

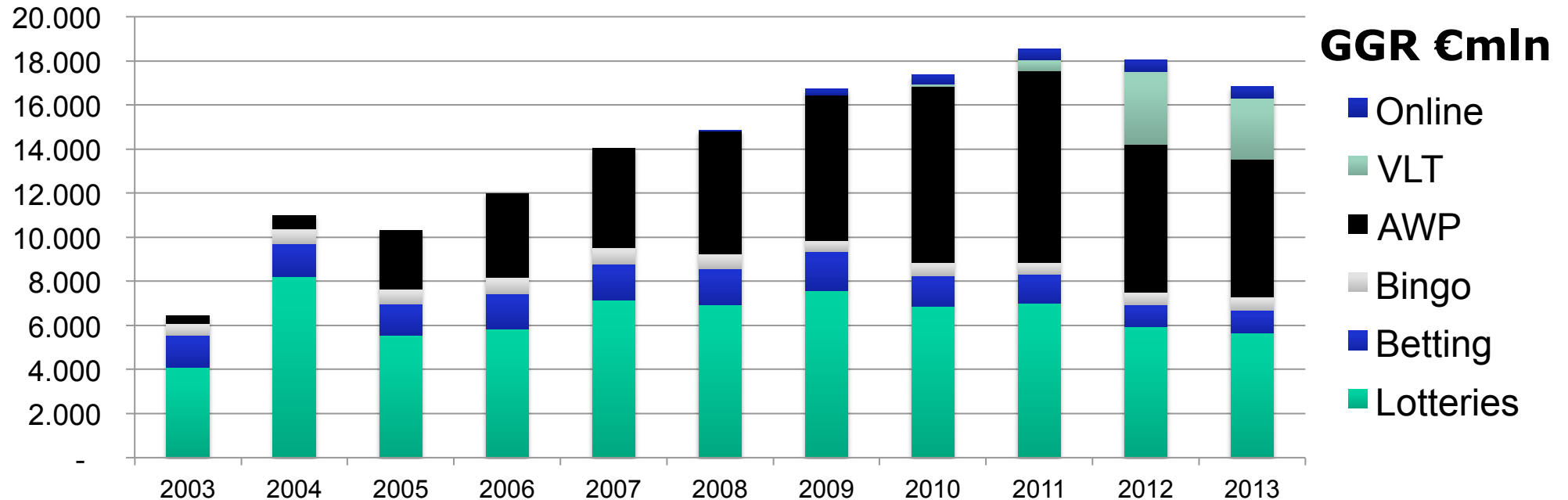
10th European Conference on Gambling Studies and Policy

