle	<p>Data provides a virtuous cycle of data. Data can provide more data through further analysis.</p> <p><i>Further data are extracted from customer behaviour through surveillance capitalism. Loyalty schemes and online accounts allow for the monitoring of customers within the omnichannel continuum for the purposes of profit from behavioural data.</i></p>
Source: Affordances of data adapted from Srnicek (2017a).	

3.4.1.1: The Competitiveness of Algorithms

Platforms simultaneously position themselves both between users and as the ground upon which activities develop (Srnicsek, 2017a). The success of the ‘developmental arc’ (Cole, 2017, online) of a platform depends on the ‘network effects’ (Srnicsek, 2017a, p. 45) which are generated as a result of its use. The more data that are gathered, the more successful the platform will become. Equally, ‘The more numerous the users who use a platform, the more valuable that platform becomes for everyone else’ (Srnicsek, 2017a, p. 45). For example, individuals are more likely to join Facebook or Twitter if their family and friends are already users. The examples offered by Srnicsek (2017a) are of Google, Facebook and Uber. The more users earned by Google, the more effective its search algorithms become thus refining the advertising targeted towards individuals. Facebook allows users to interact with each other whilst recording each interaction, whilst Uber draws data from traffic and from drivers to optimise its services.

Srnicsek (2017a) contends that competitive algorithms also afford the use of pre-existing infrastructure on which new platforms are built. The cloud platform service offered by Amazon Web Services allows the development of new businesses with a low margin of production (Srnicsek, 2017a; Lüthje, 2019). For industrial platforms, the gathering of data ensures that factory owners optimise the productive processes between individual components (Geng, 2017; Skilton and Hovsepian, 2019). Such productivity is linked to three key affordances of the IoT, according to Bartlett (2017). The IoT firstly allows for the combination of advanced machinery and analytics with optimum working practices. Secondly, the IoT connects industry to advanced communication systems based on the big data of the advanced Internet revolution thus allowing more a more nuanced analytical insight. Thirdly, the IoT improves the efficiency of productive processes and improve life standards. Whilst the nature of the IoT is varied and can thus be applied to multiple industries such as healthcare, energy or aviation (Bartlett, 2017), its evolution is reliant upon the gathering of data.

In the case of platform gambling, the network effects generated through repeated use improve the competitiveness of its wide range of gambling activities. Increased usage

theoretically refines the algorithms related to the array of gambling opportunities as touched upon during the previous chapter. Indeed, a greater number of features allows a greater number of actions (DeSanctis and Poole, 2004). Platform gambling theoretically benefits from the competitive advantage given to structural characteristics associated with platform gambling such as the algorithms which inform sporting odds or FOBT- and online gaming. The use of data especially benefits features such as cashing out or betting whilst in-play. The large quantities of in-play activity which are available online and on SSBTs rely on algorithms which quantify microdata within the event itself as well as the money already spent to control liabilities (Gainsbury et al., 2020a). For gaming products, data configure algorithms which inform the RNG and the RTP percentage (Woodhouse, 2019), as well as the game settings depending on the actions of the individual user. This may be related to stake, autoplay or the choice of features, depending on the game itself. Meanwhile, the data gathered from surveillance capitalism associated with loyalty scheme-based use of platform gambling also benefits the deployment of further products as explored in section 3.4.1.5 below.

3.4.1.2: Coordination and Outsourcing of the Workforce

Closely related to the competitiveness of algorithms is the coordination and outsourcing of the workforce as a result of the efficient use of data. Srnicek (2017a) highlights the 'few natural limits to growth' (p. 45) for platform owners who need only to maintain the capacity for data storage as opposed to procuring factory space or a workforce. The worker is rendered obsolete and the platform grows a rapid rate (Srnicek, 2017a). As mentioned earlier, *Kwiff* (2020) and *Betbull* (2020) are examples of gambling platforms which do not require the workforce associated with the land-based operators as they are not constrained by the presence of betting shops. Similar to Uber and AirBnB, they require only server space to profit from the greater quantity of data.

The efficiency of data also applies to industrial platforms which rely on robotics for manufacturing. Geng (2017) highlights five components which as part of the IoT are of importance in the production of goods: sensors, networks, standards, augmented intelligence, and augmented behaviour. The latter two of these components underline

software which will replace human analysis and judgement, thus removing human biases and error. Within betting shops, Jones (2019) warns of the onset of SSBTs and their potential to replace staff. 'Imagine a cashier that doesn't have cash differences, doesn't get conned, never goes sick, never late, doesn't overpay bets and doesn't need 20-minute break every 6 hours. Well that's what this is. SSBT is for Self Service Betting Terminal. It's the quiet ones you have to watch. You have been warned' (Jones, 2019, p. 9). SSBTs, from this viewpoint, have the potential to remove human error which may occur from betting shop employees.

The use of data therefore brings clear implications for the workforces of betting shops. We have already evaluated how the use of platform gambling has transformed the roles of betting shop employees. The nature of the digitalised sector means that platform gambling theoretically outsources the work of employees to said platforms. FOBTs and SSBTs both allow for the process of consumptive labour (see Koeber, 2011; Koeber et al., 2012), whilst online gambling removes the spatio-temporal restrictions of OTC betting (Gariban et al., 2013), thus encouraging prosumerism (see Dyer-Witheyford, 2015). Koeber et al. (2012) highlight how customers can protest against the use of consumptive labour by insisting on dealing with staff. This would imply that customers should only engage in OTC betting whilst in-shop. Nonetheless, the synergistic management of OTC betting and platform gambling within the omnichannel continuum theoretically transforms the nature of betting shop employment from bet acceptance to platform maintenance.

3.4.1.3: The Cross-Subsidisation of Platforms and Diversification of Customer Base

The importance of network effects means that platform owners must employ a diverse range of platforms through the cross-subsidisation of different business areas to diversify their user base (Cole, 2017). Srnicek (2017a) highlights how Google provides some services (for example, Mail or Drive) for free to enlist users, whilst raising revenue through its advertising operations. Amazon is another platform which benefits from cross-subsidisation. For example, its plans to speed up Prime delivery to a waiting time of one day was estimated in 2019 to have cost \$800 million (Marino-Nachison, 2019),

subsidised by Amazon's success through surveillance capitalism and its Web Services (West, 2019). This cross-subsidisation demonstrates a diversified customer base with the rapid supply of goods, a network of home objects (for example, Alexa. West, 2019) based on the IoT, and cloud services to other platform owners all deployed in order to maintain profit.

The deployment of an omnichannel continuum theoretically facilitates the subsidisation of channels to attract a diverse pool of customers. Zajdel et al.'s (2020) emphasis on the access offered through multiple touchpoints highlights the need to attract a diverse range of customers to the betting industry. For example, customers who prefer casino and slot games are theoretically recruited on FOBTs, whilst those who prefer a wider range of sports betting are done so through SSBTs. Customers who prefer these to be accessible in one setting and without the need to enter a brick-and-mortar unit are recruited online. These are in addition to customers who may wish to bet OTC within betting shops. In summary, platform gambling attracts a diverse range of customers. Data provided within Chapter Two demonstrate the cross-subsidisation which may occur within the industry. As a whole, the total online GGY for the gambling industry is over five times that of OTC betting (Figure 2.2. See also *Gambling Commission*, 2020a). The breakdown of online and land-based GGY – as demonstrated previously in Table 2.2 – demonstrates why *Entain* (2021) and *William Hill* (2021) may wish to keep shops open as they recruit customers to online gambling whilst being cross-subsidised by its Internet arm. Such recruitment may occur through the deployment of cross-channel offers. Hsia et al. (2020) argue that omnichannel migration is more likely to occur through personalised incentives. Furthermore, the closure of betting shops after the implementation of the maximum stakes imposed on FOBTs also demonstrates how FOBT gambling previously ensured the profitability of the OTC touchpoint of the omnichannel continuum (see *Entain*, 2021; *William Hill*, 2021).

3.4.1.4: *The Transformation of Low-Margin Goods to High-Margin Services*

The first three functions of data analysed above are performed at a significantly reduced cost of production. A key characteristic of platforms and data is their ability to transform

the low-margin nature of a good to a high-margin service, thanks to the negation of production costs. Srnicek (2017a) highlights subscription platforms such as Rolls-Royce and Spotify which utilise platforms to rent out a good – or subscription service – at a higher margin of profit. In the case of the current study, platform usage theoretically reduces the costs associated with traditional retail settings, thus allowing betting companies to advertise a more attractive offering to its customers compared to its OTC offering. This allows a higher margin from data-based transactions as opposed to an interaction through an employed worker, demonstrated through the difference in odds offered within OTC betting and platform gambling.

It is important here to briefly outline how odds are formed, with a reference to the disproportionality between a selection's odds and its true chance of winning. The odds of a selection winning an event theoretically relate to its chance of winning. The best example of this is the toss of a coin, the fairest odds of which would be 'even' (fifty percent chance of winning) for heads and 'even' again (fifty percent) for tails. A customer betting £1 at 'even' would win £2 (£1 winnings and £1 staked). These odds produce a total round-up of 100 percent chance of the odds occurring. However, owners would not profit with these odds and thus produce an 'over-round' to guarantee that a profit is made. For example, the same coin-toss may be priced at 5/6 (£1 staked returns £1.83: 83 pence winnings and £1 stake returned) per selection (54.64 percent each). The total odds produce a total round-up of 109.28 percent, and it is this 9.28 percent over-round which guarantees a profit for bookmakers. The bigger the over-round, the more profit for betting shop owners. Owners therefore benefit from a surplus value given within odds which are lower than the true probability of success for the customer's selection (Young and Markham, 2017).

A reduced over-round is theoretically offered through digital platforms - such as online gambling - as they offer a higher-margin service to its customer. This is demonstrated in Table 3.2 which shows the prices available at the same time in both a Ladbrokes shop and its online platform for a midweek horse race in October 2020. The data show how online

pricing is more profitable to the customer with a lower over-round thanks to three selections having larger odds online than in-shop. In summary, the table shows the use of platform gambling – and online betting above all – to provide better odds to the customer at a cost of three percent of the owners’ book thanks to the lack of costs associated with shops.

Table 3.2: Ladbrokes Shop-Based and Online Odds for 13:00 Nottingham, October 14 th 2020.		
Selection	In-shop Odds	Online Odds
Imperial Sun	9/4	9/4
Encounter Order	11/4	3/1
Adayar	7/2	7/2
Set Point	5/1	5/1
Patrolman	11/1	12/1
Handsome	20/1	20/1
Soapy Stevens	20/1	20/1
Graystone	33/1	33/1
Mesopotamia	40/1	40/1
Ron O	40/1	50/1
Carpentier	66/1	66/1
Over-round (%)	123.53	120.67
Source: <i>Ladbrokes</i> (2020). Odds taken at 9.15am, October 14 th 2020.		

Special offers are also theoretically given thanks to the reduced production costs of digital platforms. This may be particularly true of online betting where an offer such as ‘best odds guaranteed’ (BOG) – which is available within shops on a limited basis – is widely available online. BOG benefits horse racing bettors as they could win on odds larger than those taken when the initial bet was struck. For example, a customer who takes an early price of 6/1 (£60 profit from a £10 bet) on a horse will be paid out online at the starting price of 7/1 (£70 profit from a £10 bet) should their selection win. BOG is available for loyalty customers only in *Ladbrokes* (2019a) and *Coral* (2017) shops or for certain races in *Betfred* (2017) shops, whilst BOG is unavailable in William Hill shops. On the other hand, offers such as BOG are widely available to all customers through each of these companies’ websites thanks to the reduced costs associated with online gambling.

Zhang et al. (2010) argue that omnichannel pricing within retail is made less competitive by the costs incurred by the logistical supply of goods. Data, on the other hand, provides online pricing which is vastly improved in the gambling industry compared to that in-shop. In summary, the removal of production costs associated with the consumption of risk within betting shops theoretically allows owners to extract a higher-margin profit through platform gambling, thus providing for even bigger odds such as those in Table 3.2 or by offering the structural characteristics such as betting or cashing out in-play. This is also reflected by *Kwiff* (2020) and *Betbull* (2020), both of which highlight the benefit of reduced production costs associated with app-only businesses as enhancing their product offering to the customer.

3.4.1.5: Virtuous Data Cycle

The final affordance of data is the additional data they can provide through further analysis (Srnicsek, 2017a). 'The major means of wealth generation on the Internet and through proprietary platforms such as apps is the surveillance of the population' (Foster and McChesney, 2014, online). Surveillance capitalism – a system which 'unilaterally claims human experience as free raw material for translation into behavioural data' (Zuboff, 2019, p. 8) - is a significant source of profit for Google whose cross-subsidisation of free services relies on the behavioural data drawn from its users (Zuboff, 2019). Amazon, meanwhile, profits from the surveillance facilitated by the insertion of sensors into home objects, harvesting data which again optimise marketing algorithms unique to their users (West, 2019). This cycle forms what Rossiter (2016) calls the 'logistical city' (p. xiii), which ensures the surveillance and organisation of its citizens.

Surveillance capitalism underlines how platform owners rely on the harvesting of data, an example of which is represented by Cambridge Analytica's gathering and selling of data belonging to 87 million Facebook users during the run-up to the 2016 US presidential elections (Kang and Frenkel, 2018). Surveillance, however, was nothing new. Multinational corporations such as Verizon and Disney, for example, had already expanded their digital capabilities to absorb user data (Foster and McChesney, 2014).

Owners profit from the behavioural surplus of data, where data are used 'as a means of generating revenue and ultimately turning investment into capital' (Zuboff, 2016, online). Moreover, platform owners have a range of tools available to derive profit from user data. 'Marketing automation software. Customer relationship management (CRM) systems. Data management platforms. Analytics tools. These are the weapons in a marketing arms race; these are the technologies that provide marketers with the data they need to gather insights into their customers... When these technologies are integrated together in what is called the marketing technology stack, the data they generate can be even more powerful' (Glass and Calahan, 2015, p. 37). Although betting shop owners may not outwardly sell to other advertising agencies, they theoretically profit inwardly from analysis facilitating the deployment of targeted offers (Rawat et al., 2020) and the restriction of unprofitable business (Cassidy, 2020). The more data available for analysis, the more advertising that is generated and further business decisions are made.

Betting shop owners profit from a particular kind of surveillance capitalism through the deployment of a loyalty card acting as a gateway to the loyalty schemes and online membership as explored in Chapter Two. Consumer activity which is trackable by loyalty cards are part of the 'economies of capture' (Rossiter, 2016, p. xiv), co-ordinated around patterns of consumption. The importance of data extracted through digital platforms is highlighted by a former CEO of Skybet – a popular online gambling platform – who argues that 'the difference between online and offline is that online, you have an account and we can get a lot of data on any individual' (*The Invisible Addiction*, 2020). This approach was reflected by Gariban et al.'s (2013) ethnographic study of an online-based gambling company which 'records every click a customer has performed on their website, which is regarded as extremely valuable information. These are the digital footprints which customers leave behind on Easy Bet's [fictional name] website' (p. 113). Furthermore, data accessed by Skybet on their customers include details relating to banking records, mortgage details and location coordinates (Satariano, 2021). These digital footprints are then used to generate bespoke offers such as the free bets or inducements as described by Hing et al. (2019a, 2019b) and Rawat et al. (2020).

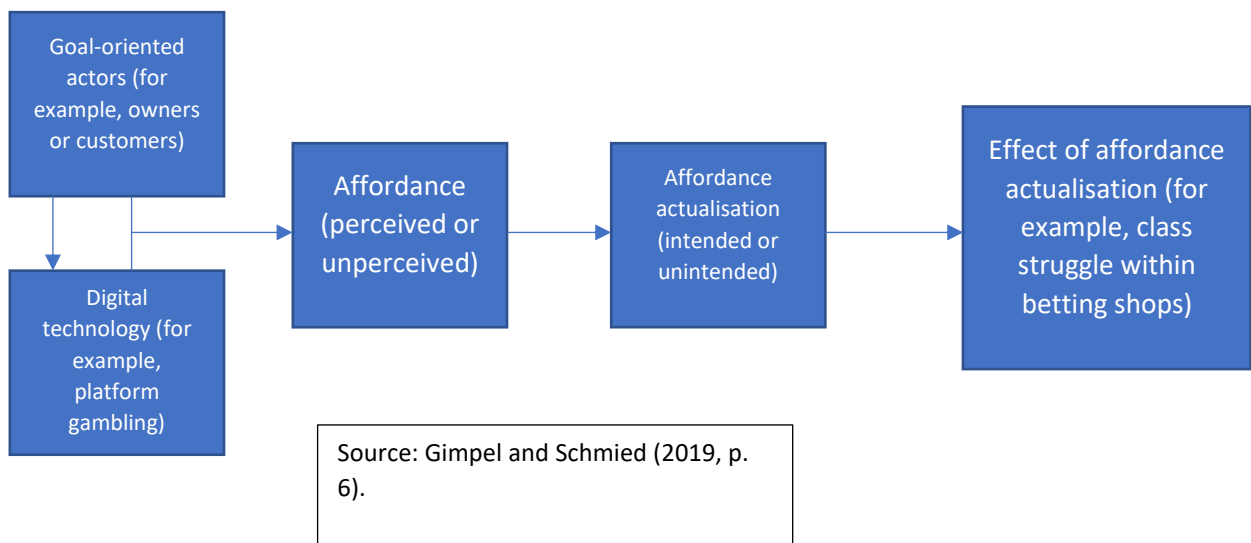
3.5: Platform Capitalism and the Adverse Economic Shift

The theoretical implications of platform capitalism dictate that technology exploits the masses rather than liberate them. Platform gambling is explored here as an example of this exploitation, thus representing an adverse economic shift which Gimpel and Schmied (2019) argue is a risk or side effect of digital transformation. Specifically, such adverse shifts are characterised by the displacement of traditional structures, the growth of superpowerful corporations and the loss of international competitiveness. Firstly, the displacement of traditional structures is defined by Gimpel and Schmied (2019) as the replacement of ‘traditional economic structures due to DTM [digital technologies and media]’ which then ‘harms beneficiaries of the traditional structures’ (p. 7). The Marxist analysis of the economy contends that only the bourgeois class benefits from the economic structure and, with technological innovation, also benefits from the onset of technology. The study’s theoretical lens, however, does outline how the traditional economic structure of the bourgeoisie and proletariat evolves to focus on the value of abstract labour drawn from traditional and immaterial labour. The other two characteristics are closely related to the central argument made by Hardt and Negri (2001). The growth of superpowerful corporations and the loss of international competitiveness specifically refers to the replacement of the nation-state as the chief actor in the global economy with the power held by multinational corporations. The economic power held by multinational companies ensures the maintenance of a global empire over a constantly evolving proletariat.

Srnicek’s (2017a) platform capitalism therefore adds an important second element to the study’s theoretical lens, simultaneously relating the affordances of data to the potentialities offered by platform gambling whilst underlining its continuation of capitalist exploitation. Gimpel and Schmied (2019) analyse how the affordances of an IS may result in the detrimental risks or side-effects of digital transformation. Figure 3.2 demonstrates how the relationship between agency and an IS can eventually result in an adverse economic shift through the actualisation of affordances. The affordances of technology – perceptible or otherwise – can be enacted by the end user of the IS or IT

artefact, thus resulting in a detrimental effect. From a platform capitalist analysis, the affordances of data through platform gambling offer potentialities to betting shop owners which, when actualised, give rise to the exploitation of customers and employees alike. For example, the use of data to develop platform gambling within an omnichannel continuum procures more customers and thus more immaterial labour. Such immaterial labour then generates further capital and data which are then reinvested into each platform. Employees, meanwhile, suffer from the outsourcing of their work to digital platforms. In summary, the effect caused by the actualisation of affordances is the abstract labour which forms the centre of the theoretical class struggle. Srnicek's (2017a) platform capitalism thus helps the study to examine the relationship between the development of platform gambling and the initial argument made by Cohen (2003).

Figure 3.2: The Relationship Between Agency, Affordances and the Negative Effects of IS.



3.6: Criticisms

There is a clear relationship between Marxism and the digital development of the UK's betting shops. However, a Marxist approach is nonetheless criticised from multiple viewpoints, not least from those citing the failure of Soviet Union communism. Specific criticisms relating to the true nature of dialectic have already been evaluated and addressed within the Marxist approach adopted through the theoretical lens, whilst a further criticism of Marxism is accounted for within the philosophical approach explored

during Chapter Four. This section addresses the main criticisms posed by liberalism as the victorious ideology to have emerged from the Cold War. Criticisms are then addressed by those who highlight the role of culture from viewpoints inside and outside of Marxism. Gramsci (1999) is considered as part of the Marxist school of thought whilst Harris (1979) offers a cultural materialist critique separate to Marxist ontology. Finally, the section evaluates criticisms from an evolutionary economic viewpoint.

3.6.1: Liberalism

Liberalism is adopted here as the main ideological opponent to Marxism and as such, is used during Chapter Seven as the alternative viewpoint during the study's retroductive analysis. This critique accounts for criticisms made by both liberalism and neo-liberalism. Indeed, the digital development of the UK's betting shops was after all set into motion by the neo-liberal attitudes of a Labour government which implemented the framework for innovation in the Gambling Act 2005 (Cassidy, 2020). Whilst liberalism names the approach 'aligned to the historical emergence of "free market" capitalism' (Phelan and Dawes, 2018, p. 1), neo-liberalism is concerned with 'political economic practices that proposes that human well-being can best be advanced by liberating entrepreneurial freedoms and skills within an institutional framework characterized by strong private property rights, free markets, and free trade' (Harvey, 2007, p. 2). Furthermore, according to Harvey (2007), the success of neo-liberalism requires 'technologies of information creation and capacities to accumulate, store, transfer, analyse, and use massive databases to guide decisions in the global marketplace (p. 3). Whilst liberalism and neo-liberalism may appear at odds, Harvey (2007) also highlights how Hayek (1945) – a prominent neo-liberal theorist – formed his basic arguments based on the *laissez-faire* economics advocated by Smith (2017). The critique therefore focuses on the economic freedom which is proposed by liberalism and neo-liberalism alike, compared to the alternative model proposed by Marx (2013a). Brief references have already been made here to the 'end of history' (Fukuyama, 1992, p. xi) signified by the fall of the Soviet Union and the success of Western capitalism. Indeed, the fall of the Soviet Union is the 'conventional referent' (Dean, 2018, p. 23) for the downfall of communism and has led to

questions such as that posed by Asatryan (2013): 'if Marx's doctrine is true, why was the end of global socialism so inglorious?' (p. 11).

However, care should be taken in highlighting the difference between Marxism and communism. It would be erroneous to portray the fall of the Soviet Union as an example of Marxism's failure to foresee the future as the state capitalism adopted by the Soviet Union was not Marx's (2013a) version of emancipation from capitalism (Resnick and Wolff, 1993). The collapse of the Soviet Union is linked to the fall of Marxism as Marx's counsel was sought by the Bolsheviks prior to the 1917 Revolution (Lipset and Bence, 1994). Yet, rather than occur at the height of the development of productive forces as predicted by Marx (2013a), the 1917 Revolution occurred within the least developed country in Europe with Russia's agrarian economy not yet advanced enough for communism to take hold (Andrews, 2007). Communism had arisen in the Soviet Union far earlier in the process described by Marx with capitalist forces failing to grow to their full capacity prior to the arrival of communism (Lipset and Bence, 1994; Andrews, 2007; Eagleton, 2011).

Additionally, communism is not dead. Dean (2018) highlights how communism is still portrayed as the most equitable yet least productive economic system. Even during the Cold War, the US and the Soviet Union saw the potential of each other's economic systems. 'The US may not be equitable, but it is productive. The USSR may not have been productive, but it was equitable' (Dean, 2018, p. 28). Capitalism is often portrayed as the optimum economic system for all, despite the bourgeois, primitive accumulation of capitalism facilitated by over-production (Bastani, 2019). Communism is therefore portrayed as the main threat to the 'fantasy' (Dean, 2018, p. 36) where free market capitalism forms the optimum economic conditions for the global population. As Dean (2018) highlights, communism poses an ideological threat to the bourgeois class, through an increasing number of the population which Bastani (2019) argues are awakening to the exploitative shortcomings of capitalism. Even within the gambling sector, the image of communism is used as a metaphor by Donoghue (2021) who argues that protective

measures such as affordability checks are similar to restrictions on alcohol enforced by Gorbachev within the Soviet Union during the 1980s. The end result for both, Donoughue (2021) argues, is a mass exodus to the black market.

Having already underlined the financial power maintained by multinational corporations reliant on data, the current study disagrees with Fukuyama's (1992) view that the interconnectivity offered by capitalism has ended exploitation. This is represented by Srnicek's (2017a) contention of platform capitalism being a natural evolution of the exploitation maintained through the capitalist system after 2008. Gimpel and Schmied (2019) also highlight how adverse economic shifts which occur as a result of digital development. Zuboff (2015) also notes how neo-liberal thought critiques the concept of platform - or indeed, surveillance - capitalism. Indeed, the transparency offered by data is impossible according to Hayek (1988) who argues that the 'extended order' of capitalism is based on transactions between actors who 'do things by circumstances of which we are largely unaware and which produce results that we do not intend. In our economic activities we do not know the needs which we satisfy nor the sources of the things which we get' (p. 14). Hayek (1945) would also disagree with Hardt and Negri's (2001) contention that the connectivity offered by data provides bourgeoisie forces with a monopoly or empire. The capitalist system is too complex to offer 'a system of telecommunications which enables individual producers to watch merely the movement of a few pointers... in order to adjust their activities to changes of which they may never know more than is reflected in the price movement' (Hayek, 1945, p. 527).

This complex system is reflective of a market constructed by actors whose rational decisions reflect the invisible hand, a metaphor coined by Smith (2017) in 1759. In *The Theory of Moral Sentiments*, Smith (2017) describes how individuals acting out of their own self-interest cause unintended social benefits, his example being that of a landowner sharing his harvest with his workers. The landowner benefits from keeping the better share of the harvest, whilst the local economy benefits from his decision to give some of the harvest to his workers. This view gives rise to the *homo economicus* who

makes rational decisions based on his own self-interest and on information presented before him (Persky, 1995). Such decisions, as per the 'invisible hand' (Smith, 2017, p. 99), then benefit the rest of the economy. This viewpoint criticises Marxist thought as actors are not influenced by an exploitative economic determinism. Furthermore, Hayek (1945) argues that 'nobody has yet succeeded in designing an alternative system in which certain features of the existing one can be preserved... such as particularly the extent to which the individual can choose his pursuits and consequently freely use his own knowledge and skill' (p. 528) in order to succeed within the capitalist system. The current neo-liberal system, however, is pursued through 'policies of privatization, deregulation, and financialization, and buttressed by an ideology of private property, free markets, and free trade... cuts in taxes for the rich and cuts in protections and benefits for the workers and the poor, resulting in an exponential increase in inequality' (Dean, 2018, p. 123). Indeed, the current economic system is closer to Dean's (2018) analysis where a divide in wealth is more prevalent than the idealism portrayed through the invisible hand.

A further critique of Marxism – and indeed of Hayek - is offered by Keynes (2003) who also acknowledges how capitalism suffers when encountered by negative phenomena such as unemployment. To repair a broken capitalist system, Keynes (2003) proposes government intervention through extra public spending to expand aggregate demand and restore confidence before withdrawing support once the economy is fully functional (Skousen, 2007). Keynes challenges assumptions that the natural market equilibrium has a tendency towards optimal monetary conditions for all (Kent, 2005). By foreseeing instability in the capitalist system, Keynes 'acknowledged Marx's economic predictions without acknowledging Marx himself, and represented, in its essentials and in bourgeois terms, a kind of weaker repetition of the Marxian critique' (Mattick, 1969, p. 16). The only difference in Keynes' (2003) theory from that of Marx is to prevent the decline of capitalism before restoring it to its normal function. The theme of intervention is relevant, with an outdated Gambling Act 2005 due to be reviewed by the government which will seek to restore confidence in an industry deemed as unbalanced (*Department for Digital, Culture, Media and Sport*, 2020).

Yet, the economic freedom promoted by both Smith (2017) and Hayek (1945) informs the modern capitalist system and as such, it is this view which is adopted as the alternative theoretical viewpoint during the study's retroductive analysis. It is worth remembering, however, that the deregulation of the UK's gambling industry occurred under the guise of neo-liberalism (Cassidy, 2020), a theoretical approach which facilitates the rise of a group of individuals which 'exercise immense influence over global affairs and possess a freedom of action that no ordinary citizen possesses' (Harvey, 2007, p. 36).

3.6.2: Culture within Marxism: Gramsci

It may seem unusual to list Gramsci (1999) – a left-wing philosopher - as a critic of Marxism. However, contrary to the continuous class struggle as outlined by Marx (2013a), Gramsci (1999) argues that the proletariat consents to bourgeois control through cultural hegemony. Although Gramsci (1999) does not define cultural hegemony specifically, he does outline the hegemony of the bourgeoisie when outlining the "spontaneous" consent given by the great masses of the population to the general direction imposed on social life by the dominant fundamental group; this consent is "historically" caused by the prestige (and consequent confidence) which the dominant group enjoys because of its position and function in the world of production' (p. 145). The bourgeoisie need not force any influence or ideas upon the proletariat, for the latter merely accepts its place within the capitalist system.

Gramsci's (1999) idea of control through consent has influenced contemporary Marxist thinkers. Jameson (1991) highlights how influence is exerted through cultural norms. 'Faceless masters continue to inflect the economic strategies which constrain our existences, but they no longer need to impose their speech... and the postliteracy of the late capitalist world reflects not only the absence of any great collective project but also the unavailability of the older national language itself' (Jameson, 1991, p. 17).

Meanwhile, Shalbak (2018) argues that cultural hegemony opposes Marxist thinking through the importance of consent whilst new economic epochs are not the result of internal struggle between classes, but rather occur through efforts by the controlling class to construct a more profitable, economic system.

However, the methodology through which control is exerted through cultural hegemony merely outlines the praxis of exploitation which is highlighted by Marxism. 'In any hegemonic formation therefore, one subject category's moral and intellectual leadership is another subject category's coercion and domination. Hegemony may therefore equate with domination. But this assumption is correct only if it is rendered explicitly from the point of view from an explicit subject category, not as a generalised attribute of hegemony, and it must be located in a dialectical relationship' (Kurtz, 1996, p. 106). There is therefore little difference between Marxism and cultural hegemony. The similarities are also reflected within platform capitalism. For example, Kreps (2011) argues that the development of cyber-thoroughfares is controlled by the 'historical bloc' (Gramsci, 1999, p. 690), or the controlling superstructure which has been produced by the social relations of production. The historical bloc manipulates the digital economy – with the use of social media sites – to obtain the data of its users and commodify activities and relationships which occur on the Internet. This is similar to the control exerted by the owners of platforms who, as Zuboff, (2015, 2019) argues, seek to harvest behavioural surplus from user activity.

Cultural hegemony, whilst acknowledged as another offshoot of Marxism, is rejected as there is no difference between Gramsci's notion of consent and Marxist exploitation as they both result in bourgeois control of the capitalist economy (Kurtz, 1996).

Furthermore, Marx and Engels (1974) argue in *The German Ideology* that the proletariat class will eventually awaken to such exploitation and seek to bring about change. If the Marxist dialectic has been ineffective at bringing about revolution against exploitation, then it will surely be as equally unsuccessful at remedying exploitation through consent.

3.6.3: Culture without Marxism: Cultural Materialism

Marxism is criticised for existing with an ontology embedded purely within the empirical relationship between the capitalist ownership of production and its governance of the economy. For example, 'the social ontology of Marxism is one of structures and forces at

the macro-level, with inadequate attention to the micro-mechanisms. Consequently, Marxism underestimates the function of social rules, and fails to appreciate why rules of some kind are an indispensable feature of action and interaction in human society' (Hodgson, 2006, pp. 23-24). This criticism forms the basis for Harris' (1979) model of cultural materialism which argues that class analysis can be explored alongside the role of culture. Harris' (1979) model consists of three layers: the infrastructure, the structure and the superstructure. Changes within the infrastructure – or the mode of production – impact the model's political and economic structures, thus transforming superstructures characterised by constructs such as art, media and consumerism (Walle, 2001). Therefore, the digital transformation brought by platforms change the nature of capitalism, thus impacting consumerism and other Internet-based leisure. Harris' (1979) model, at first glance, appears comparable to Marxist critiques of capitalism. Furthermore, the very phrase cultural materialism 'has a hint of contradiction... since part of what a materialist theory has to tell us is that culture is not of first importance' (Eagleton, 2000, p. 241).

The cultural materialist framework is inspired by Marx's unpublished Introduction to the Critique of Political Economy (see Marx, 1904; Legros, 1977). Within the Introduction, originally written in 1857, Marx (1904) writes: 'By production, the members of society appropriate (produce and shape) the products of nature to human wants; the distribution determines the proportion in which the individual participates in the production; exchange brings him the particular products into which he wishes to turn the quantity secured by him through distribution; finally, through consumption the products become objects of use and enjoyment, of individual appropriation' (p. 274). Furthermore, Marx's (1904) *Contribution to the Critique of Political Economy* outlines the causal relationship between the base of production and the superstructure, or the group of 'political and ideological functions' (Eagleton, 2000, p. 239). Similarly to Harris' (1979) model, the base and superstructure are mutually constitutive, with the superstructure of political and social constructs reflecting the control displayed within the base of production. In summary, whilst Marx is criticised by thinkers such as Harris (1979) and Hodgson (2006)

for not considering the role of culture, Harris' (1979) model is itself traceable to Marx's (1904) own texts.

3.6.4: Schumpeter and Evolutionary Economics

Capitalism's natural tendency to encourage technological development also forms the basis of evolutionary economics, 'a project that aims at fundamental reconstruction of economic theories dealing with technological change and phenomena related, as cause or effect, to technological trade' (Nelson and Winter, 1973, p. 440). Although this study lists the evolutionary economic viewpoints of Nelson and Winter (1973, 1982) and Schumpeter (2003) as a critique of the theoretical lens, there are similarities between them and Marx (2013a) within their analyses of the evolution of the economy. All highlight the self-transformative nature of the capitalist system, inspired by a Darwinian approach in formulating their analysis of the capitalist analysis. Marx, according to Hodgson (2006), endorsed a Darwinian approach towards the process of evolution thus inspiring him to adopt a Darwinian approach to the economy. Schumpeter (2003) is inspired by Marx's work but differs in highlighting innovation as the key driver of the economy as opposed to being intertwined with class exploitation. Nelson and Winter (1982), meanwhile, cite Darwin as their main influence for the framework of an evolutionary economic theory. To survive in an economic environment is to be the most efficient in processes which are tantamount to biological evolution itself. These include processes related to labour, the increase in production of goods which are in high demand, advertising product diversification and finally, policies on investment and research and development.

Schumpeter (2003), meanwhile, highlights the process of 'creative destruction', defined as the 'process of industrial mutation... that incessantly revolutionizes the economic structure from within, incessantly destroying the old one, incessantly creating a new one' (p. 81). It is this process which Schumpeter (2003) argues leads to the unsustainability of capitalism and the prediction of the rise of socialism, again similar to Marx (2013a). On the other hand, as opposed to Marxist criticisms of capitalism which highlights the relations of production as its key component, the focus of evolutionary economics on

technological development highlights entrepreneurship and innovation as the drivers of economic cycles with actors suffering as a result of not keeping up with innovation (Kelm, 1997). Such need to maintain innovation could indeed explain the need of the land-based industry to diversify into platform gambling for its survival, maintaining presence in digital spaces frequented by its customers. According to Schumpeter (1983), the need to evolve with developing technologies is vital not only to maintain competition but also to impact habitual behaviour which occurs within the 'strata of subconscious' (p. 84). Schumpeter (2003) therefore underlines the need to maintain innovation to survive within the economy.

However, Darwin receives very few mentions in Marx's work. He is mentioned only twice in the footnotes during the first volume of *Capital* (Marx, 2013a), as well as within Marx's personal correspondence (Adoratsky, 1942; Runkle, 1961). The comparison between Darwinism and Marxism is also questionable. Marxism is first and foremost a socio-economic theory, whilst Darwinism is a school of thought primarily concerned with the study of biology (Runkle, 1961). Furthermore, *The Communist Manifesto* (Marx, 2013a) was originally published in 1848, over a decade before *The Origin of Species* (Darwin, 1959) was published. Therefore, the Hegelian nature of Marx's teleology was elucidated well before Darwin's theory of evolution had emerged (Runkle, 1961). As Hodgson (2006) also highlights, the end goal of Marxism is unequivocal, the complete emancipation of the proletariat class from bourgeois control. The Darwinian approach, on the other hand, sees evolution as containing numerous, complex outcomes all dependent on species' interactions with its environment. Marxism is a theory tasked with critiquing - and foreseeing the downfall of - the capitalist model. For 'as long as capitalism is still in business, Marxism must be as well' (Eagleton, 2011, p. 2).

In summary, a Marxist analysis provides a more accurate picture of the technological evolution which is needed to ensure competition and primitive accumulation within the capitalist economy, albeit to the detriment of the proletariat. Whilst an evolutionary economic viewpoint of the land-based betting industry may highlight the necessity of

shops to maintain technological innovation towards an omnichannel continuum, a Marxist analysis is more suited to exploring the impact faced by employees and customers alike. Jones et al. (2020) allude to the former of these when arguing how ‘the leading betting shop companies are looking to develop new sustainable models that will be attuned to their new business environment’ (p. 11). These sustainable models, conversely, only benefit the betting shop owners.

3.7: Conclusion

This chapter has outlined the theoretical lens through which perceptions of the digital transformation of the UK’s betting shops are analysed. The Marxist lens is characterised by a class analysis adapted to the three key stakeholder groups, and platform capitalism which demonstrates a continuation of Marxism whilst critiquing the affordances of data for owners within the development of platform gambling. The affordances of data allow the potentialities of diversification and cross-subsidisation of platforms, the recruitment of a large pool of customers whose data provide further analysis, the reduction in the cost of production, and finally a more competitive omnichannel continuum. Equally, these potentialities for betting shop owners bring negative consequences for the proletarians under study. Data facilitate the exploitation of employee labour, as well as the immaterial labour of gambling which is subsumed through the development of platform gambling within the omnichannel continuum. The theoretical lens is therefore inspired by a number of arguments or theorists whether related to gambling (Cohen, 2003), platform capitalism (Srnicsek, 2017a) or Marxism itself (Worsley, 1981; Hardt and Negri, 2001; Marx, 2013a, 2013b). In summary, the theoretical lens explores how the development of platform gambling within betting shops can be perceived as contributing to class antagonisms, a concept which is adopted from the argument maintained by Worsley (1981) that Marxism is a transferrable lens across economic phenomena.

Criticisms of the theoretical lens have also been addressed and discounted from the study. The key criticism made by Fukuyama (1992) is disproven by the advancement of platform capitalism. The globalised connectivity offered by modern capitalism only forms a new, global empire (Hardt and Negri, 2001) and has not ended exploitation by the

bourgeois class, further demonstrated by Zuboff's (2015, 2019) analysis of the surveillance of user data. The study will return to the views of liberalism in Chapter Seven as it explores the relevance of liberalism to the structure which arises from the process of retroductive analysis. Yet, the most important critique for this study has been saved for the following chapter. Critical Realism challenges Marxist ontology thanks to the tendency of the latter to reduce phenomena to the product of class antagonisms. A Critical Realist methodological approach – as the following chapter explores – facilitates a deeper understanding of the structure of platform gambling, and its relationship with the study's class struggle.

Chapter Four: The Critical Realist Philosophical and Methodological Approach

4.1: Introduction

The methodological and philosophical approach to this study has been inspired by Critical Realism (CR), a philosophy which critiques the epistemic fallacy and empirical reductionism associated with positivism (Bhaskar, 2008; Mingers, 2011). The same critique can also be made of interpretivist research which, when carried out according to Klein and Myers' (1999) hermeneutic circle, is impacted by the researcher's own assumptions (Kreps, 2018). A CR approach is instead reliant upon qualitative data to investigate the underlying structures and mechanisms which give rise to empirical phenomena (Marsden, 1998; Zachariadis et al., 2013). Furthermore, CR philosophy asserts that structures are open and interconnected, thus making empirical phenomena difficult to predict (Mingers, 2011; Wynn and Williams, 2012). The focus therefore is placed upon conditions which *can* cause the empirical phenomenon to occur, as opposed to a prediction which is generalisable across a variety of settings. Although Bhaskar's (2008) approach appears at odds with the ontological viewpoint of Marxism, he also portrays CR as an underlabourer which investigates the relationship between theory and phenomenon. The aim of this chapter is to demonstrate the CR approach taken by the study to explore the relationship between Marxism and the digital transformation of betting shops.

Despite its criticism of positivism, CR methodology does explore a hypothetical relationship between a phenomenon and a guiding theory (Danermark et al., 2002). For example, this study is based on the researcher's prior work and research (Master's dissertation) within the land-based betting industry, with an *a posteriori* view that platform gambling may increase the capital which flows to owners from their customers and employees. CR philosophical principles therefore appear to indicate a tension between ontology and epistemology, the separation of which is sought by the researcher. CR philosophy underlines the importance of the fallibility of knowledge (Fletcher, 2017), with the view that phenomena can be explained from other viewpoints. To this end, CR philosophical principles have been translated during the current study into

methodological principles based on guidance from Wynn and Williams (2012, 2020) and previous research by Iannacci (2014) and Bygstad (2010), pursuing a broader strategy of abstraction, abduction and retroduction (Danermark et al., 2002). The latter of these stages is the central mode of inference for CR, requiring the researcher to move iteratively between the data and the guiding 'proto-theory' (Collier, 1994, p. 165) to creatively identify the mechanisms responsible for the observed phenomenon (Bhaskar, 2008). The deployment of a CR-based methodology provides a unique view of perceptions around the digital transformation of the land-based industry. Cassidy et al.'s (2013) handbook of qualitative research within the field of gambling demonstrates a wide range of ethnographic approaches, yet it contains no reference to the usefulness of CR when exploring the industry's digital development. This chapter evaluates how CR philosophical and methodological principles lend a unique perspective of the industry.

The chapter begins by evaluating the philosophical principles of CR, specifically exploring its criticisms of positivism, its emphasis upon transcendental realism, the importance of causation, emergence and the openness of structures, the separation of agency and structure, and finally, the fallibility of knowledge. Secondly, the chapter outlines the methodological principles followed during data collection and analysis. Inspired by Iannacci (2014), emergent themes were aggregated according to the affordances of platform gambling. Aggregate themes were then analysed as mechanisms through the abductive process of theoretical redescription, exploring their interaction through the theoretical lens. The study's retroductive analysis was inspired by Bygstad (2010), developing an analytical narrative to build the micro-structure of platform gambling before comparing to an external macro-structure to explore the best description of the constraints which influence the retroductive structure. The chapter also considers how the trustworthiness of the study was achieved through Lincoln and Guba's (1985) criteria, before evaluating the implications of the ethics approval process.

4.2: CR Philosophical Principles

The CR approach to epistemology and ontology differs to that of positivism. Positivism is defined by Eisenhardt (1989) as a movement ‘toward the development of testable hypotheses and theory which are generalisable across settings’ (p. 546). Yet, positivist assumptions fall prey to methodological individualism, drawing conclusions based on the nature of actors as conforming to ‘a “mere creature of habit and impulse”’ (Sellars, 1991, p. 18). As this section evaluates, CR differs in the assertion that phenomena can be explained but not predicted thanks to the evolving nature of structures which produce empirical phenomena. The section begins by exploring Bhaskar’s (2008) critique of positivism as suffering from epistemic fallacy before exploring his transcendental realist view of society, underlining how empirical phenomena are driven by underlying mechanisms. Thirdly, Bhaskar’s (2008) emphasis upon the openness of structures is evaluated. Contrary to Marx’s (2013a) dialectic, structures containing mechanisms and empirical phenomena are open, interacting with other structures, thus facilitating the diachronic emergence of other mechanisms. Next, the section focuses on the separation of agency and structure and how this is best reflected through an objective and reflexive approach before highlighting the importance of epistemological relativism, acknowledging how phenomena can be explained through multiple theoretical viewpoints.

4.2.1: The Critique of the Epistemic Fallacy

CR is, first and foremost, an alternative to positivism. Positivism as an ontological approach fails because it offers ‘easily accessible and ‘objective’ methods (e.g., quantification and statistical methods)’ (Yeung, 1997, p. 55) used by researchers whose ‘statements about *being* are translated into ones about *our (human) knowledge or experience of being*’ (Mingers et al., 2013, p. 796). This is described by Bhaskar (2008) as the ‘epistemic fallacy’ (p. 16). Indeed, positivist knowledge is based on predictions which are generalisable to wider settings (Eisenhardt, 1989). The onset of positivism during the 1960s started to produce knowledge which was ‘rigorous in the sense of being highly quantitative and mathematical, but which was far from the practical messy problems faced by real managers’ (Mingers, 2015, p. 5). This is critiqued by CR assertions related to

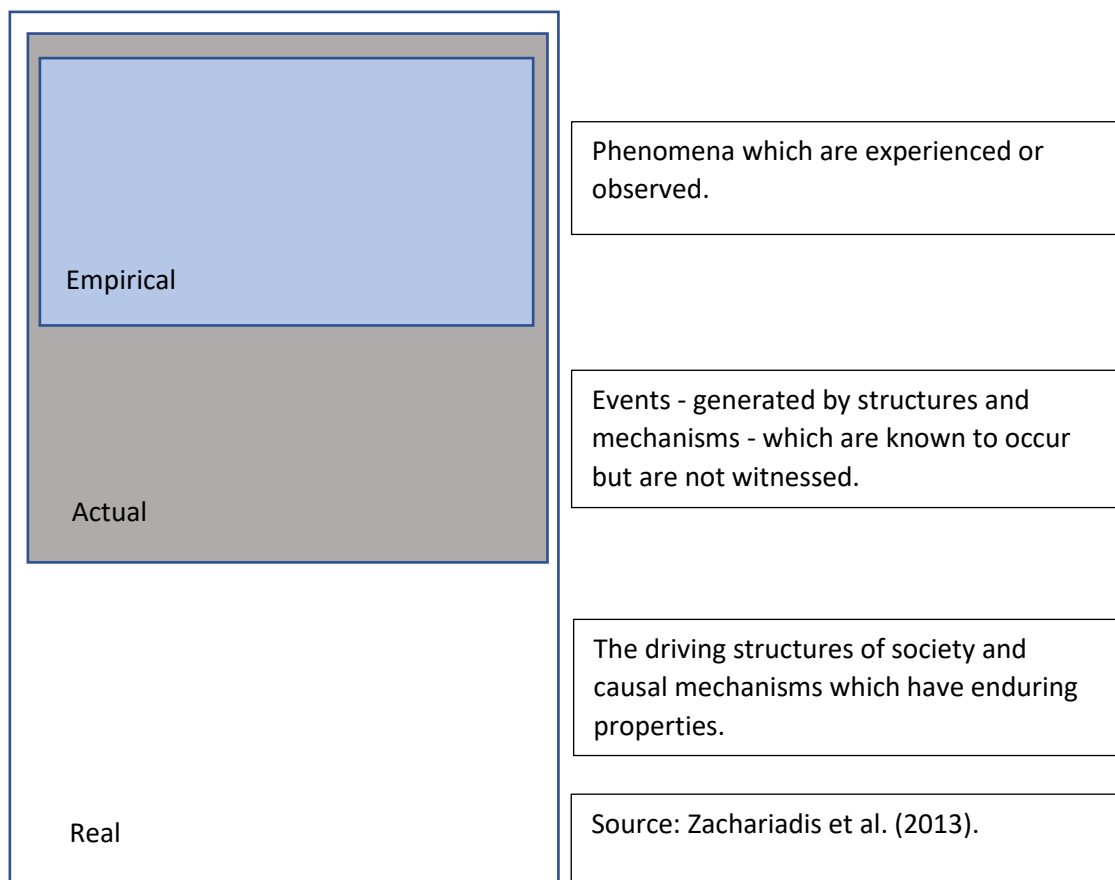
the importance of ontology as a separate entity from epistemology, as well as the world's ability to change separately from agency (Mingers et al., 2013). Positivist assumptions, according to Bhaskar (2008), fail to account for the constantly evolving conditions of society. Such criticisms are not restricted solely to quantitative, positivist assumptions. Researchers should also avoid any epistemic fallacy which occurs through qualitative research. Klein and Myers' (1999) hermeneutic principles – detailed in Table 4.1 - provide a qualitative equivalent to positivism as they suggest 'that we come to understand a complex whole from preconceptions about the meanings of its parts and their interrelationships' (p. 71). Principles such as contextualisation, abstraction and generalisation lead to the use of 'fore-projections' (Kreps, 2018, p. 16). The findings of the research according to these principles are therefore limited to the scope provided by the researcher.