***Trend of Italian gambling and
its social impact***

Giovanni Carboni – EGLA

Helsinki, September 12th 2014

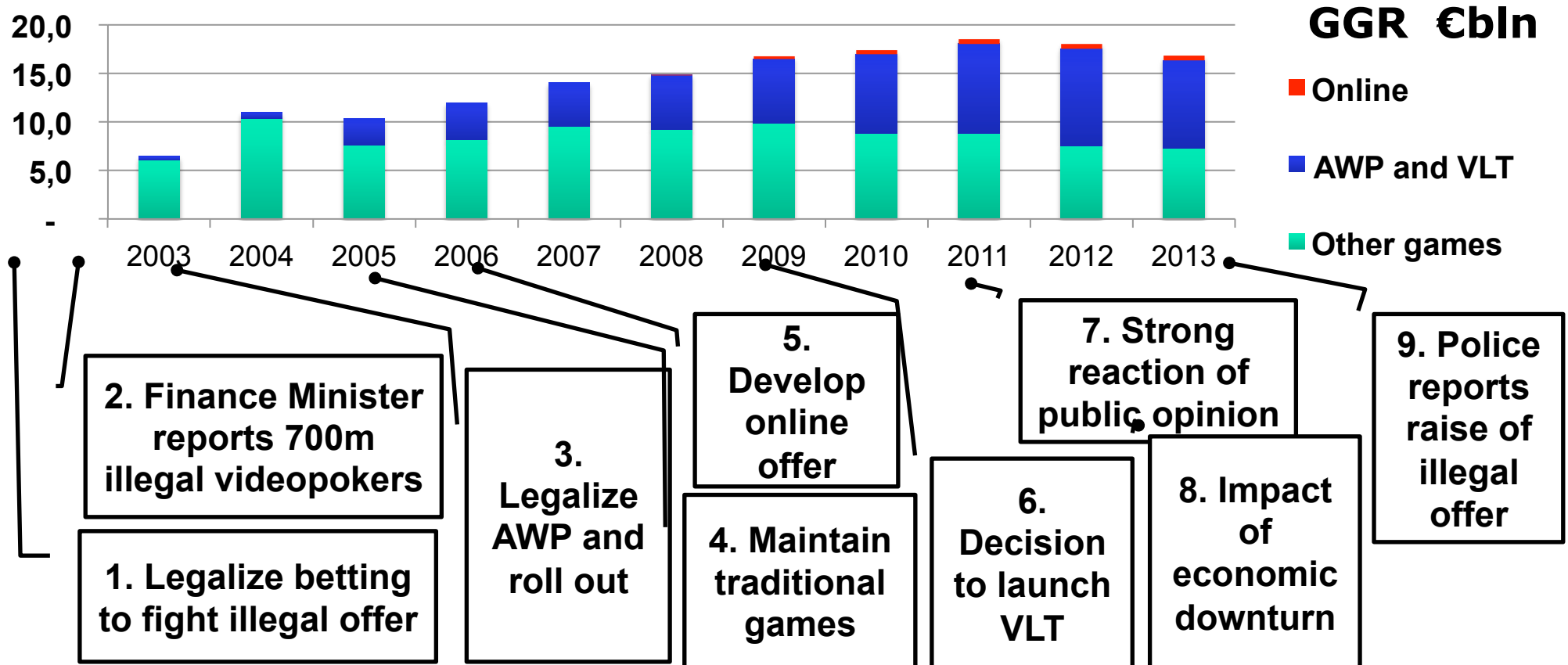
TREND OF ITALIAN LEGAL MARKET



Data: ADM and other sources

- ❑ **Gambling market almost tripled in 2003 - 2011, mostly because of introduction of AWP**
- ❑ **Sudden change in 2012, despite VLT introduction**
- ❑ **Limited impact of other games**
- ❑ **Online gambling share remains minimal (4,2%)**