Table 4.1: Summary of Principles for Interpretivist Research.

Principle	Definition
The Fundamental Principle of the Hermeneutic Circle	All human understanding is achieved through iterative movement between the interdependent meaning of the parts and the whole they form.
The Principle of Contextualisation	Requires critical evaluation of the social and historical background of the research so that the intended audience can see how the current situation under investigation emerged.
The Principle of Interaction Between Researchers and Subjects	Requires critical reflection on how data were generated through researcher-subject interaction.
The Principle of Abstraction and Generalisation	Requires the articulation of data interpretation through the above steps to the theoretical concepts that describe the nature of human understanding and agency.
The Principle of Dialogical Reasoning	Requires sensitivity to contradictions between the guiding theory and actual findings with subsequent cycles of division.
The Principle of Multiple Interpretations	Requires sensitivity to possible differences in interpretations of a phenomenon amongst participants.
The Principle of Suspicion	Requires sensitivity to possible biases and systemic distortions within qualitative data.
Source: Klein and Myers (1999, p. 72).	

The need to avoid epistemic fallacy leads the researcher to investigate the structure of events which allow the empirical to occur (Bhaskar, 2008). The causal relationship between structures and empirical phenomena is presented in CR philosophy by Bhaskar's (2008) transcendental realist analysis of society. This transcendental realism asserts that empirical phenomena occur as a result of underlying mechanisms within their specific structures (Sayer, 2000). Figure 4.1 demonstrates the strata or 'hierarchies' (Mingers, 2011, p. 306) in which these phenomena or mechanisms are located, namely empirical, actual, and real. The 'real' hierarchy consists of entities formed of the overarching structures of society and their subsequent, generative mechanisms which define what can (or cannot) occur within the structure (Sayer, 2000). These mechanisms generate the events of the 'actual', or events which are unwitnessed but are nonetheless known to occur (Bhaskar, 2008). The 'empirical' consists of phenomena which are directly experienced or observed (Bhaskar, 2008; Mingers, 2011). Indeed, it is the causal mechanisms of the real hierarchy which CR research seeks to discover.

Figure 4.1: The Stratified Ontology of Critical Realism.



Mechanisms are enduring entities – either physical (for example, atoms), social (family or the market) or conceptual (theories or ideas) – which have tendencies to act in certain ways (Mingers et al., 2013), and the continuous existence of these mechanisms generate the ‘flux of events’ (Mingers et al., 2013, p. 796). The powers of such mechanisms may not be tangible and they may not always present themselves if counteracted by another mechanism within the same structure, but they exist nonetheless (Wynn and Williams, 2012). Mechanisms ‘are quite independent of men – as thinkers, causal agents and perceivers. They are not unknowable, although knowledge of them depends upon a rare blending of intellectual, practico-technical and perceptual skills’ (Bhaskar, 2008, p. 47). This presents the key difference between CR and positivism. Whereas positivism relies on the uncovering of a perceptible factor as a reason for causality, for CR analysis ‘having a causal effect on the world implies existence regardless of perceptibility’ (Mingers et al., 2013, p. 796). Whilst confidence in a mechanism may increase if it is observable, perceptibility is not a prerequisite for a researcher’s understanding of its effects upon the structure (Sayer, 2000).

Similarities can immediately be drawn between CR philosophy and Marx’s (1904) analysis of the relationship between the forces of production and the superstructure, the latter of which would imply an empirical society driven by mechanisms formed by the bourgeois ownership of production. However, Brown et al. (2002) argue that Marxism can be criticised for implying that tendencies are similar to outcomes. Tendencies are properties of mechanisms which enable them to act in particular ways (Mingers et al., 2013), whilst outcomes occur through empirically supported conditions (Brown et al., 2002). Brown et al. (2002) contend that Marxist assertions linking phenomena and existing social relations ‘loosely’ (p. 7) follow the latter. Nevertheless, a CR approach can be used to critique and develop Marxist ontology. Bhaskar (see Bhaskar and Callinicos, 2003) argues that CR makes a theoretical contribution to the evolution of Marx’s theoretical grounding during the nineteenth century. Such a theoretical grounding is offered by Fleetwood (2002) whose CR stratification of Marxism is used during the process of retrodution.

4.2.2: Causation, Emergence, and the Openness of Structures

Causation between hierarchies is not dependent on the frequency of the phenomenon. Causation 'depends instead on identifying causal mechanisms and how they work, and discovering if they have been activated and under what conditions. Moving in the other direction, explaining why a certain mechanism exists involves discovering the nature of the structure or object which possesses that mechanism or power' (Sayer, 2000, p. 14). Causation highlights the processes in which events are generated by mechanisms influenced by the open structure (Wynn and Williams, 2012). Mingers (2011) highlights the open system as not only comprising the relationships between the three hierarchies but also between these hierarchies and other structures. Indeed, 'each component can itself be treated as a system and 'opened up' to reveal another set of components and relations. This process can go on for an indefinite number of levels until we reach the bedrock of indissoluble forces' (Mingers, 2011, pp. 306-307). Transformation in the real world seldom occurs in closed conditions like those maintained during scientific experiments (Wynn and Williams, 2012), and as such societal phenomena should not be analysed as constrained by such methods. Structures and mechanisms constantly evolve and open up to affect each other, implying that empirical phenomena are similarly subject to constant change.

Empirical phenomena are thus difficult to predict thanks to the constant change experienced within open structures (Bhaskar, 2008). Nonetheless, the emphasis on open systems does not preclude the existence of certain mechanisms within different structures, and a mechanism can exist in more than one form within the same structure (Wynn and Williams, 2012). Common or partially recurrent mechanisms are known as demi-regularities, which indicate 'the occasional realisation of a causal mechanism, with relatively enduring tendencies, in a bounded region of time and space' (Wynn and Williams, 2012, p. 794). The analysis of demi-regularities presents an opportunity for the theorist to explain causation within open systems (Fletcher, 2017). For Wynn and Williams (2012), demi-regularities are helpful in two ways when exploring causal explanations. Firstly, demi-regularities can be explored within different structures or settings to explore their tendencies within each unique setting. Secondly, demi-

regularities can highlight how a set of phenomena were unexpectedly different from the theorist's expectations. In summary, the presence of demi-regularities allows theorists to develop a deeper understanding of the structure's causal mechanisms. The study's thematic analysis was therefore based on uncovering demi-regularities which were analysed as mechanisms within the structure of platform gambling.

The openness of systems is also linked to the concept of emergence, defined as 'a relationship between two terms such that one term diachronically or perhaps synchronically arises out of the other, but is capable of reacting back on the first and is in any event causally and taxonomically irreducible to it' (Bhaskar, 1993, p. 397). Elder-Vass (2005) further defines emergence as 'a synchronic relation amongst the parts of an entity that gives the entity as a whole the ability to have a particular (diachronic) causal impact' (p. 321). The concept of emergence therefore highlights how two or more entities combine to produce new entities, the tendencies of which are exclusive from their constituent parts (Fletcher, 2013; Scott, 2014). The open structure consists of entities which combine across hierarchies to produce other generative mechanisms. As a result, the properties of a given structure emerge from the interactions of its constituent entities and mechanisms (Wynn and Williams, 2012).

The implication for a CR-based study is the need to demonstrate the role of emergent mechanisms within the structure and how these have emerged from their constituent parts. Emergence can also occur at all levels of the structure, underlining the need to highlight the causal linkage between all entities, regardless of their stratification (Wynn and Williams, 2012; O'Mahoney and Vincent, 2014). Sayer (1992) demonstrates the emergent properties of the relationship between landlord and tenant, highlighting how the 'explanations of the actions of individuals often requires not a micro (reductionist) regress to their inner constitution (though that may be relevant too) but a 'macro regress' to the social structures in which they are located' (p. 119). Whilst the emergence of social relations between landlord and tenant is easily explainable (exchange of money for accommodation), there would be no use in defining the relationship according to their

separate, biological existences (Danermark et al., 2002). In this sense, the emerging socio-technical relationship between an IS such as platform gambling and its end users should be analysed from a holistic approach focusing on the consequences of their interplay, thus building on the study's view of technology as an interactant.

4.2.3: The Realms of Science and the Separation of Agency and Structure

The difference between Sayer's (1992) macro and micro regress is related to a further CR epistemological assertion on the differences between transitive and intransitive science. Bhaskar (2014) argues that 'there is (or can be) an essential unity of method between the natural and the social sciences' (p. 86). In other words, the same methodology can be deployed to study both social and natural sciences. Whereas intransitive science consists of the realm of scientific knowledge which exists independently of human existence, transitive science is created by human agency (Mingers, 2011). The example given by Bhaskar (2008) relates to the atomic composition of oxygen which exists independently from our changing understanding of the world. This intransitive, scientific knowledge exists separately from human agency. Yet, our understanding of the social world is a product of – yet separate from – nature (Hu, 2018). Intransitive science must exist separately from human agency for us to form our knowledge of it (Sayer, 2000; Brown et al., 2002). CR philosophy therefore asserts that agency exists separately from the structure. For Bhaskar (2008), 'it is not necessary that science should continue, i.e., be ongoing. It is contingent that it is. But given this men *must* reproduce (or more or less transform) the knowledge that is given to them. Men do not construct their knowledge: they reproduce or transform it' (p. 105). Not only do structures predate the existence of their actors, but they are also reinterpreted by the actors who live within them. CR therefore highlights a dialectical nature between agency and structure. Structure shapes – and is a product of – agency (Hu, 2018).

The separation of agency and structure carries implications for CR research, specifically relating to the need to avoid epistemic fallacy as the researcher seeks to develop a new understanding of a phenomenon. This is best achieved through an approach where

objectivity and reflexivity work hand-in-hand, particularly as the researcher approached the study with an *a posteriori* understanding of the structure itself. Objectivity, according to Morgan and Olsen (2007), is a position which can be adopted as well as achieved. Not only should the researcher remain objective by assuming a position separately to their own convictions, but objectivity is achieved through empirical corroboration. Objectivity therefore plays an important role in both the separation of researcher from structure as well as in the identification of demi-regularities.

The researcher of the current study found that a reflexive approach helped to maintain objectivity after adopting advice from Attia and Edge (2017) who highlight two different forms of reflexivity: prospective and retrospective reflexivity. Prospective reflexivity relates to the effect of the researcher upon the research, whilst retrospective is related to the effect of the research upon the researcher (Attia and Edge, 2017). Reflexivity is subsequently a continuous process with the researcher taking decisions in order to remain objective from the research whilst reflecting critically during the process to provide oneself with feedback, direct subsequent research and so on. For example, as section 4.3 will outline, the researcher had already known most of the study's participants through previous work in the industry, thus threatening not only the objectivity of the findings but the true understanding of the structure. For example, pre-existing relationships occasionally led participants to mention aspects of the betting industry which they felt would be taken as granted as understood by the researcher. Participants may have alluded to their pre-conceived notions of FOBTs or special offers from betting companies without explaining them. The researcher counteracted this by asking for a full explanation of their meaning. Attia and Edge (2017) underline the need to develop an awareness of a relationship with an individual to then form a different relationship with the same individual. This separate level of consciousness, as described by Kegan (1994), allowed the researcher to develop a new relationship with participants as participant, separately from previous contact within the industry.

4.2.4: The Fallibility of Knowledge

The key mode of inference for CR – as is demonstrated later - is retroduction, an analytical process which asks which conditions make observable phenomena possible (Belfrage and Hauf, 2017). For Wynn and Williams (2012), such research must explore conditions which either encouraged, triggered or removed barriers to exercising tendencies which thus produced the empirical. The theory-laden nature of society means that multiple perspectives can explain the nature of phenomena or the tendencies of causal mechanisms (Bhaskar, 2008). As such, qualitative research inevitably uncovers the different perspectives of theorists, participants, scientists and so on (Fletcher, 2017). Smith (2006) and Zachariadis et al. (2013) all underline the CR emphasis upon epistemological relativism. Knowledge is viewed as ‘historically emergent, political, and incomplete’ (Smith, 2006, p. 200). Therefore, any theoretical lens should be treated as fallible as other theories may present a better explanation of the phenomena under study (Fletcher, 2017).

The theoretical lens which is used during the study should thus be understood as a ‘proto-theory’ (Collier, 1994, p. 165) which is amendable according to the phenomenon explored in the field. The researcher should therefore analyse all data provided by participants, regardless of any disassociation to the proto-theory (Fletcher, 2017). Equally, the fallibility of knowledge may also mean that themes which were first expected to arise may become irrelevant when investigating causal mechanisms (Aaltonen and Tempini, 2014). Objectivity and reflexivity are equally important when exploring underlying mechanisms of phenomena and the most likely explanation for their existence. In summary, just as CR philosophy contends that phenomena may not occur as predicted thanks to the continuous evolution of structures, the most accurate theoretical explanation may also differ from the proto-theory. The current study’s retroductive analysis thus benefits from analysis based on Fleetwood’s (2002) stratification of Marxist ontology whilst also comparing the structure of platform gambling within betting shops with explanations from liberal criticisms earlier detailed during section 3.6.1. This process is explained in further depth during the following section.

4.3: CR Methodological Principles

CR methodology generally pursues an overall methodological process of abstraction, abduction and retroduction (Danermark et al., 2002). These three stages not only investigate the proto-theory's relevance to an explored phenomenon, but also retroductively analyse the mechanisms which produces it. This study's CR methodological framework was inspired by Wynn and Williams (2012) and Iannacci (2014). Table 4.2 details the framework whilst the following sections evaluate how each principle was fulfilled during data collection and analysis. These principles were the explication of events, thematic aggregation, the theoretical redescription of aggregate mechanisms, retroduction and empirical corroboration. The methodological framework ensured that CR philosophical principles were reflected throughout the study. Wynn and Williams (2012) also underline an additional principle of a mixed-methods approach as part of a process of triangulation. The use of a mixed-methods approach forms part of empirical corroboration which was fulfilled here according to Lincoln and Guba's (1985) criteria relating to the trustworthiness of the study.

This section also evaluates the methodology used during the data collection and analysis. Indeed, the first principle, the explication of events, was a process ranging from the recruitment of participants to the thematic analysis of their experiences. This process was creative, gathering qualitative data from a sample recruited according to specific criteria whilst undertaking a process of thematic analysis. The following sections evaluate how emergent data were used to describe the generative mechanisms within the structure of platform gambling.

Table 4.2: Critical Realist Methodological Principles.	
Stage	Description
Explication of Events	Key themes were abstracted from the data, derived from participants' values or experiences.
Thematic Aggregation	Themes were aggregated to develop a generalisation of affordances which characterise the interactant mechanisms of platform gambling.
Theoretical Redescription of Aggregate Mechanisms	Mechanisms which emerged from themes relating to participants' experiences were theoretically redescribed through the study's analytical lens.
Retroduction	The central mode of inference for CR, moving between abstracted data and guiding theory to explore the theory's accuracy. Based on Bygstad's (2010) macro-micro approach, the study explored the structure of platform gambling using an analytical narrative before comparing with an external structure, Fleetwood's (2002) stratification of Marxist socio-economic ontology, to explore the relevance of the theoretical lens as well as the macro-constraints over the initial structure.
Empirical Corroboration	A process which ensures that proposed mechanisms maintain their causal powers. The study does so through the fulfilment of Lincoln and Guba's (1985) criteria relating to the trustworthiness of the study: credibility, transferability, dependability, and confirmability.
Source: Adapted from Wynn and Williams (2012) and Iannacci (2014).	

4.3.1: Explication of Events

Zachariadis et al. (2013) highlight the necessity of qualitative data to uncover the mechanisms of the structure and as such, the explication of events was split into three different processes related to the gathering and analysis of such data: the recruitment of participants, the data collection itself and the subsequent thematic analysis. Thirty-five semi-structured interviews (excluding pilot interviews) were conducted with betting shop owners, customers, and employees of betting shops between September 2019 and January 2020. This section describes the process undertaken by the researcher from the deployment of availability sampling methods to semi-structured interviews (including pilot interviews) and finally, the coding of emergent data.

4.3.1.1: Sampling Methods

Due to time constraints limiting the maximum number of prospective participants, studies often need a sample group of participants whose insights inform the findings (Saunders et al., 2016). The nature of the sample is a point of tension between quantitative and qualitative research (Henry, 2009; Saunders et al., 2016). Quantitative studies often deploy a random sampling method to ensure a sample which is representative of the wider population (Saunders et al., 2016). Qualitative studies, on the other hand, seek to extract data which are richer and thicker than numerical data, thus requiring a non-random sampling method to locate participants who are sufficiently experienced to answer the research question (Henry, 2009). The current study deployed availability and snowball sampling methods to locate participants. Availability sampling allowed the researcher to locate previous contacts within the industry whilst snowball sampling allowed participants to recommend further contacts who were suitable for the study (Saunders et al., 2016). Social media was an additional tool of recruitment. Out of the thirty-one total customers and employees, twelve were recruited through social media. If an individual contacted the researcher after viewing a post (example in Appendix One), the researcher responded with more details and a copy of the Participant Information Sheet (Appendix Two). This allowed the prospective participant the chance to ask questions prior to giving their informed consent.

In any case, the sampling requirement for participants was for them to have fulfilled their respective role within betting shops during the three months prior to the interview. A similar criterion was used by Mulkeen et al. (2017) during their study of consumer perception within the industry. A drawback of this sampling method is its subsequent inability to generalise the study to the wider population (Henry, 2009), although CR research – as highlighted earlier – does not seek to form positivist predictions.

Furthermore, the sample was experiential based not only on the researcher's own contacts in the industry but also on the participants' experience of the betting industry. Heron (1981) argues that experiential research takes place when the subjects being studied impact the creative thinking, management and direction behind the study and not just on the content. Although the study did not require any longitudinal surveys on

gambling patterns, it did rely on the experiences of participants and how they impacted on their perception of the industry.

The sample consisted of fifteen customers, sixteen employees and four owners, the breakdown of whom (according to age, gender and stakeholder group) is provided during Chapter Five. Some participants assumed more than one of these roles (for example, customer and employee), but they were asked nonetheless to state which primary role they fulfilled. The numbers of employees and customers were influenced by the level of data saturation encountered by the researcher. Data saturation is achieved when there is enough data to replicate the study, when additional coding is no longer feasible, and 'when the ability to obtain additional new information has been attained' (Fusch and Ness, 2015, p. 1408). The minimum number of interviews required to achieve data saturation differs between theorists. Saunders et al. (2016) argue that the minimum sample size for a semi-structured interview-based project is between five and twenty-five participants. McCracken (1988) argues that eight participants is enough for most qualitative studies, whilst Guest et al. (2006) argue that data saturation occurs after twelve interviews. The researcher felt that a minimum number of twelve interviews from both the employees and customer groups produced a diverse pool of narratives but proceeded to a greater number of interviews with each group to verify their data saturation.

Owners, on the other hand, were difficult to engage. This group consisted of two smaller subgroups: individuals who directed shops belonging to the four main brands (William Hill, Ladbrokes, Coral or Betfred) from a boardroom level and those who owned shares in any of the same companies. Although the researcher was able to contact shareowners through previous relationships (three participants who were working in shops), those who directed from a boardroom level were not as easily located. The researcher tried to mitigate this by contacting senior managers from each of the four main betting companies, forwarding them details of the study whilst assuring them of confidentiality and anonymity during the final study. Two boardroom-level owners from one company

replied with interest, both agreeing that the link between Marxism and the industry was relevant. Yet, only one of these owners agreed to participate. The researcher also expanded his network during the GambleAware 2019 Conference and whilst three other individuals from the companies under study expressed interest, the focus on Marxism eventually led to them declining participation. Nevertheless, the sample was sufficiently sized and diverse enough to fulfil the research aims. As Chapter Five details, the wide range of experiences held by the participants provided a wide pool of data. All four of the owners who participated had additionally experienced at least one of the other roles of customer or employee. In summary, the researcher felt that the sampling methods provided a sufficiently diverse pool of experiences to answer the research question.

4.3.1.2: Semi-Structured Interviews

The study deployed semi-structured interviews as its main research instrument. The semi-structured interview allowed a degree of flexibility and the researcher could therefore focus on pertinent topics which emerged during the interview itself (see Brunk, 2010). These topics emerged after a main set of open-ended questions designed to encourage participants to give in-depth answers based on their opinions and experiences. The main structure of questions – which are available in the format used during data collection in Appendix Three – was inspired by the themes explored within Chapter Two. Participants were also provided with information on betting shops as provided by the corporate arms of betting companies to gauge their views on its accuracy (see Appendix Four). Table 4.3 demonstrates how the main structure of questions remained similar for all participants whilst a small number varied according to their primary stake in the industry. For example, although all participants were asked about their respective company's loyalty schemes, each would have their own perspective on the benefits or drawbacks of schemes depending on their respective role. Table 4.3 also demonstrates how examples of follow-up questions may have varied according to the participant's primary role. Interviews commenced with an introductory group of questions, whilst miscellaneous questions based on age or other topics which participants may have wished to comment on were asked at the end. Moreover, the researcher used an additional group of questions based on Cohen's (2003) initial viewpoint in order to

investigate possible perspectives on antagonisms within the industry prior to the investigation of technology. For example, questions to employees also considered topics such as pay and working conditions, all of which were asked in an objective manner to avoid any undue influence from the study's theoretical lens. In any case, the relaxed nature of the semi-structured interview meant that questions did not always occur in the below order. The below structure of questions is not exhaustive and therefore does not detail every follow-up question which was asked.

Table 4.3: Schedule of Semi-Structured Questions.

Theme	Customer	Employee	Owner
Introductory	<p>Have you wagered in a betting shop during the last three months?</p> <p>For how long have you been visiting betting shops?</p> <p>How often do you visit?</p>	<p>Have you worked in a betting shop during the last three months?</p> <p>For how long have you been working in betting shops?</p>	<p>Have you owned shares/worked in a boardroom position within a land-based betting operator for the last three months?</p> <p>For how long have you been working/owned shares in betting shops?</p>
	<p>Which betting shop do you normally visit?</p> <p><i>Why do you visit this shop?</i></p>	<p>Which betting shop do you work for?</p> <p><i>Which aspects of the job do you enjoy/not enjoy the most?</i></p>	<p>Which betting company do you own/work for (as appropriate)?</p>
	<p>Which aspects of the industry do you enjoy or would improve?</p>		
Initial Industry Questions	<p>How do you see your relationship with the industry?</p> <p><i>Are you treated fairly? Why/why not?</i></p> <p><i>How do betting companies deal with disordered gambling?</i></p> <p><i>How well are staff members trained?</i></p>	<p>How does the industry see its customers?</p> <p><i>Are they treated fairly? Why/Why not?</i></p> <p>Are you treated fairly by your employers?</p> <p><i>How fair is your pay?</i></p> <p><i>How fair are working conditions?</i></p> <p><i>How well are you trained?</i></p> <p><i>How do betting companies deal with disordered gambling?</i></p>	<p>How do you see your relationship with your customers?</p> <p><i>Are they treated fairly? Why/why not?</i></p> <p>How are your employees treated at work?</p> <p><i>How fair is their pay and working conditions?</i></p> <p><i>How does your company deal with disordered gambling?</i></p>
Onset of Platform Gambling	<p>What has been the biggest change of technology since you first entered the industry?</p>		
	<p>How have betting shops been changed by FOBTs/SSBTs/online gambling?</p> <p><i>Do you use any of these platforms?</i></p> <p><i>How do they interact within the omnichannel approach?</i></p>		

	<p><i>Have these products made betting shops quieter?</i></p> <p><i>Which features of these are most attractive?</i></p> <p><i>How have these platforms changed gambling habits?</i></p>		
	<p>How has each platform affected the atmosphere in shops?</p> <p><i>Do customers behave differently when using each platform?</i></p>	<p>How has your work been impacted by these developments?</p> <p><i>Do any of these platforms affect your job?</i></p> <p><i>Do customers behave differently when using each platform?</i></p>	<p>How have you and your customers benefited from these developments?</p> <p><i>How do you benefit from the use of data?</i></p>
	<p>Who benefits the most from these changes and how?</p> <p><i>How much flexibility does each platform provide to the customer/owner?</i></p>		
	<p>Which aspects of FOBTs/SSBTs/online gambling would you improve?</p>		
Marketing	<p>To what extent are the odds set by betting companies fair?</p> <p><i>Do they differ online or on SSBTs?</i></p> <p><i>Who benefits the most from the pricing up of markets, betting companies or their customers?</i></p>		
	<p><i>How do the odds offered by your shop compare to its competitors?</i></p>	<p><i>How do the odds offered by your employers compare to their competitors?</i></p>	<p><i>How do your odds compare to those offered by your competitors?</i></p>
	<p>How do you believe advertising has changed the betting shop sector?</p> <p><i>Do gambling adverts promote any particular type of product?</i></p> <p><i>How has advertised changed within shops?</i></p> <p><i>How do betting companies benefit from their advertising?</i></p>		
	<p>How do you feel about the prevalence of adverts online/on television?</p> <p><i>Has the 'whistle-to-whistle' ban been effective?</i></p> <p><i>How do you feel about advertising on social media?</i></p>		

	<p><i>How do you feel about advertising in sport?</i></p> <p><i>Would you like to see less?</i></p>		
	<p>Does the advertising on the Information Sheet seem accurate?</p> <p><i>How does the experience as a customer compare to the corporate advertising?</i></p>	<p>Does the advertising on the Information Sheet seem accurate?</p> <p><i>How does the experience as an employee compare to the corporate advertising?</i></p>	<p>Does the advertising on the Information Sheet seem accurate?</p> <p><i>How do you feel that your shops' experience compares to the corporate advertising?</i></p>
Loyalty Schemes	<p>Are you a member of your shop's loyalty scheme? How do you benefit? Why did you sign up?</p> <p><i>What are the costs involved with joining the loyalty schemes?</i></p> <p><i>How are your data used by betting shop owners?</i></p> <p>Who benefits the most from the loyalty scheme? You or the shop owners?</p>	<p>What is the primary purpose of your employer's loyalty scheme?</p> <p><i>How do customers benefit from your shop's loyalty scheme?</i></p> <p><i>Would you join?</i></p> <p><i>How are customer data used?</i></p> <p><i>Are you set targets related to sign-ups?</i></p> <p>Who benefits the most from the loyalty scheme? Customers or Owners?</p>	<p>What is the primary purpose of the loyalty scheme?</p> <p><i>How do customers benefit from your company's loyalty scheme?</i></p> <p><i>How are customer data used?</i></p> <p>Who benefits the most from the loyalty scheme? You or your customers?</p>
	<p>Are loyalty schemes a gateway to online gambling?</p> <p><i>How do they act as part of the omnichannel scheme?</i></p>		
Miscellaneous	<p>Are there any other issues which you would like to see improved?</p> <p><i>Would you like to see further legislation?</i></p> <p>Are there any issues the researcher has missed?</p> <p>What is your age?</p>		
<p>Main Questions in bold. Examples of follow-up questions in italics.</p>			

Interviews were conducted in a quiet environment chosen by the participant, allowing them to focus on their experiences. Participants were incentivised and helped to feel at ease with the offer of a free lunch or coffee. A comfortable environment, Brunk (2010) argues, allows for the free and full exchange of information. In total, twenty-one interviews were conducted in neutral locations, eleven were conducted in the participant's workplace and three occurred within the participant's home, at their request. Interviews mostly lasted between forty-five and sixty minutes. Two interviews were cut short to thirty minutes due to work commitments held by the participants. Out of the eleven participants who invited the researcher to their place of work, eight were betting shop employees thus allowing the researcher to experience first-hand the working environment to which they referred. The gathered data were a snapshot of the experiences held by participants during that time as opposed to a longitudinal study. As a result, the perceptions of those eight employees may have been altered by negative events which may have occurred during their day leading up to the interview. The assessment to extent this may have occurred was assessed by the re-reading of transcripts (see Hsieh and Shannon, 2005), and during periods of reflection in which the researcher noted where this may have occurred. The main risk of semi-structured interviews is the possibility of answers being influenced by the wording or tone of the researcher's question (Maxwell, 2009). The researcher thus deployed carefully-worded questions asked in a neutral tone to avoid leading the participant into giving a biased answer. A reflexive and objective approach also helped by allowing the researcher to approach each interview without any pre-conceived notions to avoid influencing the subsequent answers from participants (Morgan and Olsen, 2007). The avoidance of interference reflects the CR emphasis on the separation of the researcher from the phenomenon under study (Hu, 2018).

All interviews were preceded by the obtaining of informed consent from participants. Participants were asked to read (or re-read where applicable) the Participant Information Sheet (Appendix Two) and to confirm their informed consent on the Consent Form (Appendix Five). These documents detailed participants' rights to confidentiality and anonymity as well as the researcher's intention to record the interview in line with GDPR

regulations. Participants were also asked to anonymously complete a Gambling Survey (Appendix Six) – a document which is detailed further within section 4.4 below. At this point, participants were assigned numbers from *P3* to *P37* to ensure further anonymity during both the data analysis and the report itself. Completed Consent Forms and Gambling Surveys were then stored securely in a locked container according to GDPR regulation.

The interviews were recorded on an electronic device and subsequently transcribed, removing the need for the researcher to write extensive answers during the interview itself. Recordings also provide a time and date stamp of when they took place (Berazneva, 2014), and can be replayed by the researcher after the interview, ensuring quality control and the inclusion of all data into transcripts (Hayes and Mattimoe, 2004; Berazneva, 2014). Most importantly, however, the recording process allowed the researcher to focus solely on the participant and the answers given (see Hayes and Mattimoe, 2004; Saunders et al., 2016). Al-Yateem (2012) explores how recording interviews impacts upon the openness of participants with mitigation recommended through prolonged engagement before the interview itself. As most participants were already known to the researcher prior to the study taking place, the presence of a voice recording device provided no hindrance on the willingness of participants to provide their experiences. All participants were happy to be voice-recorded once they were assured of their anonymity and that the recording and subsequent data were subject to GDPR regulation. As with the completed documentation above, recordings were stored securely but this time on a password-encrypted hard drive.

Hayes and Mattimoe (2004) highlight the importance of an effective recording process to ensure a high quality of recording. The easiest way to facilitate this was to find a quiet area to conduct the interview. However, the researcher was not always able to guarantee the quietness of the surroundings chosen due to him being a stranger to the chosen location on some occasions. Background noise therefore occurred during various recordings. Any impact on data was mitigated through constant revisiting of the

recording and through any brief notes which may have been made during the interview itself. Although full answers were not written during each interview, the researcher made brief notes occasionally to prompt any follow-up questions or for reference during the transcription process. Following guidance from Hsieh and Shannon (2005) and Berazneva (2014), transcripts were revisited frequently to verify the accuracy of participants' responses and to grasp the narratives emerging from each interview. Due to time constraints, data analysis was conducted alongside the overall process of data collection. As section 4.3.1.4 outlines, the combination of data analysis software and manual recording allowed the researcher to carry out a constant comparison between interviews, coding of themes and identifying similarities or differences between the accounts given by each participant. This process was nonetheless refined by the deployment of pilot interviews.

4.3.1.3: Pilot Interviews

The researcher deployed three pilot interviews before the commencement of data collection, adopting the process recommended by Majid et al. (2017). After gathering opinions from fellow academics, the researcher recruited participants for the pilot interviews through the sampling methods outlined above. The first interview was carried out under the original methodology which sought to evaluate consumer perception within both the land-based and online gambling industries. The pilot interview helped the researcher to narrow the focus to an analysis of perceptions of the three stakeholder groups specific to the land-based betting industry. A further two pilot interviews were conducted after the refining of the study's research focus and methodology.

Above all, the pilot interviews led to the rewording of questions which were originally closed or unclear. For example, the question 'Has advertising changed the betting shop for the better?', was reworded to 'How do you believe advertising has changed the betting shop sector?' (see Table 4.2 and Appendix Three). A more open-ended question attracted answers which could be explored further as part of the semi-structured interview. The pilot interviews also helped to refine the coding process which was

followed as part of the thematic analysis detailed below. On reflection, the pilot interviews helped to maintain the trustworthiness of the study as they refined the research instrument and the research focus, whilst improving the deductive coding process which was employed as part of the thematic analysis.

4.3.1.4: Thematic Analysis

Gathered data were subjected to a process of thematic analysis, the origins of which lie in narrative analysis (Riessman, 2005). Narrative analysis is the art of ‘understanding life to be experienced as a constructed story. The stories people tell and are told are powerful forms of communication to both others and one’s self’ (Rappaport, 1993, p. 240). A narrative analysis requires the theorist to create a mental model from discourse (Johnson-Laird, 1980; Brewer and Lichtenstein, 1982). The art of narratology originates from work by Bakhtin (1981) whose concept of *heteroglossia* underlines how all ‘language is stratified not only into linguistic dialects in the strictest sense of the word... but also... into languages that are socio-ideological’ (pp. 271-272). In summary, *heteroglossia* highlights the heterogenous meanings of discourse depending on the experience of the individual (Park-Fuller, 1986). Such experience may depend on age, class, gender, profession and so on. Riessman (1989) argues that the use of narrative analysis during a qualitative study illustrates the experiences behind the varied narratives of individuals. Riessman (2005) also locates thematic analysis within narratology with an emphasis on actual words uttered by the speaker, rather than the tone which may have been struck.

Braun and Clark (2006) define thematic analysis as a ‘method for identifying, analysing and reporting patterns (themes) within data’ (p. 79) which can be manipulated to fit a range of philosophical approaches. The six steps of thematic analysis outlined by Braun and Clark (2006) are: familiarisation with the data (for example, transcription), the generation of initial codes, searching for themes, reviewing themes, defining and naming themes, and producing the final report. These steps have been modified here in line with the study’s CR methodological principles. An initial list of codes – based on themes

identified during the literature review – was generated for the application to emergent data. However, as per Saldana's (2009) system of flexible, deductive coding, the researcher was flexible with new codes being added to reflect new data given by participants. This deductive and flexible system of coding led to the list of codes growing from an initial number of fifty-one codes to a total of 112 codes. A good example of this flexible approach was represented by the addition of codes around perceptions of SSBTs. These codes were linked to inclusivity of younger customers and the positive perceptions surrounding their wider range of features and sports betting. The list of codes also grew with additional regulation arising within the betting industry which occurred during data collection, notably with the ban on credit card deposits online which was announced during the period of data collection (*Gambling Commission, 2020e*). Themes were then constructed by grouping together relevant codes according to the affordance of platform gambling to which they referred. For example, individual codes linking online gambling, SSBTs or FOBTs to their individual structural characteristics were unified under 'Altered Structural Characteristics'.

The researcher deployed a system incorporating data analysis software (NVivo) with a system of manual tracking on a series of spreadsheets (an approach similarly used by Fletcher, 2013). This allowed the use of features offered by NVivo, such as the tree mapping of codes, and the cross comparison of transcripts (see Nguyen and Klaus, 2013). Manual tracking was maintained over a series of spreadsheets for each participant, thus allowing the researcher to keep a clear track of questions and code according to participant, a strategy which is advised by Thomas et al. (2012). This process helped to refine themes and identify demi-regularities, the most emergent of which were then subjected to the second stage of thematic aggregation.

4.3.2: Thematic Aggregation

The thematic aggregation of the most emergent themes was inspired by Iannacci (2014) and Volkoff and Strong (2013). Iannacci (2014) deploys a system of thematic aggregation during his investigation into the development of technology within the English and Welsh criminal justice system. Specifically, emergent themes are aggregated according to

analytical generalisations around the interplay between the legislative and digital developments of the criminal justice system. For example, themes relating to the emergence of new roles and expectations of agents are aggregated into a theme based on the structure of the relationship between the police and the Crown Prosecution Service, whilst themes relating to the interactivity and automation of the exchange of structured data are aggregated into a theme characterised by the technological change of a pre-existing procedure relating to exchange of information. These aggregate themes are then used to demonstrate how the affordances of an IS impact the criminal justice system.

The current study also aggregated emergent themes – or demi-regularities - according to the affordances of an IS which in this case was platform gambling. These aggregate themes represent affordances which, according to Volkoff and Strong (2013), reflect the generative mechanisms of a structure. Affordances reflect their ‘potential for action rather than the action itself, their relational action, their connection to an immediate concrete action resulting from goal-directing behaviours, and their application at multiple levels’ (Volkoff and Strong, 2013, p. 823). The aggregate themes therefore reflected the potentialities which had been perceived by participants to emerge as a result of platform gambling. On a practical level, the aggregation of themes presented a further opportunity to group emergent themes when using NVivo. As with Iannacci's (2014) study, this was an iterative process as the researcher sought to produce the most accurate generalisation of the affordance based on the relevant group of themes. Moreover, the use of aggregate themes provided a more focused view of the structure for the process of theoretical redescription as opposed to the analysis of themes on a more granular level.

4.3.3: The Theoretical Redescription of Aggregate Themes

Theoretical redescription - a process which Wynn and Williams (2012, 2020) call the explication and contextualisation of a structure - is the process of ‘inference or thought operation, implying that a particular phenomenon or event is interpreted from a set of general ideas or concepts’ (Danermark et al., 2002, p. 90). As such, this forms the second

stage of the overall process of abstraction, abduction and retroduction (Danermark et al., 2002; Fletcher, 2017), where the aggregate themes based on the affordances of platform gambling were theoretically redescribed through the study's theoretical lens. Abduction is a creative process which evaluates emergent demi-regularities from a proto-theoretical viewpoint (Collier, 1994; Jagosh, 2020). The concept of a proto-theory highlights the fallibility of the theoretical lens. Indeed, 'abductive logic, applied in social science, very seldom (if ever) leads to definite truths – not even in combination with induction and deduction. Abduction is more associated with a way of viewing the relation between science and reality, implying that there are no ultimately true theories, and therefore no rules either, for deciding what is the ultimate truth' (Danermark et al., 2002, p. 90). Therefore, any abductive analysis of the emergent data should be treated as fallible as the conclusions may not be the truest explanation of the empirical phenomenon (Fletcher, 2017).

Nevertheless, the aggregate themes – and the mechanisms of platform gambling they represented – were theoretically redescribed through the study's theoretical lens of class analysis and platform capitalism. In summary, the themes were evaluated from the opinion that betting shop owners exploit traditional and immaterial labour thanks to the affordances offered by an IS. Fletcher's (2013) CR research into the lives of farm women in Saskatchewan is abducted through a lens guided by Feminist Political Economy, treating her approach as fallible with subsequent retroduction highlighting external structures. This study followed this pattern, allowing the consideration that the theoretical lens was fallible and therefore malleable depending on the emergent themes.

Moreover, the abductive process should also highlight the open nature of the mechanisms which have arisen out of participants' experiences (Wynn and Williams, 2012, 2020). As Bhaskar (2008) and Mingers (2011) have previously highlighted, change occurs in society as part of an open system. The current study's theoretical redescription therefore explicated the openness of the aggregate themes and how these mechanisms unravelled each other. The abductive analysis explored how the interaction between the

aggregate themes (or mechanisms) to have emerged from platform gambling may result in the exploitation as outlined by the theoretical lens. Based on Gimpel and Schmied's (2019) model linking the affordances of an IS to detrimental outcomes, the affordances of platform gambling result in the exploitation of betting shop employees and customers. Nevertheless, as with the use of a theoretical lens, the overlapping of aggregate themes is a result of an iterative process which was borne from the theoretical approach of the researcher. It is the process of retroduction which separates researcher from the phenomenon to establish the true nature of the structure.

4.3.4: Retroduction

Bhaskar (2009) defines retroduction as a process which moves an argument 'from a description of some phenomenon to a description of something which produces it or is a condition for it' (p. 29). Retroductive analysis incorporates both deductive and inductive thought as it allows the researcher to simultaneously explore the mechanisms responsible for empirical phenomena as well as evaluate the accuracy of the proto-theory (Mingers, 2011; Wynn and Williams, 2012, 2020; Jagosh, 2020). Retroduction is a creative process which is reliant upon qualitative data to objectively explore the mechanisms which cause empirical phenomena to occur (Zachariadis et al., 2013). To carry out retroductive analysis, the researcher required a hypothesis of what may have caused the phenomena (Hu, 2018). This process differs to a positivist approach, however, thanks to the importance of entities or mechanisms which are imperceptible as well as the changeability of open structures (Wynn and Williams, 2012, 2020; Mingers et al., 2013). The process therefore highlights an explanation of events as opposed to a positivist prediction. This explanation may validate the proto-theory or amend it, depending on the mechanisms which are most emergent (Collier, 1994).

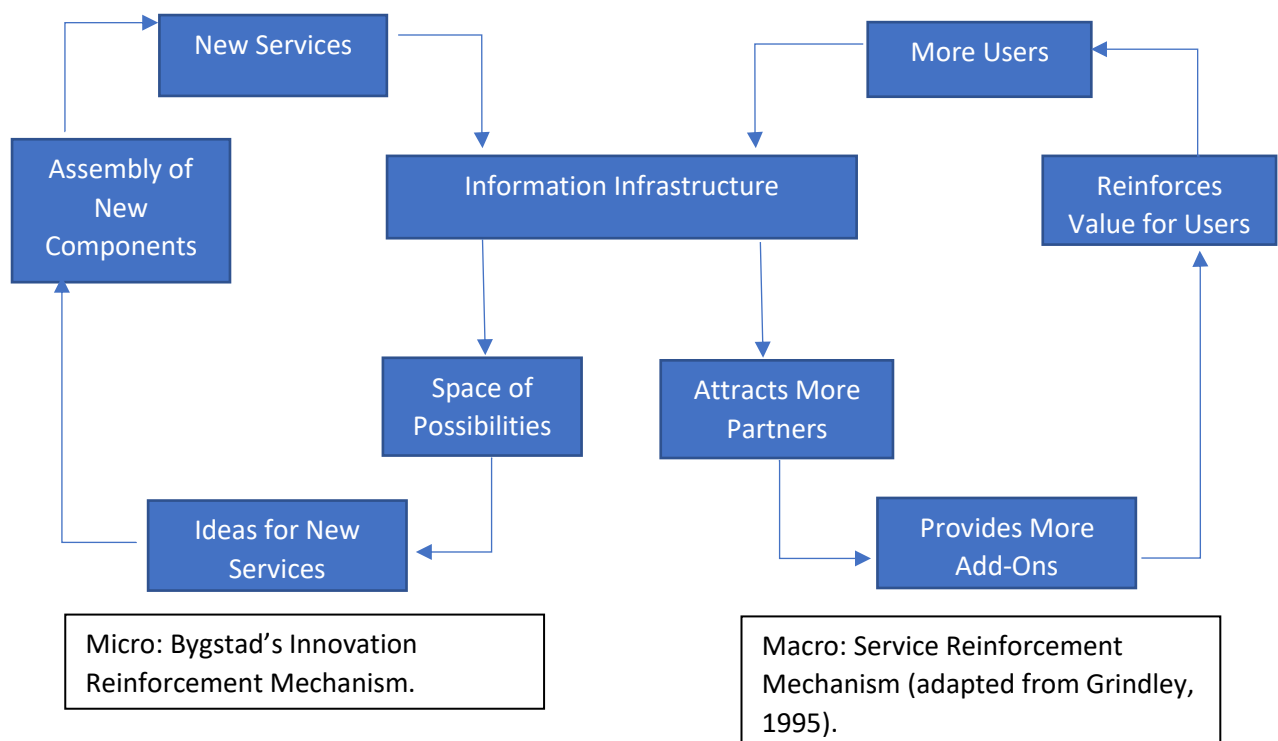
There is a lack of uniformity to retroduction, and other researchers demonstrate a variety of approaches to retroductive analysis. For example, studies by Aaltonen and Tempini (2014) and Tempini (2015) carry out retroduction through analytical narratives, linking data or mechanisms together through analysis which best explains the existence of

mechanisms. Henfridsson and Bygstad (2013) deploy an analytical narrative through a form of backward-chaining where references from an initial goal are followed to investigate the generative mechanisms of the evolution of digital infrastructure and their outcomes. Iannacci (2014), meanwhile, uses Bhaskar's (2008) transformational model of social activity to retroductively analyse the causal relationship between emergent themes and socio-technical outcomes within the English and Welsh criminal justice system. Fletcher (2013) deploys a far simpler approach, revisiting code tree maps on NVivo to explore the most emergent theme as a mechanism which was the driving force of the structure under study. Therefore, retroduction is evidently a creative but iterative process which moves the researcher between the raw data and the guiding theory to highlight the structure behind the phenomena under study. The current study adopts Aaltonen and Tempini's (2014) approach of adopting an analytical narrative to outline the nature of the retroductive structure. The analytical narrative as a retroductive method, Aaltonen and Tempini (2014) argue, is 'safeguarded by triangulation' (p. 101) thanks to its inclusion of themes which are relevant as well as those which are interesting yet disparate. This is also recommended by Brewer (2000) who places an emphasis on 'examining negative case (explaining the exceptions and the things that do not fit the analysis)' (p. 109). An analytical narrative is therefore developed within the construction of the retroductive model, triangulating entities which are the most relevant within the structure of platform gambling.

The construction and contextualisation of the retroductive structure is also inspired by Bygstad (2010) whose approach is demonstrated within Figure 4.2. Bygstad's (2010) study explores the causality of an IS on innovation, based on the case study of the evolution of an airline. Gathered data are retroductively analysed into a micro-structure based on the original research focus, evaluating how information infrastructure can foster innovation. This structure (on the left of Figure 4.2), through the use of an analytical narrative, stems from the most emergent theme 'the space of possibilities' to produce the 'innovation reinforcement mechanism' (Bygstad, 2010, p. 165). This mechanism details the causal relationship between the development of an IS, a space of opportunities and the result of new services. This micro-mechanism is then expanded to

form part of an external macro-structure which is analysed as enabling or constraining the function of the micro-structure. Bygstad (2010) describes developing systems as forming part of a larger, reinforced service mechanism – similar to that outlined by Grindley (1995) - which attracts more partners, brings more value, and subsequently attracts more users. These micro- and macro-structures, Bygstad (2010) argues, underline the relationship between systems and innovation, a relationship which subsequently attracts more users and generates more profit which then drives further innovation, hence creating a feedback loop system.

Figure 4.2: Bygstad's (2010) Micro- and Macro- Approach.



The current study adopted the same micro- and macro- approach. The study firstly highlighted the most emergent theme to have occurred as a result of the development of platform gambling, before using an analytical narrative to construct the retroductive, micro-structure based on the relationship between platform gambling and the digital transformation of the UK's betting shops. The macro-structure which is used to contextualise the micro-structure is based upon Fleetwood's (2002) CR stratification of Marxist socio-economic ontology, listed in Table 4.4. The real stratum of the system is formed of the socio-economic and socio-technical relations which Marx (2013a, 2013b)

underlines as the base of production as well as other superstructures such as the state. These mechanisms then produce events within the actual, specifically relating to the co-ordination of mass labour activity. The empirical phenomena which are observed according to Fleetwood (2002), consist of the form of exchange under the capitalist control of economic activity. These strata are evaluated in more depth during Chapter Seven, where the retroductive analysis of the study compares the micro-structure to this stratification, exploring how the retroductive structure of platform gambling is understood from a Marxist analysis.

Table 4.4: Fleetwood's (2002) Stratification of Marxist Ontology.	
Hierarchy	Entity
Empirical	Form of exchange of capital for commodities.
Actual	Co-ordination of mass labour activity.
Real	Material-technical and socio-economic relations; private property; alienated labour; the state etc.
Source: Fleetwood (2002, p. 78).	

Therefore, the process of retroduction not only allowed the researcher to develop an analytical narrative to objectively produce a structure of platform gambling, but it allowed the researcher to compare data to an external structure based on Marxist ontology. Retroduction, however, also considers other theoretical viewpoints as it seeks to uncover the most accurate theoretical description of the phenomenon under study (Wynn and Williams, 2012). As mentioned earlier, Chapter Seven also explores the micro-structure from the theoretical viewpoint of liberalism which adopts the role as the main critique of the study's theoretical lens. The researcher found that applying viewpoints explored as part of the liberal criticisms of the theoretical lens (see section 3.6.1 earlier) helped to ensure that the retroductive process helped to account for the fallibility of knowledge.

4.3.5: Empirical Corroboration

The study has already outlined how rich, qualitative data are required to explore the mechanisms behind the phenomenon under study (Zachariadis et al., 2013). Similarly to quantitative research, qualitative research should also be conducted in a rigorous and methodical manner to contribute to existing knowledge. Researchers must prove that data were collected and analysed with sufficient care and attention-to-detail to convince the reader that the results of the study are credible (Nowell et al., 2017). The empirical corroboration of the study is achieved through the fulfilment of Lincoln and Guba's (1985) four criteria related to the trustworthiness of the study: credibility, transferability, dependability, and confirmability.

Credibility, according to Lincoln and Guba (1985), is related to the truth of the findings of the study. Fletcher (2013, 2017) highlights how the inclusion of data outside of her proto-theory safeguarded the credibility of her study's findings. The researcher therefore analysed all data, as mentioned above, regardless of its compatibility with the guiding theory. This strategy accounts the CR emphasis on the fallibility of the guiding theory (Fletcher, 2017). Furthermore, credibility is achievable through data triangulation (Lincoln and Guba, 1985), which Wynn and Williams (2012) argue acts as a separate CR methodological principle through a mixed-methods approach. Examples of such an approach are offered within studies by Zachariadis et al. (2013) and Bygstad (2010), both of which draw upon a wide range of sources such as interview data, archival data or econometric analysis. On the other hand, the current study was faced with time and budgetary constraints meaning that triangulation was achieved through a 'dominant' (Mingers, 2001, p. 252) approach where interview data were corroborated with external sources. Data triangulation, to this end, was achieved through two separate strategies. Firstly, through the constant immersion within the recorded data to achieve full knowledge of the participant's meaning in order to compare with other sources as per the dominant approach. This was an example of triangulation which occurs through the comparison of data gathered from a variety of sources (Van Maanen, 1979; Shenton, 2004).

Secondly, data were verified by their original source, indicating that triangulation is not only an inter-study but an *intra*-study process. Corroboration can only occur 'where one has the opportunity to check out certain bits of information across informants and across situations' (Van Maanen, 1979, p. 548). The researcher therefore invited every participant to comment on the transcript of their interview to verify its accuracy (see Lincoln and Guba, 1985). On reflection, none of the participants questioned the accuracy of the transcribed data. Indeed, the researcher received comments from participating employees who found the exercise of sharing of their experiences to be an escape from the monotony of their work.

Transferability, meanwhile, reflects the extent to which findings can be generalised to other settings (Lincoln and Guba, 1985). There is a tension to be considered here as CR philosophy asserts that the open nature of structures renders the empirical as difficult to predict (Bhaskar, 2008; Wynn and Williams, 2012). Despite the faults evaluated here, positivist conclusions are easier to generalise to a wider population thanks to a bigger sample group (Shenton, 2004). 'Since the findings of a qualitative project are specific to a small number of particular environments and individuals, it is impossible to demonstrate that the findings and conclusions are applicable to other situations and populations' (Shenton, 2004, p. 64). Furthermore, the researcher cannot know how other researchers wish to transfer the findings to other contexts (Nowell et al., 2017). To mitigate these concerns, Shenton (2004) recommends the inclusion of certain data, a strategy which was adopted by the researcher to attain transferability. These data include the analysis of the nature of the participants and where they are based, restrictions on the participants, the number of participants, the data collection methods deployed, the length of data collection sessions, and the time period over which the data was collected. This information has been provided for transparency, thus allowing the reader to understand the context in which participants gave data. Lincoln and Guba (1985) also recommend that transferability is achieved through a thick description of the phenomena, thus allowing other researchers to make comparisons to other social structures. For example, other researchers may wish to transfer the findings of this study to the digital transformation of other leisure industries. The researcher found that participants were

able to compare the digital transformation of the land-based betting industry to other retail or leisure industries. These data have been provided during the subsequent chapters.

Dependability – similar to reliability (Noble and Smith, 2015) - reflects the extent to which similar findings could be repeated by other researchers (Lincoln and Guba, 1985). To achieve this, the researcher adopted a process of reflexivity, a continuous process as recommended earlier by Attia and Edge (2017). This allowed the researcher to gauge feedback and make informed decisions on how to direct his research. The researcher also avoided personal and research method biases in order to minimise his role within the structure under study. These measures included the avoidance of leading questions, the seeking of clarification from participants to understand their full meaning (Alshenqeeti, 2014), and as with the criterion of credibility, the inclusion of data which may have contrasted with the theoretical lens (Fletcher, 2017). In summary, dependability can be achieved by ensuring that the separation between researcher and the structure is maintained. Additionally, a clear outlining of the study's methodology helps to achieve dependability (Noble and Smith, 2015), as has been demonstrated during this study.

Empirical corroboration, and confirmability, according to Lincoln and Guba (1985), is achieved when the above three criteria are fulfilled, the conclusions reached are easily traceable from the data and are free from researcher bias (see also Nowell et al., 2017). Zachariadis et al. (2013) highlight the implication of the need for confirmability within CR research, where 'findings from qualitative research can provide information about the mechanisms that cause the events at the empirical level' (p. 860). The current study, through its deployment of CR methodological principles which separate researcher from the structure under study, provides information on how the development of platform gambling generates mechanisms which bring the empirical phenomena of perceived class antagonisms.

4.4: Ethics Approval

The research proposal was constructed in accordance with the *University of Salford's* (2019) Ethics and Research Governance Policy. The researcher undertook a training programme which detailed the necessity for ethics approval in October 2018, before research had commenced. Ethics approval was granted under reference number SBSR1819-22 in May 2019 with amendments granted in September 2019 after a change in the focus of the study and the inclusion of the three key stakeholder groups (see Appendix Seven). The researcher found the training and process for ethics approval to be helpful when considering issues relating to anonymity and confidentiality as well as the possibility that individuals who were suffering – or had previously suffered - from disordered gambling may have been recruited. As a result, the data within the study have been anonymised (giving only the participant numbers from *P3* to *P37*). Furthermore, although customers were happy to share which of the four key betting shops they often visited, employees and owners often requested that their companies were kept anonymous. The company names of employees and owners have therefore also been anonymised.

The researcher employed strategies to signpost help or raise awareness for those who may have suffered from disordered gambling. Firstly, all participants had their attention drawn to disordered gambling-related charities or organisations such as BeGambleAware, the National Gambling Helpline, GamCare, Gordon Moody Association and Gamblers Anonymous (see Appendix Five). The researcher provided these details to all participants as the sampling process did not consist of any criteria related to disordered gambling or gambling-related harm. The researcher noticed during this process that employees generally did not require any further details of such organisations either because they felt they did not suffer from disordered gambling or because they could access help through their work.

To raise further awareness, participants were also asked to anonymously complete a Gambling Survey (see Appendix Six) before the interview commenced. This survey

consisted of questions used by *BeGambleAware* (2019) to ascertain if a person suffers from – or is at risk of – disordered gambling. These questions form part of the screening process for the Problem Gambling Severity Index, an updated version of which can be found in the report by the National Gambling Treatment Service (2020). These nine questions when used by clinicians are scored between zero (for answering ‘never’) and four (for ‘almost always’) with a total score of eight or above over the nine questions indicating an individual who may suffer from disordered gambling. As this is not a psychological study of disordered gambling, these scores were not tracked. The questions were merely intended to provide participants with information on disordered gambling and for the researcher to provide further information on charities or associations who could provide help on disordered gambling where necessary. All thirty-five participants agreed to complete the Gambling Survey and, in most cases, a new awareness of disordered gambling was raised through its completion.

4.5: Conclusion

This chapter has evaluated the CR approach developed to explore the digital transformation of the land-based betting industry. Firstly, the chapter has explored the philosophical viewpoints of CR, before secondly exploring how they were translated into methodological principles. CR research, according to Bhaskar (2008), must separate ontology from epistemology, and critique the idea that phenomena must be reduced to the empirical. Open structures exist separately from the actor and consist of interconnected mechanisms, the tendencies of which give rise to empirical phenomena (Bhaskar, 2008). CR philosophy also contends that the researcher should remain objective from data collection as well as the structure under study.

The use of a theoretical lens may seem contradictory to this aim. However, the methodological principles – based upon an overall process of abstraction, abduction and retroduction (Danermark et al., 2002) – ensured that the researcher was able to evaluate emergent data through the theoretical lens before constructing the generative structure through the process of retroduction. Finally, a retroductive process inspired by Bygstad

(2010) not only demonstrates the structure of platform gambling within betting shops, but also the relationship between platform gambling and Marxism through an external structure according to Fleetwood (2002). The study contributes a unique, CR-based perspective of the industry which has otherwise been omitted by previous qualitative works within the field of gambling such as Cassidy et al. (2013) and Cassidy (2020). Themes relating to the mechanisms have been empirically corroborated according to Lincoln and Guba's (1985) criteria on the trustworthiness of research. Subsequent chapters demonstrate the findings of this methodology, starting with the most emergent themes according to participants' experiences.

Chapter Five: The Explication of Key Themes

5.1: Introduction

This chapter evaluates the key themes which were explicated during the study's thematic analysis, using 'rich and thick verbatim' (Noble and Smith, 2015, p. 35) to demonstrate their emergence. The six emergent themes are numbered from 1 to 6 within Table 5.1, along with their constituent subthemes where appropriate. Theme 1, the perceived productivity of platform gambling, was characterised by the reduced footfall within betting shops, reduced production costs, and the technology readiness of younger customers. Online sign-up targets deployed by owners (Theme 2) were perceived by participants as performance metrics designed to capitalise on these trends. Theme 3 - surveillance capitalism - generated subthemes related to the behavioural surplus harvested within the omnichannel continuum as well as the restricting of unprofitable customers. Themes 4 and 5 - the situational and structural characteristics of gambling - generated subthemes related to the specific platforms of platform gambling. Online gambling and SSBTs generated the most themes related to the accessibility of gambling whilst structural characteristics were most commonly related to FOBTs and online gambling. Finally, Theme 6 - excessive marketing levels - consisted of subthemes related to the specific emphasis of platform gambling within marketing, the excessive prevalence of televised marketing, and the relationship between gambling and sport. As the chapter explores the raw data, it becomes evident that themes overlap in places. For example, the productivity of platform gambling is reliant on its situational and structural characteristics. Meanwhile, the situational and structural characteristics of platform gambling – and online gambling in particular – rely on the marketing strategies which were perceived as excessive.

The chapter begins by outlining the nature of the sample, exploring the total number of participants according to age, gender and stakeholder groups. The chapter then evaluates the six key themes with the use of raw data whilst also corroborating with data from other sources. Finally, the chapter outlines the three policy recommendations based on the experiences of participants. Two of the three recommendations - namely the extension of the FOBT stake limit to online casino- and slot-based gambling as well as the

prohibition of gambling-related marketing - are already included as part of the review of the Gambling Act 2005 (*Department for Digital, Culture, Media and Sport, 2020*). The third recommendation relates to the emphasis of social responsibility within the maintenance of platform gambling in shops, removing online-based sign-up targets and improving training for employees.

Table 5.1: Explicated Themes.

Theme	Number of Participants Referenced	Subthemes
1. Productivity of Platform Gambling	34	<i>Declined Footfall, Young People and Technology, Reduction in Brick-and-Mortar and Labour Costs</i>
2. Online Sign-Up Targets	20	
3. Surveillance Capitalism	28	<i>Behavioural Surplus, Restricting Unprofitable Customers</i>
4. Situational Characteristics of Gambling	33	<i>Online Gambling, SSBTs</i>
5. Structural Characteristics of Gambling	27	<i>FOBTs, Online Gambling</i>
6. Excessive Marketing Levels	33	<i>Emphasis of Platform Gambling, Televised Marketing, Gambling and Sport.</i>
(N = 35)		

5.2: The Participants

As detailed previously, fifteen customers, sixteen employees and four owners (either as a shareholder or from a boardroom position) were interviewed between September 2019 and January 2020. Although customers were happy to share which of the four betting shops they visited, the companies of employees and owners have been kept confidential during the final study. This guarantee was made to ensure that employees and owners could share their experiences freely. Table 5.2 demonstrates the breakdown of participants according to their stakeholder, age, and gender groups. The categorisation of age groups is based on similar groupings used by the *Gambling Commission (2021a)* with an amendment to the age group associated with young people (normally 16-24, see also *Emond et al., 2019*) to reflect the minimum age for participation. Participants were aged between twenty and seventy-six with an average age of 42.14 ($SD = 15.61$). Customers – aged between twenty and seventy-six with an average age of 49.27 ($SD = 18.82$) – had a

higher average age than employees who were aged between twenty-one and forty-four (average: 34.13, $SD = 6.91$). The four owners, meanwhile, were aged between thirty-one and sixty-five with an average age of 47.50 ($SD = 15.35$).

Table 5.2: Participants by Stakeholder, Age and Gender Groups.

Stake	Age						Gender		Total
	18-24	25-34	35-44	45-54	54-64	65+	Male	Female	
Customer	1	4	1	1	4	4	12	3	15
Employee	2	7	7	0	0	0	9	7	16
Owner	0	1	1	0	2	0	1	3	4
Total	3	12	9	1	6	4	22	13	35
<i>(N = 35)</i>									

The researcher found that the variance between age groups was reflected in a difference of views towards the use of platform gambling. The seven oldest customers who were aged fifty-five and above had never gambled online (although one of this group played on FOBTs), claiming they preferred to interact with the staff OTC. For example,

“My betting shop... they’re very friendly. They know me now because I go in quite a lot... They’re all lovely and they all make it a nice experience’ (P11).

This interaction was also reflected by employees who underlined the importance of betting shops to older customers.

“With the older generation, sometimes you’re the only people they see so they want to come in and they want to have a chat” (P36).

Younger employees were therefore better placed to underline both the benefits and drawbacks of technology thanks to what Liljander et al. (2006) and Hickman et al. (2020) argue would be their level of technology readiness. This is evaluated in further depth as part of Theme 1 (section 5.3.1.2). Nonetheless, the age difference between participants provided a detailed image of the evolution of the industry with customers recalling chronologies of the development of shops like those portrayed by Chinn (2004), McCririck (1991) and Neal (1998), through to experiences of the industry today.

Limitations, however, manifested themselves in two key areas. Firstly, the lack of owners as discussed in Chapter Four. The four owners consisted of three shareholders and one boardroom level manager who had held thirty years of experience within the gambling industry. Secondly, a clear limitation occurred through the lack of female customers available for interview. Only three female customers were available for interview during data collection, confirming Cassidy's (2014) findings which underline betting shops as masculine settings. This was also highlighted by a female employee (P6) who felt she still experienced sexism from customers when at work.

“Even, when I’m working in the shop, if I’m working with a male colleague and there’s a bet wrong, they [customers] will go to them and say something rather than go to me even though I’m more than capable of actually fixing the problem” (P6).

The same employee also said that she knew of several female friends who enjoyed betting on horse racing but preferred to do so from their own home. The researcher incidentally asked the employee to contact said friends as per the snowball sampling method, but none were available to interview. The lack of female customers was nonetheless offset by the greater number of female employees who shared their experiences of employment and, where applicable, as a customer. In fact, although participants were recruited and interviewed as individuals who held primary roles within a certain stakeholder group, most were able to share experiences from the perspective of a different group. For example, when interviewing the group of employees ($n = 16$), the researcher found that twelve were able to share experiences also as a customer, whilst five out of the fifteen customers shared experiences as an employee within the previous three months prior to interview. Out of the small group of owners ($n = 4$), all shared experiences of employment, whilst two (one shareholder and the sole boardroom level owner) shared experiences as a customer. These added perspectives from each stakeholder group and the wide range of views informed by the varied ages of participants were key factors in helping the researcher to abstract key themes from within the industry.

5.3: Explicated Themes

This section represents the first stage of data analysis according to the study's methodological principles. The six key themes have been explicated from the perceptions

of platform gambling held by those interviewed in the field. The structure follows the outlining of Themes 1 to 6 given in Table 5.1, starting with Theme 1 relating to the productivity of platform gambling compared to OTC betting, before exploring Themes 2 and 3 which explore the subsequent strategies of online targets and surveillance. Themes 4 and 5 are characterised by perceptions of the availability and features of platform gambling. Theme 6, finally, explores the emphasis of platform gambling within marketing which was prevalent most of all on television and within sporting events themselves.

5.3.1: Productivity of Platform Gambling

The most emergent theme as a result of data analysis is Theme 1, the productivity of platform gambling ($n = 34$). Perceptions related to the productivity of platform gambling found that platforms were more profitable than OTC betting thanks to three inter-related factors. Firstly, platform gambling was seen as more productive than OTC betting owing to the decline in footfall within shops. Participants appeared to agree that this was a natural transition to have occurred within the industry, rendering platform gambling as the most efficient method for the exchange of risk. This was closely associated with the perception that younger customers would be more likely to use technology to gamble as opposed to betting OTC. These two factors result in the third subtheme, the reduction in costs related to labour and the maintenance of brick-and-mortar shops associated with migrating customers to digital channels.

To this end, much of Theme 1 may appear to be consistent above all with the development of online gambling. However, SSBTs were also perceived as more productive than traditional, OTC betting and the study's sole boardroom-level owner, Participant *P17*, outlined the extent to which this was occurring within betting shops with SSBTs now taking more than half the betting shop's turnover.

"What we are seeing is a shift in customer behaviour that is quite sizeable, but it hasn't in anyway restricted our trading times. The business is still going through. If you take £100 in sports business now, every fifty-two to fifty-three quid from every £100 now goes through the SSBT. So, what we are seeing now is customers who are choosing to bet through that medium" (P17).

Although *P17* only represents one brand of betting shop, the quoted figure demonstrates how productive the SSBT has become to the industry. Indeed, if replicated across the entire industry in accordance with data from the *Gambling Commission* (2020a), as much as £624 million of OTC betting's £1.2 billion GGY would be taken through SSBTs. To this end, owners were perceived as solely updating the infrastructure related to the operation of platform gambling (i.e., the platforms themselves), thus bypassing concerns by Trenz et al. (2020) that the legacy systems within brick-and-mortar units would be incompatible with novel, omnichannel systems. The following subthemes demonstrate the very productivity of platform gambling which leads to the upgrading of omnichannel networks.

5.3.1.1: Declined Footfall

Earlier data from the *Gambling Commission* (2020a) details how online gambling now accounts for approximately forty percent of the industry's GGY. As Figure 2.5 also demonstrated earlier with data from the *Gambling Commission* (2021a), forms of gambling which are available within shops are now more prevalent online as opposed to in-person. It was therefore unsurprising that betting shops were perceived as less profitable thanks to the declined footfall as a result of online gambling. This appeared to indicate a tension within the omnichannel continuum which is maintained by owners to recruit customers through different channels both within and outside of shops. As one customer (*P20*) elucidated,

"It's a catch twenty-two isn't it? The betting industry probably needs new punters because I don't see as many people in there as there used to be. Maybe it's more online gambling or whatever but betting shops used to be busy" (P20).

Another customer (*P11*), who did not gamble online, also highlighted the advent of online gambling as being a cause of the declining footfall.

"I reckon a lot of people would rather do that [gamble online] than go to a shop. Especially if they're working or whatever" (P11).

Finally, one employee (*P30*), when asked to elaborate why shops were quieter, firmly stated,

"It can only be because of Internet betting" (P30).

From the participants whose experiences generated the theme of the greater profitability of platform gambling ($n = 34$), thirty used language that referred to the decline of shop business as a result of the growth of online gambling. The convenience associated with online gambling was associated with the removal of spatio-temporal barriers which are otherwise in place within betting shops (Gariban et al., 2013).

This trend is not exclusive to the land-based betting industry as all brick-and-mortar shops are now subject to the loss of footfall to online channels. As a reminder, 34.5 percent of all retail sales – as of February 2021 – were made online (*Office for National Statistics, 2021*). One owner (P9) – also an employee – contextualised the shift to online gambling within this general migration to online retail.

“In general, the shops are quieter in comparison to ten years ago. Based on official figures, based on a year ago to this year, there hasn’t been a decrease in shop turnover on official figures... But then, online and not just for this industry, but online across the high street has probably impacted our shops because less people go into the high street” (P9).

There was, therefore, an inevitability that betting shops would lose custom to the online industry, a conclusion shared by Jones et al. (2020). An omnichannel approach ensures that retailers can evolve alongside the natural removal of division between land-based and online channels (Hsia et al., 2020). P9 elaborated further by specifically arguing that betting shops needed to capitalise on the opportunity for online evolution.

“It’s the modern day that we’re in, I guess, it’s not really... I wouldn’t say it’s specific to our company nor is it specific to our industry. I think, generally... shops on the high street need you to bet online as well” (P9).

The relationship between betting shops and their online arms can be explored through the share of owners’ online GGY as detailed earlier in Table 2.2. The total online GGY of Ladbrokes, Coral and William Hill in 2019 was £1.9 billion, which – according to data from the *Gambling Commission (2020a)* – accounts for 33.5 percent of the UK’s total online GGY. Although this is a significant online market share held by three land-based brands, competition, and survival with the remaining 66.5 percent of the industry requires an omnichannel approach.

The researcher often found that participants took the relationship between the declined footfall within betting shops and the prevalence of online gambling as an already established fact. Participants were thus asked to elaborate on how they had noticed this relationship to uncover more detail. For example, one customer (P32) who had previously worked as an employee within shops in London argued that the decline was immediately noticeable through the number of slips taken OTC per day.

“It [Internet] has given them a bit of a kicking, really, hasn’t it? In my old shop in London, if you didn’t take eleven hundred bets on a Saturday, there was a steward’s enquiry. But then, it started to go down and go down and go down. Everyone was going online” (P32).

An employee (P12), meanwhile, detailed how online gambling detrimentally impacted levels of employment.

“Now, it’s absolutely dead because people are using their phones and with online, the offers are better than in shop, so it’s understandable why people would use the online. It obviously affects people’s jobs, there have been shop closures which has not been good, but it is the way of the industry and that is the way it is going” (P12).

Participant P12 argues that the shift towards online gambling and its improved offering is a natural process resulting in the closure of shops. The internal restructuring of shops was deemed an inevitable process of the omnichannel integration, similar to that described by Larke et al. (2018). The perceived relationship between the productivity of platform gambling and the reduced costs of such restructuring is unpacked further within section 5.3.1.3.

However, migration from the shops to online was also perceived as occurring thanks to the maximum stake enforced on FOBTs. With the maximum stake limit taking effect from April 2019, employees highlighted how the lack of limits imposed on online gaming had reduced shop footfall as customers could enjoy the same products from home without a maximum stake limit. When the researcher asked one employee (P14) to clarify if the stake limit had made shops quieter, they responded,

“Big time! Because people don’t have to leave their home to put a bet on. And you can bet more online on roulette now than you can in shop, which has always been the case, but people like to do ten, twenty or thirty pounds a spin” (P14).

This was also confirmed by another employee (P5) whose brother had suffered from disordered gambling through playing casino- or slots-based games online.

“So, online, there’s just not the regulations that there is for in shop [...] It’s just pushed everybody online” (P5).

Indeed, P5 mirrors the same argument made by Bradford (2019) who also highlights the inconsistency between FOBT and online gaming. Another employee (P35) felt that the disparity between regulation on FOBTs and online gaming was unfair on shops given that a review of online stakes was in their view inevitable.

“Yeah, because basically, after last April with the stake limit on the machines, people have said they’re not coming into the shop and I have seen that, so it has definitely affected the shops... Because people have said they will do it on the Internet, but the good thing is that they have said that they will do it online as well at some point. The unfair thing is that they should have done it the same time as well as in-shop because that way, shops closed and people have lost their jobs” (P35).

The FOBT stake limits can be attributed to a general fall in the number of betting shops and subsequently, jobs (Gambling Commission, 2020a; Entain, 2021; William Hill, 2021). This shift was also reflected heavily in the movement in land-based and online GGY for William Hill (2020) during 2019. Land-based GGY had decreased by £133.8 million (a decrease of seventeen percent) on the previous year whilst online GGY increased by £55.9 million (an increase of twelve percent), thanks to the stake limits. As P35 had predicted, the introduction of stake limits was reviewed as a possibility during the review of the Gambling Act 2005 (Department for Digital, Culture and Media and Sport, 2020). Nevertheless, the lack of consistency of maximum stakes between FOBT and similar online content was perceived as another factor which resulted in the migration of customers to the Internet.

Therefore, the reduced footfall can be explained by the development of online channels as well as the implementation of the FOBT stake limits. There is, however, a third element which is characterised by the lack of replacement for an older generation of customer which is not being replaced by 18–24-year-olds. This is best understood through the second subtheme of the technology readiness of young people.

5.3.1.2: Young Customers and Technology

Although the researcher expected to uncover perceptions of young people – defined here as aged between eighteen and twenty-four as outlined within section 5.2 earlier - as preferring technology and transaction over interaction ($n = 16$), the researcher was surprised to uncover arguments highlighting the dying out of older customers who preferred OTC betting ($n = 13$). One customer (P29) summarised how young customers were failing to replace the generation of older customers.

“They [shops] will get quieter and quieter and as the older generations die out and people... everyone now uses the Internet and young people coming into betting, they all use the Internet. It’s a shame for betting shops, but it’s the same for any industry. Shops die out all the time” (P29).

This was also corroborated by the sample employed by this study where no customer over the age of fifty-five had gambled online. The association between a reduced, older clientele within shops which are now integrated as part of an omnichannel continuum is perhaps inevitable, given that technology readiness is a key principle of omnichannel management (Hickman et al., 2020). Platform gambling was perceived as being more attractive to young customers who possessed a higher degree of readiness towards technology. Table 5.3 demonstrates the prevalence of online gambling according to age group between 2016 and 2020 with data from the *Gambling Commission* (2021a). Whilst online gambling had increased amongst young customers prior to the study’s data collection, prevalence within the 25-34 and 35-44 age groups also grown. A large increase

Age (% of respondents)	Year to Dec 2016	Year to Dec 2017	Year to Dec 2018	Year to Dec 2019	Year to Dec 2020*
16-24 (%)	14.7	11.9	11.9	16.9	16.2
25-34 (%)	16.1	20.3	20.3	21.4	17.3
35-44 (%)	15.1	14.8	17.1	22.0	18.5
45-54 (%)	13.4	12.6	15.4	18.2	20.3
55-64 (%)	10.6	14.5	16.5	14.7	18.8
65+ (%)	8.1	8.5	7.3	9.3	12.6

Source: *Gambling Commission* (2021a).
 *Note: Year to December 2020 impacted by Covid-19 lockdowns.

in online gambling amongst those aged fifty-five and above during 2020 may be attributed to the betting shop closures forced by the Covid-19 pandemic.

The deployment of platform gambling within an omnichannel continuum was nonetheless perceived as an opportunity for owners to enlist young customers to their brand's digital experience, a key aspect of omnichannel management as Verhoef et al. (2015) would argue. One area manager (P18) emphasised this growing trend, saying that his employer's need to recruit young customers to online gambling was leading to declined footfall.

"It's killing them [betting shops] slowly. There's no two ways about it. We drive people to have online accounts because we know that, as a younger person, you will have an online account and if it's not with [company name redacted], you'll have it with somebody else. There is a drive, as a broader brand, not to lose the customer completely. Generally, it's killing the retail estate" (P18).

Similar to P18, participants ($n = 16$) highlighted how younger customers preferred the digital touchpoints offered within the omnichannel continuum and owners were perceived as reacting accordingly. Boardroom-level owner P17 outlined why this drive occurs with online gambling acting as the most common entry into point into the continuum.

"With the Internet... many younger people and many people first into betting find their way through an online platform. In many cases, you'd have many customers nowadays who have never stepped inside a betting shop, they use their betting platform and see their experience as something different to what might be termed as a traditional betting shop customer" (P17).

The terminology used by P17 demonstrates not only the need to acquire younger customers with a higher degree of technology readiness, but also the waning importance of the "traditional" betting shop customer. No longer are owners concerned with trading risk with 'life's sufferers' (McCrick, 1991, p. 26), but they are seeking to acquire more custom over digital platforms.

The key reasons for this perceived relationship are addressed as part of Theme 4 within section 5.3.5 below. However, one customer (P11) aged seventy-two acknowledged that

younger customers were more likely to use platforms such as the Internet as it permeates into more aspects of everyday life.

“I think they could say more about shops but you see, in a world like today, we’re living more on the Internet, aren’t we? So, people like me who don’t like the Internet still go into shops. Young people rely on their computers. They live on their computers, day in day out. Older people don’t... or they don’t tend to” (P11).

Indeed, just as the readiness of younger customers was a factor which fed into the productivity of platform gambling, so was the reticence of older customers to try forms of platform gambling. The researcher sought to understand from the study’s oldest participants why elderly customers were unwilling to try forms of platform gambling, but he was often faced a blunt response such as the one as given by P4 (aged sixty-nine).

“I’ve never had a bet online, I never will, I have no interest in it” (P4).

The reasons why elderly customers did not engage in platform gambling varied depending on the platform. As the chapter explores later on, some customers were discouraged by negative perceptions surround the characteristics of some platforms, whilst others displayed a level of ignorance towards platforms as they preferred to maintain their OTC relationships with betting shop employees. The situational and structural characteristics which may also encourage younger customers into platform gambling are also explored later.

Importantly, not only does the use of platforms to gamble highlight the benefit of including means which encourage transaction over interaction within a shop setting, but it also draws reference to Clarke and Critcher (1985) who predicted that leisure activities would become reliant on digital technology. Platform gambling, to this end, was perceived as more attractive to young customers. However, although the industry itself has experienced an inevitable, digital transformation, the very shop fabric in which the omnichannel continuum is housed was perceived as lacking investment.

5.3.1.3: Reduced Brick-and-Mortar and Labour Costs

Subthemes related to reduced footfall and the burgeoning, younger customer base are linked to a third consisting of the reduced production and maintenance costs which occur

thanks to the productivity of platform gambling. This subtheme ($n = 30$) manifested itself in two forms, the improvement in offers available mainly through online gambling, and consumptive labour. One customer (P26) said he refused to gamble online despite the improved offers which are advertised to entice customers online.

“Companies are encouraging people to bet online because it’s cheaper for them. Ladbrokes will give best odds on all the races and so will all the others, but they won’t do it in the shops” (P26).

One employee (P5) spoke of her dislike of online gambling, and how enhanced offers were directly linked to the elimination of shop-based costs.

“They want to draw people online, don’t they? They want their business online. That helps, in the scheme of things, in not needing betting shops at the end of the day. It reduces overheads, it reduces a lot and maximises profits. Business is business, isn’t it? It’s one of them, so they’re bound to offer better odds online to entice customers to do that rather than in the shop” (P5).

Meanwhile, another employee (P10) described how enhanced prices were offered on online sports betting markets - such as horse racing - through a reduced over-round (see Table 3.2).

“So, an average race will trade... an average race online trades at about 101 or 102 percent overround, which is good, obviously. It’s a fine margin; the betting companies won’t make a lot of money out of that, but that’s all online. So, in shops you usually trade at anywhere about or between 110 and 114 percent. But then betting shops have overheads. Rent, business rates, staffing costs” (P10).

The difference in overrounds found online and in-shop highlights the higher profit margins associated with the deployment of online gambling. Owners were perceived as giving more value to its online sports betting customers thanks to the reduction of production costs. Participants corroborated the analysis made earlier in section 3.4.1.4, confirming that over-rounds were significantly lower online thanks to the lack of maintenance costs associated with platforms. This also provides an alternative view of omnichannel pricing offered by Zhang et al. (2010) who contend that online pricing may lack value due to logistical costs. The end result in the gambling industry is closer to that found by Tueanrat et al. (2021) who argue that value is a key factor in the experience of omnichannel customers.

The improved sports betting value was also perceived as offered by SSBTs. Odds on SSBTs, according to participants, often differed to those offered OTC thus allowing customers to benefit from an online price even when in-shop. This was perceived as a negative aspect by some participants. For employees, the variance in odds defeated the objective of providing a consistent experience throughout the omnichannel continuum.

“It’s like the SSBTs we have in shop. They’re completely different prices to what’s on a coupon or what we’re offering on the screens. It’s like “why?”. Why does it have to be different, why isn’t it all the same? They say they want customers to come in and come back to us but all they’re wanting is for customers to go online” (P5).

The SSBT, from this view, was therefore perceived as a mere advertising window for their companies’ online sports betting channels (see Jones et al., 2020). For customers, the difference in prices may be perceived as unfair.

“If you’re in the same building as someone who is getting seven-to-two in shop, and you’re getting four-to-one on a terminal, that’s just not right” (P29).

Although the reduced costs associated with platform gambling may enable a more favourable sportsbook to the customer thanks to the higher margins, the inconsistency of odds across touchpoints meant that older customers with a lower level of technology readiness were perceived as being punished by missing out on better prices offered by the same company, within the same betting shop. This is an example of the difficulties faced by owners as they seek to unify customer experiences across the omnichannel continuum (see Larke et al., 2018).

Reduced production costs were also perceived as manifesting themselves through the poor maintenance of shop fabric and the reduction of the wage bill. The lack of shop maintenance was evidenced by one customer (P4) whose Ladbrokes’ shop toilet had not been repaired for six months prior to the interview.

“Ladbrokes’ toilets have been closed now for six months, and they don’t seem interested in fixing it. And I see it as the same as a shop, same as a pub, it’s looking after the customer. So basically, the customer service is rubbish, not from the point-of-view of the management of the shop. That’s fine... it’s not their fault... Because it doesn’t matter to them, because they know that people who bet are going to have a bet regardless of if the toilets are open or not” (P4).

An employee (P27), meanwhile, criticised the run-down nature of the group of shops in which he was based.

“They definitely date back [...] because if you go in most shops, they’re falling apart” (P27).

Another employee (P14) argued that the lack of investment in his shop was leading to unsafe working conditions, particularly during the summer months.

Participant: “I’d love to have air con that works!”

Researcher: “Why do you feel they’re not repairing the air con?”

Participant: “Because... they’re a bit worried about shops at the moment, shutting... and whether or not it is worth spending the money on them” (P14).

Employees and customers both underlined the lack of shop maintenance with basic amenities such as toilets or air conditioning units not being repaired. Customers felt that the lack of investment in shop fabric impacted their experience within shops, whilst employees also highlighted the negative implications for working conditions.

P17, to this end, conceded that his business was not investing as much as it should within its shop estate.

“I do think we could invest in the fabric of our estate better. I think it’s important in the leisure sector that ultimately, we have a venue people choose to come to and that kind of reflects the value that we have on the customer. So, too many of our shops are under-invested so I would certainly change the level of investment in terms of customer facilities” (P17).

Yet, the onset of platform gambling was perceived as more productive, thus removing any possibility of building maintenance. Participant P18, when asked further on what he was perceived was a hesitancy to invest in the shop estate, argued,

“Because we need to please the shareholders and put more money on the bottom line. We are owned by an online company, so any money spent on real estate is just cost off the bottom line” (P18).

Trenz et al. (2020) argue that brick-and-mortar units carry the ‘baggage’ (p. 1208) of previous infrastructures which can make omnichannel implementation difficult. On the contrary, the current research found that shops were adapted to the omnichannel industry whilst basic maintenance issues unsolved thanks to their cost. The synergistic

management of platforms within the betting shop places greater concern on the individual role of each touchpoint, rather than the maintenance of the shops which house them.

Platform gambling was perceived as reducing labour costs through the advent of consumptive labour as defined earlier by Koeber (2011). From the group who referenced the reduction of costs ($n = 30$), sixteen referred to the consumptive labour extracted through the use of platforms housed in-shop. SSBTs were described on one hand as an example of self-service technology which expropriates employees' skills. One customer (P22) refused to use SSBTs owing to their lack of interaction and their threat to jobs.

"I get annoyed, you can't have everything done through terminals. You know, I go over to the staff and say to them about 'what do you think of the King George?', I can't do that to a machine, can I? The staff should have that knowledge and be able to have a chat, you can't do that with a bloody terminal! You can't have a door where you go in – which I think is what they're aiming for – you zap your thing in the doorway and there is a load of terminals and you think 'we're talking to machines all the time'. I think it's wrong, but people who work in betting shops have been downgraded because the skill they have isn't being used because they've got all this technology. They're trying to do away with the staff, and I think it's totally wrong" (P22).

The customer - in the face of self-service technologies installed in betting shops - protested against SSBTs and FOBTs by dealing solely with employees, thus ensuring that employees had a better chance at staying in employment. This was also an example of protesting the dehumanisation of labour which Koeber et al. (2012) argue helps to maintain the role of the shop worker.

On the other hand, SSBTs clearly provide value to shop owners. As a reminder, *Entain* (2020b) planned to install a further 9,000 SSBTs into its shops during 2020, whilst *William Hill* (2021) saw twenty-six percent of its in-shop sports betting business in 2020 was taken through SSBTs. P17 outlined how SSBTs provide a profitable arm of production to their owners.

"They [SSBTs] are self-servicing by nature, and I think that kind of encourages customers to use the platform. It enables a broader spectrum of the general public to come into retail (P17)".

Technology readiness is a factor upon which the omnichannel continuum is reliant (Hickman et al., 2020) and this view presented the concept of consumptive labour as a positive aspect, where customers are given the choice to interact with technology as long as they prefer transaction over interaction (Doyle, 2006). Yet, similarly to P22, employees in particular felt that SSBTs were being used to render shop labour obsolete. One employee (P30) shared knowledge of a shop in Ireland which had fully replaced OTC betting with a sole SSBT-based offering.

“There is a shop in Ireland which is just full of SSBTs and there’s nobody in there. Somebody just comes and opens the door in the morning. In there, there is a machine where if you have won it prints out a ticket, and you take it to another machine and it gives you the cash. So, if they’ve started that in Ireland, I would say potentially, that is something they’re looking at. There is a security camera and CCTV, there is somebody manning it somewhere, off-site. If someone smashed it up, for example, there’s no-one there to stop it” (P30).

P30 felt that this was the future *modus operandi* for betting shops, as Jones (2019) warns. This was a view shared again by participants within all three stakeholder groups, most commonly within employees and shop-based owners ($n = 19$), of whom twelve used language which referenced a threat to jobs. Yet, SSBTs at the very least transform the role of betting shop employees. As Hilton et al. (2013) argue, employees are nonetheless required to correct transactions and retrain customers to use self-service technologies.

Betting shops, therefore, are no more immune to elements of digital transformation than their retail neighbours, especially in relation to the development of technologies – in this case, platform gambling - which form part of the omnichannel continuum. As the chapter explores later on, customers can seamlessly move between touchpoints with the use of a loyalty card. Although individual themes - such as the inconsistency of value across platforms - demonstrate a logistical issue in the unification of customer experience through the continuum, platform gambling was seen as more productive thanks to the quieter nature of shops, the technology readiness of a growing group of younger customers, and the associated reduction in production costs.

5.3.2: Online Sign-up Targets

According to Zhang et al. (2010), omnichannel management relies upon the development of metrics which measure the performance of channel integration. An example of this was an emergent theme from the data collection; specifically, the strategy of online customer acquisition within betting shops. Conversations around the omnichannel continuum within shops and the use of loyalty schemes meant that employee targets measuring online sign-ups had emerged from every interview conducted with employees and owners ($n = 20$). The new digital bettor (NDB) was a metric which measured employee success in growing their employer's omnichannel growth. The NDB can therefore be understood as a measurement in the effectiveness of OTC betting as an entry point into the omnichannel continuum where the new account could be accessed from any form of platform gambling.

Participant *P17* articulated the NDB as a metric which sought to simultaneously capitalise on digital transformation as well as improve the customer journey through the touchpoints offered by his company.

"NDBs involve colleagues talking to customers - predominantly new, or existing customers - taking the customer through a journey and selling them a product. In actual fact, I think it is the journey and the selling that is actually more difficult than the NDB. But the NDB is the company fixation point, because when you expand that a little bit more, the customer has already chosen to walk through your door, they like betting and you're saying, "as part of the experience of the brand, we'd like you to have an app and if you want to get on there, we'll give you some money to play with as well". I probably look at it different to others, but the fact is that we need our colleagues to sell a product that is more difficult than the product" (P17).

In summary, *P17* felt that the NDB was a target deployed to help customers access the online touchpoint of his company's omnichannel continuum. The process of achieving NDB targets was perceived here as difficult but necessary to allow shops to evolve alongside the industry's digital transformation. OTC betting has therefore become a gateway maintained for the sole purpose to recruit customers to companies' online platforms.

There was a minority of participants who felt that such targets were inevitable. *P9* earlier,

for example, agreed with the view of Jones et al. (2020) that an omnichannel approach was a sustainable business strategy for betting shops. Some employees shared the view that performance metrics to this end were inevitable. For example,

“Obviously... like in any industry, there are targets, there are KPIs and there is pressure to achieve those targets” (P33).

The perceptions held by P9 and P33 reflected the inevitability of omnichannel trading for betting shops, a development which has impacted other retail industries (Hsia et al., 2020). Participants who were indifferent towards – or supportive of - such targets also highlighted the positive aspects of the loyalty scheme at the centre of the omnichannel approach such as the depositing of cash in-shop to use online and the possibility of using responsible gambling measures such as deposit limits and the ability to track spend. These positive aspects are explored as part of the online aspect of Theme 4 (section 5.3.4).

On the other hand, targets were mainly referenced as detrimentally impacting shop employment in two ways: the consequent redundancy of the employee and the stress associated with targets. Redundancy was perceived as a gradual process stemming from the prevalence of online gambling in which NDBs naturally played a part. Employees perceived themselves as being forced to achieve NDB targets which would in turn reduce their level of shop business, thus putting jobs at risk.

“Ultimately, we are shutting ourselves, but I can understand... we are in a fortunate position of being online and in-shop” (P30).

Another employee (P12) specifically linked performance against his company’s NDB metric to the decline in shop footfall.

“There’s massive pressure with online sign-ups at the minute and it’s obviously the way the company sees the future. I can tell that with business levels and how much they’ve gone down in the six years that I’ve been there and it is online” (P12).

As P18 stated earlier, NDBs were perceived as hastening the end of the retail estate. Employees from Ladbrokes and Coral shops also confirmed reports from Davies (2019a) that performance against such targets formed a criterion against which redundancy was judged. In this sense, employees could not win. Employees had to achieve NDB targets to

avoid redundancy, simultaneously enlisting customers to a form of gambling which would still renders employees as redundant.

NDB targets were also perceived as increasing stress and employee workload. This stress firstly manifested itself through pressure from senior management to achieve such targets. Employees generally felt that targets had affected their ability to carry out their work.

“You go into work thinking ‘God, am I going to be able to get this?’. You know, if you don’t get it as well, you’re going to get a phone call, you’re going to get stick from someone if you don’t hit your targets. The pressure on your back, it feels like you’re carrying a million tonnes of bricks when it’s a bookies at the end of the day” (P27).

This was also reflected by an owner (P19) – and in this case, also a shop manager - who argued that NDBs were the most important focus in the running of her shop.

“I just think that the higher management are always on our case and we’re getting messages all the time saying we’re not hitting targets and everything and if you don’t hit your targets you get pulled into meetings. It’s just a bit too much” (P19).

Indeed, the requirement to hit NDB targets meant that employees were threatened with disciplinary action if they were not fulfilled on a consistent basis. Employees are therefore compelled to encourage customers – familiar and new – to try online gambling. Their aims are assisted by cross-channel sign-ups which are offered as part of loyalty scheme membership, a strategy which is explored further as part of Theme 3.

There was, however, an ethical issue which had arisen out of the drive to secure sign-ups. This issue manifested itself in a trade-off between achieving sign-up targets and encouraging responsible gambling. Online gambling has been criticised elsewhere for its inability to fulfil its obligations towards CSR (Bull, 2009; Yani-de-Soriano et al., 2012), and this argument informed the hesitance of those who felt that NDBs were detrimental to the promotion of responsible gambling. One employee (P31) described how he was expected to simultaneously promote conflicting initiatives in NDBs and responsible gambling.

“Yes, because now we’re going to talk about responsible gambling, because they always told us we need to be responsible about people who are vulnerable and all people gambling. On the other side, we’ve been told that we need to get more sign-ups” (P31).

Another employee (P37) also criticised this apparent trade-off between CSR towards vulnerable customers and the pressure of NDB targets, claiming that she would like to see owners visit her shop to see the difficulty faced when maintaining both requirements.

“I just feel that a lot of the time they put too much pressure on us and they don’t realise what it’s like to actually be in our shoes. So, they think “oh, they can hit those numbers, easy”, whereas in fact, going back to the whole responsible gambling thing, they want us to push NDBs and stuff like that. How can we do that when we’re trying to do the responsible gambling thing at the same time?” (P37).

Concerns which associated NDBs with gambling-related harm were informed by the characteristics within Themes 4 and 5 as explored later. Employees perceived themselves as possibly facilitating disordered gambling or gambling-related harm as customers may be negatively impacted by the structural characteristics of online gambling. These characteristics, where presented by SSBTs or FOBTs, could be managed in a shop setting where employees are on hand to assist customers (Beckett et al., 2020).

It was this trade-off which had led some employees to either refuse or not actively sell loyalty cards to customers. The researcher noticed that experienced employees were more willing to share how they dealt with such trade-offs. For example, one employee (P8) who had spent fifteen years working in shops gave an example of how he approached a situation where a customer may have previously avoided online gambling.

“I’m always of the opinion, if someone comes up and asks about a certain event and I’ll say we’ve got it online, we haven’t got it in shop... I’d say ‘by the way, if you didn’t know, if you sign up you’ll get twenty pounds’ worth of free bets’. It’s your choice, I’d never push it on to someone and if someone says no straightaway then I’m like ‘fine’. I would never say ‘you’re missing out’ or use those words. There’s been a few people that have been asked if they’ve got a Grid card and they’re like ‘no, I don’t want one’. So, judging by the response I get from that first question... if they showed some interest, I would follow it up. If they were like ‘I don’t want to do it’, I would leave it” (P8).

Another employee (P10) - who had worked within shops for eighteen years – argued that it was irresponsible to pursue NDB targets.

“I think offering a customer anything that they might not want or might not ask for in betting terms is irresponsible. It’s difficult, isn’t it? It can be irresponsible if offered to the wrong person and then you’re relying on somebody using their judgment. So, in that regard, a lot of people would have been irresponsible when offering cards and for other people, it’s fine” (P10).

Therefore, NDB targets were perceived as problematic thanks to their detrimental impact on betting shop employment, the expectations of employees themselves, and the lack of consideration to those who may experience gambling-related harms. Although some employees were able to manage these expectations and prioritise responsibility, most employees and owners who referenced this theme criticised the NDB metric and the lack of CSR which occurred through the pressure exerted on to employees to fulfil online sign-up targets through the selling of shop loyalty cards.

5.3.3: Surveillance Capitalism

The loyalty schemes sold as part of NDB targets are at the centre of the omnichannel continuum which integrates platform gambling, designed to acquire customers with the aim of encouraging migration between touchpoints with a single wallet (Jones et al., 2020). According to participants ($n = 28$), the schemes – reliant on the claiming of human experience as per Zuboff’s (2019) definition of surveillance capitalism - serve two key purposes. Firstly, to track gambling habits for the encouragement of further spend and secondly, to restrict or block unprofitable customers. The loyalty card therefore was an example of logistical media which Rossiter (2016) argues is used to track and facilitate activity, or in this case, further gambling. Participant *P17* elaborated on the business decisions which are taken by operators on such data.

“I think you [the customer] get more given to you by the company. You get greater odds available to you... and I also know that they’re giving me that because they’re paying me, because they’ve paid for my data, my habits and to learn from me... As a company, we get intuitive data that enables us to make some good consumer decisions based on a very big pool of information” (P17).