MAIN DRIVERS



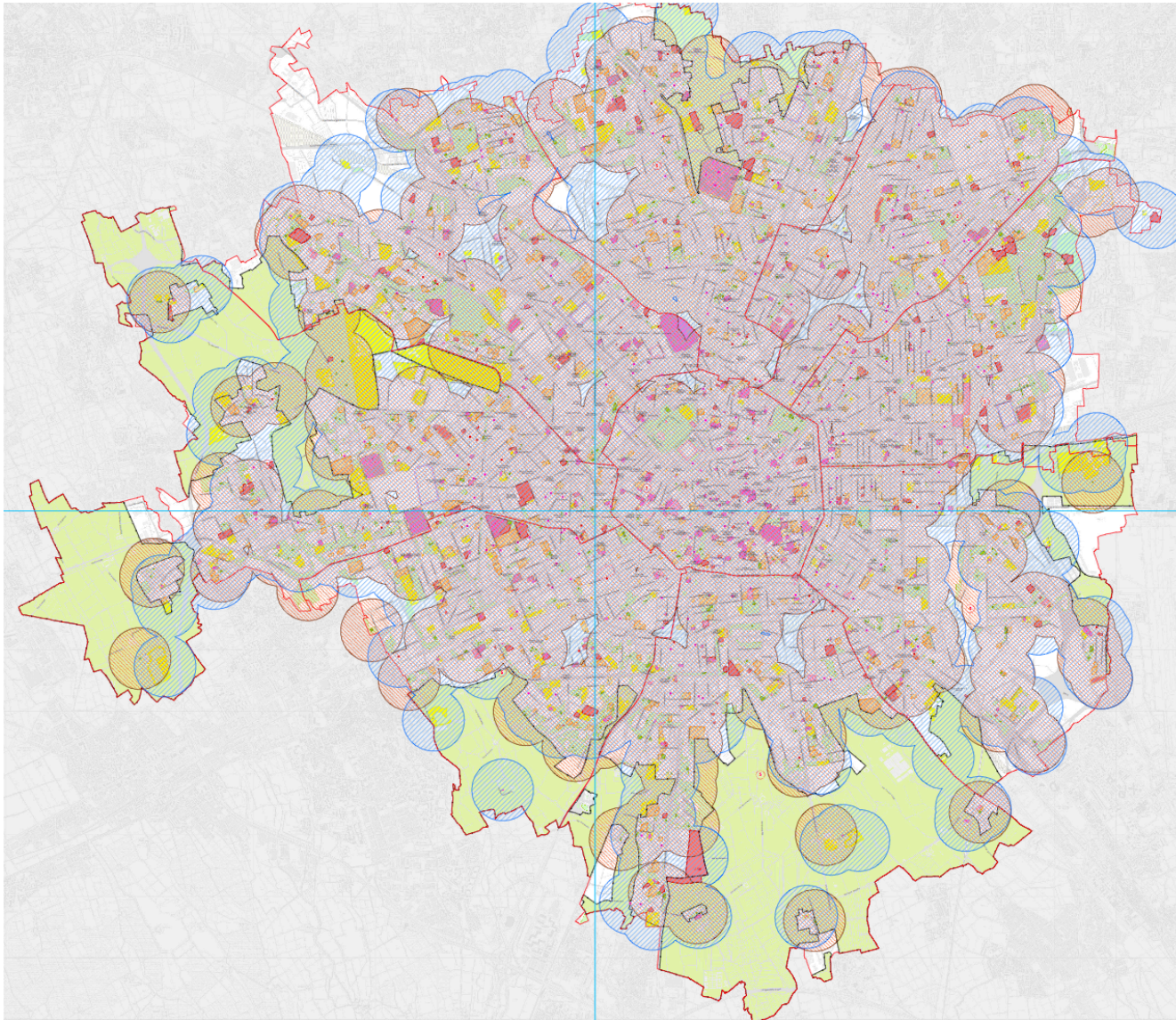
□ **2003 – 2011: Fight to illegal offer and tax income are main drivers till 2011**

□ **2012 – now: Strong attack by third sector and then by media, public opinion and politicians**

SOCIAL AND POLITICAL SCENARIO

- ❑ **Third sector's entities pretend severe regulatory measures against gambling**
- ❑ **Social impact becomes a main concern for politicians**
- ❑ **420 articles on La Repubblica and 120 articles on Corriere della Sera against gambling in 2012**
- ❑ **Protest supported by surveys provided by different entities ...**
- ❑ **... while Government says: *"still does not exist any study acknowledged, exhaustive and validly representing the phenomenon"***
- ❑ **Disproporzionate energy and time dedicated by politicians**
- ❑ **Two legislative initiatives in overlap currently under discussion**
- ❑ **Strong territorial limitations by local administrations, despite gambling would be central State reserve**

MUNICIPALITY STATES BANNING RULES IN MILAN



- **At least 500 mt from any “sensitive place”:** school, churches, hostitals, barracks, sport-venues, ...
- **(New) betting shops and gaming halls are banned from 96% of the territory of the city**
- **It will became from 99%**