The above statement encapsulates the importance of data to betting shop owners, and confirms the point made earlier by the former CEO of Skybet (*The Invisible Addiction*, 2020) on the profitability of user data when comparing the benefits of online gambling to the land-based industry. Whilst *P17* did not allude to the gathering of other personal data

such as banking data or location data as carried out by Skybet (Satariano, 2021), he does reference the use of behavioural data harvested from loyalty schemes for profit, whether through the deployment of targeted promotions or the restriction of customers.

5.3.3.1: Behavioural Surplus

Behavioural data informed by gambling habits were perceived ($n = 22$) as harvested in order to attract further spend through free bets or inducements such as those described by Hing et al. (2019a, 2019b) and Rawat et al. (2020). This was perceived as a positive strategy by some participants who argued that customers were rewarded for brand loyalty with cross-channel offers.

“The company, they can see their betting patterns and target them with some offers that the customer will be interested and not just deleted from the inbox straightaway. So, they feel rewarded for their loyalty” (P33).

Participant P12 – when asked who he felt were the main beneficiaries of loyalty schemes – argued that the exchange of customer and behavioural data for free bets and special offers benefited both customers and owners alike.

“I’d say both really. The customer benefits from all the boosts and the company has them as a loyalty member. They can see what they’re betting on et cetera and if there are any patterns that emerge or if anything is alarming” (P12).

Therefore, although there was clearly a behavioural surplus from customer data, it was not seen by all as detrimental to the customer as they were being rewarded for their normal gambling habits. P12 also touched upon the possibility of loyalty schemes being a way to highlight the emergence of signs of disordered gambling, a possibility of the loyalty card also highlighted by Wohl (2018). However, only one other participant also saw the potentiality of using loyalty schemes for the purposes of tracking and minimising disordered gambling. The researcher did not find this surprising as Wardle (2016) argues that loyalty schemes are more likely to attract spend from customers suffering from disordered gambling, particularly when used on FOBTs.

Similarly to recommendations made in relation to other leisure industries (Zhang et al., 2010; Hsia et al., 2020), customers were perceived as incentivised to migrate to platform

gambling with the deployment of cross-channel promotions. Promotions referenced by participants included BOG, free football coupons (OTC and platform), cash match on FOBTs (for example, spend £5 and receive £5 free play), increased payouts on SSBTs and other free bet offers. The researcher also noticed during the data collection process that initial sign-up offers provided by owners to fulfil NDBs were focused on the diversification of customer spend across channels. The loyalty schemes offered by three of the main companies - Ladbrokes, Coral and William Hill - were advertised with sign-up offers which encouraged participation on at least two touchpoints of their omnichannel continuum. Betfred, meanwhile, offered a machine card to its FOBT customers. Table 5.4 demonstrates how all schemes rewarded new customers for their data. Indeed, whilst the sum of free bets or play were greater than the initial spend, as *P17* has highlighted, the commodity of data was perceived as more valuable to the owners.

Shop	Loyalty Scheme	Spend Requirement	Reward
Ladbrokes	The Grid Card	Open a new card/account, bet £10 online	1 x £10 free bet OTC
Coral	Connect		1 x £10 free bet online Free Spins
William Hill	Plus Card	Open a new card or link to new account, bet £10 online	Get 3 x £10 free bets to use between SSBTs and online
Betfred	Machine VIP Card	None. Machine customers can open membership as desired.	Free spins given to customers who return to shop on a frequent basis
Source: Researcher analysis.			

Discussion with participants therefore revealed that loyalty schemes do indeed act as an entry into the omnichannel continuum, enabling what Rossiter (2016) would describe as control through logistical media. This was indicated firstly by participants whose experiences with the loyalty scheme revealed the need for customers to open an online account merely to join. For example,

“Yeah, so, the loyalty card nowadays you can’t open unless you have the online element, so you have to sign up to both in-shop and the online side” (P9).

Furthermore, one customer (P33) elaborated on his entry into online gambling through the Coral loyalty scheme – the ‘Connect’ card - which deployed offers across the full range of platform gambling within the omnichannel continuum.

“At the start, I never had an online account... You had the bet £5, get £20 when you join, I used to go on slots a bit and you used to get the... if you play a certain amount like £20, then a certain amount would come out the machine [FOBT]” (P33).

For customers, the need to give full contact details as well as an email address meant that marketing based on their spend could be sent directly to their phone whether through text or email. Therefore, not only did the opening of a loyalty account require the customer to join the omnichannel continuum, but the use of contact details also meant that customers received bespoke offers directly on their personal devices.

5.3.3.2: Restricting Unprofitable Customers

There were participants ($n = 9$) who were fiercely opposed to giving their details for the purposes of a loyalty scheme or account, preferring to avoid surveillance above being rewarded for their loyalty. This does not mean that customers who avoided loyalty schemes were confined to solely betting OTC as forms of platform gambling available in-shop – FOBTs and SSBTs – do not require loyalty scheme membership. Yet, whilst these customers may have spent on FOBTs or SSBTs, they still avoided their shop’s loyalty schemes.

“But the reason I didn’t want to give Hills any of my personal details, that’s what it came down to... I decided that right at the start, I perceived ulterior motives rather than just to offer me a gift, you know” (P25).

Meanwhile, one customer (P32), when asked why they felt that owners were the main beneficiary of loyalty schemes, simply replied,

“Oh, the betting shop, especially if you give them the online information, then they’ve got you ain’t they?” (P32).

This attitude towards the sharing of details may be associated with the personal choice of gambling as a private activity. Indeed, the researcher had to reassure two customers that their details would not be submitted to any gambling companies, banks or credit-rating databases during the data collection process.

The researcher found that those who avoided surveillance from owners did so mainly because they wanted to avoid restrictions from owners who, in response, may argue that they are entitled to generate profits. ‘We are not obliged to keep on taking a battering’, Cassidy (2020, p. 117) is told by one bookmaker. There is thus a need for owners to control unprofitable spend through the tracking of winning customers to either reduce the size of their bets or refuse spend completely (Cassidy, 2020). To this end, the researcher interviewed one customer (P29) who, due to his betting patterns, was restricted in shops of all brands within his local area. He had previously travelled from Devon just to place bets in shops where he was not recognised in Somerset, Bristol and London. His betting pattern, he argued, did not suggest any insider information, but he was punished for consistently betting on horses whose odds would normally reduce in size closer to the start of the race. Loyalty scheme membership, he argued, was merely a front to track his betting patterns.

“[...] if you have a loyalty card, they’ve got all your information. They know every bet you have and with what I do, I don’t want that” (P29).

One employee (P12) highlighted how easy it was for owners to restrict winning customers online.

“Yeah, all the time. It’s the same with online if someone is winning, they get restricted... so to try and beat the bookie is very, very hard and I don’t think there is a way of beating the bookie” (P12).

Loyalty schemes therefore present the opportunity for owners to manage their liability through the production of risk, forming some of the decisions referenced by P17 earlier. Any customer who presents a risk to their profits could be restricted or rejected completely with P29 presenting an example of how such customers were forced to travel further afield as a result.

However, the diverse nature of platform gambling means that unprofitable customers need not be turned away completely. Owners were criticised for restricting customers on their sports offering whilst encouraging them to continue spending on gaming products offered by FOBTs or online. P25, who earlier stated that he avoided loyalty schemes and

accounts for the fear of being tracked, gave a specific example of how owners would divert unprofitable customers to gaming products.

“The way... they promote irresponsible... online slots and things like that. They might shut down an account if someone starts doing too well on sports betting, but then tell them that only the casino or slots is left available to them and they’re free to carry on with that which of course is... I mean, there’s nothing sporting in that at all, is there? You know, ‘you beat us on that game, play us on that game.’ Online, I’m almost certain they do that” (P25).

Indeed, it would be easier for betting shop owners to ensure a profitability from otherwise unprofitable customers would be to restrict them to gambling on products which owners can ensure a long-term profit thanks to an RTP percentage which fixes the odds in the owners’ favour. In summary, customers who utilise ‘skill’ to profit from sports betting are instead encouraged to gamble on ‘luck’ (Nick Luck Daily, 2020).

Therefore, surveillance capitalism was perceived as benefitting owners mostly through behavioural data which are used to extract further profit from the customer. Loyalty cards, as an entry point into the omnichannel continuum, were perceived by participants as an opportunity to monitor customer spend to protect profits either through the encouragement or restriction of customer spend, depending on customer profitability.

5.3.4: Situational Characteristics of Gambling

Most participants referenced the situational characteristics of gambling ($n = 33$), with platform gambling facilitating easier access to the industry. However, the thematic analysis uncovered online gambling ($n = 32$) and SSBTs ($n = 22$) as the most commonly referenced platforms which made gambling more accessible. Only seven participants referenced FOBTs as attracting the first, initial spend, a low figure which surprised the researcher as the study has previously outlined the relationship between the GGY generated by FOBTs and the prevalence of betting shops within the UK (see Figure 2.4). This section therefore explores how the other two forms of platform gambling were perceived as influencing the initial decision to gamble.

5.3.4.1: Online Gambling

The common reference to the ease of access to online gambling again confirms arguments made by Gariban et al. (2013), as online platforms transcend spatio-temporal constraints presented within betting shops. Online gambling also provides the customer a wide range of products on their smart devices (Deans et al., 2016), and all products normally found within shops are more likely to be gambled upon online (*Gambling Commission, 2021a*) as demonstrated within Figure 2.5 earlier. The relationship between online gambling and their situational characteristics was also closely linked to Themes 1, 2 and 3. Owners were perceived as seeking to draw customers' attention to their more productive and accessible online channels with cross-channel sign-up offers, as mentioned earlier.

The researcher objectively sought to maintain some balance within the data collection and therefore asked participants for positive and negative aspects related to the availability of online gambling. The main positive aspect of online gambling was the convenience afforded by its development. One owner (P19) acknowledged that, although it had a detrimental impact on their shop's business, it was an obvious benefit to customers.

"Why would you come into a shop when it's chucking down with rain when all you have to do is pick your phone up and click, click, click and your bet is on" (P19).

This opinion was shared by a customer (P34) who also specifically cited the weather as a factor.

"From my point of view, usually weather. If it's not very nice weather, I won't go out. It's just laziness" (P34).

The ability to gamble privately at home was perceived as the key situational characteristic of the Internet which influenced the initial decision to gamble. This corroborates data from the Gambling Commission (2020d) which confirm that home is the most likely place for gambling outside of shops.

The role of online gambling within the omnichannel continuum was also referenced as a key feature of the availability to gamble. Thanks to the combination of loyalty schemes as a gateway to online gambling along with the use of betting shops to house an entry point to online gambling, the availability of online gambling is aided by the ability to fund - and withdraw cash from - online accounts at the shop counter. One customer (P16) who had previously worked within the industry argued that this was a key selling point for the omnichannel continuum.

“I would recommend it on the grounds of an online usage thing, for the perks of being able to get money out in cash if you wish to” (P16).

Another participant, a current employee (P30), felt that the role of their company’s loyalty scheme not only reinforced the situational characteristics related to cash-based funding, but also made their company more competitive as their shops offered a base for customer enquiries which would not ordinarily be available with online-only operators.

“I personally feel it’s the best one out there purely because you can use it in-shop and online, it’s one whole thing. You can go in and get cash out. If you’ve got a Bet365 account, there’s no shop to go into. Plus, if there’s a dispute or anything, there’s a face you can go to” (P30).

The omnichannel continuum deployed within betting shops, therefore, is comparable to other companies which provide logistical options through their shops. In this case, however, the customer is able to pick-up or deposit cash for their gambling. Furthermore, owners had accounted for the need for customer-to-employee conversations around transactions (see Zhang et al., 2010), thus making online gambling more accessible and achieving the omnichannel network of an integrated shop, online and mobile network.

However, the availability of online gambling was also perceived as facilitating unlimited access to the industry which could contribute to disordered gambling. This was highlighted by the use of sheets detailing the advertising of betting shops by owners (see Appendix Four) which were presented to participants to gauge their accuracy. Within the sheet containing information from *Ladbrokes* (2019b) the industry is presented as ‘available 24 hours day, 365 days a year, so people can bet on Christmas Day’. Those who read the statement appeared shocked by its implied availability with employees

describing as exploitative. One Ladbrokes customer (P13) who was aged seventy-six and did not gamble online, was shocked by the availability of online gambling.

“But then do I need to know it’s 24 hours and 365? Is that important? Not to myself. But it might be... Now, what I would say is that could be a bit ‘in your face’ for someone who has got a problem [...] Yeah, in that piece you gave me, that was the one bit that stuck out to me. Do we really need to... don’t we need a Christmas dinner?” (P13).

Another customer (P3), meanwhile, underlined the risk of the unrestricted accessibility to online gambling for disordered gamblers.

“At least in shop, you have someone looking over your shoulder, checking that you’re alright. Online, you don’t. You could be sat on your room for hours, on your own, on your phone with no interaction, so I think that’s really unhealthy” (P3).

Therefore, the ability to gamble privately without interaction on a daily basis – including on Christmas Day – was perceived as harmful particularly to those who suffer from disordered gambling. Regulatory changes during the data collection process had incidentally addressed this possible relationship with the *Gambling Commission* (2020e) requiring that online operators joined *Gamstop* (2021), an online register which allows customers to self-exclude from multiple gambling websites.

Other perceptions which held online gambling as more accessible continued the overlap with subthemes within Theme 1, particularly when arguing that young customers were more likely to gamble online than in betting shops. Similarly, Forrest and McHale (2021) argue that males under the age of thirty-four are most likely to gamble online. This perspective again outlined the migration to online gambling as a natural process.

“Because I think that’s the way it is going. It is a generational thing as well; the younger generation are definitely more inclined to go on their phones or online. They’ve got apps on their phones. In a technology-driven industry, it’s like that, it is the way it’s going, isn’t it? Do you get them younger generation back into your shop when they’re already gambling online?” (P36).

Therefore, the greater availability of online gambling also occurs as part of a natural tendency for younger customers to gamble without the need to visit a betting shop. However, as section 5.3.5.2 explores later, the availability of online gambling is aided significantly by its structural features.

5.3.4.2: SSBTs

Perceptions related to the situational characteristics of SSBTs were more positive than those related to online gambling. *P17* detailed the positive affordance of SSBTs to both owner and customer.

“They bring all the online platforms to retail. It means that as an operator... if you like the brand, you’re having more familiarity in retail than just online, so there are reasons to come in. I think that the wider range of options available mean that we can offer a far broader betting proposition than we’ve ever been able to do over the counter, I.E., bet in-play. We talk about the visualisations we now have, the world lotteries that we now have. I think that as a proposition for the consumer, they are exceptional. They are self-servicing by nature, and I think that kind of encourages customers to use the platform. It enables a broader spectrum of the general public to come into retail” (P17).

This was confirmed by *P19* who felt that these benefits were tangible within her shop.

“I think people feel they can just come in and... with the SSBTs, they can actually see – when they’re putting their selections on – how much they can get and they like that, the SSBTs. So yeah, they just basically come in do their thing and go” (P19).

Indeed, self-service technologies appeal to those who prefer transaction over interaction (Doyle, 2006). Participants commonly referenced how SSBTs made gambling more accessible to younger customers who did not wish to interact OTC. Participants also highlighted SSBTs as attracting more foreign customers whose interactions with employees were made difficult by language barriers. The wide range of sporting events on the SSBT meant that the foreign customers were able to gamble on events which were less likely to be available OTC. These factors reinforce the role of SSBTs in encouraging an initial gambling spend.

The main situational characteristic attributed to SSBTs, however, was its relationship with online gambling. Jones et al. (2020) highlight the window provided by SSBTs owners towards the brand’s online platforms. SSBTs were perceived here as offering the same betting products associated with online betting to customers who did not wish to bet online. The SSBTs were commonly referred to as a bridge between shops and their online channels.

“Yeah, I think it [the SSBT] was a bit of a slow burner, I guess, especially in certain areas. But now they’ve pretty much took off. There’s a wider range of markets. It’s kind of like that bridge between online and in-shop, I guess, is the easiest way to describe how they work. It’s still an in-shop bet where they have the online markets and the online feel where the customer doesn’t have to interact with you so much” (P9).

This bridge, for one customer (P3), acted as a pulling factor for younger customers within betting shops.

“I think it is good. I think it’s especially good for young people. Because, you’d rather have young people in shops than online and I think they’d kind of just go in and sort themselves out... and if people don’t want to interact with people, they just want to come in, put their bets on and go. I think it is good” (P3).

SSBTs, therefore, were perceived as a popular touchpoint within shops, offering the same diversity of sports betting as available online, thus diversifying shops’ customer bases.

Although SSBTs encouraged consumptive labour, the ability for customers to produce and consume their own risk was seen as a positive aspect of the self-service touchpoint.

However, although SSBTs provide the same betting product as online gambling within betting shops, it could be expected that they also provide the same risks of disordered gambling due to the asocial nature of self-service transactions (see McCormack and Griffiths, 2012). Customers who used SSBTs, nonetheless, did not feel that such risks were duplicated on the shop-based platform. Instead, they highlighted the choice offered by SSBTs as well as their flexibility.

“Well, I like them. Can you be really, really sick [develop disordered gambling] on them? I don’t think so. I suppose you could go to the counter and keep loading up, but people would just knock it back, won’t they? There’s nothing you can do on there that you can’t do online. It’s alright” (P32).

Another customer (P21), when asked about SSBTs, simply replied,

“I like them. Yeah, they make it easier and quicker to get in and out. Better for race-to-race bettors than to use the counter” (P21).

Indeed, SSBTs, rather than posing the same risks as online gambling, were perceived as quick and easy to use. The difference may be attributed to the physical presence of SSBTs within shops with employees present to monitor and discourage excessive spend.

On the other hand, there was also the view that SSBTs were replacing employees, similar again to Theme 1. P22 elaborated at length his view that SSBTs were not only making employees redundant, but they were also detracting from the shop experience.

“They do, that’s what I think they’re aiming for. Every company, that’s what they’re aiming for. In the end, a bit like when you see them in the supermarkets. The aim is... they’ve got to pay somebody to sit on the till, but if you get people doing it themselves, it does away with that. They won’t need staff to put a bet on, they’re out the window. The customer service or the experience – as you’ve been saying – is getting worse. That’s where these companies... there must be someone else in the hierarchies of these companies, that they seem to think that the human being can interact with the machine. They don’t need to interact with a human, it’ll be easier on a machine” (P22).

This reflects the view that self-service technology can detrimentally impact the retail experience for those who prefer interaction (Kimes and Collier, 2015). Furthermore, some employees also argued that betting shops were an important hub for elderly customers who may rely on such shops for interaction. Self-service technology, to this end, would lessen the interaction which some participants felt was so important. Nonetheless, online gambling and SSBTs – neither of which require employee interaction – were perceived as the forms of platform gambling which had rendered the activity of gambling as more accessible.

5.3.5: Structural Characteristics of Gambling

The structural characteristics of gambling were referenced by participants who gave examples of how platforms relied on specific features to ensure continuous spend. Indeed, out of those who referenced the structural features of platform gambling ($n = 27$), twenty-two participants referred to the structural features of FOBTs, whilst seventeen referred to those offered by online gambling. FOBTs and online gambling were therefore analysed as the most structurally reinforced platforms. Only four participants referred to structural features offered by SSBTs, referring to the ability to cash out or bet in-play as available within online sports betting.

5.3.5.1: FOBTs

As a reminder, the structural characteristics of FOBTs are characterised by gameplay including bonus features, the short time between spins, audio features, and video or on-screen features which immerse a customer into the game, thus inducing continuous spend (Parke and Griffiths, 2006; Harris and Parke, 2016). Where possible, the researcher asked participants for what they thought were the most attractive features of FOBTs or why they felt customers enjoyed playing on them. The group of customers ($n = 15$) were all asked if they played FOBTs and if so, why. Only four customers stated that they played on FOBTs, with one customer (P20) confirming that the virtual features of the FOBT were what he enjoyed most.

“It’s just the flashing lights and the noise that the roulette wheel makes... you feel like you’re in the casino” (P20).

The researcher found that this was the only occasion where a participant spoke positively of the features offered by a FOBT. The immersive features offered by FOBTs were deemed here as a positive experience, allowing the customer to immerse himself into his preferred gambling activity.

Otherwise, the use of visual features was mostly criticised as exploiting customers, with FOBTs also criticised for exploiting customers whose luck was at the mercy of a RNG which operated according to a fixed RTP percentage. Participants therefore made observations which agreed with Schüll’s (2012) findings on EGMs in Las Vegas, where the structural features of EGMs were designed to lengthen playing time and ensure continuous spend. The visual features of FOBTs were perceived as enticing customers into harmful levels of spend, contributing to what P28 described as the “buzz” which made FOBTs so attractive. These features were criticised above all by customers aged over fifty-five. For example,

“Because they’re like fruit machines, they’re down the front there in the arcade. Fruit machines and human nature, bright lights and things, you know. And I think it’s just human nature, we all like playing a game of chance but these machines are designed to take a load of money, it’s not like two pence or a ten pence, we’re talking about a hell of a lot of money. They’re a machine and also, a digital machine. It’s not a mechanised machine and that’s another worry that... I expect there’s a database where it all goes

back to them, and it tells them that this program will alter itself because, you know... I don't trust them, I never have" (P22).

Meanwhile, P18 – an area manager - also criticised how the immersive features of FOBTs could extract spend from customers over prolonged periods of time.

"Even the most simple things like the colours, the flashing lights, the noises... But some of us are simple creatures and some of us get a thrill from that right through to the really detailed games where people can become like anything else, completely immersed in a game and plus, the sort of thrill of the big win" (P18).

This criticises the deployment of the FOBT's structural features to encourage spending towards their RTP percentage. Furthermore, perceptions shared by P22 and P18 specifically emphasise the digitalisation of fruit machines, allowing owners to deploy sophisticated visual features to ensure continuous spend.

In addition to the use of visual features and the management of an RTP algorithm, other participants argued that the rapid frequency of spins provided by FOBTs, and the prospect of a quick win, also exploited customers.

"People don't want to wait for anything... They are too quick. Before the stake limit, you could spin £100 every twelve seconds" (P29).

Further elaboration on this was made by P25 who referenced the rapid nature of gameplay and the need for FOBT players to find a quick win.

"It is certainly a way of making money quickly depending on luck of course... All those logos combining. It is a way of making money quickly. Why are people drawn to them in the first place? They see other people winning on them, or hear other people bragging about winning on them. I suppose... if you see something do well on something, I think that's easy money which of course it's not. You can't go into it irresponsibly, you've got to be responsible towards yourself, haven't you?" (P25).

P25 referred to the overconfidence which – as Philander and Gainsbury (2021) would argue - may characterise EGM players. The above arguments can also be corroborated with analyses of gambling behaviour after the implementation of the stake limit. *William Hill's* (2020) first annual business results post-implementation confirmed that sportsbook wagering within its shops experienced an annual increase of six percent as a result of the stake limits, with material increases in betting on greyhound and virtual racing. A similar reason for gambling was found by Auer and Griffiths' (2021) study of Norwegian horse

race bettors, most of whom stated their motivation for betting as the chance of a big win in a short space of time. This is significant as these events last under a minute (or longer if a long-distance horse race), suggesting that customers who enjoyed a high level of rapid gambling on FOBTs had migrated to other forms of gambling where the outcome of the event was known shortly after the wager was placed.

Experiences given by participants also appeared to reference an in-shop division which exists between sports bettors – who deemed themselves as wiser than FOBT players – and FOBT gamers who were playing against an RNG (Cassidy, 2012). This division was also portrayed through the generalisation of behaviours of those who lost both OTC and on FOBTs with those playing the latter more likely to display aggressive behaviours.

“I believe that the machines do, yeah. Because a lot of customers do their nut on them... and a lot of customers kick off because they’ve lost a lot of money on them but if they bet over the counter, they don’t seem to get as annoyed” (P14).

Another participant felt that such aggression was inevitable with the onset of FOBTs. P32, whilst recalling his previous employment within shops in London, recalled when FOBTs were first introduced and the subsequent, unsafe conditions which had occurred.

“When we had the meeting in my old shop. We gathered around, we had to get in early and they showed us. ‘This is how much you can get it up to’, and all that. I turned – and looked at my manager – and she looked at me and we didn’t have to say anything. We both knew: ‘oh shit’. This is going to be so wrong. And it was, it was so wrong. People were getting up to three thousand, four thousand, there were scuffles, I had to break up scuffles in the queue to go on the machines. There were queues to get on the machines! I don’t know what it was like down here, but in London, people would be shouting numbers, telling them what to do, and if it come in, they demanded money. Then, people would leave the shop and they’d have them up the wall. The whole thing went wrong, it fell apart” (P32).

This confirms Cassidy’s (2012) earlier findings, suggesting that FOBT players were perceived differently to sports bettors. This perception has been repeated elsewhere by journalistic arguments, suggesting that FOBT gaming is a more harmful form of gambling than sports betting (Nick Luck Daily, 2020).

There was no reference by any participant to the argument that FOBTs were the ‘crack cocaine’ of gambling, as made within the popular press (Chapman, 2019; Meddings, 2019). Far more reference was made to the efforts made by shop owners to ensure that FOBTs were made as appealing as possible to ensure continuous spend. This was confirmed by P10 who had witnessed this growth during his eighteen years within betting shop employment.

“I heard a few years ago that a study group from [betting company redacted] went over to Las Vegas to study how they brand their machines, you know, with lights down the side or a certain amount of, you know, there’s a lot of market research that’s done in the ways of colours, in the way that screens move, in the way of things that people would find subconsciously satisfying or attractive. I haven’t really paid a lot of attention to it, I don’t know what exactly but I’m in no doubt that the way that they’re together, or the way they behave and the branding and things, it’s not by accident” (P10).

This view was shared by another employee (P27) who – despite being aged twenty-one and thus having spent far less time in the industry than P10 – could also see this view.

“They’re designed to make money. They entice with big screens and fancy lights” (P27).

These views again agree with findings by Schüll (2012), arguing that machines are designed to be addictive. Therefore, the structural characteristics offered by FOBTs were generally criticised by the sample. Whilst a small number of participants played FOBTs, they were mostly viewed as exploitative.

The structural characteristics of FOBTs were perceived as encouraging disordered gambling – similar to previous work by Delfabbro et al. (2020) - as well as irate customer behaviour within betting shops, neither of which employees felt could be met with a sufficient level of training. Jones (2019) highlights the difficulty an employee may experience when interacting with FOBT customers, anecdotally criticising the standard of training for employees. As Hing and Nuske (2012) and Beckett et al. (2020) similarly argue, employees within the current study felt they were insufficiently trained to interact with disordered gamblers within shops. One female employee (P7) noted the intimidating nature of the interactions which took place despite a lack of training.

“Yeah... it’s just balls for being brave enough to go out there and sort it out, or if someone is getting lairy you can shout over to them and ask them to stop or, like the numerous

times when someone was hitting the machine when I was working there, you'd shout over to them and ask them to stop and if they carried on you go out there and have a chat with them... some of these guys in there are a lot bigger than you and you're not going to want to go out there and ask them to stop gambling or calm down, are you?" (P7).

This view was reinforced by an owner (P19) – also a female employee – who explicitly called for an improvement to training in carrying out such interactions.

"I think they could do with something. If it is to do with problem gambling, then it can be quite intimidating going out and talking to certain customers. So, they could do with – it's alright giving them a piece of paper with all the emails saying this is what service should be used – but it's also about body language and maybe they should do more of a course for people to go on so they can be shown how to deal with aggressive customers" (P19).

Disordered gambling in-shop was perceived as more likely to occur on FOBTs, providing further insight to the relationship between the prevalence of disordered gambling and the presence of EGMs (see Williams et al., 2021). Yet, the training for employees to recognise and interact with disordered gamblers consisted only of written or online learning.

5.3.5.2: Online Gambling

The structural characteristics of online gambling were viewed with less cynicism, partly because of the heterogenous nature of gambling activities which were available. The wide range of sports betting markets available thanks to the advanced quantification of sports meant that owners could offer a wider range of betting opportunities.

"However, obviously, developments in technology means that the bookies can come up with different ways for people to re-invest their money so, a lot of the time people will win but they'll re-invest it rather than collecting it because there's something else they want to bet on" (P9).

These inventive methods consist of offers which immerse the customer in a wide range of markets (Gainsbury et al., 2020a; *Spotlight Sports Group*, 2020). For example, customers can gamble in-play on the *"number of goals"* in a football match, the *"minute they are scored in"* (P14), or other markets such as a tennis player to win the next point (Gainsbury et al., 2020). The ability to bet in-play, as well as the ability to cash out, was perceived as a strategy deployed by owners to entice further spend.

“If someone puts a football acca on a Saturday, they’re encouraged to put another one on... but also with cash-out options, I think people can spend a lot of time on there. I know certain people who are on there all the time because they’re on there checking the cash-out options, you know they go on the actual site and they’re inclined to bet on other things” (P36).

Even the least experienced participant, who had only gambled within a betting shop once before (and within the three months prior to interview), demonstrated an awareness of the ability to bet in-play.

“People can place bets now half-way through a football game” (P24).

Indeed, betting and cashing out in-play were commonly referenced characteristics of online gambling which, when combined with the sheer number of markets available per sporting event, Killick and Griffiths (2021) argue would encourage continuous involvement within sports betting.

Criticisms of the structural characteristics of online gambling focused on its asocial nature, as well as the lack of stake limits applied to online gaming products. Similar to McCormack and Griffiths (2012), the isolated nature of online gambling was perceived as a structural characteristic which made it a higher risk activity compared to gambling in-shop. Participant P5 – an employee whose brother had previously experienced disordered gambling - argued that isolation was a key hooking point of online gambling.

“As soon as you’ve got them online, that’s it, they’re hooked, it’s so easy and the fact that they can withdraw their money in cash, in shop, it’s so easy for them to go “I’ll just have a tenner on it”. Sat at home, it is just so easy and that is how they hook them” (P5).

This opinion was shared by another employee (P14) who argued that online gambling defeated the objective of combatting disordered gambling.

“It’s a bad idea! Because you don’t see when someone is distressed or doing their nut online” (P14).

Another employee (P37) who had experienced disordered gambling through the use of online gambling shared insight with the researcher as to how the insular nature of online gambling encouraged an excessive level of spend.

“That’s where most people bet now. You can sit there in your pyjamas, watching Eastenders, and it gets to the point where people lose houses betting on it” (P37).

The isolation of online gambling was viewed as a harmful structural characteristic by most participants on the grounds that it promoted a riskier form of gambling compared to that of in-shop. In summary, the lack of interaction that would otherwise occur OTC presents dangers for disordered gambling with employees unable to monitor online gambling.

Furthermore, the lack of interaction was perceived as exacerbated by the lack of stake limits applied to online gaming products. Such online stake limits have been recommended by the Gambling Harm APPG (2020). P30 was able to lend further insight on the larger spend per spin on online gaming.

“With making it only two pounds, if they want to do thirty- or forty-pound spins now, they have to go online and no-one is telling them “do you want to stop?”. I know of people that have sat in the pub and they’re playing on the phone doing five-hundred-pound spins. You can go and get a drunk at the bar, come back and they’ve lost two or three grand. That can’t happen in the shop” (P30).

Whilst most participants agreed that reduction in £100 stake limit was necessary, the severity of the much lower maximum of £2 per spin was perceived as forcing customers to gamble online where the above risks are so prevalent. Participants generally felt that online gaming should face the same restrictions in stakes as they do in shop when monitored by employees. Action taken by the *Gambling Commission* (2021b) after the data collection, however, saw online gaming content restricted to a minimum of 2.5 spins per second, the removal of graphics celebrating the returns of equal to or below spin stake as a win, the removal of autoplay, and the removal of the ability for customers to reverse withdrawals.

Although the flexibility of payment methods facilitated by the omnichannel continuum was a positive, situational characteristic of online gambling, digital payments were perceived as a harmful, structural characteristic. Payment via digital means was commonly compared to cash gambling which was seen as a more controllable activity. Parke et al. (2016) note how the ability to pay for gambling via cashless methods ‘may represent a greater risk for problem gambling’ (p. 10) in land-based settings, let alone when used online in more isolated settings. The seamless transactions from debit cards

or digital wallets were perceived as exploiting further unavoidable levels of spend from customers. P22 specifically referenced the ability to touch cash as part of his gambling.

“On the Internet, you don’t get that, you’re just being credited, you’re not getting anything. It’s nice to have that money and I’ll put it on my Grid card and have that ten pounds on the Grid card, but you’ve not felt that money, you’ve not touched it” (P22).

This was confirmed by another customer (P26) who refused to gamble online, citing the risk between gambling with material cash in-shop and on-screen data.

“No, I don’t bet on that kind of stuff. But I also happen to think that I don’t like online gambling either because if you gamble with cash in your pocket, when there’s no cash left in your pocket, you don’t gamble any longer. The trouble is if you’ve got money in your bank account, you can wipe it out” (P26).

The issue of cashless gambling can also be linked to the possibility that credit cards were previously an option for funding gambling online, allowing customers to practice credit betting with borrowed money, a practice which was forbidden in shop. However, several participants stated that this was a form of funding which they would see blocked if given the choice with some speaking from experience of loved ones who accrued credit card debt through gambling. As such, the *Gambling Commission (2020e)* enforced a ban on credit card usage during the data collection process, effective from April 2020.

Therefore, the main structural characteristics related to FOBTs and online gambling were perceived as harmful. Each characteristic - whether the lighting or gameplay offered by FOBTs or the ability to pay quickly to fund an insular activity - was perceived as developments made to extract continuous spend from customers. FOBTs, meanwhile, were perceived as encouraging a form of customer behaviour which employees could only meet with an inadequate level of training, whilst the insular nature of online gambling was perceived as encouraging disordered gambling.

5.3.6: Excessive Marketing Levels

Most participants ($n = 33$) used language which referenced the excessive prevalence of marketing within the gambling industry, a concern which – as highlighted in Chapter Two - resulted in tighter restrictions on gambling adverts in their exposure to young people

(CAP, 2020; IGRG, 2020) as well as the 'whistle-to-whistle' ban on advertising during live sport before 9pm from August 2019 (IGRG, 2020). The current study found that marketing was still perceived as excessive despite the whistle-to-whistle ban, manifesting itself in three key areas: the emphasis of platform gambling within marketing, excessive televised advertising despite the whistle-to-whistle ban, and the prevalence of adverts within sport itself.

5.3.6.1: Emphasis of Platform Gambling

The emphasis of platform gambling within gambling-related marketing overlaps with Themes 1, 3, 4 and 5. As established earlier, owners may perceive online gambling as more productive thanks to its wide-ranging situational and structural characteristics. It is therefore predictable that participants ($n = 29$) highlighted the content of gambling marketing as mostly related to features provided online, such as cashing out or betting in-play, or special prices offered solely online.

"I do, because it's almost between every advert you get the thing of, you know, whatever price the next football match you want is "this to win" and stuff like that. I just think it encourages people to bet on their mobile devices" (P26).

Participant P9, when asked if advertising impacts shop business, replied,

"Massively. Like I said, most of them focus around the in-play sector, don't they? They're usually advertising a price, it's a live market, isn't it that's advertised? It gets people on straightaway" (P9).

Indeed, the above customer and owner perceived the industry as seizing opportunities during live sport to entice customers towards the accessibility and concessions offered online. Marketing, according to this view, attracts customers to the potentially detrimental, insular nature of online gambling which participants felt was avoidable when such gambling was carried out in-shop.

On a shop level, special odds and offers provided two operational issues. The advertising of odds which were bigger online was cited by employees as a factor in the reduction of footfall, thus boosting productivity of problem gambling as discussed during Theme 1. The second operational issue consisted of confrontations which occurred between

employees and customers when an online price was not available in-shop. *P15*, a shop-working owner, mentioned to the researcher how customers would become unhappy if they were not given odds for a selection which had been advertised online.

“And then it will be the wrong price because the price they’ve seen online will be different to the price they’ve seen in shop” (P15).

The discrepancy in odds may indicate a further difficulty in replicating the customer journey across channels (see Larke et al., 2018). This aspect was reinforced by *P5* whose job of promoting the BOG element of her company’s loyalty scheme was made difficult by her employer’s decision to make BOG online-only during the data collection.

“I mean, they get told ‘sign up’... or get told ‘you don’t get best odds guaranteed’. We’re going to take these offers away from you, but we’re going to give it to the ones who bet online” (P5).

The difference in odds is therefore a deliberate strategy towards online acquisition as opposed to omnichannel mismanagement. This strategy also contradicts one argument made by Gariban et al. (2013) who – through their ethnographic study of an omnichannel gambling company – opine that online and shop-based customers are treated as equally valuable within the industry. To this end, the researcher asked *P15* to elaborate on the above point and also asked if parity was likely to occur across the two channels.

“For it to be – because when they’re advertising it, it will be the online price – not the price that they’re coming into a shop for and that can be very different. But, would they change that? Probably not because they’re trying to entice people to go online so they’re offering better odds to go online” (P15).

The owner, when asked if she felt her company could mimic the online odds in shop to reduce confrontation and enhance service, felt that greater emphasis was placed on the industry drive to maintain competition and thus the profitability of platform gambling through more enticing promotions.

Overlapping with Theme 3, the emphasis of platform gambling within marketing also manifested itself within the deployment of targeted offers depending on customer behaviour, similar to Rawat et al. (2020). These offers emphasise the use of platform gambling as they would encourage customers to gamble over the digital touchpoints of

the continuum as opposed to OTC. One customer (P25) outlined how targeted promotions were formed by the deployment of loyalty schemes.

“Having said that, I have seen on one occasion a few years ago, not Ladbrokes – it was Hills - where I used to go in there regularly and I was offered a membership of a new membership scheme. A card where it gives you a small percentage of what you put in the machine and then at a certain point it gives you back” (P25).

An employee (P36) then elaborated on how the loyalty scheme offered by her employer enticed further spend through shop-based platforms.

“I didn’t mention as well that people who have signed up to membership, we have the option then [...] you have got the option then to transfer them over as a VIP customer. Basically, that means they get everything the same as a normal member, but they get daily free plays and that obviously then encourages them to come back to the shop on a daily basis” (P36).

Customers who visited P36’s shop would be sent daily free plays based on their spending behaviour to entice them back into the shop. P36 hesitated to respond when asked if they felt this was a positive marketing strategy. This strategy, however, is similar to that described by Greenstein (2012) where casino gamblers in Las Vegas were incentivised with gifts or offers within the loyalty scheme, based on their previous spend.

Themes related to the prevalence of online marketing did emerge from the data, further reinforcing the importance of platform gambling as online adverts naturally encourage participation on online platforms. However, its relatively low level of emergence within the current study ($n = 14$) was a surprise to the researcher considering that online and social media-based marketing forms the greatest cost of marketing for the industry (GambleAware, 2018). Furthermore, there was no specific reference to the way in which any gambling operator may use social media platforms such as Twitter, despite the activity which has been explored elsewhere (Houghton et al., 2019; Killick and Griffiths, 2019; Newall et al., 2020b). Facebook, on the other hand, was referenced on five occasions, suggesting that participants perhaps preferred to use Facebook over Twitter and were therefore unaware of the activities of gambling operators on Twitter where campaigns such as ‘#MyOdds’ are deployed (Newall et al., 2020b, p. 2). Analysis by the Gambling Commission (2020d) finds that users were more likely to follow operators on

Facebook.

Those who did reference the prevalence of marketing on social media underlined not only its emphasis on online gambling, but also its potential harm towards those who suffer from disordered gambling. Indeed, Gainsbury et al. (2016) argue that disordered gamblers are significantly more likely to recall adverts on social media. This was given further insight by P37 who was still seeing marketing on Facebook despite having signed up to *Gamstop* (2021) in order to self-exclude online.

“They’re all over it. I Gamstopped myself. I scroll through Facebook and all I get is Paddy Power adverts, but I’ve Gamstopped. I’ve got an addiction, why are you trying to get me online?” (P37).

Marketing on social media, then, does not discriminate between gamblers who are low- or high-risk. Nonetheless, the deployment of marketing was perceived as encouraging customer interaction with online gambling. This perception was perhaps inevitable, given the enhanced accessibility of online gambling, and the ability to access it from online, social media platforms.

5.3.6.2: Televised Marketing

The emphasis of platform gambling was reflected heavily within perceptions relating to the prevalence of televised marketing deployed by the industry. Televised adverts were perceived as encouraging customers to gamble using the very structural features offered in particular by online gambling.

“...because it is almost between every advert you get the thing of, you know, whatever price the next football match you want is “this to win” and stuff like that. I just think it encourages people to bet on their mobile devices” (P26).

Furthermore, the prevalence of televised marketing was not restricted merely to during sporting events.

“On TV, it’s way too much. For example, I’ve got Sky and Netflix and sometimes before the movie is going to start, I will see an advert about betting. It doesn’t matter, Ladbrokes, Betfair, Bet365, whatever. It’s way, way too much” (P31).

It was therefore clear that, despite the relatively low spend on televised marketing according to *GambleAware* (2018), televised marketing was perceived as a problem by most participants ($n = 25$) despite the whistle-to-whistle ban voluntarily enacted by BGC members from August 2019.

Older participants who could recall eras between the legalisation of the betting shops and the deregulation of the later twentieth century elaborated at length on the growth in televised marketing. One customer (P26) lamented that this growth meant that advertising was now inescapable.

“There never used to be any at one time. It didn’t exist. Nowadays, every sporting channel, it’s on” (P26).

Meanwhile, P32 - who was aged fifty-five and could thus also recall such deregulation of advertisements - argued that televised marketing should be prohibited altogether.

“I don’t think they should be allowed to advertise. It’s a dirty game, ain’t it? A dirty game. I feel unclean sometimes!” (P32).

Another customer (P20) detailed how marketing has evolved from times explored by Chinn (2004) and Samuels (2011) to the open advertisement of features deployed on operators’ digital platforms.

“You know, I was expecting the British Standards to come in and stop the television adverts because in the middle of a game, you’ve got big name film stars coming on saying ‘have a bet’. It seems like, on one hand they’re trying to restrict it with the £2 stake and on the other hand, encourage... I know they can’t... or they could, they could stop it if they wanted to and say “no, we’re not advertising on television”, because in the beginning, you couldn’t put a betting shop on the window. You had to put “Turf Accountants”, your name had to be short, all the windows were blacked in, you couldn’t just... restricted opening hours. It’s gone too free and easy now and the advertising, in my opinion, is too much” (P20).

Cassidy (2020) highlights the importance of the neo-liberal attitudes which had encouraged the development of the Gambling Act 2005. These liberal attitudes were criticised by one customer (P16) who felt that the relaxation of regulation around gambling adverts was harmful.

“Gordon Brown has a lot to answer for. Advertising became legal under him when he loosened up certain things” (P16).

Therefore, the prevalence of televised marketing for some older participants represented an unnecessary growth of an industry from previously tolerated but opposed, to widely promoted and accessible.

The whistle-to-whistle ban was enacted as a response to previous criticisms in relation to its role within live sport (IGRG, 2020). Participant P17 argued that this ban was necessary to curb the excessive level of televised adverts.

“It seems too many. Even I get bored of them. They appear everywhere. I don’t think they’re conducive at this moment in time of what we’re about or moving forward. I think they have served their purpose, but I think we’re looking at them differently now. When I say there are too many, I don’t think there will be too many in the future because of the decisions that were taken. But we did get to the stage where there was a proliferation of advertisements and then it wasn’t just... It was shirts, it was everything that was betting-orientated. But then, what I would also say is that I do genuinely feel there is a natural link between a sporting event and a fan potentially having a monetary interest in the sporting event. Actually, on a leisure basis, it enhances for me, as a consumer now, the experience of that event. So, I think it has had its positives and it certainly has its negatives” (P17).

In summary, P17 felt that the prevalence of televised marketing had become excessive beyond the level which would be acceptable for a leisure activity naturally linked to a sporting event. Although the link between gambling and sport is debated further below, the strategy of looking at adverts “*differently*” suggests that the whistle-to-whistle ban is a meaningful attempt at reducing the levels of marketing.

The BGC (2020a) found through their own analysis of marketing that televised advertising had reduced advertising exposure by 1.7 billion views between August 2019 and December 2019. This was contradictory to the perceptions given by participants who felt that televised marketing was still pervasive. The researcher found that perceptions of who were most affected by such adverts were divided into two general groups. Firstly, there were participants who felt that televised marketing negatively impacts society as a whole, encouraging people of all ages to begin gambling regardless of affordability.

“It’s just so full on now, it’s on media, it’s on TV. People are actually getting sucked in. Even people who don’t regularly gamble, they start going to casinos or start going into

betting offices. 'Let's have a bet. Let's see if we can win some money.' These days, there's not an awful lot of money out there and people make choices, especially around this area" (P23).

Televised adverts were not only deemed as ubiquitous during live sporting events. P37 told the researcher they would see adverts before the 9pm watershed during other televised programmes.

"I've noticed there's a lot of adverts. You watch the TV at night, there's always a gambling advert. Always. They've got the responsible gambling in it now, which they didn't always have. But yeah... near enough every ad break, there's a Paddy Power, or a Betfred" (P37).

Therefore, not only was the whistle-to-whistle ban being perceived as ineffective at reducing the level of harms being inflicted by televised marketing, but it was noticeable that the ban was not being applied to other types of programming. This is due to certain adverts being exempt from the ban, such as those broadcast during horse racing coverage and bingo-related marketing (IGRG, 2020).

Secondly, the level of televised adverts was perceived as exploiting young people and children. The researcher noticed how P18 was struck by the thought that his children would not only notice such advertisements but go on to gamble as a result.

"Put it this way, my five kids will grow up seeing gambling adverts and they are likely to open some sort of account at some stage, based on being brainwashed by that. I do think that. Particularly, more likely a male, I would say" (P18).

This view was mirrored by an owner (P15) who argued that teenagers were the target of televised marketing.

"It's mainly aimed at the football, isn't it? If you've got, like a fourteen- to sixteen-year-old watching the football, seeing all these adverts, they might – I'm not saying they would – but they may try to open an online account" (P15).

This viewpoint which was shared by other participants agrees with findings from studies such as *Populus* (2018), Ipsos MORI (2019, 2020) and Nyemcsok et al. (2018) which underline the exposure to underage gamblers from televised adverts. In summary, the whistle-to-whistle ban was deemed as ineffective and perhaps inevitably so given the close-knit relationship between the industry and sport itself.

5.3.6.3: Gambling Adverts Within Sport

Closely related to both the emphasis of platform gambling and the prevalence of televised marketing is that of marketing within sport itself. Televised marketing which encourages structural features such as live odds and betting in-play is reinforced by the presence of marketing which may appear pitchside or on the clothing worn by athletes. Although the prevalence of marketing within sport was of lesser importance to participants ($n = 15$), it was still an emergent theme which linked the availability of platform gambling to the sports industry itself. Although the relationship to English football in particular (similar to Lopez-Gonzalez and Griffiths, 2018; Jones et al., 2019; Sharman, 2020) was of particular prevalence, other sports were also highlighted. For example, *P24* – whose only gamble was on a boxing match - highlighted the prevalence of gambling adverts within said contest.

“So, when the boxing was on every other advert was betting because people are going to place bets. People can place bets now half-way through a football game. So, it’s like... the difference is buying loads of toys isn’t going to ruin your life. It’s easy to stop. But gambling is an addictive thing. You’ve got adverts on the canvass for betting shops. Adverts on the pillars and then adverts popping up every twenty seconds, it felt like! But pre-match you’ve got adverts, post-match you’ve got adverts, you almost see so many, it’s hard to realise” (P24).

This perception highlights findings by Purves et al. (2020) which categorise boxing as the sport with the highest frequency of gambling adverts. Although *P24* had only ever gambled once, he felt that the level of gambling marketing within the boxing match he was watching had normalised the relationship between boxing and gambling itself. *P24* therefore criticised the point made earlier by *P17* who argued gambling enhanced the leisure of watching a sporting event.

Nevertheless, the relationship between online gambling and English football was the most common reference point for those who generated the current subtheme. As a reminder, during the data collection which took place during the 2019/2020 football season, ten of the twenty teams in the English Premier League displayed gambling companies as their main sponsor (Sharman, 2020). This was highlighted by a customer (*P25*) who criticised the use of footballers as role models to wear gambling-related marketing.

“There’s a lot of sponsorships of football teams with shirt sponsors and a lot of online casinos who get plastered on the front of football shirts and I think that is wrong... Obviously, these people [footballers] are like virtual gods to little kids, aren’t they? The City team or whatever... they’ve got like XYZ Casino or something and it’s legitimising something they shouldn’t be doing towards kids. Kids aren’t old enough to make that decision” (P25).

Yet, 1.6 percent of children aged 11-16 in England and Scotland are classed as disordered gamblers (Gambling Commission, 2020g). This study does not claim that the prevalence of disordered gambling within children is attributable to the prevalence of marketing within in sport, yet P25 and others felt that children were most at risk from seeing such advertisements, similar to the views posed by *Gambling With Lives* (2020). This particular relationship between sport and marketing thus poses a CSR-related risk to platform gambling. With English Premier League football displaying advertising every twenty-one seconds (Purves et al., 2020), the most likely platform which is to be used as a result would be that of online gambling. At the time of data collection, legislative action had already been taken in Italy to ban the display of gambling marketing during sporting events to reduce the risk of disordered gambling (*Il Presidente della Repubblica*, 2018).

In summary, participants agreed with views that children and young people were ‘bombarded’ (Duncan et al., 2018, online) by gambling adverts, although the most likely avenue through which this would occur would be within sporting events themselves. The digitalisation of the industry has meant that such advertising strategies, along with that of televised marketing, emphasise the structural and situational characteristics of online gambling in particular. The potentially harmful consequences of such marketing led participants to recommend the prohibition of gambling-related marketing, as explored in the following section.

5.4: Policy Recommendations

In addition to exploring the key themes to arise from within the field, the researcher was also able to summarise policy recommendations based on the views of participants who were asked how they would change or legislate the gambling industry in the future. The policy recommendations which consequently emerged were threefold: the extension of the FOBT stake limit to similar online products, the removal of gambling-related

marketing, and a greater emphasis on CSR and training within betting shops. At least two of the three policy recommendations (FOBT stake limits and the prohibition of marketing) were considered as part of the review of the Gambling Act 2005 (*Department for Digital, Culture, Media and Sport, 2020*).

The maximum stake limit of £2 per spin already implemented on FOBTs should be extended to casino- and slot-based games online. This recommendation is also made by Gambling Related Harm APPG (2019). This was based on the perception given by most participants at the futility of implementing a limit on a form of gambling which was easier to monitor for employees. The limit was also perceived as too punitive on customers who could comfortably control their spending within previous limits on FOBTs. Rather than play on FOBTs at a much reduced spend, customers may prefer to play similar games online where the maximum spend is far higher. A minority of participants suggested that the maximum spend per spin on FOBTs should be lifted to suggestions between £5 and £20 to provide a safer environment for customers. However, the overwhelming majority of participants ($n = 32$) argued that the stake limit should be maintained and extended, thus providing uniformity for the industry and protection for customers whilst removing the 'wild west' (Bradford, 2019, online) which awaits customers who have moved to online gaming. Recent interventions by the *Gambling Commission* (2021b) in relation to online content stopped short of introducing such limits, indicating that they may be introduced by the forthcoming review of the Act.

Gambling-related marketing should be prohibited. Participants ($n = 20$) widely felt that the prevalence of gambling-related marketing was too high, and that the prohibition of marketing was necessary for two reasons. Firstly, to help reduce the possibility of gambling-related harm across wider society and secondly, due to the gambling industry having already sustained a level of growth rendering marketing as no longer necessary. The whistle-to-whistle ban was perceived as ineffective despite the *BGC's* (2020a) analysis of its success. Moreover, participants were also concerned that children were exposed to a high prevalence of marketing and, whilst the BGC has announced measures

to curb the reach of adverts to underage gamblers (IGRG, 2020), the only way to prevent harmful exposure according to participants was to prohibit advertising altogether.

More emphasis should be placed on CSR within betting shop operations. This recommendation, according to participants across all three stakeholder groups, consists of two constituent parts. Firstly, less emphasis should be placed upon targets related to NDBs ($n = 19$). This would reduce the trade-off which is encountered by employees who are asked to recruit customers to a platform which lacks a level of CSR towards the three licensing objectives of the Gambling Act 2005 (see HM Government, 2005). Secondly, more training should be provided to employees on how to interact with customers who experience gambling-related harm ($n = 20$). This step emerges out of the common perception that employees were insufficiently trained to interact with customers who suffered from disordered gambling. Employees felt that training was a more responsible investment of time and effort than the pursuance of NDB targets. Employees also suggested that omnichannel customers should be required to check in with employees in-shop to verify that they are comfortable with their gambling spend. The benefits to this are twofold. Firstly, this would strengthen the omnichannel continuum, confirming the need for well-trained OTC employees to help ensure the safety of customers on all channels. Secondly, such interactions would inevitably address the isolation which was perceived as a particular risk of online gambling.

5.5: Conclusion

This chapter has detailed the findings of the data collection and how they were refined during the first stages of analysis. Participants felt that the key events within the field, according to their experiences, were defined by the affordances which they felt data had lent to platform gambling. Platform gambling allows the harvesting of customer data for profit, co-ordinates employees towards the enlisting of customers to the omnichannel continuum, makes gambling more accessible with more features, and facilitates an excessive level of marketing. Some of the above themes were perceived as a positive for the customer. For example, SSBTs provided a flexible option for customers who avoided

online gambling, whilst the use of loyalty schemes at least rewarded customers with offers such as free bets.

Furthermore, the emergent themes confirm some of the previous qualitative research in the field of gambling. For example, participants referenced the division between FOBT and OTC customers as found by Cassidy (2012), as well as the masculinity of betting shops (Cassidy, 2014) which had proven to be a limitation. On the other hand, the data gathered here would disagree with the contention made by Gariban et al. (2013) that OTC and online customers are equally valued. Emergent themes demonstrate how owners were perceived as seeking to recruit OTC customers into the omnichannel platform. OTC customers – and their data – are commodities which betting shop owners seek to convert into digital custom which can be tracked for the sake of further profit. The omnichannel continuum, to this end, is not to ensure that all customers are treated as equally valuable irrespective of their chosen medium, but it is designed to entice customers on to more productive forms of platform gambling. The following chapter aggregates the emergent themes into mechanisms enacted by the development of platform gambling, before theoretically redescribing them through the study's theoretical lens.

Chapter Six: The Aggregation and Theoretical Redescription of Themes

6.1: Introduction

Having explored the key themes to have emerged from the participants' perceptions of the development of platform gambling, the study now moves on to the next stages of its CR methodological framework: the aggregation of themes into mechanisms and their theoretical redescription. Inspired by Iannacci (2014), emergent themes are aggregated into mechanisms which are brought about by the development of platform gambling. These mechanisms are formed according to generalisations in relation to the affordances of platform gambling, and their interaction gives rise to the empirical phenomenon characterised by class antagonisms. Although the theoretical redescription of aggregate themes takes place from a proto-theoretical viewpoint (Collier, 1994), the process does contextualise the structure under investigation (Marsden, 1998).

Table 6.1 demonstrates the aggregation of Themes 1 to 6 into the two mechanisms which emerge from the development of platform gambling: the productivity of data (Theme 7) and the omnipresence of platform gambling (Theme 8). Each of these mechanisms reflect a diachronic entity, formed by the constituent, emergent themes which were explored during the previous chapter. The phenomenon which emerges out of the interaction between Themes 7 and 8, this chapter argues, consists of the class antagonisms between betting shop owners and their customers and employees.

Theme	Aggregate Themes/Mechanisms
1. Productivity of Platform Gambling	7. The Productivity of Data
2. Online Sign-up Targets	
3. Surveillance Capitalism	
4. Situational Characteristics of Gambling	8. The Omnipresence of Platform Gambling
5. Structural Characteristics of Gambling	
6. Excessive Marketing Levels	
(N = 35)	

To this end, the chapter – after having outlined their emergence - theoretically redescribes the two mechanisms through the study’s theoretical lens in two stages. Firstly, by demonstrating how these mechanisms are understood through Srnicek’s (2017a) platform capitalism and his affordances of data. The analysis of the two mechanisms through the lens of platform capitalism and the affordances of data facilitates an understanding of how the digital nature of platform gambling brings potentialities for owners, allowing them to remain competitive. The relationship between platform gambling, the affordances of data and the consequent class antagonisms are understood according to Gimpel and Schmied’s (2019) model, associating the affordances of an IS to negative outcomes. The key mechanisms are aided by the potentialities offered to owners which occur due to the adaptation of platform capitalism within the land-based betting industry. The interaction between the three key stakeholder groups and the IS of platform gambling sets into motion Srnicek’s (2017a) affordances of data which - when actualised - facilitate the dual exploitation of customers and employees.

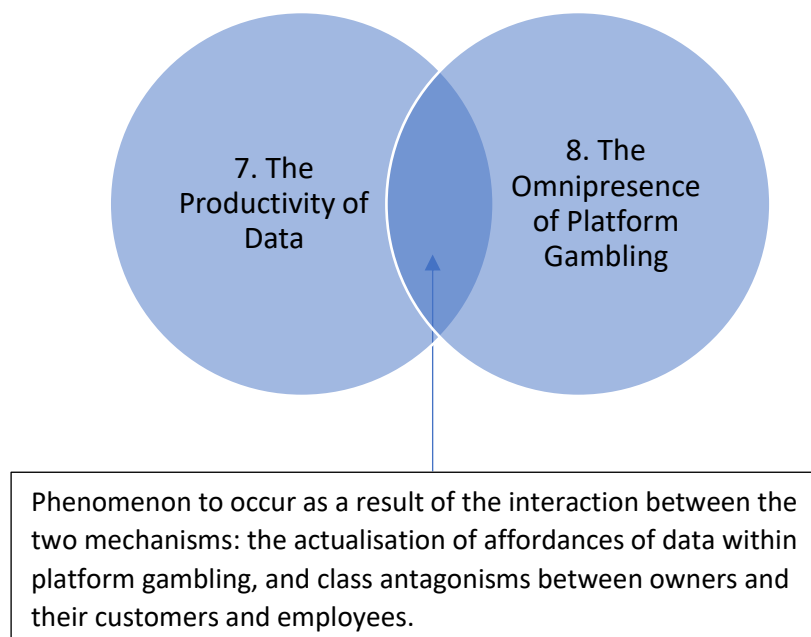
Secondly, the chapter explores how these affordances relate to the class antagonisms which occur as a result of the interaction of the two mechanisms. The affordances of data which allow owners to profit from the development of platform gambling help to form the class struggle between bourgeois owners and proletarian customers and employees. These mechanisms demonstrate an example of both the exploitation of the worker through the digital transformation of shops offered by the omnichannel continuum as well as the proletarianisation of the customer through the use of data to encourage further spend. The chapter therefore links the digital transformation of betting shops to Marx’s (1973, 2013a, 2013b) analyses of the capitalist development of technology and class, as well as arguments made by Lazzarato (1996) on the subsumption of immaterial labour into the capitalist system.

6.2: The Mechanisms of Platform Gambling

The thematic aggregation of emergent themes and their presentation as mechanisms – as well as the contextualisation of the overall structure – are presented here within a staged approach, detailing how the mechanisms are formed before their interaction with each

other. These two mechanisms of platform gambling – presented within Figure 6.1 - reflect the CR assertion of the emergence of diachronic mechanisms, the tendencies of which are exclusive from their parts (Bhaskar, 2008). Furthermore, the emergent mechanisms interact with each other, unravelling within the open system (Mingers, 2011). The centre of Figure 6.1 represents the phenomenon which arises as a consequence of the interaction between the mechanisms which have emerged from the role of platform gambling in betting shops. Theme 7 (the productivity of data) interacts with Theme 8 (the omnipresence of platform gambling) to produce the empirical phenomenon of the class antagonism between betting shop owners and their customers and employees, aided by the role of data within platform gambling. Employees are alienated from their work as they maintain the very digital channels which will eventually see them into redundancy, whilst customers see their labour extracted through digital means which render gambling as omnipresent.

Figure 6.1: The Interaction of the Mechanisms of Platform Gambling.



Therefore, the digital transformation exhibited through platform gambling benefits owners yet also exploits customers and employees alike. The exploitation within the structure is heterogenous in nature, exemplifying how data are now used by the bourgeois class to maintain a capitalist system (see Dyer-Witthford, 1999). The following

sections evaluate how the two mechanisms have emerged from the aggregation of the constituent themes drawn from the study's participants, beginning the process of linking the Marxist theoretical lens to the digital transformation of land-based sector. The aggregation of themes has been inspired by Iannacci (2014) and Volkoff and Strong (2013), the latter of whom would argue that the aggregation of themes forms the generative mechanisms of the structure under study.

6.2.1: Productivity of Data

Data maintain an important role within gambling (whether through platforms or OTC), even before any consideration of the industry's digital transformation. Sports betting odds are influenced by quantitative analysis of previous sporting events as well as the management of risk. SSBTs incorporate all of these sporting data along with data from user interaction to provide a self-service software, thus transforming the interactivity of in-shop sports betting (Newall et al., 2021). FOBTs, meanwhile, rely on data for the running of software, the maintenance of gameplay and the RTP percentage, the outcome from the RNG as well as the monitoring of user interaction (Schüll, 2012). Online gambling incorporates all of the above through its numerous gambling opportunities (Deans et al., 2016). Yet, it is the control of data afforded through the synergistic management of these digital platforms which resulted in the perception of platform gambling as more productive than OTC betting. Figure 6.2 demonstrates how the mechanism relating to the productivity of data emerges from the interaction of Themes 1, 2 and 3, the tendencies of which are not reflective of the powers of the productivity of data as a whole. In summary, platform gambling relies on the productivity of data to maintain its profitability.

Figure 6.2: The Emergence of the Productivity of Data.



Although the mechanism is a diachronic entity, a brief explanation of the synchronic, constituent themes help to demonstrate the CR assertion of emergence. For example, themes provided by participants imply an ownership need to remain competitive owing to the natural flow of customers to digital platforms. Although SSBTs were described as diversifying the customer base, shops were mostly perceived as losing footfall with older customers as yet unreplaced by a younger customer base. Owners were therefore perceived as seeking to capitalise on the technology readiness (a principle of the omnichannel continuum according to Hickman et al., 2020) of younger customers by investing solely into digital platforms. This meant that, although FOBTs and SSBTs may be updated within a shop setting, the shops themselves were perceived as outdated, unwelcoming, or unsafe thanks to the perceived lack of willingness on the part of owners to invest in them. Indeed, platform gambling does not require the repair of a shop's customer toilets or air conditioning.

Secondly, data were perceived as more productive thanks to their ability to facilitate the monitoring and even control of customers. The loyalty card which was central to the omnichannel network for all betting shops under study required customers to register

with personal details and they were then tracked to monitor their gambling habits as well as their profitability to owners. Loyalty schemes were naturally sold as a benefit to customers and were also sold with a cross-channel offer to encourage not only cash spend but also migration within the continuum, a strategy which is recommended by Hsia et al. (2020). However, there were customers who either wished to maintain a degree of privacy or were wary of the ability of owners to restrict their own betting patterns. Participants such as *P29* who struggled to place bets OTC, felt that the digital monitoring of betting patterns would serve only to restrict betting which may be unprofitable to owners.

The final constituent theme is the NDB target set for employees in relation to online customer acquisition, a metric which Zhang et al. (2010) would argue is a key strategy of omnichannel management. Paradoxically, only employees who signed up the most customers to online betting were confirmed as being the ones who avoided redundancy from Ladbrokes and Coral shops (see Davies, 2019a), whilst employees who did open loyalty cards across all brands recognised how such a drive could render their roles as redundant. This, nonetheless, did little to divert less-experienced participants from the stressful process of encouraging customers into online gambling despite views that customers may be encouraged into gambling-related harm.

6.2.2: The Omnipresence of Platform Gambling

Platform gambling is also characterised by its perceived omnipresence, with Themes 4, 5 and 6 all forming a mechanism characterised by the constant ubiquity of platform gambling. Figure 6.3 demonstrates how this mechanism emerges out of its individual themes. Platform gambling is accessible through a range of hardware - whether personal or shop-based - and contains more features. Trenz et al. (2020) and Hickman et al. (2020) argue that an integrated omnichannel approach allows flexibility and thus, convenience, for the customer. In the land-based betting industry, transactional convenience is offered through an omnichannel approach with multiple touchpoints (Zajdel et al., 2020). For example, online gambling removes the spatio-temporal constraints of the betting shop. However, customers who prefer transaction over interaction but wish to avoid online

gambling can use SSBTs. FOBTs, meanwhile, can be accessed as part of the omnichannel continuum, with customers logging in with their loyalty card and transferring money between FOBT and account. Each platform consequently alters the situational characteristics of gambling in different ways, heightening the accessibility of the industry.

Figure 6.3: The Emergence of the Omnipresence of Platform Gambling.



In works such as those by Griffiths (1995. See also Griffiths et al., 2005), situational and structural characteristics, although separate, are normally defined together. The same is true of the findings in this study, as the availability of platform gambling opens the door to each platform’s structural features. A key structural feature of online gambling which is aided by its accessibility, for example, is its numerous gambling opportunities (Deans et al., 2016). Sporting events commence frequently thus offering chances to reinvest winnings (Auer and Griffiths, 2021), and casino- and slot-based products are designed to encourage further spins through their immersive features (Griffiths and Barnes, 2008). SSBTs and FOBTs offer the same range of sporting and gaming products respectively, providing alternative methods to access the same or similar characteristics of online gambling, giving betting shops a stronger high-street presence.

Despite the digital, omnichannel continuum spanning channels which cover both shop-based and online channels, it is – according to participants – reliant upon a level of

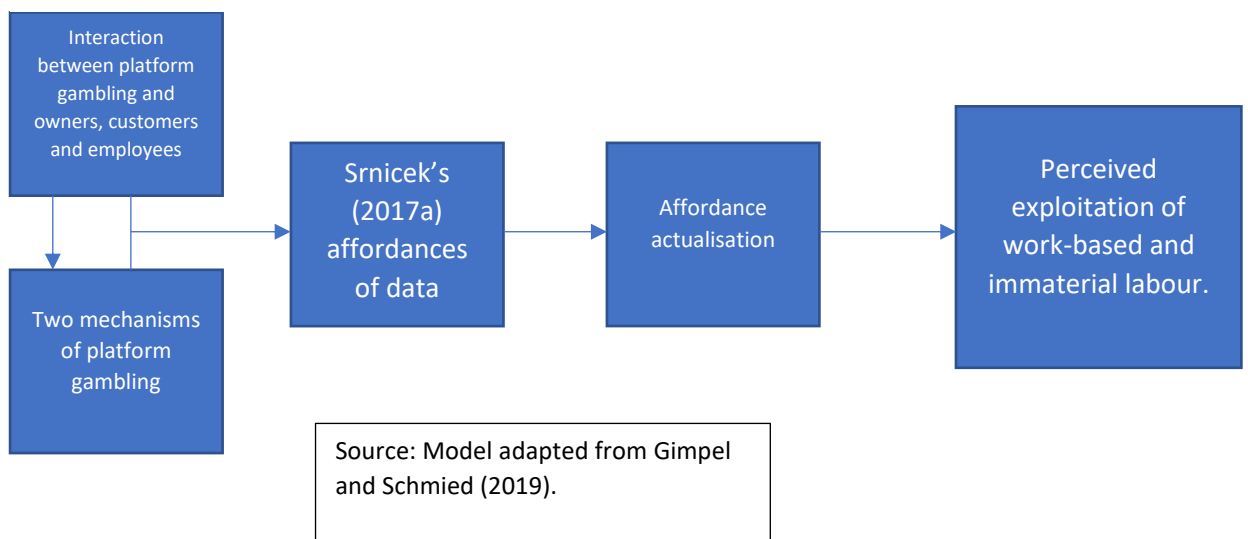
advertising which is primarily geared towards online gambling. Whether televised, on social media, or during sport itself, adverts were generally perceived as highlighting the availability the structural features offered in particular by online gambling. Ipsos MORI (2020) also underlines the urgency which is implicit within such advertising, enticing the customer to gamble online at that very moment. However, shops still benefit from the brand exposure of such advertising (Ipsos MORI, 2019). The problem arises in the mismatch of offers which occurs between digital platforms and OTC betting, the former of which offer more value to the customer as is the case in other retail industries (Tueanrat et al., 2021). Furthermore, the omnichannel nature of platform gambling means that such offers are targeted – similar to those highlighted by Rawat et al. (2020) - and not always merely openly advertised through television or social media. These offers, according to participants' experience, encourage spend across platforms thus promoting the situational and structural characteristics of each platform, directing spend away from OTC betting.

6.3: Platform Capitalism

Just as platform capitalism is a natural evolution of capitalism itself (Srnicsek, 2017a), platform gambling was perceived as a natural evolution of the exchange of risk. The mechanisms of platform gambling also demonstrate its role as an interactant, where causal effects occur both upon technology and its user (Markus and Rowe, 2018). In this case, the productivity of data configures aspects related to the omnipresence of platform gambling, which then extract further data and so on. The lens of platform capitalism not only helps to understand how platform gambling benefits betting shop owners, but it can also be explored according to Gimpel and Schmied's (2019) risks and side effects of technology, where the onset of platform gambling causes a detrimental socio-economic shift. Figure 6.4 specifically details how this occurs according to Gimpel and Schmied's (2019) model as explored earlier. The interaction between the three stakeholder groups and the two mechanisms of platform gambling give rise to Srnicsek's (2017a) affordances of data to the betting shop owners. The actualisation of these affordances causes the socio-economic impact brought about by the exploitation of work-based and immaterial labour, informing the specific class antagonisms which are explored in more depth during

Section 6.4. This section evaluates the reliance of the interaction of the two mechanisms upon each affordance in turn, detailing how data are perceived as ensuring the competitiveness of productive algorithms used by platform gambling, impact betting shop employment, cross-subsidise OTC betting, transform risk into a high-margin product, and provide further data through analysis.

Figure 6.4: The Relationship Between the Mechanisms of Platform Gambling, the Affordances of Data and the Exploitation of Labour.



6.3.1: Competitiveness of Platform Gambling

Network effects underpin the 'developmental arc' (Cole, 2017, online) of a platform (Srnicsek, 2017a). The greater the quantity of data (or users), the more competitive the algorithms which inform production. Network effects within platform gambling, according to participants, manifest themselves in two ways: through the drive for users, and the use of data to provide novel gambling opportunities. Firstly, the more users within the omnichannel continuum, the more refined the algorithms become. Hence the deployment of NDB targets for employees to encourage migration of customers to online channels. This therefore reflects why employees such as P27 were experiencing pressure to fulfil NDB targets which - despite feeling like a "million tonnes of bricks" (P27) - were necessary to make online gambling more competitive. The development of platform gambling within an omnichannel continuum saw the perception that each of the high street operators under study were now online operators, as highlighted by P5 earlier. In

summary, participants perceived the deployment of platform gambling across an omnichannel continuum as refined by increased user interaction.

Secondly, the quantification of sports was perceived as providing further gambling opportunities. As mentioned by P9, data allow betting shop owners and their traders to devise new ways in which customers can bet within sports. As highlighted earlier by *Spotlight Sports Group (2020)* and Gainsbury et al. (2020a), the deployment of algorithms based on quantified sporting metadata means that numerous events can be offered per sporting event where customers can bet or cash out in-play. These were identified as key features by participants as they widened the appeal of sports betting to a wider range of customers, thus proving the omnipresence of platform gambling with more features. The ability to bet or cash out in-play was perceived during the current study as benefitting the owners and are most likely to appeal to disordered gamblers according to other studies (Gainsbury et al., 2020a; Newell et al., 2020a).

The benefit afforded to owners by network effects is also characterised by the higher spend per customer against the reduction of betting shop staff. One employee (P5), when asked for her view on the main beneficiaries of the optimisation of the structural features of platform gambling, argued that owners benefitted as its features allow customers to reinvest their winnings more quickly.

“The betting company, definitely, because the more that they’ve got, the more profit they make. Because, as much as you have big winners now and again and you do have that, nine times out of ten, that money gets reinvested. It might take them a bit of a period to reinvest it, but it gets reinvested. The guy that won forty grand off us at the beginning of this year, it’s pretty much gone and not just with us” (P5).

Platform gambling benefits from increased usage just like any other platform. The engagement of customers who continue to turnover spend on platforms improves algorithms, reduces margins and boosts profitability. Auer and Griffiths (2021) contend that a high volume of betting opportunities forms a structural characteristic which reinforces further spend. The greater the number of the betting opportunities offered by platform gambling; the more productive sports betting becomes for betting shop owners. SIS (2021) demonstrates this through its provision of greyhound racing coverage. Indeed,

betting shop owners can show 'the best live greyhound content at peak times, with 54 British and Irish fixtures a week (the most in the market) plus market-leading virtual greyhound racing, offering your customers a betting opportunity every 3 minutes to help drive profitable betting' (SIS, 2021, online).

This is also true of gaming products on FOBTs and online. Such content relies upon data firstly to maintain algorithms related to the RNG and the RTP percentage, and secondly for the provision of structural characteristics such as audio and visual features, or the frequency of spin time which ensures a high level of spend. Participants P25 and P29 underlined how FOBTs encourage spend with the promise of a big win. However, rapid, customer input refines the RTP percentage, the deployment of features within gameplay and the use of audio and visual features, thus encouraging further playing time. Usage features such as autoplay, which sees the machine spin on the player's behalf, also drives further profitability. 'For the machine operator, the more plays, the greater the player turnover, and the greater the profit. The auto-play only stops when the player needs to make a decision regarding features... or wins' (Parke and Griffiths, 2006, p. 166). Schüll (2005) also underlines how the concept of autoplay removes the customer from 'betting against the RNG to win' (p. 78), instead facilitating faster gambling which coincides with the RTP percentage maintained by the owners.

Finally, however, data allow owners to control their liabilities through the odds which are offered. One employee (P7) elaborated on her experience of such data being used to control prices after the taking of large wagers.

"You know there's something dodgy going on there and it does make a difference to the odds. I will admit I did take a bet on something before, and it made a massive impact on the odds... the bet itself was five hundred pounds each way. I can't remember the odds on the horse but it did impact the odds" (P7).

However, although P7 shared her suspicion of price control methods deployed by the owners, a senior trader argues that traders now oversee 'the algorithm rather than compiled the odds... The quality of your in-house algorithm became a differentiator in the marketplace' (Spotlight Sports Group, 2020, online). The management of liability in this

way also relates to the management of unprofitable customers as outlined previously by P29. 'Liability control was also improved by the automating processes that had previously been manual... More real-time activity on markets and customers could be viewed to best manage the customer base and reflect their activity to improve the quality of decisions made by the company and user experience' (*Spotlight Sports Group, 2020, online*). The deployment of a loyalty card allows owners to harvest behavioural surplus across channels relating to customer spend not only for promotion, but also to restrict unprofitable customers. The harvesting of such data is explored during section 6.3.5.

6.3.2: Coordination and Outsourcing of Betting Shop Employment

Data simultaneously co-ordinate and streamline the workforce within the UK's betting shops. Platform gambling continuously transforms the role of the betting shop within the omnichannel continuum and the role of the employee changes accordingly with staff now expected to maintain the seamless experience between touchpoints. Similarly to factory-based production (Geng, 2017), the insertion of sensors and augmented behaviour has made gambling more productive. Employees are thus required to maintain the digital platforms of the omnichannel continuum which they perceived as leaving them redundant. Workers are also coordinated to oversee channels such as FOBTs which they felt cultivated unsafe working conditions thanks to their perceived relationship with disordered gambling. The surplus value which is thus drawn from the trade-off between CSR and digital transformation was a clear indication that platform gambling had detrimentally coordinated betting shop labour. Moreover, the insertion of SSBTs into betting shops was perceived as a proliferation of platforms which act as a direct replacement of the employee. Customers in particular were able to relate the development of SSBTs to other retail units such as supermarkets.

"It's a bit like the quick checkout in supermarkets. It just does away with people working there" (P26).

It was the belief of P30 that betting shops themselves were destined towards consisting solely of SSBTs, and he was not the only one to believe that this was the case.

“Yeah. I’ve thought that soon there’ll be shops that aren’t manned but will have loads of cashpoints or SSBTs. They’ll get emptied like first thing every morning or something” (P21).

Indeed, employees – whilst being redeployed to maintain or train customers on self-service technology (see Hilton et al., 2013) – are also being made redundant by their self-servicing nature of SSBTs which engages customers into a role of consumptive labour. With approximately 12,000 SSBTs within a total of approximately 4,200 *William Hill* (2021), Ladbrokes and Coral shops (*Entain*, 2020b, 2021), their presence is growing, providing more structural features based on the interaction from customers in a process not dissimilar from that between machine and worker as highlighted by Briken (2020).

Shop labour has also been coordinated towards the growth of online gambling, as previously highlighted with the deployment of NDB targets. Zhang et al. (2010) argue that such metrics are needed to measure the recruitment performance of touchpoints within an omnichannel network. Not only does the synergistic link between OTC betting and online gambling redeploy employees as intermediaries for online gambling, but it also outsources betting shop labour. Srnicek (2017a) argues that the outsourcing of labour through platform capitalism is done so through cloud platforms which houses the services carried out by employees. As such, the processes relating to bet placement and the monitoring of gambling activities are housed within the network of platform gambling, whilst labour is also outsourced thanks to the transformed role of the consumer. Platforms such as FOBTs and SSBTs outsource the labour through the consumer who takes on the role of consumptive labour (Koeber et al., 2012) on machines, whilst online gambling transforms the consumer into an app-based ‘prosumer’ (Dyer-Witthford, 2015, p. 177). As *P18* and *P33* both described, the very nature of the NDB meant that employees were expropriating their own skill, but this was also accepted as it was deemed the natural way in which owners could ensure their shops’ survival.

Finally, the shop workforce is also seeing its work outsourced by marketing campaigns with platform gambling acting as the dominant subject of advertising techniques according to participants. Special odds were advertised as existing solely through digital

platforms, which participants such as *P15* highlighted as causing operational issues within shops. The perception of marketing was also seen as related to the network effects of platform gambling which help to inform structural characteristics such as betting or cashing out in-play. Marketing within sport was seen as an opportunity to promote these features thus directing custom away from OTC betting and removing the employee from the consumption of risk. Ipsos MORI (2020) underlines the urgency which is implicit within marketing, thus encouraging online gambling away from the constraints of gambling in brick-and-mortar units. Owners are therefore perceived as deploying marketing with a focus on a network of platform gambling which both coordinates and outsources betting shop employment.

6.3.3: The Cross-Subsidisation of OTC Betting

There is a clear relationship between Srnicek's (2017a) affordance of data in relation to the cross-subsidisation of platforms - intended to share costs between platforms and attract a diverse pool of customers – and the development of platform gambling. Although the optimisation of the data across the omnichannel continuum diversifies the customer base and provides flexibility to customer and owner alike, the deployment of each platform clearly subsidises the costs associated with an OTC presence which in turn has been repurposed to maintain the omnichannel continuum. Betting shops were perceived as subsidised by the technologies which have caused their digital transformation. No participant shared any concerns similar to those held by Trenez et al. (2020) that the historical 'baggage' (p. 1208) carried by the outdated fabric of betting shops would constrain omnichannel development. Each platform subsidises OTC betting through their respective situational and structural characteristics which act as part of the seamless migration within the omnichannel continuum. Owners were also perceived as neglecting investment into betting shop fabric in order to focus solely on platform gambling.

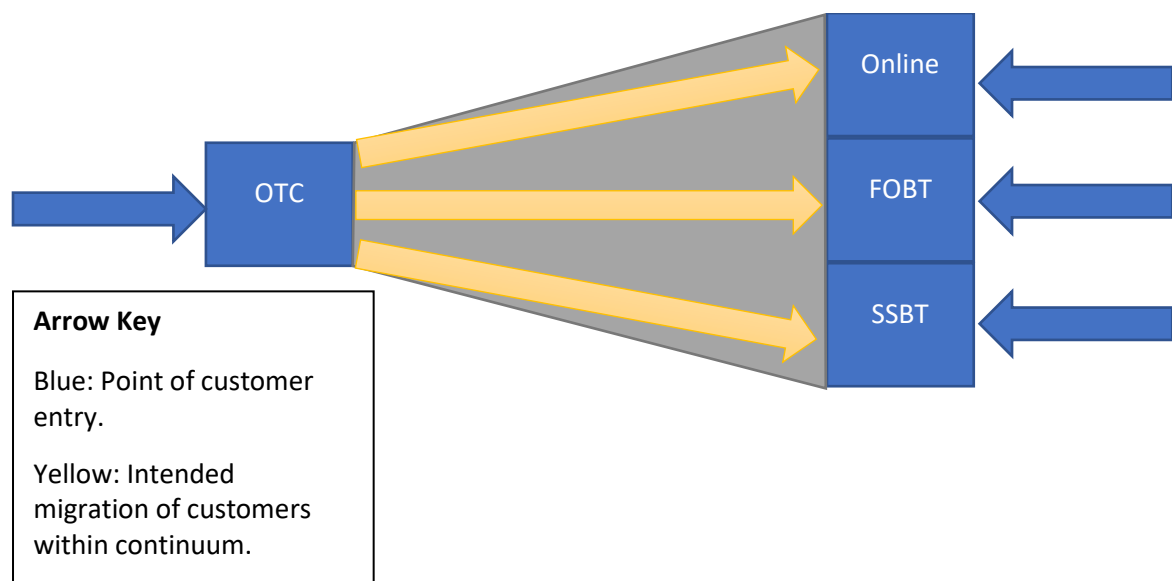
Gariban et al. (2013) argue that online and land-based customers are treated as equally valuable. Owners here, on the other hand, were perceived as finding higher value in their online customer base, thus subsidising OTC betting. Participants spoke of the reduced

footfall within shops as a result of the higher prevalence of online gambling, and owners were perceived as understandably pursuing a strategy capitalising on the growth of prosumerism. OTC betting provides a gateway to online gambling thanks to the possibility that customers can make deposits into - and withdraw from - their online accounts whilst in shop, therefore foregoing the need to make any digital payments. Although this was seen as a positive aspect within the previous chapter by participants such as *P16* and *P30*, the researcher felt that participants had demonstrated the repurposing of the shop counter as facilitating the migration to online channels. Online customers, whilst they have the option to visit a shop and deal with an employee to settle any disputes, were not being encouraged to gamble OTC.

OTC presence, meanwhile, was also perceived as necessary if only to maintain the networks of SSBTs and, to a lesser extent, FOBTs. As participant *P17* stated during the previous chapter, fifty-two percent of the money now wagered on sports betting within shops is now taken through SSBTs, overtaking spend taken through OTC betting. As mentioned during the previous section, the SSBT optimises production by bypassing the employee completely whilst also providing flexibility to sports betting customers who wish to avoid betting online. OTC betting was not perceived as offering the same features available through SSBTs and customers as a result had migrated to self-service technology. The subsidisation of OTC betting from FOBTs was demonstrated by participants who highlighted the customer migration which had occurred as a result of the maximum FOBT stake implementation. Examples characterised by the reduced footfall (see section 5.3.1.1) as a result of the stake limits demonstrated how FOBTs had subsidised OTC betting through the loss of jobs which had occurred when restrictions were not placed upon similar content online. The point was also made by participants *P19* and *P35* that shops may have survived the stake limits had they also been implemented online as this would have restricted the move online to gambling at higher limits. The perceived relationship between shop closures and stake limits again highlights the reliance of OTC betting upon technology for its existence.

Therefore, the omnichannel continuum which was laid out within Chapter Two can now be reimagined through the flow of customers within the industry. Figure 6.5 demonstrates the omnichannel continuum with the intended flow of customers between channels. Owners were perceived as seeking to drive customers from OTC betting to forms of platform gambling with no intention to ensure the flow of customers in the other direction. Whilst there is an integrated network between online and shop channels – the key aim of omnichannel management (Verhoef et al., 2015; Hickman et al., 2020) - the synergistic relationship of platform gambling is designed to either circumvent OTC betting – thus reducing costs – or to use it as a gateway to platform gambling. To this end, customers are encouraged to migrate between each digital platform whilst enticed by cross-channel offers (Table 5.4).

Figure 6.5: Customer Migration Within the Omnichannel Continuum.



6.3.4: The Transformation of Risk into a High-Margin Product

Srnicek (2017a) underlines the profitability of platforms thanks to their reduced production costs. Without labour or property costs, platforms merely need to acquire more server space to operate. The ability of data to transform a good into high-margin product also manifested itself within the perceptions of the study's participants. Tueanrat et al. (2021) argue that omnichannel customers perceive themselves as benefitting from

a greater sense of value, similarly to the participants during the current study who argued that the digital nature of platform gambling affords better value than that found within OTC betting.

The marketing strategies and the odds offered by owners through platform gambling also demonstrates the higher profit of margin which is possible through digital channels. The main focus of all marketing – according to participants – was online gambling. The structural characteristics of online gambling form a cycle where they produce - and are produced by - a higher profit margin. Cashing out in-play, for example, encourages customers to take an early profit or loss that would be less than the final payout (Killick and Griffiths, 2021), whilst enabling a quicker reinvestment on a wide range of events as highlighted by *P9* and *P36*. However, although odds which are offered online may exceed those available within shops, they are still lower than the most accurate statistical likelihood of a win for the customer.

“From the punters’ point-of-view, you’re not really getting any more real value for money... you’re probably getting the value you should have had in the first place” (P18).

Higher odds and offers such as BOG are available for the customer through digital platforms because the costs of production are lower, thanks to the removal of shop-based costs. Online gambling, above all, provides the highest margin as it altogether removes the costs associated with brick-and-mortar shops. Zhang et al. (2010) highlight how online pricing operated by omnichannel retail companies would increase thanks to the logistical operations involved in delivering goods to the customer. This concern is non-existent to betting shop owners who, thanks to the absence of the logistical operations involved in the provision of odds, can offer increased odds over its online platform. As evaluated earlier and as highlighted by *P10*, better odds are available online thanks to the lack of production costs. SSBTs and FOBTs, meanwhile, although they do not eliminate costs still provide a higher margin of production compared to OTC. SSBTs are an example of a self-service technology which removes the need for shop labour (see Kimes and Collier, 2015) by providing the same sports betting product offering and value as available online.

Even before evaluating participants' perceptions, FOBTs provide a higher margin as owners benefit from their control of the RTP percentage (Schüll, 2012). Participants highlighted how the insular nature of FOBT gaming meant that reinvestment was more likely with FOBT players thus less likely to collect their winnings. These winnings were thus reinvested at the RTP percentage set by the owner, thus providing a higher profit margin. Algorithms which enable the rapidity of gameplay and features such as those described by Parke and Griffiths (2006) and Harris and Parke (2016) encourage faster spend and thus more profit. Again, thanks to the customer's additional role as the producer of their own risk, the only costs involved would be the rental of hardware and digital content from third-party platforms as well as the relatively low pay of staff to maintain them. Platform gambling, therefore, improves the margins made by betting shop owners. The removal of shop- and labour-based costs ensures that platform gambling provides the most profit at the lowest costs.

6.3.5: The Virtuous Data Cycle

The final affordance of data according to Srnicek (2017a) is their ability to provide more data when analysed. Indeed, actors who gather the greatest quantities of data to be used effectively will survive and prosper within the platform capitalist system (Glass and Calahan, 2015). Similar to the analysis of raw material made earlier by Marx (2013a), user data need to be extracted from user activity for platform gambling to operate. User data then optimise the provision of content as a result of the optimisation from network effects, as well as facilitating the behavioural surplus of behavioural data from user activity. Reflecting the virtuous cycle which can be provided by data, data harvested by platform gambling were clearly perceived as being extracted to ensure the prosperity of owners through either the restriction of winning customers or the enticement of customers with offers based on their gambling behaviour.

Within platform gambling, surveillance capitalism was perceived as occurring through the loyalty schemes offered in shops. Although loyalty schemes were advertised as a gateway to full access to the omnichannel continuum with cross-channel offers to attract customers, they were perceived by participants as a tool through which owners could

extract behavioural data. Data relating to preferred gambling product, the types of bets wagered, the normal time of day the customer gambled and the levels of spend were all perceived as extracted from the customer's membership of the scheme. These data are then used to shape the production of each customer's immaterial labour. The most commonly perceived use of data was the provision of bespoke offers based on gambling behaviour. These targeted offers often arrive via text or email, encouraging an urgency of immediate spend (Rawat et al., 2020). The targeting of offers in this way is a clear example of Zuboff's (2019) behavioural surplus with data – freely given by the customer – used to extract further profit. This can also be understood through the Rossiter's (2016) description of the logistical city. Customer's previous gambling habits were analysed and used to extract further spend through decisions which are 'all too frequently an unwitting acceptance of command' (Rossiter, 2016, p. xiii). Shop owners therefore profit through the use of data as described by Glass and Calahan (2015).

The second benefit for owners of the behavioural surplus consists of the protection of capital through the restriction of winning customers. Instead of being used to extract further capital, the behavioural surplus consists of the capital which is protected from unprofitable customers, thus confirming Cassidy's (2020) previous research. Owners are perfectly entitled to manage risk in order to make a profit (Chinn, 2004), yet the extent to which owners were perceived as willing to go in order to do so was perceived by some as odious. *P17* outlined how his company had access to a wide pool of data which his company did not use effectively enough. On the other hand, those seeking to avoid being monitored by operators felt that the mechanisms deployed to this end ensured that even customers who were studious – yet, not profitable - were subject to restrictions. These mechanisms were perceived by participants as unfair, particularly when customers were then encouraged to continue spending on gaming products.

The researcher noticed during the data collection process how the manual, OTC tracking of customers within betting shops was perceived as equally profitable for owners. Participant *P29* described how multiple betting shops of all four chains within his local

area refused his bets as they were deemed as unprofitable. The need to avoid surveillance from shops without having to bet online meant that he needed to travel from the South West to as far as London to place his bets. Platform gambling, on the other hand, de-anonymises gambling and therefore removes the opportunity for customers such as P29 to stake large amounts in shops in other regions. Other participants noted that they wished to avoid platform gambling and submitting their details for this reason. Although participants often noted these customer monitoring processes with an element of distrust, the natural drive towards profit compels platform owners to use any data they can to protect profits.

6.4: The Marxist Redescription

The use of Srnicek's (2017a) platform capitalism demonstrates the application of a Marxist theoretical lens to the digital transformation of betting shops by highlighting the benefit of technological innovation to the capitalist class. Participants shared perceptions of how the digital transformation of betting shops had sustained the flow of wealth which was criticised by Cohen (2003) and is characteristic of the existence of capitalism (Marx, 2013a). As such, one customer (P24) in particular underlined their view that the industry sustains this flow of capital.

"They [betting shop owners] just see me almost like as walking cash machine, don't they? They need people to go into shops to place bets, so I'm just a way of producing that money to send into the system. I don't think they see us as customers, or friends or members. You're just someone who comes in and places a bet. You might win, you might not. It's just a way of getting money out of us... and shareholders have to work out more ways of getting money out of people, and if that means putting more machines in, they'll do that" (P24).

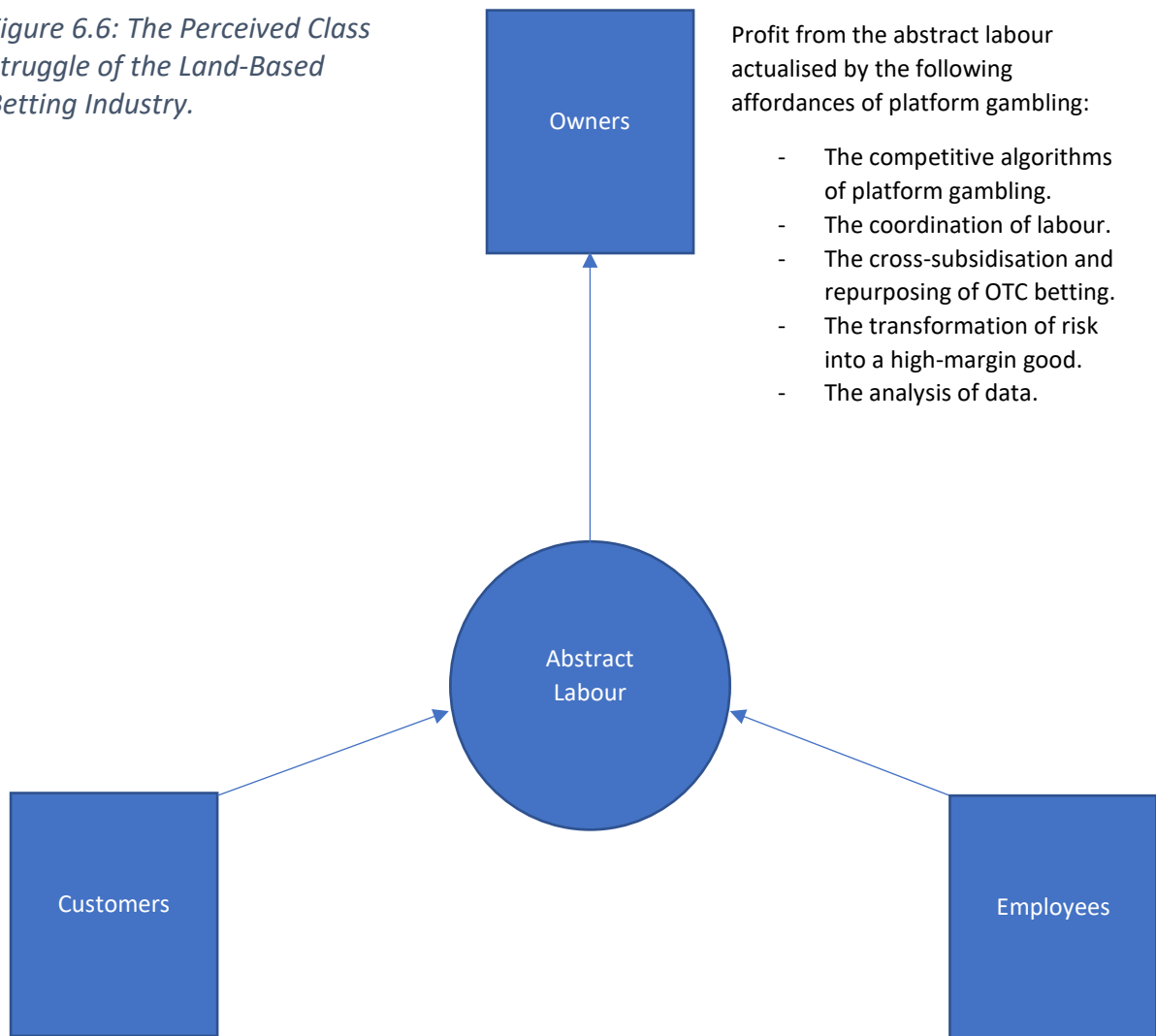
The argument made by P24 reflects the direct relationship between primitive accumulation and the land-based industry. This view – as well as others – are now explored through the second part of the study's theoretical lens, thus helping to answer the main research question which seeks to address how platform gambling can result in a perceived class struggle characteristic of capitalism's tendency to simultaneously foster exploitation and innovation.

This section begins by evaluating an overview of the class struggle which occurs as a result of the interaction between the two mechanisms of platform gambling. The two sections which then follow evaluate the heterogeneity of the abstract labour which was perceived as occurring thanks to the development of platform gambling, exploring the two proletarian groups in turn. Perceptions related to the exploitation of work-based labour are firstly evaluated, exploring how Marxist views on the technological innovation of capitalism can be applied to the impact of digital transformation of shop labour. Secondly, the subsumption of the immaterial labour of gambling is considered, informed by perceptions which portray platform gambling as facilitating the proletarianisation of the customer.