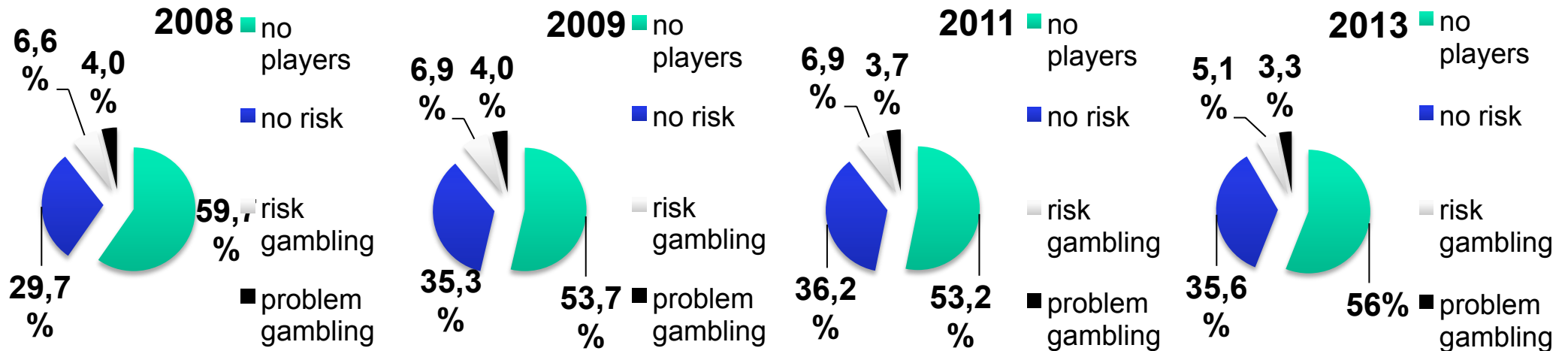
EPIDEMIOLOGICAL SURVEYS

Some real survey is carried out ...

Most Reputed Surveys regularly repeated

<p>IPSAD Italian Population Survey on Alcohol and Other Drugs</p>	<p>CNR</p>	<p><i>compliant with EMCDDA</i></p>	<p>multi- purpose</p>	<p><i>sample around 40.000 people</i></p>	<p>age 15 - 64</p>	<p><i>postal questionnaire</i></p>	<p>PGSI</p>	<p><i>also gambling in 2007, 2011, 2013</i></p>
<p>ESPAD European School Survey Project on Alcohol and other Drugs</p>	<p>CNR</p>	<p><i>compliant with EMCDDA</i></p>	<p>multi- purpose</p>	<p><i>around 15.000 people</i></p>	<p>age 15 - 19</p>	<p><i>questionnaire distributed at school</i></p>	<p>SOGS-RA broad rates then narrow rates</p>	<p><i>annual, gambling since 2007</i></p>
<p>CIRMPA Università La Sapienza - Roma</p>		<p><i>independent sponsored by a core market operator</i></p>	<p>gambling only</p>	<p><i>around 2.000 players</i></p>	<p>age 18 - 74</p>	<p><i>interview on the phone</i></p>	<p>SOGS and PGSI</p>	<p><i>biannual, 2008, 2010, 2012</i></p>