6.4.1: The Class Struggle of the Land-Based Betting Industry

The theoretical redescription of the two key mechanisms emphasises the class struggle explored by the study. Specifically, class antagonisms between owners and their customers and employees emerge from the interaction between the mechanisms of the productivity of data and the omnipresence of platform gambling. Figure 6.6 demonstrates how Hardt and Negri's (2001) relationship between the heterogeneous nature of abstract labour and its homogenous value to the capitalist class applies to the land-based betting industry. In doing so, the abstraction of labour from both proletarian groups characterises the class struggle which occurs as a result of the development of platform gambling. The digital transformation of betting shops is a deliberate process to facilitate the further exploitation of the working class, which Dyer-Witheford (2015) would argue is characteristic of the development of capitalism as a whole. Platform capitalism works in tandem with the primitive accumulation of money (Fuchs, 2019). Therefore, the bourgeois control of data facilitates the accumulation of wealth.

Figure 6.6: The Perceived Class Struggle of the Land-Based Betting Industry.



Profit from the abstract labour actualised by the following affordances of platform gambling:

- The competitive algorithms of platform gambling.
- The coordination of labour.
- The cross-subsidisation and repurposing of OTC betting.
- The transformation of risk into a high-margin good.
- The analysis of data.

Immaterial labour extracted through:

- The omnipresence of platform gambling characterised by the situational and structural characteristics as well as marketing, designed as part of the digital transformation of the consumption of risk.
- The productivity of data, characterized by network effects, the natural migration to digital platforms, and the deployment of surveillance capitalism intended to profit from the behavioural surplus from user data.

Labour exploited through:

- The omnipresence of platform gambling, the features of which circumvent the need to gamble OTC, thus expropriating skill from shop labour.
- The productivity of data, leading to the redeployment towards platform maintenance and the surplus value derived through NDB targets and the management of customer behaviour.

This class struggle represents how betting shop owners – as with all bourgeois owners of capital – must innovate for the sake of primitive accumulation. The heterogenous nature

of abstract labour reflects how the two mechanisms of platform gambling exploit customers and employees in unique ways. Cohen's (2003) initial argument linking gambling to the redistribution of wealth was a critique of the industry's treatment of customers. Platform gambling was perceived as intensifying this flow of capital through each mechanism. Data were considered as more productive through the behavioural surplus produced by the surveillance capitalism facilitated by the intersection between the omnichannel continuum and platform gambling as well as the natural trend of customers migrating to digital channels. The situational characteristics of platform gambling were designed to promote the availability of gambling to customers who preferred interaction over interaction, whilst structural characteristics made possible by digitalisation – such as the sheer number of markets or features of games – were designed to extract further capital after the initial spend. Continuous spend was also made easier by the possibility of digital payment methods, as highlighted by Parke et al. (2016). These characteristics were then reinforced by excessive marketing with efforts made by the BGC (*IGRG*, 2020) to restrict advertising seen as ineffective. As a leisure activity, gambling within betting shops was further subsumed by the digitalisation of the industry, and customers were therefore – to adopt Dean's (2018) term - proletarianised by the bourgeois owners as their immaterial labour is translated into capital.

As for employees, to paraphrase Marx (2013b), platform gambling was perceived as making use of them. Employees have seen the expropriation of their skill and are also required to maintain and promote the very platforms which were rendering them obsolete. Dyer-Witheyford (2015) highlights the prosumerism of mobile apps and platform gambling is no different, recruiting the consumer to the role of employee and completely removing the need for the worker. The very omnipresence of platform gambling, meanwhile, negates the need for shop labour. The situational and structural characteristics of platform gambling are based on the flexible consumption of risk without the need for an employee. Marketing was also driven by the need to highlight the availability and features of platform gambling such as cashing out or betting in-play. Platform gambling – and the drive to acquire customers to platform gambling – renders employees obsolete.

Also to be considered within these class antagonisms is the issue of CSR, an aspect this study has shown cannot be maintained by a platform capitalist system which – despite being concerned with the commodification of data (Srnicek, 2017a) – sustains the primitive accumulation of capital as highlighted within *The Communist Manifesto* (Marx, 2013a). The surplus value of betting shop employment arises from the requirement of employees to maintain and promote platform gambling as well as recognise - and then, manage - instances of disordered gambling. Participants felt that the latter of these two aspects was of lesser importance to owners, with the pressure of NDB targets guiding the actions of the employee. In summary, interactant platforms – equally shaped by technological development and user action (Markus and Rowe, 2018) - worsen the conditions experienced by the shop workforce and tighten ownership control of immaterial labour.

6.4.2: Employee Labour

Criticisms of the neo-liberal deregulation of gambling made by Cohen (2003) and Pidd (2017) omit the exploitation faced by employees, choosing instead to focus on the impact of the industry's growth upon the customer. The era of platform gambling to this end could be understood as a new epoch which – similarly to the onset of capitalism as within Marx's (2013a) *Communist Manifesto* – has reformed the class divide, with the proletariat now characterised by the struggle of customers and employees alike. The omnichannel management of platform gambling ensures that employees are headed towards redundancy. In fact, the exploitation of the worker can be characterised in two areas: the obsolescence of the worker and the extraction of surplus value related to their role in the promotion and maintenance of platform gambling. This correlates to the ability of data to outsource and co-ordinate the workforce (Srnicek, 2017a).

Platform gambling was perceived as rendering the shop employee obsolete due to the automation of the consumption of risk. As Marx (1973) highlights in *Grundrisse*, the implementation of fixed capital or machinery reduces the labour required to produce exchangeable goods. This view is also reflected by contemporary thinkers such as

Varoufakis (2019) and Dean (2018). Furthermore, the worker within the factory does not maintain the machinery but the machinery 'makes use of him' (Marx, 2013b, p. 292). These claims made by Marx (2013b) in relation to the production of goods can be reflected within the production of risk where platform gambling provides an automates the process offered by OTC betting. The productivity of data also ensures that the omnichannel continuum which integrates each platform benefits from a sense of interoperability. Platforms are therefore synchronised on a network inspired by the IoT, where individual platforms are able to harvest data from its users within their respective environments without the need for worker input, consequently adding to Bartlett's (2018) list of industries in which IoT-based technologies operate. The consequent productivity results in further profits for owners with automation embedded in the relationship between the ownership of production and the exchange of labour and goods (Fuchs, 2019). Automation therefore augments bourgeois profitability, reducing the need for the workforce and thus satisfying capitalism's requirement for primitive accumulation. This was reflected within perceptions linked to platform gambling and its design to improve productivity, cut down on production costs and thus grow profits.

Each platform negates the need for betting shop labour through its own distinctive features. The interaction between the two mechanisms of platform gambling demonstrates how the employee is removed from the gambling process. Online gambling and SSBTs were two platforms which were perceived as specifically developed to replace the worker thanks to their sports betting products. In the case of online gambling, its situational and structural characteristics are predicated on the flexibility offered by not having to visit a betting shop (Gariban et al., 2013), let alone interact with staff. The placement of gambling products within devices such as smartphones or laptops facilitate an easy, automated access to gambling (Deans et al., 2016). Marx (1973) highlights how the development of technologies permits the development of more productive workflows and processes. Online gambling is an example of the altered workflow practices which facilitate reduced cost in labour. 'Despite the hopes attached to the app economy, apps are not counter to capital's tendency to drive humans out of the production process. Rather, they are an ancillary part of this drive. Apps downloaded to

‘prosumer’ mobile users those functions within highly automated production and distribution systems that still require human decision, thereby removing the waged worker even from a linking function’ (Dyer-Witheford, 2015, p. 177). As such, online gambling was perceived as creating a young generation of prosumers. Perceptions from *P11* and *P18* earlier demonstrated how owners were perceived as needing to evolve with digitalisation just to ensure that shops survived. These views were similar to those portrayed earlier by Lukács (2017) who underlines the removal of the ‘qualitative, human and individual attributes’ (p. 69) of labour due to the competitive nature of capitalism. Furthermore, with no shop-based costs, the employee was being outpriced by their own employer through different channels. This was represented through examples given by *P10* and *P15*, both of whom highlighted the discrepancies between shop-based and online odds.

SSBTs, meanwhile, were perceived as a direct replacement of employees thanks to their bet placement capabilities which remove the employee within the betting shop itself. Srnicek and Williams (2016) make a similar comparison to the introduction of automated cashpoints and the subsequent reduction in bank cashiers, whilst Kimes and Collier (2015) highlight how self-service technologies reduce labour costs. SSBTs were considered as a risk to shop labour by participants of all three stakeholder groups. As the sole boardroom-level owner (*P17*) elucidated to the researcher, their self-servicing nature make them an attractive product to owner and customer alike. Moreover, SSBTs are betting shop employees without the propensity for human error (Jones, 2019). There is therefore a duality of platform gambling which is representative of capitalism itself, consisting of technological innovation and exploitation of the workforce. Innovation has afforded to the customer the flexibility of transaction over interaction across all platforms, yet the antagonisms of automation are embedded within the class struggles of Marxism with the production of fixed capital being of a higher value than that of the employee.

Furthermore, employees are expected to perform extra duties, thus maintaining platform gambling at the lowest cost. This surplus value extracted from shop labour is similar to the surplus value highlighted by Marx (1971) earlier. Employees faced this through two main aspects, the first of which was through the extra duties faced with maintaining FOBTs and furthermore, interacting with customers who may react adversely whilst playing them. This was summarised by an area manager (P18).

“I run twenty-eight shops and if there is a report of an issue in a shop, it is normally to do with a FOBT” (P18).

This statement reflected the wider view that FOBTs were unsafe for employees. The detrimental working conditions associated with FOBTs were seen as further exploiting the workforce who were tasked with interacting with customers who suffered from disordered gambling without sufficient training. Participant P19 argued earlier how *“intimidating”* it was to be interacting with disordered gamblers after experiencing training from *“a piece of paper with all the emails saying this is what service should be used”*. The lack of training in interacting with customers who may suffer from disordered gambling as a result of FOBTs added to the earlier mentioned trade-off between encouraging platform gambling and CSR towards customers who suffer from disordered gambling. Yet, the ‘essential condition for the existence, and the sway of the bourgeois class, is the formation and augmentation of capital’ (Marx, 2013a, p. 73). Employees felt that their desire to focus on CSR was undermined by the drive to maintain machines which were seen as designed specifically for profit.

The argument made here is not to diminish the importance of disordered gambling. The current study is not a study of disordered gambling and by no means lessens - or heightens - its importance. However, the perceived relationship between disordered gambling and the structural characteristics of FOBTs uncovers a surplus value derived from shop labour. Employees felt that they were untrained and disproportionately remunerated for the extra duties which platform gambling provided.

“I don’t think that the staff are trained or paid to a good enough standard to be cum counsellors. I think that a lot of staff are working in a shop because they’re working in a

shop. They're not counsellors; they're not trained counsellors to help people with problems" (P10).

Related to the policy recommendation within the previous chapter, sufficient training for employees to effectively recognise and then interact with disordered gamblers would provide betting shop employees a fairer sense of employment if accompanied by a higher rate of pay. However, the instinctive tendency towards primitive accumulation means that increased pay and reduced focus on platform gambling is unlikely.

Surplus value was also perceived as being derived from the pursual of NDB targets - which also expropriated employees' skills - whilst maintaining their usual shop duties. Employees often referenced the difficulty in maintaining all of these requirements. P37 earlier stated that she would like for her employers to witness the impracticalities associated with a large number of duties. The pressure associated with NDBs resulted in employees having to juggle the need to fulfil targets related to platform gambling and the identification of disordered gamblers. Namely, employees felt that they were expected to achieve targets even if it meant disregarding responsibilities related to disordered gambling. This confirms findings within previous research by Hing and Nuske (2012) which underlines the difficulty of staff intervention within issues related to disordered gambling if it contradicted management objectives. Furthermore, with staff from Ladbrokes and Coral shops facing redundancy from their roles depending on their performance against such targets (Davies, 2019a), employees from these two shops often spoke of the difficulty in trying to balance responsibilities.

The surplus value associated with NDBs also demonstrates an inability of technology to liberate the masses. A comparison of the development of platform gambling to Marx's (2013a) teleology of economic development would see employees obtain the tools of platform gambling to free themselves from the exploitation incurred by the omnichannel system deployed by the owners towards the control of their own business. However, owners ensure that such prospects are limited by linking the fate of the workforce to the profitability of each platform. Employees are expected to promote forms of platform

gambling, and they were clear that their livelihoods depended on targets related to NDBs or FOBT and SSBT spend. As one employee (P30) complained,

“As a company, they set you targets and if you don’t get them, you certainly know about it!” (P30).

Employees were therefore expected to promote forms of platform gambling in order to ensure a consistent brand experience for the customer. Betting shop employees – as per the development of capitalism which Young (2010) and Cassidy (2020) highlight as proliferating the role of gambling – are being rendered obsolete by the development of platform gambling. This is further reflected by the increased industry GGY earned through forms of digital gambling compared to OTC (*Gambling Commission, 2020a*).

Surveillance capitalism – and the possibility that data provide the opportunity for further analysis (Srnicek, 2017a) - also renders the shop worker obsolete. Participant P17 earlier spoke of the importance of data to his company and the decisions that could be made with them vis-à-vis promotions and restrictions. These decisions, however, are made without the input of employees. The logistical networks which monitor customer spend within the omnichannel continuum differ from traditional labour ‘which is defined by class stratification across urban spaces and an economy based on the manufacturing of goods. Like the global city, the logistical city is a city of services, but these services are driven by computational systems’ (Rossiter, 2016, p. 36). Data are harvested from user spend within the continuum by algorithms which then signal to owners the decisions the promotions or restrictions to be deployed. For betting shop employees, this removes their ability to monitor or make decisions on their own customers as the data harvested from their loyalty membership provide a higher level of productivity.

In summary, a Marxist analysis of the perceptions shared by betting shop employees highlights the antagonisms which occur within capitalism as a whole. Employees found that the requirements of their role meant that they were having to prioritise the push for data over concerns relating to disordered gambling. This reflects the drive to build a competitive system of platforms for their employers. Yet, the digital transformation of

betting shops has expropriated the workforce of its skill. There was also evidence that capitalism was the accepted *modus operandi* for employees. Recalling earlier accounts given by *P18* and *P9* and similar to Marx's (1973) argument of capitalism forcing bourgeois owners to innovate to be competitive, owners were acknowledged as having to do the same with employees accepting that forms of platform gambling were an inevitability. *P9* also acknowledged the wider context of retail shops needing to develop an online channel to ensure profitability, a need which Hsia et al. (2020) would argue is an inevitability. This can also be understood through Dean's (2018) argument which underlines neo-liberalism – and its technological innovations which reduce knowledge to data – as reducing the demand for labour. In a nutshell, platforms produce the conditions for the exchange of risk so that shop employees are no longer required to.

6.4.3: Immaterial Labour

Platform gambling has also made the industry more accessible for its customers through an expanding network of cyber-thoroughfares controlled by its owners. As mentioned throughout, the Marxist analysis adopted here of gambling portrays it as an act of immaterial labour – or labour which would normally occur outside of the capitalist system (Lazzarato, 1996) - which relocates capital from the poor to the rich through the cyber-thoroughfares of platform gambling. Gambling is therefore implied as a leisure activity which is subsumed into the capitalist economy. The nature of platform gambling and its use of data as a key commodity is perceived as exacerbating the primitive accumulation of capital.

Considering the role of interconnectivity as highlighted by Hardt and Negri (2001), the growth of networks within the gambling industry provides more opportunities to appropriate immaterial labour, thus allowing owners to augment further wealth and control. Platform gambling ensures that the immaterial labour of gambling is easily accessible and is therefore easily commodified. The network effects generated by platform gambling were perceived as generating further data and capital for owners, two commodities which co-exist along with their respective capitalist systems (Fuchs, 2019). The situational characteristics of platform gambling enable more opportunities for

customer leisure and ownership profit alike, and the cyber-thoroughfares through which gambling is conducted represent an example of the use of information infrastructure within the production of immaterial labour. The information system is now the central part of the production and consumption of risk. Each of the platforms evaluated here are reliant on data and as such, were perceived as more profitable than OTC betting. The flexibility offered by the synergistic management of platform gambling improves productivity for the owners by reassigning customers to the role of prosumers. As such, the analysis of the consumer taking on the role of consumptive labour or prosumerism has been evaluated as part of the exploitation suffered by employees.

There is also a surplus value to the exchange of capital and risk to be considered within the act of gambling itself. Immaterial labour is drawn from the use of improved odds on digital platforms which are given thanks to the improved profit margins facilitated by data. *P18* earlier confirmed Young and Markham's (2017) argument that surplus value is drawn even from boosted odds. Within all aspects of the omnichannel continuum, the customer is destined to lose long-term thanks to the nature of the odds being stacked against them. Table 3.2 earlier demonstrated how sports betting odds are compiled to guarantee a profit regardless of the event's outcome, whilst fixed RTP percentages within gaming products ensure long-term profit for owners. The enforcement of such odds guarantees the long-term guarantee of capital accumulation for owners. The reduction of the bourgeois advantage through odds could be provided through education at an early age. A lesson on the disparity between odds and the true probability 'could well prove to be one of the more memorable maths lessons of a student's GCSE career. And if, at the end of it, a potential addict understands why and how the gambling industry makes its money, it could be one of the most important lessons of their life' (Wood, 2018, online). Just as the owners benefit from the surplus value from betting shop employment, they also benefit from the surplus value of immaterial labour with odds which ensure that customers lose over the long-term.

It is evident that data are used to extract capital from customers. 'No matter what social milieu, geocultural situation, or mode of production, the individual today is always

connected to circuits of capital' (Rossiter, 2016, p. 96). Data ensure that owners can extract spend from customers in multiple ways, thus ensuring that – as per the process of proletarianisation more generally (Dean, 2018) – owners can incorporate the leisure activity of their customer into their platform capitalist system, thus benefitting from the subsequent 'network effects' (Srnicsek, 2017a, p. 45). When evaluating the productivity of data within platform gambling, owners clearly benefit from surveillance capitalism. Zuboff (2019) highlights the behavioural surplus of such data which can be compared to the surplus value of labour outlined by Marx (1971). The behavioural surplus of data ensures that platform owners benefit from the surplus value of freely extracted data. Within platform gambling, owners appear to profit from the behavioural surplus of data in two ways: through targeted offers or inducements based on customer spend, and the restriction of unprofitable customers. The drive to encourage customers into platform gambling where cyber-thoroughfares are controlled by owners ensures that they can also restrict wagers from unprofitable customers more efficiently through measures such as maximum stakes and restrictions. The desire to avoid submitting data to owners for customers was to ensure that they avoided these restrictions which were deemed as unfair, especially considering the money made by betting shop owners through products controlled by a RNG and a RTP algorithm.

Structural characteristics extract further immaterial labour. For example, platform gambling also offers a flexibility of payment methods. The situational characteristic of the possibility to fund online gambling with cash ensures that customers do not have to use digital payments when gambling online, with OTC betting being kept open to facilitate deposits and withdrawals. On the other hand, a key structural characteristic of platform gambling is that of cashless gambling and the use of debit and credit cards to fund gambling (Gainsbury and Blaszczynski, 2020), which can lead to greater spend (Parke et al., 2016). Although credit cards have been prohibited from online gambling since the data collection (*Gambling Commission*, 2020e), debit cards are still a method which can be used to deposit online. Recalling the viewpoints of P5, P22 and P26, cashless gambling was perceived as facilitating capital flow to the owners of betting shops. The perceived

ease of spend on platform gambling thus subsumes further levels of immaterial labour into the capitalist system.

The audio and visual features offered by FOBTs and online gaming were also seen as directly encouraging exploitative levels of spend similar to other studies (Schüll, 2012; Harris and Parke, 2016; Delfabbro et al., 2020). FOBTs were perceived by participants as reliant on RTP algorithms which ensured long-term profitability for betting shop owners. Similar to Marx's (1973, 2013b) argument in *Grundrisse* and *Capital* where the fate of the worker is reliant on their use of fixed capital, the fate of the customer is similarly tied to their use of technology. Data not only enable their structural characteristics which encourage further spend, but they also – according to participants – decide the outcomes of each spin through an RNG (see Schüll, 2005). Furthermore, data also allow shop owners to optimise the bespoke content of a multitude of games, allowing a wide choice to the customer on FOBTs and the Internet alike. On the other hand, whilst the maximum stake per spin on FOBTs has been restricted in order to reduce disordered gambling, the maximum spend per spin on online gaming content has not been subjected to a maximum limit, meaning that owners are able to accumulate an even higher level of capital (Bradford, 2018). This reflects viewpoints given earlier by *P5*, *P14* and *P35*, all of whom highlighted the inconsistent regulation between the two channels. The increased profit obtained through casino- and slots-based games is significant when considering the absences of costs associated with betting shops.

Additionally, platform gambling also possesses a structural characteristic relating to its higher frequency of gambling opportunities. Gaming products on FOBTs and online were referenced by participants (for example, *P5* and *P25*) as having a high spin frequency, a characteristic which Schüll (2005) compares to a Marxist critique of the improved productivity of factory machinery. Sports betting opportunities, meanwhile, are more numerous online and on SSBTs. As referenced during the previous chapter, both FOBTs and the wide range of sporting events suited customers who preferred frequent gambling opportunities. The higher frequency of betting opportunities again provides more markets through which capital can be exchanged, optimising production for owners who

can harvest mass profit from customers. The development of the sports betting industry in this way can also be seen as a natural evolution. Sports are now quantifiable in with an array of micro-markets available to the customer and owners are thus able to interact with their customers in different ways through different markets (Gainsbury et al., 2020a; Newall et al., 2020a). Once again, these markets are advertised at a surplus value, with the odds offered for their respective outcome far lower than those which would reflect the true possibility of its actual occurrence (Young and Markham, 2017). Therefore, data are used to provide a more diverse nature of markets which are priced unfairly and occur more frequently.

The prevalence of marketing was also perceived as exacerbating the flow of capital to the owners. This was perceived as obvious by participants who highlighted the deployment of marketing by owners to boost their own profitability. As P17 explained to the researcher,

“It has reached a wider audience. It has tapped into certain sports that maybe they wouldn’t have been able to tap into as quickly as they have done. It has clearly yielded some very strong gross wins because the advertising spend is humungous. So, we’d only facilitate that spend if we thought it was playing through” (P17).

Participants perceived owners as profiting from the excessive levels of marketing achieved by the £1.2 billion annual expenditure (GambleAware, 2018). As the interaction between Themes 7 and 8 suggest, the excessive prevalence of marketing aims to heighten the productivity of platform gambling above all else. Furthermore, just as it is disingenuous to suggest that the ban has been successful when compared to the level of extant marketing within live sport itself (Purves et al., 2020), it is also contradictory to suggest that owners may wish to curb strategies which heighten profit. For example, the use of social media platforms such as Twitter to not only advertise odds but encourage platform users to request their own (Newall et al., 2020a), indicates the deployment of a strategy which aims to extract capital from the customer. Although the employee may try to achieve a balance between capital and CSR, the gambling operator does not seek to achieve this balance through its marketing, and nor can it be expected to within in a capitalist system reliant upon the primitive accumulation of capital (Yani-de-Soriano et al., 2012). Customers – when enticed with offers – were perceived as directed towards a form of gambling which is more productive for owners, contains an array of frequent

gambling opportunities (Gainsbury et al., 2020a; Newall et al., 2020a, 2020b; Auer and Griffiths, 2021), facilitates cashless spend (Gainsbury and Blaszczynski, 2020) and is thus easier for owners to commodify customers' immaterial labour. Marketing therefore helps to boost the profitability of platform gambling which – when considering Lazzarato's (1996) definition of immaterial labour – represents an encroachment of cyber-thoroughfares into a leisure activity, thus further subsuming gambling into the capitalist system.

6.5: Conclusion

This chapter has theoretically redescribed the viewpoints of participants through the study's theoretical lens. Two key mechanisms have arisen out of the emergent themes which can be considered as interacting within an open system brought about by the development of platform gambling. The interaction between the productivity of data and the omnipresence of platform gambling demonstrates how betting shop owners maximise profits to the detriment of both employees and customers alike. This exploitation maintains the flow of capital to the owners who in turn control the cyber-thoroughfares through which data are exploited. Platform capitalism – presented by Srnicek (2017a) as a natural continuation of capitalism after the 2008 financial crash – still results in the primitive accumulation of wealth for the bourgeoisie (Fuchs, 2019). This chapter has also contributed a theoretical understanding on platform gambling and its relationship with Srnicek's (2017a) platform capitalism. The potentialities offered by data allow owners and customers to engage on a network which is shaped by user interaction. This is summarised by the overall competitiveness of the platform which evolves along with its customer base. Indeed, 'more users beget more users' (Srnicek, 2017a, p. 45), and owners benefit from this cycle as they optimise the features of their platforms according to the behaviour of users within the omnichannel continuum. The use of a loyalty card as a gateway to an online account ensures that the customer has a logistical media for access to the consumption of risk and subsequent reward based on their gambling habits.

The chapter has also demonstrated how the development of platform gambling is representative of the duality of capitalism. In the same way capitalism simultaneously fosters innovation and class antagonisms, platform gambling provides innovative ways to gamble whilst widening the antagonism between owners and their employees and customers. Not only does platform gambling proliferate the inequality highlighted by Cohen (2003), but it also demonstrates the plight of the worker when faced by the industry's digital transformation. Employees are being replaced by online gambling and SSBTs, whilst they also did not feel paid or trained sufficiently to maintain FOBTs or deal with customer interactions which arise from their usage. These findings emerge from an abductive analysis which, as mentioned at the start of this chapter, may not be the truest reflection of the phenomenon under study according to CR philosophy (Danermark et al., 2002; Mingers, 2011). However, the explication of structure has helped to demonstrate how the key characteristics of platform gambling according to those in the field may result in the industry's class antagonisms.

Chapter Seven: Retroduction

7.1: Introduction

The study's proto-theoretical lens has explored two mechanisms of platform gambling from an approach which – despite its exploration of the structure under study (Marsden, 1998) – may not represent the most accurate explanation of the phenomenon (Danermark et al., 2002). The study's final stage of analysis is that of retroduction, removing the researcher's proto-theoretical viewpoint to explore the structure which emerges from the development of platform gambling within betting shops. The process of retroduction is inspired by Bygstad's (2010) previous research, constructing the micro-structure from the study's data before contextualising against the conditions which are provided by a macro-structure. In accordance with the objectivity required within the iterative movement of retroduction, the analytical narrative adopted here pieces together the initial structure through the empirical corroboration of relevant mechanisms as well as the negation of disparate themes (Brewer, 2000; Aaltonen and Tempini, 2014). The micro-structure, whilst free from the theoretical lens which has guided the study, still relies on the terminology which has been derived from the literature review and thus emerges from the coding process as part of the thematic analysis. In summary, the current chapter demonstrates how an external structure can be deployed to understand the retroductive structure which emerges from platform gambling and its digital transformation of the land-based betting industry.

The chapter is divided into three main parts. Firstly, the structure of platform gambling is constructed and evaluated, detailing how the main theme derived from the thematic analysis of the perceptions of participants sets into motion the main structure. As such, the retroductive structure differs from the structure analysed during Chapter Six thanks to its emphasis on the productivity of platform gambling as the main causal mechanism to emerge from the development of platform gambling, as well as the removal of marketing campaigns as a disparate theme. Secondly, the micro-structure of platform gambling within betting shops is contextualised against the macro-structure employed by the study, namely Fleetwood's (2002) CR stratification of Marxist ontology. Fleetwood's (2002) structure – characterised by a classification of Marxist ontology within the

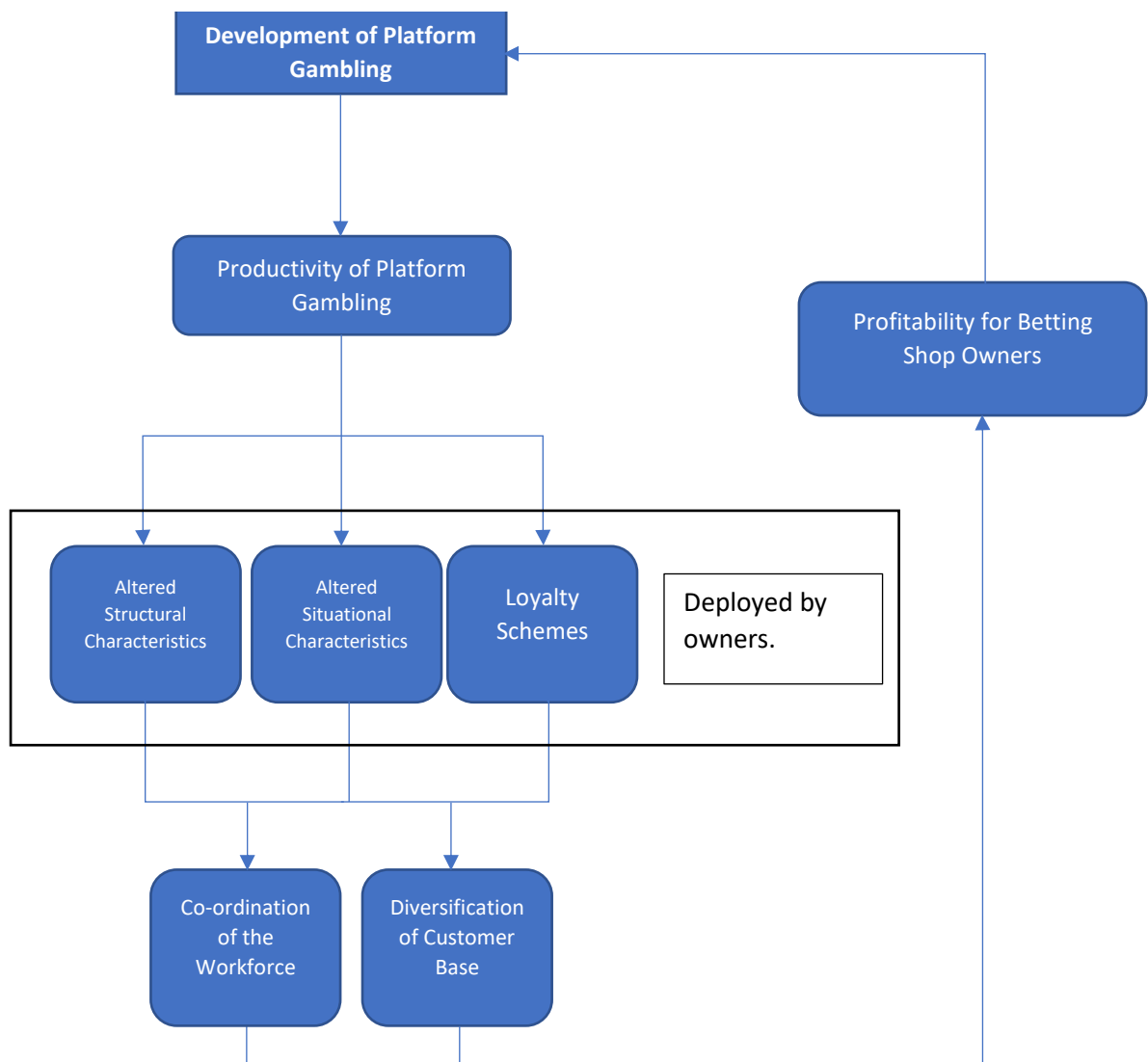
hierarchies of the real, actual and empirical - is applied to the mechanisms which are enacted by the onset of platform gambling within betting shops. Finally, the chapter explores explanations of the main structure from the main theoretical alternative to Marxism, outlining how the liberal arguments explored in Chapter Three fail to grasp the antagonisms which arise from the development of platform gambling.

7.2: The Micro-Structure of Platform Gambling

This section explores the structure of the development of platform gambling within betting shops which has been constructed through the iterative process of retroduction. As a reminder, retroduction requires the theorist to move between the data and the theory to explore the accuracy of the latter, with the proto-theoretical viewpoint being amended as required to highlight the most accurate explanation of the phenomenon (Bhaskar, 2009). This sets CR philosophy apart from positivist approaches, as retroduction accounts for the mechanisms within the real stratum which exist regardless of their perceptibility (Mingers et al., 2013). An example of this imperceptibility is evident within Fletcher's (2013) study. Although her study of farm women is guided by Female Political Economy, the key, emergent theme of Fletcher's (2013) research is characterised by perceptions related to the corporate control over the farms of her participants. The current study deployed the strategy of highlighting the most emergent theme, before constructing an analytical narrative to construct its role as a mechanism within the structure of platform gambling within betting shops. Unlike Fletcher's (2013) study, however, the most emergent theme has already been highlighted during the explication of key themes. The single, most emergent theme was that of the profitability of platform gambling (Theme 1), specifically relating to the improved productivity offered by platform gambling in light of the decline of footfall, the technological readiness of younger customers and the potentiality of platform gambling to reduce production costs.

Figure 7.1 demonstrates the structure formed by the development of platform gambling within betting shops to have emerged from the retroductive analysis. As opposed to the structure which is formed by the aggregated themes in Chapter Six, the retroductive structure is not a mutually constitutive relationship between the productivity offered by the digital nature of platform gambling and its omnipresence, but rather is a structure which emerges out of the potential profit to be extracted through the productivity of platform gambling. The productivity of platform gambling encourages betting shop owners to implement forms of platform gambling with altered structural and situational characteristics whilst securing the migration of customers on to digital platforms through the deployment of loyalty schemes. These three mechanisms then interact to facilitate the co-ordination of the workforce to promote and maintain forms of platform gambling

Figure 7.1: Retroductive Structure of Platform Gambling Within Betting Shops.



as well as the diversification and recruitment of a larger customer base. The end result is a heightened level of profitability for betting shop owners who then invest in the further development of platform gambling.

The nature of the perceptions which informed the profitability of platform gambling was evaluated previously during section 5.3.1. What the retroductive process did uncover, however, was a relationship between the profitability of platform gambling and the desire of betting shop owners to capitalise on this profitability by making gambling more accessible through each platform, ensuring a high volume of gambling opportunities with each activity – whether sports betting or gaming – containing features to entice further spend. This relationship can be reduced to each platform. For example, this was encapsulated perfectly earlier by *P10* who recalled how senior management visited Las Vegas to ensure that key features similar to those described by Schüll (2012) could be extracted and installed into FOBTs. FOBTs offer casino products as well as slots games with winnings based on ‘reel order’, which are ‘typical of slot machines found in places around the world like Las Vegas’ (Parke and Griffiths, 2006, p. 154). Indeed, data allow betting shop owners to produce – and maintain – a wide range of gaming content designed to prolong and intensify customer spend.

The removal of the spatio-temporal barriers to gambling removes the costs associated with the maintenance of brick-and-mortar units, thus incentivising owners to maintain their online operations which a wide range of gambling opportunities across a spectrum of games and sports. Although the SSBT offers the same sports betting opportunities as online gambling, it represents a need to maintain the brick-and-mortar units which house them. Yet, as one employee argued (*P7*), SSBTs still provide a significant impact to the availability of gambling for customers who preferred transaction over interaction, whilst reducing labour costs.

“Massive impact, especially with more people betting on the SSBTs, they don’t need you stood behind the counter to take their bets. Then, some were spending more on the SSBTs instead of over the counter. Again, because you get better odds on there” (P7).

As a reminder, according to *P17*, fifty-two percent of his company's shop-based, sports betting turnover is now taken through SSBTs. When correlating this information with data from the *Gambling Commission (2020a)*, each digital platform now generates more annual GGY than OTC betting. The profitability of each platform, therefore, provides an incentive to ensure that their respective situational and structural characteristics are available to the customer. Naturally, online gambling is the most accessible form of platform gambling with the most features (Deans et al., 2016). Yet, owners can cater for online customers within shops thanks to the flexibility of products offered by the other digital platforms of the omnichannel continuum. FOBTs cater for gaming customers, whilst SSBTs cater for sports bettors. These platforms also accommodate customers who do not wish to gamble online.

The experiences shared by participants also indicate how the very situational and structural characteristics which are deployed by owners also involve the flexibility of payment methods available. One employee (*P6*) summarised the effect of the potential ease of cashless spend on platform gambling (or online in particular) compared to traditional, OTC betting which may be paid for in cash.

"I think in the older days when I was younger and my dad used to go into a betting shop, you had the money in your purse or wallet. You had that amount. It weren't so much as you even bank cards to really go out and get that money straightaway. You had that money, that's what you went in with and you either came out with money or you didn't. There weren't like any in between whereas now online, if you've lost money, you can instantly chase it again. You can instantly put money on again" (P6).

This reflects concerns made by Parke et al. (2016) that digital payments facilitate a higher level of continuous spend. The argument made by *P6* also highlights the findings made by McCormack and Griffiths (2012) that the lack of awareness of actual spend through digital means was part of the asocial nature of platform gambling.

At the same level, owners were perceived as deploying loyalty schemes within shops specifically to entice customers into a continuum where the network of platforms and the ability to harvest user data makes platform gambling more productive for owners.

Rossiter (2016) highlights how logistical media can track and manage spend and shops' loyalty schemes were represented as doing this through the deployment of bespoke offers and the restriction of unprofitable spend. The emphasis on loyalty cards was evident during the data collection process when one of the main high-street operators had just ceased a period where all customers – even if they were not a member of the loyalty card – were offered BOG in-shop. P17 elaborated on the difference in costs between card-based and non-card-based BOG.

“I also think it [BOG] is an industry ‘must have’ almost now, if you’re going to compete. But, if we hadn’t put it on the card, we would have been giving away £16 million gross revenue per year. So, we would have to make £16 million more through customer generation than if we didn’t do it. If we put it behind the card, it was around £6.7 million that we gave away so we would have to make £6.7 million. We took a view at the time that this is the right decision because every pound we squeeze from the competitor makes that competitor’s future less likely and it serves our purpose by forcing competitors to make some decisions about their future” (P17).

P17 maintained that BOG was not viable for all shop customers owing to the cost. Yet, all four of the companies under study offer BOG to all online customers which - also in accordance with the flow of customers within the omnichannel continuum explored during the previous chapter - outnumber those betting in-shop (*Gambling Commission, 2021a*). This is a clear example of the productivity of platform gambling leading to the implementation of loyalty schemes where the value of customer data outweighs the costs associated with BOG. Indeed, ‘Data is the new oil’ (Arthur, 2013, online).

However, although the retroductive structure includes the importance of loyalty schemes, it negates other marketing strategies which have been mentioned elsewhere, for example, within sport or on television. According to participants, the productivity of platform gambling – and the migration to digital channels it entails – was perceived as efficient enough without the use of marketing, and it was generally felt that marketing was excessive given the prevalence of platform gambling. For example, one employee (P21) acknowledged the high prevalence of advertising and its lack of impact upon the setting in which gambling may occur.

“Massively. It’s all over the telly now, ain’t it? So, people are just going in but I’d say most of them tend to go online, don’t they?” (P21).

Another customer (P4) also gave the view that marketing was unnecessary and had little effect on the initial decision to gamble.

“I think there should be no advertising, full stop. Anywhere. Because the betting man is going to have a bet regardless, he’s not interested in adverts and that. If he wants to have a bet, he’s going to have a bet” (P4).

Owners, therefore, do not need to deploy televised or sport-based marketing to encourage platform gambling. For the four chains under study here, brand awareness is also maintained by their physical presence on the high street as highlighted by Ipsos MORI’s (2019) recent study where one young person aged between sixteen and seventeen claimed, ‘You are always going to know the Ladbrokes [logo]. It’s like McDonalds, it is always there’ (p. 41). Another participant aged between nineteen and twenty-three said ‘I know that’s Coral, but I’ve never been to it, use it, I just know it’s Coral. That’s bizarre’ (Ipsos MORI, 2019, p. 41). The existence of brand awareness may have helped *Entain* (2019b) in its decision to donate its Premier League sponsorship to GambleAware at the start of the 2019/2020 football season. Indeed, the physical presence of the four main operators on the UK’s high street could be seen as a key advertising strategy in itself. The excessive prevalence of marketing may have formed the mechanism related to the omnipresence of platform gambling during the previous chapter, but platform gambling manifests itself within betting shops regardless of the marketing found elsewhere. Whilst SSBTs and FOBTs maintain a physical presence within betting shops, online gambling is advertised within shops through single-wallet loyalty schemes (Jones et al., 2020) and NDB metrics as explored earlier.

The immediate consequences of the development of situational and structural characteristics of platform gambling and the loyalty scheme are two-fold, both of which have already been explored at great length. Firstly, shop labour is co-ordinated in accordance with the features of platform gambling, repurposing the role of OTC betting as subsidised by the digital platforms of the omnichannel continuum. The structural nature of platform gambling as an insular activity across all platforms means that the employee effectively becomes obsolete. FOBTs require no employee interaction during gameplay (Harris and Parke, 2018) unless there are concerns related to the display of

signs of disordered gambling, whilst SSBTs are a direct example of the implementation of self-service technology encouraging consumptive labour (Jones, 2019). Online gambling, meanwhile, removes the need for the employee completely (Killick and Griffiths, 2021). The emphasis of the loyalty scheme as an entry to a more profitable omnichannel continuum has therefore led to the employee now being mostly expected to merely sell the benefits of platform gambling to customers. Davies (2019a) has previously reported that Ladbrokes and Coral employees with the best performance in this area were more likely to be saved from redundancy and employees confirmed during the current study that this was the case. Employees also described how they would eventually be forced into further redundancy by the ever-growing reliance upon SSBTs.

Secondly, the characteristics of platform gambling and the loyalty scheme deployed by shop owners have resulted in the diversification of the customer base. The structural features of online gambling were credited by participants as attracting mainly younger customers, agreeing with findings made elsewhere (Gainsbury et al., 2020a; Newall et al., 2020a; Forrest and McHale, 2021), whilst SSBTs were credited as diversifying the customer base within betting shops. FOBTs, meanwhile, were perceived as attracting customers who preferred the specific characteristics offered by gaming content, whether that be the nature of the gameplay, the colourful visual features or the insular nature of gambling. Participants also cited confidence of a rapid win, reflecting the over-confidence found within EGM players more generally (Philander and Gainsbury, 2021). Platform gambling diversifies the customer base within the omnichannel continuum as well as recruiting them as prosumers. Verhoef et al. (2015) underline the definition of an omnichannel approach as facilitating a consistent customer experience over the synergistic management of multiple touchpoints. The synergistic management of touchpoints within betting shops, to this end, attracts a diverse pool of customers to the customer experience offered by the four main operators.

The empirical phenomenon to emerge as a result of the structure is the perceived profitability for shop owners. Furthermore, the role of each platform as an interactant has now ensured that the structure of platform gambling forms a cycle. Profit is made

from the configuration of platform gambling, resulting in a higher level of investment into platform gambling made by owners. The constant interaction between platform gambling and its users provides the optimisation and subsequent investment which makes platform gambling more prevalent. The higher prevalence of platform gambling results in both a larger, more diverse customer base, as well as optimised production costs. Participants painted a duality to the role of platform gambling. Shops were quieter because platform gambling – above all, online gambling – acts as the first route into the industry for new customers. Furthermore, betting shop owners, seeking to capitalise on this growing trend, were perceived as rendering shops obsolete thanks to their drive to recruit customers on to omnichannel continuum through loyalty schemes. Where the shop is no longer profitable (for example, thanks to FOBT maximum stakes), it is closed and the workforce is subsequently reduced (*Entain, 2021; William Hill, 2021*) in order to protect what *P18* earlier labelled as “*the bottom line*”. This subsequently leads to profitability for betting shop owners, completing the structure of the development of platform gambling within betting shops.

7.3: The Macro-Structure of Fleetwood’s Stratification

The purpose of the development of platform gambling within betting shops is clear: to enlist more customers through its features within a loyalty scheme, optimise production costs and thus make profit for betting shop owners. This would appear to indicate the presence of the Marxist critique of capitalism within the retroductive structure. However, given the fallibility of knowledge (*Bhaskar, 2008*), the retroductive structure would benefit from the comparison to an external structure, thus exploring the suitability of the theoretical approach. A comparison is used here to contextualise the original, retroductive micro-structure against a macro-structure as inspired by *Bygstad (2010)*, outlining how the micro-structure of platform gambling within betting shops is constrained by the economic environment in which it operates.

The macro-structure is formed by *Fleetwood’s (2002)* CR stratification of Marxist ontology - as detailed earlier in *Table 4.4* – which applies the CR principle of stratification to the ontological themes within Marxist thought. The real hierarchy consists of the

mechanisms formed by the evolution of social relations and technology associated with capitalism as well as superstructures such as the state. The actual hierarchy consists of events characterised by the mass co-ordination of labour, occurring as a result of the mechanisms of the real hierarchy. Empirical phenomena manifest themselves within the exchange of capital for commodities or labour. Fleetwood (2002) argues that his structure is transformational as well as hierarchical. The inclusion of socio-economic and material-technical relations within the real hierarchy ensures that mechanisms emerge from the interplay between class relations and technological innovation, both of which form the duality of capitalism (Marx, 2013a). Meanwhile, other superstructures such as the state reflect relations within the base of production (Marx, 1904). The transformation which Fleetwood (2002) argues is represented within the structure can be related to the dialectical cycle which Marx (2013a) argues is characteristic of the class struggles. In summary, Fleetwood's (2002) structure unites CR philosophy with Marxist ontology through the CR assertion of stratification and through an emphasis on transformation.

Fleetwood's (2002) model is thus used as part of the retroductive process to explore the relationship of Marxism to the development of platform gambling within land-based betting shops. Table 7.1 details how themes from the micro-structure of platform gambling can be stratified according to Fleetwood's (2002) model. The development and subsequent productivity of platform gambling occur within the real stratum, whilst the actual hierarchy is characterised by the co-ordination of mass labour (both work-based and immaterial) through the specific situational and structural characteristics of each platform as well as the surveillance capitalism which exists within platform gambling. The empirical is characterised by the continued exchange of capital for risk through platforms. The relationship between each of these hierarchies is evaluated further below.

Hierarchy	Fleetwood's Stratification	Relationship to Reproductive Structure
Empirical	The mode of exchange of capital.	The continued use of platform gambling for the exchange of capital for the consumption of risk.
Actual	The co-ordination of mass labour.	Co-ordination of immaterial and betting shop labour through the situational and structural characteristics of platform gambling. Extraction of immaterial labour through the deployment of surveillance capitalism and loyalty schemes. The redeployment of shop labour towards the fulfilment of targets (NDB) or the maintenance of platforms.
Real	The development of socio-economic and material-technical relations.	Development and productivity of platform gambling based on the commodity of data.

Source: Adapted from Fleetwood (2002).

7.3.1: Technical Development – Real

The real stratum of Fleetwood's (2002) structure forms the basis for what he labels as the qualitative version of Marx's (2013b) labour theory of value. The material-technical process through which this occurs is characterised by its spatio-temporal universality, the co-ordination of raw materials and machinery, and the consequent production of goods and services (Fleetwood, 2002). The material-technical process is also dependent on a socio-economic process characterised by the material transformation which occurs through the human co-ordination of activities, the (re-)production of social relations, and the specific spatio-temporality of human co-operation which can vary between epochs. This version of the labour theory of value, Fleetwood (2002) argues, explains 'how relations between people (as producing units) appear in the (value) form of a relation between things (commodities) by invoking the 'deep' causal mechanisms that facilitate production and exchange under capitalism' (p. 82). In summary, Fleetwood's (2002) analysis of material-technical and socio-economic processes reflect the duality of capitalism as highlighted during this study. Capitalism simultaneously fosters class antagonisms as well as technological innovation (Marx, 2013a, 2013b).

Platform capitalism can be understood as an evolution of these material-technical and socio-economic relations (Srnicek, 2017a). Material-technical relations when adapted to platform capitalism are characterised by their spatio-temporal universality as previously, the extraction of data from user activity, and the coordination of platforms to ensure that such data are extracted. The socio-economic process is reliant upon the expropriation of skill from the workforce into cloud platforms (Srnicek, 2017a), and the subsumption of data from user activity into the capitalist system (Dean, 2018) which characterises the antagonistic relationship between users and platform owners. Such interplay transforms the labour analysed within Fleetwood's (2002) original structure, including the immaterial labour which is extracted by platforms integrated as part of the IoT. Furthermore, the role of platforms as interactants ensure that relationships are reproduced with causal effects moving back and forth between platforms and agency (see Markus and Rowe, 2018).

Platform gambling is an example of this transformation, acting as an extension of Srnicek's (2017a) platform capitalism and thus as an extension of the natural tendencies of capitalism as described by Marx (2013a). The interplay between the socio-economic and material-technical relations which occur as a result of the development of platform gambling represents the betting shop ownership's need to remain competitive through innovation, thus driving innovation as Marx (1973) elucidated in *Grundrisse*. At a material-technical level, data are the main commodity to be extracted from user activity and the deployment of the three platforms is intended to extract such data. According to the main theme of the retroductive structure which emerges out of the development of platform gambling, data are to be extracted out of the immaterial labour of younger customers who – rather than replace the diminishing group of older, OTC customers – are perceived as preferring to enter the industry via platforms. Furthermore, the flexibility associated with an omnichannel approach (Hickman et al., 2020; Trenz et al., 2020) helps to represent the spatio-temporal co-ordination of platforms to extract such data. These material-technical processes help to maintain the socio-economic relations characterised by the extraction of data from gambling and the production of relations between platform owners, customers and employees alike.

This analysis helps to relate the proliferation of platform gambling to the argument made by Cohen (2003) which inspired this study. Platform gambling is a continuation of the methods relied upon by owners to extract spend by harvesting data. Indeed, platform capitalism co-exists alongside other forms of capitalism (Fuchs, 2019). As for the worker, the development of platform gambling is an example of the technological developments and the expropriation of worker skill. As the exploration of the actual will demonstrate, the interoperability of the omnichannel continuum plays an important role in the success of platform gambling.

7.3.2: Co-ordination of Labour – Actual

According to Bhaskar (2008), the actual consists of events which are not experienced yet are known to occur. Fleetwood's (2002) stratification contends that the actual is characterised by events concerning the mass co-ordination of the labour force by the bourgeois owners of production. This co-ordination of labour occurs as a result of the transformation of socio-economic and technical-material relations. The role of platform gambling within betting shops simultaneously co-ordinates both employee and immaterial labour towards the extraction of data and the optimisation of digital platforms.

In the case of the land-based betting industry, the interplay between technological developments and the reproduction of capitalist relations has seen the duties of the employee transform from the roles of settlers, cashiers and boardmen (Chinn, 2004; Samuels, 2011) to the roles of data entry and platform maintenance encountered today. The development of platform gambling in particular, however, has co-ordinated labour in two ways. Firstly, as the study has already explored, surplus value is derived from betting shop labour which consists of the need to maintain the operation of the omnichannel continuum as well as the usual duties concerned with managing a betting shop. However, platform gambling, when understood through Marx's (1973, 2013b) analyses of technological developments, was perceived as expropriating skills from shop employees. Betting shops themselves were perceived as outdated and suffering from a lack of

investment owing to a sole focus in driving customers to forms of platform gambling, such as through the use of NDB targets. Rather than being restricted by the outdated nature of previous shop-based technologies (Trenz et al., 2020), owners have upgraded platforms within shops and have neglected the remainder of betting shop fabric. Platform gambling not only co-ordinates the workforce, but also co-ordinates the development of existing shops with investment diverted solely into FOBTs, SSBTs or the infrastructure linking shops to online gambling.

Secondly, the immaterial labour of gambling is co-ordinated by the situational and structural characteristics of platform gambling itself. Gambling, classed as an activity not normally part of capitalist labour production per Lazzarato's (1996) definition of immaterial labour, is further subsumed into the capitalist system through the accessibility and structural features of each platform. The cross-subsidisation of each platform, as Srnicek (2017a) argues, attracts a diverse customer base and improves the flexibility of gambling to both owner and customer. The customer, free from the constraints associated with OTC betting, can gamble how they wish over a platform of their choice. The Gambling Commission (2020d) highlights the wide range of settings in which this gambling occurs. Although most online gambling takes place at home, customers also gamble online at work, during their daily commute, within pubs and clubs as well as within sports venues. There are parallels here between the epoch of platform gambling and the industry which operated before the legalisation of betting shops where bookies' runners also facilitated gambling within these settings (Chinn, 2004). The difference is the universal organisation of platforms which are configured to encourage direct interaction between customer and shop owner as opposed to the use of a human intermediary. Additionally, data have made possible a wider range of gambling opportunities available through platforms. Whether through gaming products, betting or cashing out in-play, or indeed the provision of custom sports bets, betting shop owners have renewed their relationship with customers. Online gambling, in particular, provides 'individuals with instantaneous gambling venues in their pockets via mobile phone technology' (Deans et al., 2016, p. 111).

The betting shop owners' co-ordination of immaterial labour through the processing of data provides a clear example of the ownership control of cyber-thoroughfares where customers inevitably hold an online presence. The surveillance capitalism which is made possible through the deployment of loyalty schemes within platform gambling further shapes the immaterial labour which is appropriated from the customer. As participants had described, data harvested from loyalty card membership within the omnichannel continuum are used by the owner to enhance their own profitability. Data are used to shape the way in which immaterial labour is extracted, namely through cross-platform offers on the type of gambling which is preferred by the customer. Just as Hing et al. (2019a, 2019b) and Rawat et al. (2020) also highlight, these offers are sent directly to the customer and rely on the customer fulfilling spending requirements. Finally, surveillance allows the betting shop owner to ensure that unprofitable customers can be monitored and restricted. Despite the inequalities of this highlighted by participants and indeed, elsewhere (*The Economist*, 2017; Cassidy, 2020), the restriction of customers who are winning is an example of how shop owners use data to extract only immaterial labour which is profitable to them. In summary, both the promotional and monitoring aspects which are possible through the loyalty schemes are examples of how media such as loyalty cards can impact the immaterial labour of gambling.

Therefore, the actual hierarchy of Fleetwood's (2002) stratification helps to demonstrate how the co-ordination of data as the main commodity reproduces the relationship between betting shop owners and their customers and their employees. For customers, their immaterial labour is co-ordinated through the platforms which have been so strategically developed within the real hierarchy, whilst employees are expropriated of their skill if not made redundant altogether.

7.3.3: Mode of Exchange – Empirical

The empirical hierarchy of Marxist ontology is specifically characterised as the continued exchange of capital (Fleetwood, 2002). The emergent mechanisms of the real stratum and the subsequent co-ordination of labour result in an empirical phenomenon which -

when applied to the land-based betting industry - is characterised by the exchange of capital and risk through interactant platforms. FOBTs, SSBTs and online gambling shape the consumption of risk between owners and customers. Fleetwood (2002) underlines that the transformative nature of Marxist ontology is based on the complex network of socio-economic and evolving technical relationships, both of which reflect the duality of capitalism: class exploitation and technological innovation. The empirical phenomenon experienced here – the mode of exchange – is a result of this duality.

Each platform's role as an interactant also ensures that they evolve according to user interaction, as per the causal trajectory of technology according to Markus and Rowe (2018). The competitiveness of each platform is further enhanced by the data derived through continued usage. DeSanctis and Poole (1994) argue that the greater number of features within an IS facilitate a greater quantity of actions for the users. The structural characteristics of platform gambling translate into the same number of actions which translate into more gambling opportunities. Increased user data – and network effects - enhance these opportunities for production (Srnicek, 2017a). Therefore, the adoption of platform capitalism as the main mode of exchange leads to the refinement of the algorithms deployed by platform gambling.

The empirical phenomenon is therefore traced back to the mechanisms of the real as well as the events of the actual. The empirical phenomenon of exchange through platform gambling is given rise from the co-ordination of the betting shop workforce towards the maintenance and profitability of platform gambling, and from the co-ordination of immaterial labour through loyalty schemes and the development of an omnichannel continuum which allows cross-channel interaction. These, however, are set into motion by mechanisms related to the development of platforms reliant on data. The comparison of platform gambling to Fleetwood's (2002) stratification therefore implies the relevance of Marxism to the development of platform gambling. The natural evolution of platform gambling based on the commodification of data demonstrates the capitalist duality of technological innovation combined with the bourgeois exploitation of the lower classes

which Hardt and Negri (2001) underline as encompassing all abstract labour, whether work-based or immaterial.

7.4: The Viewpoint of Liberalism

The process of retrodution is aided by the consideration of alternative theoretical viewpoints (Wynn and Williams, 2012). This section therefore evaluates the viewpoint offered by liberalism as the main ideological opposition to Marxism and its relationship to the retroductive structure. Specifically, this section explores if attitudes to economic freedom presented by liberalism and neo-liberalism - as explored earlier within section 3.6.1 - provide a more accurate description of emergent perceptions than that provided by Fleetwood (2002). Gambling has grown as part of transnational capitalism, and the interconnectivity offered by global networks has seen the proliferation of gambling opportunities (Cassidy, 2020). It is also worth remembering that the framework for platform gambling was laid within the Gambling Act 2005 which deregulated the UK's gambling industry (Cassidy, 2020). The development of platform gambling within a neo-liberal economy facilitates the prosperity of betting shop owners as well as granting customers the freedom to gamble within an openly advertised sector.

To this end, liberal approaches toward the digital transformation of gambling can be criticised in light of the forthcoming legislative review. Gavriel-Friend (2014) opines that the success of liberalism in relation to gambling can be assessed by answering questions such as 'What is the dominant discourse about gambling in a given country?' (p. 475). The dominant discourse within the UK is clear. A maximum stake limit on FOBTs was implemented in April 2019 (Woodhouse, 2019), whilst studies by Muggleton et al. (2021) and Forrest and McHale (2021) draw on samples of over 100,000 customer accounts to underline the harm caused by gambling through the correlation between online gambling and financial harm or the prevalence of online gambling within deprived areas of the UK. Furthermore, aspects of the industry such as advertising, player protections and the maximum stakes of online casino- and slots-based products are being explored as part of the review of the Gambling Act 2005 (*Department for Digital, Culture, Media and Sports,*

2020), whilst the *Gambling Commission* (2020c) has also investigated the need for affordability limits. The dominant discourse within the UK is that gambling industry continues to exploit customers just as Cohen (2003) had previously argued.

On the other hand, Donoghue (2021) argues that measures taken to make gambling safer 'will be the end of the GC [Gambling Commission], but it will take with it the British gambling industry, its jobs, the taxes it generates and its reputation' (p. 65). Oakley (2021) also highlights the detrimental impact of such measures on the horse racing industry which benefits from a levy payment from operator profit. This view would confirm a relationship between liberalism and the development of platform gambling, with the latter arising from the free exchange from the customer and thus benefitting the interconnectivity between gambling and other industries, such as horse racing. However, perceptions which informed the retroductive structure did not reflect this view. Entities such as the situational and structural characteristics of platform gambling were perceived as implemented by shop owners to generate profitability rather than benefit the wider economy. In fact, participants felt that restrictions - such as a maximum stake on online gaming products (see section 5.4) - were required not to interfere with an individual's gambling, but to make gambling *safer* for customers.

Hayek (1945) argues that a key feature of neo-liberalism is the self-determination of the worker through their own 'knowledge and skill' (p. 528). The micro-structure disproves the self-determination of the betting shop worker who may find themselves co-ordinated by the features of platform gambling which data facilitate to the owners. *P30*, for example, highlighted earlier the possibility that the growth of SSBTs would negate shop labour whilst viewpoints such as those given by *P18* outlined how shop labour suffered from the deployment of NDB targets which contributed to the closure of betting shops. To this end, deregulation and technological innovation has not benefitted shop labour. Technological innovation – itself a key aspect of neo-liberalism (Harvey, 2007) - has rendered shop labour increasingly obsolete.

As for customers, themes related to liberalism were characterised firstly by the perceived need of an individual to recognise their own disordered gambling ($n = 6$). For example,

“That depends on the customer and if they are going to realise they have a gambling problem because if we’re going to go to the customer and tell him ‘look mate, you’ve got a gambling problem, you’re not doing very well, you’re spending too much’ and all that, they get a bit annoyed and tell us ‘what’s your problem? It’s my money and I will do what I want’” (P31).

This appears to indicate an unwillingness to interfere with an actor who, according to liberal thought (Persky, 1995), is acting out of their own self-interest despite suffering from disordered gambling. Secondly, liberalism was also characterised by perceptions related to the freedom to gamble without impediment ($n = 8$). P25 cited how the maximum stake implemented on FOBTs – despite being set a much lower level than his usual spend – was necessary to prevent other customers from suffering harm.

“Because I like to gamble myself, there’s a freedom aspect isn’t there, doing it as a pastime? I don’t want people telling me I can’t. It’s my choice, you know? But with the cap on stakes on those machines, to be fair, even though it might not suit my needs, I can’t think that’s curtailed my freedom to do what I want” (P25).

Themes indicative of liberalism were therefore related to the self-interest of gamblers which was either encountered by employees who attempted to initiate an interaction out of concern for gambling habits, or by customers who felt that they could gamble according to their own rationality without the need for regulation from the government. These can both be understood through the prism of self-determination, allowing the *homo economicus* to further their own economic agenda. The same applies to the gambling industry, where neo-liberal thinking ‘must not only legitimise and support gambling, but also refrain from subjecting it to regulation, as this hampers competition and contradicts the ideas of the free market economy’ (Gavriel-Fried, 2014, p. 474). Therefore, each customer, even if suffering from disordered gambling, should be free to pursue their own self-interest.

The current study does not contribute to research around disordered gambling. However, the differing position of liberalism can also be understood in terms of the akratic consumption highlighted previously by Young and Markham (2017). Young and Markham

(2017) argue that ‘the paradox of akratic consumption’, or the consumption of a good despite it being contrary to self-interest ‘is resolved if it is understood as a contradiction between a liberal discourse of individual freedom and the material reality of oppressive social relations’ (p. 2764). Although themes relating to liberalism were materialised as per the objective and reflexive nature of the data collection, their inability to accurately reflect the current phenomenon under study is indicated by previous work linking Marx to disordered gambling. The presence of oppressive social relations characterised by capitalism naturally indicates the better fit of a Marxist analysis, highlighting how the mechanisms of the retroductive structure – produced by digital transformation – result in a more profitable mode of exchange for shop owners.

A key criticism would also be made here by Hayek (1945) who argues that the control of a capitalist system would be impossible thanks to its complex nature. The retroductive structure disproves Hayek’s (1945) argument in the case of platform gambling. Not only can owners move ‘a few pointers’ (Hayek, 1945, p. 527), but they control odds, the activity of customers and also benefit from the network effects which allow them to profit from the engagement through the loyalty schemes enabled by platform gambling. P17 earlier highlighted the “*decisions*” which are taken according to data harvested through loyalty schemes and – whilst there may be a potential to protect customers – such decisions were perceived as inducing further immaterial labour or, as one employee (P14) argued, restrict unprofitable business.

“Because they can limit your stakes if they think you’re going to win too much, or if you have started winning too much. They say it’s not good for business” (P14).

Rather than fall prey to what Hayek (1945) would highlight as an unpredictable, or uncontrollable economy, owners have been perceived here as possessing the tools to ensure they can *control* their economy thus encouraging antagonisms with customers and employees. There is no invisible hand as advocated by Smith (2017). Instead, there is the continued expropriation of labour skill and proletarianisation of the customer which ensures that owners are perceived as constructing an ever-growing wealth of capital.

The current study argues that Marxism is the most suitable approach from which to describe the digital transformation of the land-based betting industry. Although technological development forms part of the *modus operandi* of neo-liberalism (Harvey, 2007), the current study demonstrates how the digital transformation of an industry can bring a detrimental socio-economic impact (see Gimpel and Schmied, 2019). For employees, their self-determination is linked to the performance of each platform. For customers, although gambling may be an activity carried out within their own self-interest, platforms ensure their gambling is subsumed as part of the control of data, which exists alongside the primitive accumulation of capital (Fuchs, 2019). This does not reflect the success of liberalism or signal Fukuyama's (1992) end of history but rather is indicative of the expansion of bourgeois control displayed by betting shop owners.

7.5: Conclusion

Retroduction is intended to explore the mechanisms of the real stratum away from the previous theoretical lens, thus acknowledging mechanisms both perceptible and imperceptible within the structure under study (Mingers et al., 2013). The retroductive process deployed here – rather than uncovering pertinent mechanisms as Fletcher's (2013) study had done - refocused the structure which emerges from the development of platform gambling to one key mechanism: the productivity of platform gambling. As a micro-structure, the productivity of platform gambling sets into motion other mechanisms enacted by owners who seek to capitalise on reduced costs, subsequently co-ordinating the forms of labour which characterise the proletariat class under study.

Fleetwood's (2002) stratification of Marxist ontology allows the understanding of the digital transformation of betting shops in relation to the interplay of technological development and the reproduction of capitalist relations within the real stratum. Therefore, the mechanisms which are discovered are understood as the result of the duality of capitalism which Marx (2013a) outlined, class struggle and technological innovation. The application of Fleetwood's (2002) structure as a macro-structure is therefore important for the study for two reasons. Firstly, the structure underlines the relevance of class antagonisms (consisting of bourgeois owners and proletarian

customers and employees) to the development of betting shops. Secondly, the structure highlights the importance of Srnicek's (2017a) platform capitalism as an extension of Marxism and the affordances of data which assume their role within the structure. The productivity of platform gambling is characterised by the reduced costs associated with maintaining digital technology and as such, is part of cycle which ends in the ownership profit from – and further investment in – platform gambling.

Chapter Eight: Conclusion

8.1: Introduction

This concluding chapter ends the study by summarising the study's contributions as well as providing an overview of how the study fits into an industry which is in the midst of uncertainty due to both the ongoing economic turbulence caused by Covid-19 and the ongoing review of the Gambling Act 2005. In any case, the main research question of the study is **how can the digital transformation of the land-based betting industry be perceived by the industry's owners, employees and customers as sustaining the redistribution of wealth?** The CR methodological process followed within this study discovered that the digital transformation was perceived by participants as sustaining the redistribution of wealth due to the productivity of platform gambling, a mechanism which drives betting shop owners towards the maintenance and enhancement of its specific features, resulting in the co-ordination of shop and immaterial labour for profitability. Through the perceptions of thirty-five participants within the land-based betting industry, the study has explored how platform gambling facilitates antagonisms between shop owners and their customers and employees. Whether through the structural and situational characteristics which facilitate further spend, or the coordination of platform gambling within an omnichannel continuum which harvests data from loyalty card and online account membership, the digital transformation of the UK's betting shops demonstrates the risk that technological innovation can be detrimental to a wide socio-economic group as per Gimpel and Schmied (2019).

The chapter firstly summarises the study's contributions which are threefold. Namely, the unique, Marxist theoretical lens which has been used to analyse perceptions of platform gambling, the relationship between Srnicek's (2017a) affordances of data and platform gambling, and the application of CR methodological principles to qualitative data derived from those within the industry. Secondly, the chapter evaluates the limitations encountered by the study which are also threefold: the limitations of the sample, the impact of Covid-19 and the review of the Gambling Act 2005. Finally, the chapter ends by outlining the recommendations for future studies which again are relevant to the

changing industry in the face of Covid-19 as well as the expanding industry in the United States of America (USA).

8.2: Summary of the Study's Contributions

As discussed during the introductory chapter, the study makes no contribution towards extant research linking disordered gambling to each form of platform gambling, although participants have during the study outlined their view on how such relationships occur. Factors such as the asocial nature of platform gambling, the structural characteristics of each platform and cashless payments have been cited by participants here, similarly to other academic works (Griffiths, 1999; McCormack and Griffiths, 2012; Parke et al., 2016). Instead, the study's contribution to the fields of IS and gambling is theoretical in terms of its unique, Marxist theoretical lens, the comparison between platform gambling and Srnicek's (2017a) affordances of data, and the CR methodological approach deployed within the UK's betting shops.

8.2.1: A Marxist Perspective

The study has explored the industry's digital transformation through a unique theoretical lens based on a Marxist analysis of two key features of capitalist development (Marx, 1973, 2013a, 2013b): the growth of class antagonisms and technological development. Capitalism depends on the primitive accumulation of capital through the control of the forces of production as well as the technological innovation which occurs through the need for cheaper productivity. The relationship between Marx's (2013a) analysis of class and the UK's betting industry is clear when revisiting Cohen's (2003) argument which inspired this study. As a reminder, 'there are few means more ruthlessly efficient [than the gambling industry] for redistributing wealth from the poor to the rich' (Cohen, 2003, p. 20). With the industry having transformed significantly since Cohen's (2003) argument, the current study has sought to investigate if the development of platform gambling can be perceived as exacerbating this flow of capital. In doing so, the study contributes an understanding of how an IS can bring a detrimental socio-economic impact, as also argued by Gimpel and Schmied (2019).

Inspired by Worsley's (1981) argument that Marxism is a process which is transferrable to any economic phenomena, the study's lens examines how the bourgeois betting shop owners benefit from platform gambling to the detriment of proletarian customers and employees. In the case of employees, just as Marx (1973, 2013b) argues, they have seen their skills expropriated and have been gradually rendered obsolete through technologies which have optimised the production of risk thanks to the commodification of data. Customers here have been perceived as being exploited through the subsumption of immaterial labour into capitalist production. The features of platform gambling transform customers into prosumers to enhance profitability, causing what Dean (2018) would term as the proletarianisation of the customer. This sees the immaterial labour of gambling become part of the abstract, heterogenous labour which would be underlined by Hardt and Negri (2001) and Marx (2013b) as extracted by the bourgeoisie, or in this specific case, betting shop owners. To this end, the lens views the perceptions of those within the industry through the antagonisms maintained by shop owners who extract an abstract labour which is homogenous in value but is also heterogenous in nature thanks to the labour extracted from customers and employees alike.

Srnicek's (2017a) platform capitalism as a natural extension of Marxism helps to demonstrate how platform gambling facilitates this flow of capital through the benefits of platforms to the ownership's productivity. For Srnicek (2017a), platforms are the hardware or software which bring users together. It is clear from this study, however, that platform gambling is perceived as an interactant, a term which Markus and Rowe (2018) use to highlight the causal effect that technology and its users have upon each other. Not only does platform gambling bring platforms and its users (owners, customers and so on) together, but they shape their subsequent actions and *vice versa*. Platform gambling relies on the commodification of data which leads betting shop owners into the drive for control of cyber-thoroughfares, a condition which Dyer-Witheford (1999) argues is the pre-condition for Cyber-Marxism. Data, like labour, carry a surplus value and platform capitalism is conditioned with extracting data from user activity. As Fuchs (2019) argues, the drive for data is intertwined with the drive for capital, and those control cyber-thoroughfares will accumulate capital. Data within the land-based betting industry,

is quickly overtaking the productivity of OTC betting, as evaluated during the following section.

8.2.2: The Affordances of Data and their Role in Platform Gambling

Big data are therefore the key to success in platform capitalism. Srnicek (2017a) argues that data carry five potentialities to owners who can harvest data, and these can be applied to the development of platform gambling. Firstly, the greater quantity of data which is extracted, the more competitive platform gambling becomes. Whether from the network effects brought through increasing quantities of user data or through the quantification of sport, owners optimise structural and situational characteristics based on the data available to them. More data result in the higher volume of gambling opportunities with features to reinforce continued spend. These gambling opportunities occur across each form of platform gambling which, along with OTC betting, creates an omnichannel continuum in shop. This continuum represents another affordance of data, namely the cross-subsidisation of platforms and the diversification of customer base. The subsidisation, however, occurs in accordance with the desired trajectory of customer migration within the continuum. Customers are perceived as encouraged to migrate from OTC to digital platforms, but not in the other direction. Platform gambling was perceived as subsidising the betting shops which – thanks to the investment in platforms above all else - are outdated in their appearance.

Thirdly, data reduce production costs and outsource work. In the case of platform gambling, betting shop staff are either rendered obsolete by platform gambling or are repositioned to maintain its operation, with the subsidised OTC component of the omnichannel continuum maintained merely to facilitate sign-ups through - or deposits into and withdrawals from - loyalty cards or online accounts. Registered customers benefit from cross-channel offers which arise from the fourth affordance of data to betting shop owners, the transformation of a service into a high-margin good. Removed from the constraints of staffing or – in the case of online gambling – property costs, betting shop owners transform gambling into a high margin good. Higher profit margins translate into more attractive odds or offers available through platform gambling. The

targeting of such offers occurs thanks to Srnicek's (2017a) fifth affordance of data, the ability of data to generate further data. Similar to methods described by Zuboff (2019) and Rossiter (2016), betting shop owners extract data from their customers gambling habit for further profit, whether that is through bespoke, targeted promotions or the need to restrict business from unprofitable owners.

Data, therefore, are a valuable commodity to betting shop owners. The aggregate themes detailed in Chapter Six outline how data influenced the perception of platform gambling as more productive as well as omnipresent, whilst the retroductive structure in Chapter Seven stems out of the single, most emergent theme to have emerged during data collection: the profitability of platform gambling. The profitability of platform gambling is reliant on data optimising production, recruiting more customers, generating further analysis and in doing so, improving the competitiveness of each platform. In summary, Srnicek's (2017a) affordances of data outline how betting shop owners benefit from the development of digital channels.

8.2.3: The Application of Critical Realism to the UK's Betting Shops

The third contribution of the study is an application of CR philosophical and methodological principles to perceptions and experiences from those within the UK's betting shops. In doing so, the study answers a call made by Wynn and Williams (2020) for further CR-based research into the field of IS, whilst it also contributes a form of qualitative research not covered by elsewhere in the field of gambling. Methodological principles were applied to discover the underlying mechanisms of the digital transformation of betting shops. However, as Bhaskar (2008) notes, the openness of the structure reflects the openness of society; it is impossible to investigate such mechanisms in closed, laboratory conditions and therefore, the research presented here only describes the causality behind the phenomenon under study, rather than make generalisable predictions. On the other hand, as opposed to a positivist approach, the study avoids the 'epistemic fallacy' (Bhaskar, 2008, p. 16) through the execution of a CR methodological framework inspired by Wynn and Williams (2012, 2020) and Iannacci (2014).

The methodological framework was similar to the three stages of abstraction, abduction and retroduction as outlined by Danermark et al. (2002). The aggregate themes of the productivity of data and the omnipresence of platform gambling which were drawn from the explication of key themes were theoretically redescribed through the study's theoretical lens. However, retroductive analysis, inspired by Bygstad (2010), allowed the researcher to draw on both inductive and deductive reasoning to uncover the actual mechanisms to emerge from the development of platform gambling within betting shops. The retroductive structure of the development of platform gambling within betting shops stems out of one singular mechanism based on the most emergent theme, the profitability of platform gambling. This mechanism translates into the optimisation of situational and structural characteristics of platform gambling, and the deployment of loyalty schemes, all of which subsequently co-ordinate the labour which is extracted from both employees and customers. The empirical phenomenon is the consequent profitability for owners who then make further investments into the development of platform gambling. The retroductive structure also differs in its negation of broader advertising strategies. Indeed, the policy recommendation made during Chapter Five in relation to the prohibition of gambling-related marketing reflects how forms of platform gambling (and in particular, online gambling) will occur even without the prevalence of marketing. The marketing strategy of importance to the retroductive structure is that of the loyalty card. Acting as a gateway to a seamless migration within the omnichannel continuum, the loyalty card facilitates control through logistical media which Rossiter (2016) would argue allows the use of data to control logistical movement. In this case, the loyalty card is used to connect owners and customers through digital platforms.

An exploration of the retroductive structure from a Marxist perspective was offered through a comparison with Fleetwood's (2002) stratification of Marxist socio-economic ontology. The structure of the development of platform gambling within betting shops offered themes which aligned with Fleetwood's (2002) stratification of Marxism, focussing on the development of socio-economic and technical relations, the mass co-ordination of labour, and the empirical mode of exchange. Furthermore, retroductive

analysis provides further evidence of the risk of technological innovation which Gimpel and Schmied (2019) argue can cause adverse economic shifts. In this case, the primitive accumulation of capital occurs through platform gambling, thus benefitting owners to the detriment of their customers and employees.

8.3: Limitations

Although this study has answered its research question and fulfilled its aims and objectives, practical constraints have provided barriers in some areas and should therefore be considered in conjunction with the study's findings. These limitations relate to the problems encountered with the sampling method, the impact upon the industry as a result of the ongoing Covid-19 epidemic, and the forthcoming review of the Gambling Act 2005.

8.3.1: Sampling

As has been discussed during Chapters Four and Five, the study encountered limitations during the recruitment of participants. Although the availability and snowball sampling methods recruited during data collection allowed the researcher to recruit a healthy level of customers and employees based on data saturation criteria according to Guest et al. (2006), the researcher did struggle to recruit female customers as well as betting shop owners. The sample may also be limited by its locality, with all participants being recruited in the South West of England.

McCrick (1991) argues that a 'woman's place now is as likely to be on the racecourse or in the betting shop as in the home' (p. 37). Thirty years later, it would be reasonable to assume that the stereotype which informs McCrick's (1991) statement may have given way to gender equality within betting shops. Conversely, the researcher found that betting shops were still a masculine environment as evidenced by the lack of female customers available for interview, confirming Cassidy's (2014) portrayal of betting shops as masculine settings. Participants *P6* and *P30* described the experiences of a female within the implied masculine setting of a betting shop. *P6*, an employee, detailed how her

female friends gambled from home for the fear of judgement associated with visiting a betting shop. Although the researcher did ask P6 to contact such friends who may have at least once visited a betting shop within the previous three months as per the sampling criteria (and is grateful to her for doing so), none responded with interest. This problem was however offset by the experience of other female participants – whether employee or owner – as customers.

Betting shop owners were also difficult to recruit. Within the subgroup of the betting shop owners, three were shareholders whilst only one from boardroom level agreed to participate. Nonetheless, all four owners were willing to engage despite the focus of Marxism within the recruitment material. Other interest from senior managers waned after the sending of Participant Information Sheets (Appendix Two). A similar lack of owner participation has also been encountered in other explorations of the gambling industry, such as the decision of the then CEO of Entain to avoid participation in the *Online Gambling Harm Inquiry* produced by the Gambling Harm APPG (2019). Whilst the researcher did not expect individuals of CEO level to be available for the current study, those at a boardroom level across all of the betting shops studied who later reneged on initial interest demonstrated similar behaviour. The inclusion of shareholders helped to bolster the number of owners to four and all owners were able to empathise with customers and employees where appropriate.

The downfall of qualitative sampling methods is their failure in being representative of the general population (Henry, 2009). In the case of the current study, although the sample size did ensure data saturation, participants were all recruited from the same geographical region and experiences may therefore differ from those within the same stakeholder groups elsewhere. For example, shop employees in the South West of England may draw on different experiences compared to those from more urban settings such as London or Birmingham. Some participants – such as P32 - recalled experiences from such locations during previous years, but the sample is not geographically

representative of the rest of the UK. This is, however, offset by the CR philosophy which asserts an emphasis on the description of a phenomenon rather than a prediction.

8.3.2: Covid-19 and Its Impact on the UK's Gambling Industry

The global Covid-19 pandemic significantly impacted the UK's land-based betting industry. Betting shops were closed during the UK's first lockdown between March 2020 and June 2020, and they continued to experience closure between December 2020 and April 2021. With the data collection finishing in January 2020, the current study considers perceptions leading up to this point and therefore does not consider the impact of Covid-19. However, the pandemic – along with subsequent lockdowns experienced within the UK – may have changed perceptions around platform gambling as well as the profitability of betting shops which may have already been losing business to platform gambling.

Studies such as those by Wardle et al. (2021) and Sharman et al. (2021) explore the impact of lockdowns on gambling participation. Sharman (2020) also explores the possible long-term impact of Covid-19 upon the UK's gambling industry, particularly in comparison to Italy and Spain where legislation on marketing within sport has been tightened to protect disordered gamblers during lockdown. In the UK, as Sharman (2020) also notes, safeguarding action during lockdowns was voluntary from the *BGC* (2020b) whose ten-point pledge encouraged safer gambling during lockdowns whilst removing all advertising. The Gambling Commission also saw fit to remind operators at the start of England-wide restrictions in November 2020 of their responsibility towards customer protection (McArthur, 2020). Initial research by the *Gambling Commission* (2020b) on the industry's progress up to June 2020 – soon after betting shops were permitted to reopen after the first lockdown – found that the number of customers migrating from land-based gambling to similar online products was low (1.6 percent) and that although lockdown prompted customers to gamble on new products (such as virtual events) during the suspension of sports, customers claimed to be spending either the same or less. This was corroborated by Gunstone et al. (2020) on behalf of YouGov, who also argue that gambling decreased during the initial lockdown. According to Wardle et al. (2021), most

sports bettors stopped participating in gambling activities during lockdown, whilst a minority migrated to lotteries and virtual sports.

For platform gambling within betting shops, the long-term impact of lockdown remains unclear. According to an update from the *Gambling Commission* (2020h) in December 2020, whilst industry GGY increased by twenty-nine percent between September 2020 to October 2020 thanks to the increase in live sport betting, it was not able to provide fully accurate trends for betting shops thanks to local restrictions or phased reopenings. However, it did note that the GGY increase of forty-nine percent from SSBTs during the same period was the biggest of any product, possibly due to the unwillingness of customers to interact with employees during a pandemic. This could be an example of how the perceptions may have changed since the start of the pandemic. Customers who previously avoided forms of platform gambling may now have turned to them in a bid to either continue gambling whilst betting shops were closed, or to find a safer alternative to interacting OTC. For employees whose jobs were already at risk from platform gambling, the pandemic may have expedited the process for shop closures in favour of a more profitable mode of production. William Hill, for example, closed 119 betting shops in the aftermath of the first lockdown (Grammer, 2020), whilst *Entain* (2021) seeks to develop a retail estate based on a “shop of the future” ... that better connects the retail environment with the online digital experience’ (p. 7). Indeed, the Covid-19 pandemic may have blurred the pre-lockdown perceptions which were explored here, with operators seeking to adapt accordingly.

8.3.3: The Review of the Gambling Act

Also as mentioned previously, the Gambling Act 2005 is currently under review (*Department for Digital, Culture, Media and Sport*, 2020). Whilst this section does not wish to revisit the reasons for or against the review, it does acknowledge how the recommendations made by participants may be addressed by the forthcoming review. The data collection process took changes in regulation into account wherever possible. The whistle-to-whistle ban (*IGRG*, 2020) was introduced before the commencement of data collection and was thus included from the outset. The ban on credit card usage

online (*Gambling Commission, 2020e*) and the recommendation by the Gambling Harm APPG (2019) for maximum stake limits for online casino- and slots-based content were included in interviews after they were announced.

The main contributions of the study are theoretical in nature and are therefore not outdated by the review. Nevertheless, the review of the Act was announced in December 2020 and has addressed at least two of the three main policy recommendations: the extension of the maximum stake limits to online gaming and the prohibition of gambling marketing (*Department for Digital, Culture, Media and Sports, 2020*). It is also reported that gambling-related marketing may be banned from all professional sports uniform from late-2021 (Collins, 2021). The third recommendation, namely the greater emphasis of CSR within the betting shop, may be addressed yet the focus would appear to be on ensuring that the UK's gambling legislation is reflective of the Internet 4.0 era. The experiences of participants should therefore be read in the context of preceding the review and contributing to the debate which will inform a revised Gambling Act as and when it is enacted.

8.4: Recommendations for Future Study

As the limitations to the study demonstrate, the industry is subject to continuous evolution thus providing opportunities for further study. The recommendations for further study relate to the above limitations as well as the growth of markets overseas. Specifically, the study recommends the application of a CR methodological approach to perceptions within the post-Covid-19 land-based industry as well as a similar theoretical approach within developing industries such as the US. Furthermore, the theoretical lens should be applied to other industries which have adopted an omnichannel approach.

Firstly, the development of the Covid-19 pandemic opens further questions about the use of platform gambling. Specifically, the pandemic may have altered the use or perception of platform gambling, thus hastening the closure of more betting shops in the UK. A CR approach would therefore identify the mechanisms enacted by the pandemic in relation to gambling behaviour. Although quantitative studies such as that by Wardle et al. (2021)

may form the relationship between pandemic and online gambling, a qualitative CR approach would account for wider aspects such as the closure of shops, the desire to avoid interaction and the impact of the pandemic upon perceptions previously held against online gambling. This could also be carried out in a different part of the UK, where participants may hold different experiences of betting shops.

The study also recommends that a similar theoretical lens be applied to other cultural settings where platform gambling continues to encounter significant growth. The biggest opportunity for this is presented by the burgeoning gambling market in the USA where the Supreme Court's decision to repeal the federal ban on sports betting is seeing the legalisation of sports betting in a growing number of states. Indeed, as of April 2021, twenty-two states in the USA had legalised sports betting (Rodenberg, 2021). The owners of the UK's betting shops are responding accordingly. *Betfred Sports* (2021) was operating in four states as of March 2021. *William Hill* (2021) generated a GGY in the USA of £148.2 million during 2020, before being acquired by Caesars Entertainment in 2021 (Barber, 2021b). Caesars Entertainment aims to solely operate the USA arm of William Hill's operations whilst selling off its UK-based betting shops to another party (Barber, 2021b). Meanwhile, *Entain's* (2021) joint venture with MGM International also generated a full year GGY of \$178 million during 2020. With the industry growing in the USA, the approach here could be adapted to the perceptions where the deregulation of gambling in the US may allow the proliferation of class division and technological innovation, two themes central to the Marxist approach developed here.

Finally, the study's theoretical lens should be applied to other industries which have adopted an omnichannel approach. Hsia et al. (2020) argue that omnichannel retailing is inevitable for land-based retail. However, this implies that other industries may be subjected to the same flow of capital with the productivity of staff overtaken by that of platforms whilst customers may be enticed into further spend by structural characteristics of digital platforms. The Covid-19 pandemic has seen a shift of online spend with the *Office of National Statistics* (2021) reporting an increase in online retail purchases during the pandemic. Indeed, Internet sales as a percentage of total retail

spend increased from 19.1 percent in February 2020 before the start of the first pandemic to 34.5 percent in February 2021. Retailers such as Argos, whose omnichannel approach allows customers to order online and pick up or return in-store, saw online sales rise to ninety percent of their total income during 2020 (*J. Sainsbury PLC, 2020*). Next, another retailer, has found that 'the longer the pandemic encourages online shopping, the more likely it is that customers will keep shopping that way' (*Next PLC, 2021, p. 12*). A similar theoretical lens could be applied to the employees, owners and customers of such omnichannel retailers to examine the mechanisms which drive the empirical phenomenon of the exchange through retail omnichannel platforms in a post-Covid-19 industry.

Appendix One: Recruitment Material

Recruitment Material

As per my Ethics Application form, while I do intend to make use of contacts already formed in the gambling industry, I also intend to use social media and word-of-mouth to recruit participants for my study. Below is an example of a post I would intend to use on social media to attract interest from any prospective participants. This post will include the focus of the study, the duration of the interview and also reiterates the anonymity of the participant as well as their right to withdraw at any point.

'I am currently looking for individuals who have gambled within the last three months to participate in my PhD study which is focusing on stakeholders' perception within the gambling industry. Should you wish to take part then you will be invited to an interview with me which will last approximately one hour and will be based upon your experiences within the gambling industry. You would be recorded for transcription purposes but any information you give will be treated in the strictest of confidence and furthermore, you will not be identifiable in the final study. You would also have the right to withdraw at any time. Interviews can be conducted at a time and place convenient to yourself, and I will even provide refreshments! If you are interested and would like more information, then please contact me in confidence via email at: J.J.Wheaton@edu.salford.ac.uk.'

Should the snowballing technique of recruitment be successful with the word-of-mouth encouraging prospective participants to contact me with the view of taking part, then the material will take a similar form with the below paragraph.

'Thank you for inquiring about participation in my study. Should you wish to take part then you will be invited to an interview with me which will last approximately one hour and will be based upon your experiences within the gambling industry. You would be recorded for transcription purposes but any information you give will be treated in the strictest of confidence and furthermore, you will not be identifiable in the final study. You would also have the right to withdraw at any time. Interviews can be conducted at a time and place convenient to yourself, and I will even provide refreshments! If you are interested and would like to take part then please confirm your interest to me at: J.J.Wheaton@edu.salford.ac.uk.'

Appendix Two: Participant Information Sheet

Participant Information Sheet: A Marxist Analysis of Consumer Perception Within The Land-Based Betting Industry

Researcher: James Wheaton for study towards the award of Doctor of Philosophy in Business and Management (J.J.Wheaton@edu.salford.ac.uk).

Co-Supervisor: Professor Chris Brady, Director of Centre for Sports Business (chris.brady@salford.ac.uk).

Co-Supervisor: Dr James Mulkeen, Associate Dean Accreditations and Partnerships (james.mulkeen@salford.ac.uk).

You have been invited to take part in a research project investigating consumer perception within the betting industry. Before you decide on whether to take part, it is important for you to understand why the research is being done and what it will involve. Please take time to read the following information carefully before you decide on whether you wish to take part. You are welcome to discuss this project with others if you wish before you make your decision. Please ask the researcher (J.J.Wheaton@edu.salford.ac.uk) if there is anything that is not clear or if you would like more information.

Purpose of the Study

The aim of the study is to investigate the view that the land-based betting industry can be analysed through a Marxist lens, with class analysis focusing on the relationship between gambling companies and their consumers. Furthermore, the study also evaluates this relationship against the backdrop of evolving technology, advertising, loyalty card schemes and other aspects of the betting shop experience. The study will use information gathered from interviews to analyse if these links can be made. There is very little research published on the relationship between Marxism and the betting industry so the study aims to make an advance in this area.

Why have I been chosen?

You have been chosen because you have gambled or worked within a betting shop during the last three months. Whatever your experience beforehand, your viewpoints and experiences will be vital towards the final outcome of my study.

Do I have to take part?

It is entirely up to you to decide whether to take part. If you do decide to participate then you will be given this Information Sheet to keep and you will also be asked to sign a consent form. You have the right to withdraw at any time without giving any reason why.

What will I have to do?

You will be interviewed by the researcher with the interview lasting no longer than an hour. The interview itself will be semi-structured with an initial series of open-ended questions sparking open discussion about your experiences as a consumer or employee within the land-based betting industry. You will be given the opportunity to detail your experiences and an in-depth view of whether you think the betting industry is fair. You will also be asked questions about betting companies and if you believe that they act responsibly as a whole.

Before the interview commences, you will be asked to complete a Gambling Survey, the questions of which have been adapted by a survey from BeGambleAware. This is to help the researcher identify any participants who may be at risk from problem gambling. This survey should take no longer than five minutes. Please answer these questions honestly and feel free to ask the researcher any questions you may have.

The interview will be recorded on a sound-recording device and then transcribed for the purposes of analysis. **You will remain anonymous during the final study and your details will not be passed on.** Any information you do give will remain confidential. Your name will not be used and the study will also ensure that you are not identifiable from any other personal details.

When your interview has been transcribed, it will be analysed by the researcher to see if any key themes emerge from the discussion. These themes will then be compared with those emerging from other interviews. The study will be looking to see if various themes linked with the overall theme of the project (for example, themes relating to Marxism) emerge, but it will be open to other themes (such as the emergence of Internet betting, for example). It is intended that around thirty participants will be interviewed.

The interview will take place in a neutral location; a coffee shop, for example and your lunch or drink will be paid for by the researcher. The use of a neutral location is intended to enable you to feel comfortable in sharing your experiences and opinions of a constantly changing betting industry.

What are the possible risks of taking part?

To reiterate, none of the information you give will be passed on. This means that you may give your opinions on various betting companies or activities in strict confidence.

If you have previously suffered from any problem gambling and this then comes to light during the interview, then there could potentially be the risk of feeling distressed at recalling memories linked to previous activities. You are strongly advised to inform the researcher before the start of the interview of any history of problem gambling.

What are the possible benefits of taking part?

We are a university and so it is part of our reason for being that we advance knowledge through research as well as through teaching. Your participation in this research helps us to do that.

We cannot promise the study will help you but the information we get from the study will help to increase the understanding of the betting industry from an alternative perspective. You will however be able to enjoy a coffee or tea completely free of charge and be allowed to share your experiences in a comfortable, relaxed environment.

What if there is a problem?

If you have a concern about any aspect of this study, you should ask to speak to the researcher by email (J.J.Wheaton@edu.salford.ac.uk) who will do their best to answer your questions. Following this, if you have any issues or complaints, you may contact the research supervisor Professor Chris Brady by email (Chris.Brady@salford.ac.uk) or the Associate Dean Accreditations and Partnerships and research co-supervisor Dr James Mulkeen by email (james.mulkeen@salford.ac.uk) or by telephone on 0161 295 2066.

Will my taking part in the study be kept confidential?

All information which is collected from you during the course of the research will be kept strictly confidential. The final study will use anonymised data and you will not be identifiable by the answers you give.

Your data will be handled in accordance with current GDPR legislation. Data from yourself will be gathered by the researcher and stored securely either in a locked cabinet in a secure office (consent form), or on a password-protected computer (transcription of the interview). Your interview will be given a research code, known only to the researcher ensuring anonymity. Furthermore, the master list of participants will be stored securely by the researcher, again in a locked cabinet.

Any information you give will not be passed on to a third party and will only be accessible to the researcher as well as the research supervisors who may wish to check that the research is being conducted to the highest standard. Your data may also be accessed by internal or external auditors who again wish to check that research procedures are being adhered to. Your personal data will only be retained until six months after the final completion of the researcher's PhD study, as per GDPR regulation.

As mentioned above, the researcher will record the interview. The audio recording of your interview made during this research will be used only for analysis. No other use will be made of them without your written permission, and no one outside the project will be allowed access to the original recordings.

What will happen to the results of the research study?

The results will be reported during a final, published thesis which is submitted to fulfil the requirements of the Doctoral award. The results will be made available to you by request upon publication. Once again, you will not be identified during the final study. The University may wish to keep some of the information you give for future study. If we do this, then this will be done in a completely anonymised fashion.

Where can I access additional gambling-related help?

The list below details organisations should you wish to access any additional help in relation to gambling, or if you feel you may talk to someone about your gambling.

BeGambleAware: www.begambleaware.org

National Gambling Helpline: 0808 8020 133

GamCare: www.gamcare.org.uk

Gordon Moody Association: www.gordonmoody.org.uk

Gamblers Anonymous: www.gamblersanonymous.org.uk

Please retain this Information Sheet for your own reference along with your copy of the signed Consent Form. Thank you for taking the time to read this information sheet.

September 2019.

Appendix Three: Semi-Structured Interview Schedule

Guide for semi-structured interview

The below open-ended questions are designed to provide the basis for open dialog on the participant's initial responses. There are three different interview structures for customers, employees or owners to be used as applicable. The questions in bold will form the main structure of the interview while questions in italics are follow-on questions which may or may not be used depending on the participants' answers. Discussion may subsequently lead on to other topics based on the participant's initial answers or experiences. The conversation should start by discussing the information on the Participant Information Sheet, checking they are happy to take part and answering any questions the Participant may have. The participant should then sign the Consent Form to confirm they are happy to take part and be recorded. The below questions are to be asked and recorded only after the Gambling Survey has been completed, in the case of customers and employees. The interview should last approximately one hour. At the end, remember to thank the participant and then advise them of what happens next with their data and also the study. Also, refer them to the contact details on the Information Sheet in the instance that they have any further queries.

Questions for Customers

Opening Questions

Have you wagered in a betting shop in the UK within the past three months? How often do you have a bet? How long have you been visiting betting shops?

What type(s) of gambling do you enjoy the most? For example, horses, football, Fixed-Odds Betting Terminal?

Why do you enjoy this type of gambling?

Have you always enjoyed this type of gambling?

Questions on Class Struggle

How do you see your relationship with the betting industry?

Are you treated fairly by the betting industry?

Are others treated fairly by the betting industry?

How do betting companies tackle problem gambling?

Which betting shop do you normally use? Why do you prefer this company compared to others?

Is this related to any special offers or customer service experience the company may offer?

Who controls the betting industry? The customer or the betting shop owners? Why do you think this?

To what extent do you feel that the customer influences the way that betting shops operate?

Questions on Flow of Capital

To what extent do you agree that the odds given by the betting companies are fair?

How do you feel about the special, enhanced odds which are given?

Are there any sports which offer particular value?

Does it depend on which betting company you use?

Who benefits the most from the pricing up of markets, betting companies or their customers?

Have you ever been a member of a loyalty card scheme offered by this company? Why did you sign up?

How have you benefitted from being a member of the loyalty scheme?

Who benefitted the most from your membership? Yourself or the betting company? Why do you think this?

Are loyalty schemes a gateway to online gambling?

How do you believe advertising has changed the betting shop sector?

Has advertising changed the betting shop for the better?

To what extent do you feel that betting companies benefit from their advertising campaigns?

How do you feel about the prevalence of adverts online or on television?

Has the 'whistle-to-whistle' ban been effective?

Would you like to see less gambling adverts?

The owners of your preferred betting company advertise the in-shop experience as this: READ ADVERT FROM RESPECTIVE COMPANY from sheet titled 'Advertising on Betting Shops from Betting Companies'. Does this advert feel true when you bet with them? If so (not), why (not)?

How would you change the in-shop experience?

Questions on Technology

How long have you been using betting shops?

What has been the biggest change since you first wagered in-shop?

How has the onset of FOBTs, Internet betting and SSBTs affected betting shops?

How do they interact within the omnichannel approach?

Which features of each platform are most attractive? Why?

How have these platforms changed gambling habits?

Who benefits the most from these developments? The betting companies or the customer? Why?

How much flexibility does each platform provide to the customer/owner?

How has each platform affected the atmosphere in shops?

Which aspects of FOBTs/SSBTs/online gambling would you improve?

Concluding Questions

What changes would you like to see within the industry in the future?

Do you feel that there is a role for further legislation?

Are there any issues the researcher has missed?

How old are you?

Questions to Employees

Opening Questions

Have you been working in a UK betting shop for the last three months? How long in total have you worked within the sector?

Are you happy to name the company you work for?

Is there any aspect of the job you enjoy in particular?

Do you enjoy sport/customer service/betting in general?

Questions on Class Struggle

How do you see your customers' relationship with the betting industry?

Are they treated fairly by the betting industry?

How do betting companies tackle problem gambling?

Who controls the betting industry? The customer or the betting shop owners? Why do you think this?

To what extent do you feel that the customer influences the way that betting shops operate?

Are you treated fairly by your employers?

How fair is your pay?

Questions on Flow of Capital

To what extent do you agree that the odds given by the betting companies are fair?

How do you feel about the special, enhanced odds which are given?

Are there any sports which offer particular value?

Does it depend on which betting company you use?

Who benefits the most from the pricing up of markets, betting companies or their customers?

What is the primary purpose of your employer's loyalty scheme?

How does the customer benefit from the membership of the loyalty scheme?

How are customer data used?

Who benefits the most from their membership? The customer or the betting company? Why do you think this?

Are loyalty schemes a gateway to online gambling?

How do you believe advertising has changed the betting shop sector?

Has advertising changed the betting shop for the better?

To what extent do you feel that betting companies benefit from their advertising campaigns?

How do you feel about the prevalence of adverts online or on television?

Has the 'whistle-to-whistle' ban been effective?

Would you like to see less gambling adverts?

Your employers advertise the in-shop experience as this: READ ADVERT FROM RESPECTIVE COMPANY from sheet titled 'Advertising on Betting Shops from Betting Companies'. Does this advert feel true when you work for them? If so (not), why (not)?

How would you change the in-shop experience?

Questions on Technology

What has been the biggest change since you first worked in a betting shop?

How has the onset of FOBTs, Internet gambling and SSBT affected the betting shops?

How do they interact within the omnichannel approach?

Which features of each platform are most attractive? Why?

How have these platforms changed gambling habits?

Who benefits the most from these developments? The betting companies or the customer? Why?

How much flexibility does each platform provide to the customer/owner?

How has your work been impacted by these developments?

Do any of these platforms affect your job?

Which aspects of FOBTs/SSBTs/online gambling would you improve?

Concluding Questions

What changes would you like to see within the industry in the future?

Do you feel that there is a role for further legislation?

Are there any issues the researcher has missed?

How old are you?

Questions for Owners

Opening Questions

Have you owned shares/worked in a boardroom position within a land-based betting operator for the last three months?

Which betting shops/company do you own/manage, and how long have you been running it for?

Is there any aspect of the industry you enjoy in particular?

Do you enjoy sport/customer service/betting in general?

Questions on Class Struggle

How do you see your relationship with your customers?

How do you ensure that they are treated fairly?

How does your company tackle problem gambling?

Who controls the betting industry? The customer or the betting shop owners? Why do you think this?

To what extent do you feel that the customer influences the way that betting shops operate?

How are your employees treated at work?

How fair is their pay?

Questions on Flow of Capital

To what extent do you agree that the odds given by the betting companies are fair?

How do you feel about the special, enhanced odds which are given?

Are there any sports which offer particular value?

How does your company compare to its competitors?

Who benefits the most from the pricing up of markets, betting companies or their customers?

What is the primary purpose of your company's loyalty scheme?

How does the customer benefit from the membership of the loyalty scheme?

How are customer data used?

Who benefits the most from their membership? The customer or the betting company? Why do you think this?

Are loyalty schemes a gateway to online gambling?

How do you believe advertising has changed the betting shop sector?

Has advertising changed the betting shop for the better?

To what extent do you feel that betting companies benefit from their advertising campaigns?

How do you feel about the prevalence of adverts online or on television?

Has the 'whistle-to-whistle' ban been effective?

Would you like to see less gambling adverts?

Your company advertises the in-shop experience as this: READ ADVERT FROM RESPECTIVE COMPANY from sheet titled ‘Advertising on Betting Shops from Betting Companies’. To what extent do your shops offer this experience?

How would you change the in-shop experience?

Questions on Technology

What has been the biggest change since you first entered the industry?

How has the onset of FOBTs, Internet gambling and SSBT affected the betting shops?

How do they interact within the omnichannel approach?

Which features of each platform are most attractive? Why?

How have these platforms changed gambling habits?

How have you and your customers benefitted from these developments?

How do you benefit from the use of data?

Who benefits the most from these developments? The betting companies or the customer? Why?

How much flexibility does each platform provide to the customer/owner?

Which aspects of FOBTs/SSBTs/online gambling would you improve?

Concluding Questions

What changes would you like to see within the industry in the future?

Do you feel that there is a role for further legislation?

Are there any issues the researcher has missed?

How old are you?

Appendix Four: Operator Information on Betting Shops

Advertising on Betting Shops from Betting Companies

Below are the adverts from betting companies in relation to the experience their customers in their shops. Please read the relevant adverts to the participants to ask for their perception:

Ladbrokes: ‘The name Ladbrokes is synonymous with betting and gaming: the hallmark of a premier brand. The Company, the origins of which date back to 1886, employs 15,000 people in six countries and is one of the world’s leading betting and gaming enterprises. Ladbrokes is a market leader in retail bookmaking in the UK, Ireland, Belgium and Spain where it operates a combined total of more than 2,700 betting shops...In addition to its extensive retail presence Ladbrokes is a world leader in remote betting and offers thousands of betting markets on a daily basis over the telephone and Internet. The telephone betting operation, utilising call centres in the UK and Malaysia, services around 100,000 customers, while Ladbrokes.com, the Company’s online betting and gaming facility, has attracted more than 765,000 active clients. Betting is available in 18 languages and the same number of currencies. The site incorporates the highest levels of security, which underwrite an integrated array of sports betting and gaming services available 24 hours a day, 365 days of the year’.

Ladbrokes. (2019) ‘Information about Ladbrokes’ [Online]. Available at: <https://news.ladbrokes.com/about-us.html>. Accessed on 29 July 2019.

Coral: ‘[Coral.co.uk](https://coral.co.uk), together with Coral's strong retail estate, ensures its' customers have consistent product experience across all channels. This includes the fast-growing area of 'bet-in-play' sports betting where Coral is one of the market leaders and the Coral "Connect" card which allows customers to deposit and withdraw money in shops and play online, alongside a host of other benefits.’

Coral. (2017) ‘About us’ [Online]. Available at: <https://help.coral.co.uk/s/article/About-Us>. Accessed on 29 July 2019.

William Hill: ‘In our shops, you’ll find a wide array of betting opportunities, from football to horse and greyhound racing, virtual racing and numbers betting. Today, every major event comes with betting odds attached, from royal weddings to Royal Ascot, General Elections and reality TV. You can bet over-the-counter with a betting slip or a football coupon, or electronically through the self-service betting terminals. For gaming, you can

play electronic roulette, blackjack, slots or an array of other casino-style games on our gaming machines.

Throughout our shops, we encourage responsible gambling, with a range of tools to help customers gamble safely, from setting time and spend limits on gaming machines to information on support services to self-exclusion systems’.

William Hill. (2019) ‘Retail’ [Online]. Available at:

<http://www.williamhillplc.com/about/our-businesses/retail/>. Accessed on 29 July 2019.

Betfred: ‘Owned and operated by Fred Done, who started in 1967 with just one shop in Salford, Betfred has grown to become the world’s biggest independent bookmaker with over 1,600 retail outlets.

From the start Betfred has differentiated itself by offering excellent customer value and service, the same traits which are at the core and heart of the business today.

No other high street bookmaker offers daily bonuses and price boosts like Betfred.

Key retail highlights:

- Betfred LBO’s (Licensed betting offices) offer a fun and friendly community environment.
- Betfred offers a wide variety of bonuses and promotions on a daily basis in order to differentiate itself from the competition and to give its customers the real value the company is known for throughout the gambling industry.
- BetfredTV offers customers the chance to watch live Sky Sports & BT Sport action in the shops and also hosts the ever popular Freds Pushes on Wednesday & Saturday mornings in which Fred himself takes to the sofa to deliver boosted odds.

Each LBO has:

- 2 Best Odds Guaranteed meetings every day.
- Live broadcast of every UK and Irish horse-race
- Virtual Greyhound and Virtual Horse Racing
- The latest 55” TV in multi-view and video wall technology
- Ability to bet on every major sporting event
- Betfred in-house TV channel – Betfred TV

- Friendly and well trained staff with an emphasis on customer service'

Betfred Corporate. (2019) 'Retail' [Online]. Available at:
<http://www.betfredcorporate.com/about-betfred/retail/>. Accessed on 29 July 2019.

Appendix Five: Informed Consent Form

Consent Form: A Marxist Analysis of Consumer Perception Within The Land-Based Betting Industry

Participant's Name:

Address:

Email:

Telephone Number:

Study Identification Number (to be completed by the researcher):

Please tick as appropriate:

I confirm that I have read the information sheet dated September 2019 for the above study. I have had the opportunity to consider the information, ask questions and have had these answered satisfactorily.	<input type="checkbox"/>
I understand that my participation is voluntary and that I am free to withdraw at any time without giving any reason.	<input type="checkbox"/>
I agree to complete the Gambling Survey before the start of the interview.	<input type="checkbox"/>
I agree to my interview being recorded and then later transcribed for the purposes of analysis.	<input type="checkbox"/>
I understand that I will not be named during the final study.	<input type="checkbox"/>
I agree to take part in the above study.	<input type="checkbox"/>

The list below details organisations should you wish to access any additional help in relation to gambling, or if you feel you may talk to someone about your gambling.

BeGambleAware: www.begambleaware.org

National Gambling Helpline: 0808 8020 133

GamCare: www.gamcare.org.uk

Gordon Moody Association: www.gordonmoody.org.uk

Gamblers Anonymous: www.gamblersanonymous.org.uk

For further details, please contact the researcher James Wheaton:

j.j.wheaton@edu.salford.ac.uk.

Signed by:

Participant:	Researcher:
Name (PLEASE PRINT):	Name (PLEASE PRINT):
Date:	Date:

Appendix Six: Gambling Survey

Gambling Survey

To help the researcher identify participants who may be at risk from problem gambling, all interviews will start with a Gambling Survey. The questions below have been adapted from an online survey from *BeGambleAware*. Please answer them as honestly as you can and also, please ask the researcher if you have any questions. Thank you.

Question	Never	Sometimes	Most of the time	Almost Always
Have you bet more than you could really afford to lose?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you needed to gamble with larger amounts of money to get the same feeling of excitement?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you gone back on another day to try to win back money you have lost?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you borrowed money or sold anything to gamble?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you felt you might have a problem with gambling?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have people criticised your betting or told you that you had a gambling problem, whether or not you thought it was true?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you felt guilty about the way you gamble or what happens when you gamble?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Has your gambling caused any financial problems for you or your household?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Has gambling caused you any health problems, including stress or anxiety?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Questions adopted from *BeGambleAware* (2019) 'Quiz: Do I have a Gambling Problem?' [Online]. Available at: <https://www.begambleaware.org/gambling-problems/do-i-have-a-gambling-problem/>. Accessed: 1 March 2019.

Appendix Seven: Ethics Approval Confirmation

Appendix 7.1: Initial Ethics Approval Confirmation

The University requires all research involving human participants, animals, human or animal tissue, or sensitive data conducted by its academic staff, research degree candidates and taught UG and PG students be subjected to ethics panel's scrutiny. This means that most researchers within the University are required to apply for ethics approval from the relevant Ethics Panel before commencing data collection.

Ethics applications take a minimum of 4-6 weeks to turn around and this should be considered in relation to deadlines and data collection.

The student must discuss the content of the form with their dissertation supervisor who will advise them about revisions. A final copy of the summary will then be agreed and the student and supervisor will 'sign it off'

The signed Ethics Application Form and application checklist must be e-mailed to your Research Centre Support team in the Research & Knowledge Exchange Division:

School of Arts & Media	A&M-ResearchEthics@salford.ac.uk
Salford Business School	SBS-ResearchEthics@salford.ac.uk
School of Built Environment	S&T-ResearchEthics@salford.ac.uk
School of Computing Science & Engineering	
School of Environment & Life Sciences	
School of Health & Society	Health-ResearchEthics@salford.ac.uk

Application Checklist

The checklist below helps you to ensure that you have all the supporting documentation submitted with your ethics application form. This information is necessary for the Panel to be able to review and approve your application. Please complete the relevant boxes to indicate whether a document is enclosed and where appropriate identifying the date and version number allocated to the specific document (*in the header / footer*), Extra boxes can be added to the list if necessary

Document	Enclosed? (Indicate appropriate response)	Date	Version No.
Application form	<u>Mandatory</u>	Amended according to feedback from previous submission.	May 2019 2
Risk Assessment Form	Yes	Included owing to the risk of conversation on the subject of problem gambling.	1
Participant Invitation Letter	Not Required	Word of mouth or social media to be used.	
Participant Information Sheet	Yes		1
Participant Consent Form	Yes	Researcher's email address added	May 2019 2
Data Protection Check list	<u>Mandatory</u>		1
Participant Recruitment Material – e.g. copies of posters, newspaper adverts, website	Yes	Example of message which is to be used on social media	May 2019 2
Organisation Management Consent / Agreement Letter	Not Required	Participants do not work for a specific organisation.	
Research Instrument – e.g. questionnaire	Yes	Semi-structured interview guide attached. Also, a further document titled Validity of Research Instrument	May 2019 2 May 2019 1
Draft Interview Guide	Yes	Amended with possible follow-up questions	May 2019 2
National Research Ethics Committee consent	Not Required	This project does not come under such a remit.	

The form must be completed electronically; the sections can be expanded to the size required.

School	Salford Business School
Course of Study	PhD in Business and Management – Distance Learning
Is this application a resubmission from a rejected application? Please state the reference number	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Reference number:
Is this an amended version of a previous approved application? Please state the reference number	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Reference number:
Is this a revision of an ongoing application? Please state the reference number	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> Reference number: SBSR1819-22
Has this project received external funding?	NO If YES, please provide name of Research Council or other funding organisation: Click here to enter text.
Do you use non-human genetic materials from outside UK for your research?	NO If YES, has this been collected since the 12 th October 2014? Select

1a. Title of proposed research project
A Marxist analysis of consumer perception within the gambling industry.
1b. Is this project purely literature based?
Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>

2. Project Focus
The focus of this project is to investigate the view that consumer perception within the gambling industry can be analysed from a Marxist perspective, while also investigating the possibility that any class friction between gambling companies and their customers has a causal relationship with the development of technology. This view of the relationship is inspired by the development of technology in Karl Marx's <i>Capital</i> (2001) where an analysis of the technology during the era of industrialisation in England described new factory technology as a bourgeois tool of further exploitation.

3. Project Objectives

The main objective is to investigate the view that the gambling industry can be viewed through a Marxist lens as the struggle between two 'classes': the gambling companies and the consumer. It will do so by examining consumer perception, with participants being asked to give their perception of the role of gambling companies.

Furthermore, the thesis will seek to place the roles of the gambling industry and the consumer within the cultural materialist framework as outlined by Harris (1979). This would allow the analysis of any causal relationship between the changes in the mode of production, its effects upon the gambling industry and also, the superstructure of consumer perception.

The changes in the mode of production in this case would relate to the changes in technology in the industry which have moved at a rapid pace. From the age of 'bookies' runners' before the legalisation of betting shops in 1961, to the use of 'blowers' in betting shops for racing commentary and results, to the advent of online and mobile betting, the betting industry has transformed at great pace (Jones et al., 2000). Betting companies have been able to make use of new products thanks to the proliferation of the internet, as well as advances in the quantitative analysis of sport. This may have facilitated further exploitation on the part of gambling companies. The thesis will also therefore seek to answer the question: have technological advances facilitated further exploitation in the view of the consumer?

Harris, M. (1979) *Cultural Materialism: The Struggle for a Science of Culture*. New York: Random House.

Jones, P., Clarke-Hill, C., and Hillier, D. (2000) 'Viewpoint: back street to side street to high street to e-street: sport betting on the internet', *International Journal of Retail & Distribution Management*, vol. 28, pp. 222-227.

4. Research Methodology

Previous research on consumer perception within the gambling industry has taken the form of a quantitative nature with thousands of participants being asked to respond to questions in an online survey (Gainsbury et al., 2013; Gainsbury et al., 2018). However, a qualitative study of a much smaller sample will allow for a more in-depth investigation of the superstructure that is consumer perception (Nguyen and Klaus, 2013) and complement the quantitative studies.

The qualitative study will be carried out through **face-to-face**, semi-structured interviews, in a similar fashion to the study conducted by Nguyen and Klaus (2013). An initial series of open-ended questions will then allow the flexibility of an open dialogue, encouraging both the participant and researcher to elaborate on any topic that may emerge during the interview itself (Brunk, 2010). **These open-ended questions will be inspired by the research aims of the study and will ask about: the frequency of the participants' gambling; the age of the participants; how long they have been betting and what changes they have experienced in this time; their choice of preferred betting company; their perception of customer service in the industry; and what changes they would like to see in the future.** As Brunk (2010) also comments, comfortable surroundings for the participant would also encourage open dialogue. This researcher will be seeking neutral surroundings for each interview to allow both parties to speak freely. Each interview will be recorded on a voice-recording device and then transcribed accordingly.

Focus groups were briefly considered as a further instrument of research the researcher decided against their usage. As Bloor et al. (2001) argue, the guarantee of participants' anonymity is at risk, particularly if the group of participants are drawn from the same local group. Further unable to share their true experiences of the industry while speaking in front a group of their peers (Morgan, 1996). A face-to-face interview, as Brunk (2010) argues, will allow for a free exchange of information. This free exchange will benefit from data which has not been affected by group dynamics which could have otherwise occurred in a focus group.

This study seeks to recruit fifteen participants who have gambled within the UK's gambling industry within the past three months, allowing for a study from the consumer's perspective. **The sampling techniques which are used will be of convenience and of the snowball effect. Participants will be invited to participate either through contacts already made within the betting industry or through word-of-mouth. Social media will also be used to ask if there are any individuals who would be happy to be interviewed.** The number of fifteen interviews should be efficient in accordance with the view of Brunk (2010: 256) who quotes McCracken: 'For many research projects, eight respondents will be perfectly sufficient'. Fifteen

participants should provide a deeper pool of quantitative data, although the researcher recognises the time that is required for the process of recruitment, data collection and analysis.

The coding of data gathered is an area to be decided upon by the researcher after further training to be undertaken. However, the data gathered from the interviews will be coded and analysed for different themes with the use of software such as NVivo, a method used in studies such as that of Klaus and Maklan (2012). Ryan and Bernard (2003) argue that the analysis of text involves several tasks, including the decision of themes most important within the research project. The themes that will be under investigation, at least at this stage, will be those of class (betting companies and customers), exploitation, technology and change within the industry. These themes should link nicely into the research focus discussed above.

Bloor, M., Frankland, J., Thomas, M., and Robson, K. (2001) *Focus Groups in Social Research*. London: Sage.

Brunk, K.H. (2010) 'Exploring origins of ethical company/brand perceptions – A consumer perspectives of corporate ethics', *Journal of Business Research*, vol. 63, pp. 255-262.

Gainsbury, S.M., Parke, J., and Suhonen, N. (2013) 'Consumer attitudes towards Internet gambling: Perceptions of responsible gambling policies, consumer protection, and regulation of online gambling sites', *Computers in Human Behavior*, vol. 29, pp. 235-245.

Gainsbury, S.M., Russell, A.M.T., Hing, N., and Blaszczynski, A. (2018) 'Consumer engagement with and perceptions of offshore gambling companies', *New Media and Society*, vol. 20, pp. 2990-3010.

Henry, G.T. (2009) 'Practical Sampling', pp. 77-105 in Bickman, L., and Rog, D.J. (eds.) *The SAGE Handbook of Applied Social Research Methods*. Thousand Oaks: Sage.

Klaus, P., and Maklan, S. (2012) 'EXQ: a multiple-item scale for assessing service experience', *Journal of Service Management*, vol. 23, pp. 5-33.

Morgan, D.L. (1996) 'Focus Groups', *Annual Review of Sociology*, vol. 22, pp. 129-153.

Nguyen, B., and Klaus, P. (2013) 'Retail fairness: Exploring customer perceptions of fairness towards retailers' marketing tactics', *Journal of Retailing and Customer Services*, vol. 20, pp. 311-324.

Ryan, G.W., and Bernard, H.R. (2003) 'Techniques to Identify Themes', *Field Methods*, vol. 15, pp. 85-109.

5. What is the rationale which led to this project?

There 'are few means more ruthlessly efficient for redistributing wealth from poor to the rich' (Cohen, 2003: 20) than the gambling industry. What Cohen describes is very much a characteristic of the capitalist system that Karl Marx and Frederick Engels described in *The Communist Manifesto*. 'The essential condition for the existence, and for the sway of the bourgeois class, is the formation and augmentation of capital' (Marx and Engels, 2000: 25). The gambling industry, as far as Cohen (2003) was concerned, only augmented the capital of the bourgeois gambling companies.

This thesis will investigate the view that consumer perception within the gambling industry reflects the view that the consumer perception within the betting industry reflects a class struggle between the betting companies and the consumer. Marx (2000) argued that the capitalist system was contradictory. It provided an opportunity for entrepreneurs to develop innovative technology and advance industry, but only while it exploited the proletariat. The bourgeois extracted capital from the lower class thanks to the appropriation of their labour, the alienation of the lower class from their work and the surplus value of labour, the cost of which is driven down by the competition between the various workers of the lower class (Marx, 2000; Marx and Engels, 2000).

This analysis of capitalism feeds into the claim that Marx and Engel famously made in *The Communist Manifesto*: 'history of all hitherto existing society is the history of class struggles' (Marx and Engels, 2000: 14). Furthermore, the 'ideas of the ruling class are in each epoch the ruling ideas, i.e. the class which is ruling material force of society, is at the same time its ruling intellectual force' (Marx and Engels, 1974: 64). Society, whether in the eras of slavery, feudalism or indeed, capitalism, have been characterised by the exploitation of the lower classes by the upper classes.

Inspiring this is the Hegelian dialectic, or the notion that the history of society is defined by the clash of two opposing forces. A thesis, the *status quo*, is confronted by an alternative, or antithesis. A synthesis – an amended version of the original thesis – occurs as a result of the struggle between the two conflicting forces (Hegel, 1874). The dialectic, Hegel (1874: 126) argued was the 'life and soul of scientific progress', shaping societal and political structures. Hegel had realised that this occurred thanks to Man being alienated from the natural environment around him. It was Marx who argued that this natural environment could be understood as the economy (Levine, 1981). The economy consisted of two forces and the ideal synthesis – and the teleological goal of all events which occur in the economic system – is one of communism and the absolute emancipation of the proletariat (Marx and Engels, 2000). Marx used this interpretation of the dialectic approach to outline his version of history, historical materialism and it is also, as Althusser (2005) would argue, the outline for his more scientific dialectic materialist approach.

This thesis will aim to contribute a uniquely Marxist perspective on the gambling industry. Despite Cohen's (2003) quote above, research on the link between Marxism and the gambling industry seems scarce. As Dotan (2000) argues, the rise of the gambling industry – even in the Year 2000 – went hand-in-hand with the rise of capitalism. It therefore made sense to this researcher to explore the link between Marxism and the gambling industry. The primary unit of analysis will be class and the classes analysed during this thesis will be that of gambling companies and the consumer. In doing so, the thesis borrows the viewpoint of Worsley (1981: 103) who argues that 'quite different criteria can be invoked in defining a proletarian, a peasant or a bourgeois, and in allocating people to those categories. The end-results will be different interpretations of the class system'. This argument allows for different interpretations of a class struggle. Consumers may designate gambling companies as bourgeois in their exploitative nature and this would indeed suggest a class struggle.

Underpinning this is the cultural materialist framework as described by Marvin Harris (1979). This model implies a causal structure between the infrastructure such as the mode and base of production, structures such as the capitalist economy and superstructures, namely the structures which exist inside the minds of individual actors. Indeed, these superstructures may include art, sport or consumer perception (Harris, 1979; Walle, 2001). These constructed realities theoretically are shaped by individual's thoughts towards them and this thesis will attempt to analyse the content of a specific superstructure: consumerism. Harris' model has been credited by some academics who argue that he has successfully created a model involving the mode of production and its impact upon structures while negating Marxist rhetoric (Walle, 2001; Legros, 1977). Yet, if a superstructure such as consumer perception perceives the gambling industry as exploitative with capital flowing in the direction of the bourgeois gambling companies, then this could imply that the cultural materialist framework is not totally devoid of Marxism as Harris preferred.

Harris' (1979) cultural materialist structure provides the ideal framework in which to identify a causal relationship between the changes to technology, their effects upon the gambling industry and the perception of it from the consumer. It is especially helpful as it would allow the thesis to account the role of evolving technology. Harris' framework has been described as 'a synthesis of Marx's causal primacy of infrastructure and Darwinian mechanisms of natural selection' (Price, 1982: 709). The evolution of technology may have underpinned any exploitation on the part of the bourgeois gambling companies, again reinforcing the rationale for including it in this study.

In sum, the rationale for this study is to contribute an alternative, Marxist view on the gambling industry while investigating the effect of technological changes on the relationship between gambling companies and their consumers.

Althusser, L. (2005) *For Marx*. London: Verso.

Cohen, N. (2003) 'Gambling with our future: casinos wherever you want them; fruit machines that you can play on credit in the hope they will spit out a small fortune. Nick Cohen on how new Labour sold out to the gaming industry', *New Statesman*, vol. 132, pp. 20-24.

Dotan, E. (2000) 'The game of late capitalism: Gambling and ideology in The Music of Chance', *Mosaic: A Journal for the Interdisciplinary Study of Literature*, vol. 33, pp. 161-176.

Harris, M. (1979) *Cultural Materialism: The Struggle for a Science of Culture*. New York: Random House.

Hegel, G.W.F. (1874) *The Logic of Hegel: Translated From The Encyclopaedia of the Philosophical Sciences With Prolegomena*. Translated by William Wallace. Oxford: Clarendon Press.

Legros, D. (1977) 'Chance, Necessity, and Mode of Production: A Marxist Critique of Cultural Evolutionism', *American Anthropologist*, vol. 79, pp. 26-41.

Levine, A. (1981) 'Althusser's Marxism', *Economy and Society*, vol. 10, pp. 243-283.

Marx, K. (2000) *Economic & Philosophic Manuscripts of 1844*. Translated by M. Milligan, edited by A. Blunden and M. Carmody [Online]. Available at: <https://www.marxists.org/archive/marx/works/download/pdf/Economic-Philosophic-Manuscripts-1844.pdf>. Accessed: 4 January 2019.

Marx, K. (2001) *Capital: A Critique of Political Economy* [Ebook]. Vol. I. Translated by Samuel Moore and Edward Aveling. London: The Electric Book Company.

Marx, K., and Engels, F. (1974) *The German Ideology* (2nd ed.) Introduction by C.J. Arthur. London: Lawrence and Wishart.

Marx, K., and Engels, F. (2000) *The Communist Manifesto* [Ebook]. London: The Electric Book Company.

Walle, A. (2001) 'Marx, economics and consumer response', *Management Decision*, vol. 39, pp. 803-808.

Worsley, P. (1981) 'Marxism and Culture: The Missing Concept', *Dialectical Anthropology*, vol. 6, pp. 103-121.

6. If you are going to work within a particular organisation, do they have their own procedures for gaining ethical approval?

E.g. within a hospital or health centre?.

Yes No

If **YES** – what are these and how will you ensure you meet their requirements?

7. Are you going to approach individuals to be involved in your research?

E.g. within a hospital or health centre?.

Yes No

If **YES** – think about key issues – for example, how you will recruit people? How you will deal with issues of confidentiality/anonymity? Then make notes that cover the key issues linked to your study.

The main qualification that will be used for the sample will be those who have gambled in the last three months. I will be approaching individuals who I have formed relationships with during my experience within the betting industry (provided that they fulfil the main qualification), while also using word-of-mouth to help awareness of my study spread. Any individual who makes contact with me in relation to my study will be treated with the strictest of confidence. Furthermore, I will also be using social media to appeal for any individuals who may wish to take part in my study. They will be asked to contact me privately with any thoughts and concerns before setting up any interview.

I have attended a compulsory ethical induction with the University of Salford which made me aware of the ethical implications of my research as well as the data protection requirements. I have also sought advice from the ethical guidance section of the University of Salford's website (<https://www.salford.ac.uk/ethics/guidance-and-resources>). I will also be relying on the advice of my research supervisors who will be able to use their experience to advise me on any issues which may arise during the process.

Henry, G.T. (2009) 'Practical Sampling', pp. 77-105 in Bickman, L., and Rog, D.J. (eds.) *The SAGE Handbook of Applied Social Research Methods*. Thousand Oaks: Sage.

8. More specifically, how will you ensure you gain informed consent from anyone involved in the study?

If after having made contact with an individual, they are happy to participate, an interview will be arranged for a neutral location which will help the participant to feel at ease (for example, a coffee shop). While there will be no remuneration, I will provide all drinks for the participant at my own expense.

I will provide participants with a Participant Information Sheet and Consent Form, giving full details of the study and what impact their research will have in the field. The Sheet will also detail:

- How participants' data will be collected and stored according to GDPR regulations.
- Their importance of having their informed consent.
- Their right to withdraw at any time.
- The process of the recording and transcribing the interview.
- Guarantees of anonymity and confidentiality.
- How results will be used in the final study.

The Sheet will also highlight that it is my intention for the thesis to use anonymised data. Participants will be informed that although their interview is recorded to be transcribed, only the researcher will have

access to the data and furthermore, will be stored securely on a password-protected computer that can be accessed only by the researcher.

Before the interview starts, the participant will also be asked to complete a Gambling Survey, more details of which can be found in Question Ten of this form. This is to allow the researcher to identify any problem gamblers who may feel uncomfortable discussing their experiences. Otherwise, this will be presented as an opportunity for participants to share their experiences within the betting industry within a safe environment. In my experience, consumers are not always keen to share their experiences as betting can be a very private activity.

If the participant agrees to the above, they will then be asked to sign a Consent Form (two copies: one for researcher and one for participant), detailing that they are indeed happy to participate. This form will also be stored securely for data protection purposes.

9. How are you going to address any Data Protection issues?

As mentioned above, interviews will be recorded and then stored on a computer for the purposes of transcription. In order to comply with GDPR legislation, all data will be encrypted in password-protected files on a password-protected computer that only the researcher will be able to access. Furthermore, any paper files with participant data, or the master list of participants, will be stored in a lock box in a secure office, again only accessed or used by the researcher.

The participants will be informed at the start that they will remain anonymous throughout the study and any information they give will be treated with the strictest confidentiality. All data will be coded with a system only known to the researcher and will also allow the participants to access their data at any time during the study if so desired. Furthermore, false pseudonyms will be used in the final study which do not give any resemblance whatsoever to the participants' real identity. Participants will be informed of these above points – along with their right to withdraw – before any interview takes place.

Data will not be held for any longer than is necessary according to GDPR and will be destroyed in a secure manner, six months after the final completion of PhD study.

10. Are there any other ethical issues that need to be considered? E.g. Research on animals or research involving people under the age of 18.

No other ethical issues are anticipated. Those who suffer from problem gambling will not be asked to participate out of respect for their own wellbeing. These will be identified by a Gambling Survey that will take place after the Consent Form has been signed but before the interview begins. The questions on this survey have been adapted from *BeGambleAware's* (2019) online problem gambling survey which asks potential problem gamblers questions to ascertain if they are at risk from problem gambling. If any participants answer 'almost always' or 'most of the time' to any of the questions, then this would indicate signs of problem gambling and the interview will not take place out of respect for their own wellbeing. Details for organisations which help problem gambling (for example, GamCare or BeGambleAware) will also be made available for those who should request them.

Individuals under the age of 18 will not be invited to participate.

BeGambleAware (2019) 'Quiz: Do I have a Gambling Problem?' [Online]. Available at: <https://www.begambleaware.org/gambling-problems/do-i-have-a-gambling-problem/>. Accessed: 1 March 2019.

11 (a) Does the project involve the use of ionising or other type of "radiation"

Yes No

11 (b) Is the use of radiation in this project over and above what would normally be expected? E.g. in diagnostic imaging?

Yes No

11 (c) Does the project require the use of hazardous substances?

Yes No

11 (d) Does the project carry any risk of injury to the participants?

Yes No

11 (e) Does the project require participants to answer questions that may cause disquiet/or upset to them?

Yes No

If you answer YES to any of the questions in 11(a)-(e) then you must complete and submit a risk assessment document with your application.

12. How many subjects will be recruited / involved in the study / research? What is the rationale behind this number?

My previous MA level research has given me experience in the carrying out of qualitative research with the awareness that the gathering and analysis of data can be time-consuming. As mentioned above, eight participants would be deemed as a sufficiently sized sample on which to carry out a qualitative study (Brunk, 2010). This researcher wished to provide a bigger sample to provide a deeper pool of knowledge and experience. A pool of fifteen – although could be criticised for still not being truly representative of the population – should provide a bigger pool of data than only eight participants.

When considering data saturation, it is worth remembering that 'one size does not fit all' research process, the broad selection criteria means that data from each participant may well be varied. The initial number of fifteen is only three interviews more than Guest et al's (2006) study but this is also influenced by the time constraints on the process related to the gathering and analysis of data.

Brunk, K.H. (2010) 'Exploring origins of ethical company/brand perceptions – A consumer perspectives of corporate ethics', *Journal of Business Research*, vol. 63, pp. 255-262.

Fusch, P.I. and Ness, L.R. (2015) 'Are We There Yet? Data Saturation In Qualitative Research?', *The Qualitative Report*, vol. 20, pp. 1408-1416.

Guest, G., Bunce, A., and Johnson, L. (2006) 'How many interviews are enough? An experiment with data saturation and variability', *Field Methods*, vol. 18, pp. 59-82.

13. Please state which code of ethics has guided your approach (e.g. From Research Council, Professional Body etc).

Although not funded by the University, I have sought guidance from the resources available on the University of Salford's Ethics and Research Governance policy: <https://www.salford.ac.uk/ethics/guidance-and-resources>.

Remember that informed consent from research participants is essential.

Please refer to the guidance on how to prepare your Participant Information Sheet and Consent Form.

Projects that involve NHS patients, patients' records or NHS staff, will require ethics approval by the appropriate NHS Research Ethics Committee. The University Ethics Panel will require written confirmation that such approval has been granted. Where a project forms part of a larger, already approved, project, the approving REC should be informed about, and approve, the use of an additional co-researcher.

Appendix 7.2: Ethics Confirmation Letter



**Research, Innovation and Academic
Engagement Ethical Approval Panel**

Doctoral & Research Support
Research and Knowledge Exchange,

Room 827, Maxwell Building

University of Salford
Manchester

M5 4WT

www.salford.ac.uk/

15 May 2019

James Wheaton

Dear James,

**RE: ETHICS APPLICATION SBSR1819-22: A Marxist Analysis of Consumer
Perception Within the Gambling Industry.**

Based on the information that you provided, I am pleased to inform you that your application SBSR1819-22 has been approved.

If there are any changes to the project or its methodology, please inform the Panel as soon as possible by contacting SBS-ResearchEthics@salford.ac.uk.

Yours sincerely,

A handwritten signature in black ink that reads 'David Percy'.

Professor David F. Percy
Chair of the Staff and Postgraduate Research
Ethics Panel
Salford Business School

Appendix 7.3: Ethics Amendment Confirmation

Amendment Notification Form		
Title of Project:		
<i>A Marxist Analysis of the Consumer Perception within the UK's Land-Based Betting Industry.</i>		
Name of Lead Applicant:	School:	
<i>James Wheaton</i>	<i>Salford Business School</i>	
Are you the original Principal Investigator (PI) for this study?		Yes
<i>If you have selected 'NO', please explain why you are applying for the amendment:</i>		
Date original approval obtained:	Reference No:	Externally funded project?
<i>15/05/2019</i>	<i>SBSR1819-22</i>	<i>No</i>
Please outline the proposed changes to the project. NB. If the changes require any amendments to the PIS, Consent Form(s) or recruitment material, then please submit these with this form highlighting where the changes have been made:		

The study now adopts a critical realist approach to the three aspects of Marxism which may control the land-based betting industry: class analysis, the development of technology and the flow of capital. These are all aspects which Marx had argued had benefitted the bourgeois of society. Marx and Engels (2000, p. 8) famously argue in *The Communist Manifesto* that 'the history of hitherto existing society is the history of class struggles'. Marx (2000, p. 14) in 1844 argued that is the concentration of capital in the hands of a few, it is in general an inevitable consequence if capital is left to follow its natural course'. Finally, Marx (2001) used his *Capital* to highlight how the development of technology provided a benefit to the bourgeois ownership of production through the increased productivity of labour-saving equipment.

These three aspects of Marxism are applied to the land-based betting industry. Worsley's (1981) theme of Marxism as a process which can be applied to any economic societal is adopted when defining the two classes for the study. The 'bourgeoisie' are the owners of land-based betting shops, while the 'proletariat' are all customers, regardless of class. The class analysis is the primary unit of analysis, but each aspect can be evaluated individually. The application of class analysis seeks to evaluate how the consumer sees their relationship with their chosen betting companies. The evaluation of the flow of capital seeks to evaluate how betting companies maintain a flow of capital from the consumer with strategies such as advertising, the surplus value of odds for sporting events and loyalty schemes. Finally, the development of technology seeks to evaluate the onset of Fixed-Odds Betting Terminals and Internet betting and their impact on betting shops. All of these will be evaluated as being controlled by the bourgeois betting companies.

The project now intends to interview three stakeholders of the betting industry: customers (as originally planned), employees and owners. Furthermore, the study now solely focuses on perception within the land-based betting industry with a critical realist perspective on the aspects of Marxism which influence consumer perception within betting shops. The study uses a four stage approach in outlining the research. The research first outlines the *a posteriori* approach to the study, outlining how the researcher can construct an argument from personal values or experiences (Benfield, 1974). The study then uses a process of abstraction, abduction and retrodution to develop its theory. This process was used by Fletcher (2013) in her critical realist approach during a study on farm women in Saskatchewan. The first stage of abstraction allows the researcher to ascertain what is of importance during the study and the empirical events or causal mechanisms which influence them (Danermark et al., 2002; Fletcher, 2013). In this instance, the study has outlined the consumer perception within betting shops being affected by FOBTs, Internet betting, advertising and so on. The stage of abduction then allows the researcher to analyse from a theoretical viewpoint yet to be applied (Danermark et al., 2002), which in this cause is Marxism. Finally, the study uses a retroductive approach, which is defined by Bhaskar (2009, p. 29) as a process which moves an argument 'from a description of some phenomenon to a description of something which produces it or is a condition for it'. This allows the study to move back and forth between the initial theory and the data, allowing the researcher to amend the guiding theory according to the critical realist viewpoint that all knowledge is fallible (Fletcher, 2013). The study analyses data with a deductive, yet flexible, coding system, which allows for the codes of analysis on NVivo to be influenced by the literature review and theories outlined but again be altered according to the data which emerges (Gilgun, 2005; Fletcher, 2013).

Trustworthiness of the study is maintained by the four criteria given by Lincoln and Guba (1985): credibility, transferability, dependability and confirmability. Credibility – the truth of the findings of the study (Lincoln and Guba, 1985) – is ensured partly through the negative case analysis of the data as well as data triangulation. Negative case analysis ensures that the researcher searches for data which does not fit the guiding theory (Fletcher, 2013), while triangulation ensures that data

from multiple sources are compared to corroborate the emergence of dominant themes (Van Maanen, 1979; Shenton, 2004).

Transferability, meanwhile, refers to the extent to which the study can be transferred to other settings (Lincoln and Guba, 1985). As Nowell et al. (2017) argue, the researcher cannot know how other researchers may wish to transfer the study to other contexts. Yet, Lincoln and Guba (1985) recommend that transferability is still achieved through a thick description of the phenomena, thus allowing other researchers to draw comparisons to other phenomena. This study aims to provide a Marxist analysis of the consumer perception within the betting industry through a critical realist approach. A thick description of the structures which cause this link will allow the transferability to consumer perception within other sectors.

Dependability is the extent to which the findings would be repeated by other researchers, if they were to repeat the methodology (Lincoln and Guba, 1985). This is the same as 'reliability' which is defined by Noble and Smith (2015, p. 34) as the 'consistency of the analytical procedures, including accounting for any personal and research method biases that may have influenced the findings'. Noble and Smith (2015) advise that reliability can be maintained by a clear outline of the research processes involved. Advice given by Alshenqeeti (2014) to maintain reliability and neutrality also includes avoiding leading questions and asking participants to clarify their answers for sake of clarity. Lincoln and Guba's (1985) recommended strategy is to maintain an audit trail, which leaves the reader a clear path demonstrating the decisions taken by the researcher during the data collection. Nowell et al. (2017) argue that reflexivity is key, and that a reflexive account kept during the process aids the dependability of the study. As such, this study allows for discussion which reflects upon the themes and codes used, as well as the decisions taken by the researcher relating to changes during the research process. The researcher also remains objective during data collection and analysis through the avoidance of leading questions and, as mentioned above, negative case analysis.

Finally, confirmability for Lincoln and Guba (1985) is achieved when the above three criteria are fulfilled, the conclusions reached are easily traceable from the data and are free from researcher bias (see also Nowell et al., 2017). Confirmability is related to the notion of internal validity which is defined by Noble and Smith (2015, p. 34) as the 'precision in which the findings accurately reflect the data'. This study makes use of 'rich and thick verbatim' from participants which the reader can use to make their own judgement on the subject (Noble and Smith, 2015, p. 35), while Alshenqeeti (2014) argues that an objective stance during the interview and the avoidance of leading questions will minimise the risk of researcher bias. Objectivity, as such, is part of the axiology of critical realism (Saunders et al., 2016). Strategies offered by Lincoln and Guba (1985) relate to the first three criteria above, with a reflexive audit trail detailing the methodological and theoretical choices used as markers throughout the study (see also Nowell et al., 2017).

A semi-structured interview is still used as the main instrument, but the main body of questions are informed by the aim and objectives of the study. All participants are asked on how they see the relationship between betting industry and consumer, who benefits the most from the use of advertising, the pricing of odds and loyalty card schemes and their impact upon betting shops. Participants are also asked about the impact of technology (FOBTs and Internet betting). A similar main body of questions is given to each of the three stakeholders, while some questions and some of the questions which emerge after the initial answers may vary depending on who is being asked.

Sampling methods and methods of recruitment remain the same, with availability sampling allowing the researcher to make use of contacts already made within the betting industry.

Snowball methods through word-of-mouth and social media are also used, allowing participants to identify further individuals who may be of relevance to the study (Saunders et al., 2016). The study intends to interview at least thirty participants, with around eighty per cent of the sample consisting of customers who have wagered in a betting shop within the last three months (similar criteria used by Mulkeen et al., 2017). The rest of the sample consists of employees who have worked in betting shops within the last three months as well as owners of the largest chains of betting shops according to the Gambling Commission (2018): William Hill, Ladbrokes, Coral and Betfred.

Alshenqeti, H. (2014) 'Interviewing as a Data Collection Method: A Critical Review', *English Linguistics Research*, vol. 3, pp. 39-45.

Benfield, D.W. (1974) 'The A Priori – A Posteriori Distinction', *Philosophy and Phenomenological Research*, vol. 35, pp. 151-166.

Bhaskar, R. (2009) *Social Realism and Human Emancipation*. London: Routledge.

Danermark, B., Esrtrom, M., Jakobsen, L., and Karlsson, J. (2002) *Explaining Society: An Introduction to Critical Realism in Social Sciences*. London: Routledge.

Fletcher, A.J. (2013) *The View From Here: Agricultural Policy, Climate Change, and the Future of Climate Change in Saskatchewan*. PhD Thesis. University of Regina.

Gambling Commission. (2018) *Industry Statistics: April 2015 to March 2018*. London: Gambling Commission.

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Marx, K. (2001) *Capital: A Critique of Political Economy* [Ebook]. Vol. I. Translated by Samuel Moore and Edward Aveling. London: The Electric Book Company.

Marx, K., and Engels, F. (2000) *The Communist Manifesto* [Ebook]. London: The Electric Book Company.

Mulkeen, J., Abdou, H.A., and Parke, J. (2017) 'A Three Stage Analysis of Motivational and Behavioural factors in UK Internet Gambling', *Personality and Individual Differences*, vol. 107, pp. 114-125.

Noble, H., and Smith, J. (2015) 'Issues of validity and reliability in qualitative research', *Evidence Based Nursing*, vol. 18, pp. 34-35.

Nowell, L.S., Norris, J.M., White, D.E., and Moules, N.J. (2017) 'Thematic Analysis: Striving to Meet the Trustworthiness Criteria', *International Journal of Qualitative Methods*, vol. 16., pp. 1-13.

Shenton, A.K. (2004) 'Strategies for Ensuring Trustworthiness in Qualitative Research Projects', *Education for Information*, vol. 22, pp. 63-75.

Van Maanen, J. (1979) 'The Fact of Fiction in Organizational Ethnography', *Administrative Science Quarterly*, vol. 24, pp. 539-550.

Worsley, P. (1981) 'Marxism and Culture: The Missing Concept', *Dialectical Anthropology*, vol. 6, pp. 103-121.


Please say whether the proposed changes present any new ethical issues or changes to ethical issues that were identified in the original ethics review, and provide details of how these will be addressed:

The researcher does not foresee any new ethical issues which were not previously considered. Measures laid out previously include the use of a Gambling Survey with questions used by *BeGambleAware* (2019), and these are given to both employees and customers before the start of the interview to ensure that participants do not suffer from problem gambling. This avoids any unnecessary distress to the participant during the interview. The participants are also given details of charities and associations which can help with problem gambling.

BeGambleAware. (2019) 'Quiz: Do I have a Gambling Problem?' [Online]. Available at: <https://www.begambleaware.org/gambling-problems/do-i-have-a-gambling-problem/>. Accessed on 1 March 2019.

Amendment Approved:	<input checked="" type="checkbox"/>	Date of Approval:	16/09/2019
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Chair's Signature:



Once completed you should submit this form and any additional documentation to the relevant Ethics Panel that reviewed the original proposal:

School of Health & Society	Health-ResearchEthics@Salford.ac.uk
School of Health Sciences	
School of Built Environment	
School of Environment & Life Sciences	S&T-ResearchEthics@salford.ac.uk
School of Computing Science and Engineering	
Salford Business School	SBS-ResearchEthics@salford.ac.uk
School of Arts & Media	A&M-ResearchEthics@salford.ac.uk

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