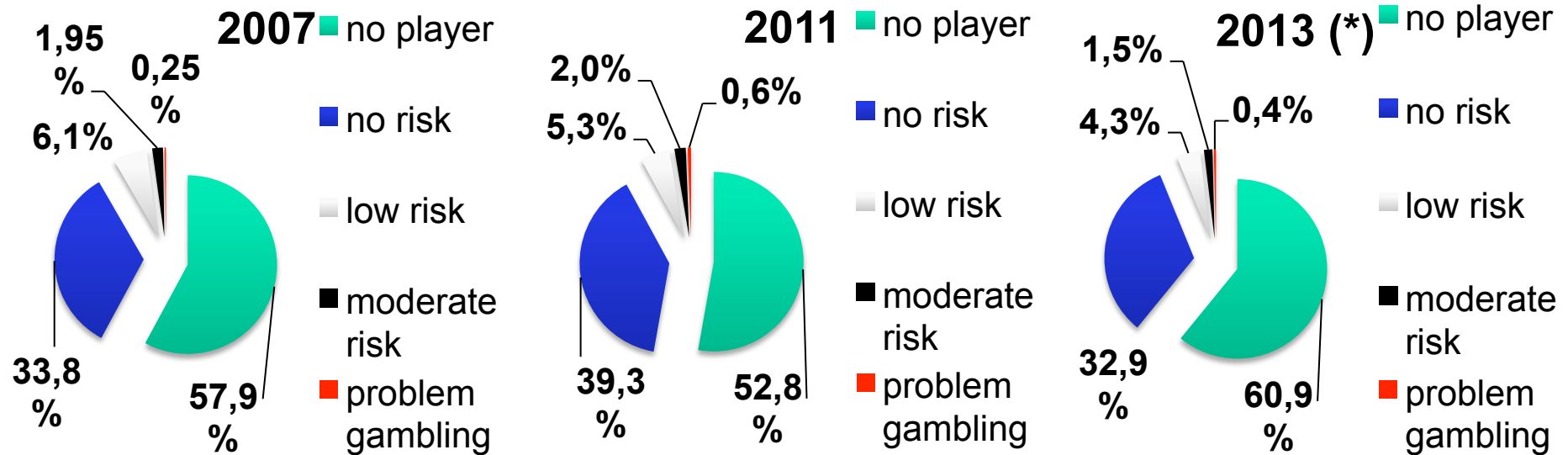
ESPAD – 2008 2009 2011 2013, age 15-19, SOGS-RA



Data: Ifc-CNR

- **Rate of player and rate of player at risk decrease since 2008**
- **Public opinion complains about gambling to minors despite severe prohibition**
- **Surveys do not clarify whether minors play legal or illegal gambling**

IPSAD – 2007 2011 2013, age 15-64, PGSI



Data: Ifc-CNR

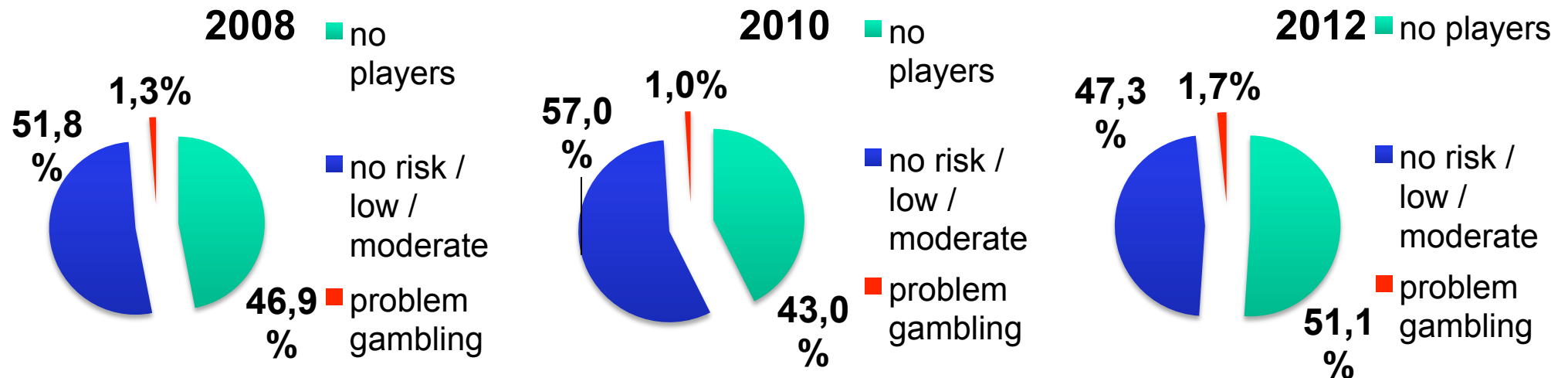
(*) 2013 data preliminary

- **Problem gambling trend seems to reply market trend**
- **Many recreational players are running out of gambling**
- **Problem gambling rate does not seem to particularly concern, in comparison with other EC countries results**

CIRMPA – 2008 2010 2012, age 18-74, SOGS&PGSI

CIRMPA survey does not measure gambler prevalence vs total population and it does not directly provide problem gambling rate vs players population

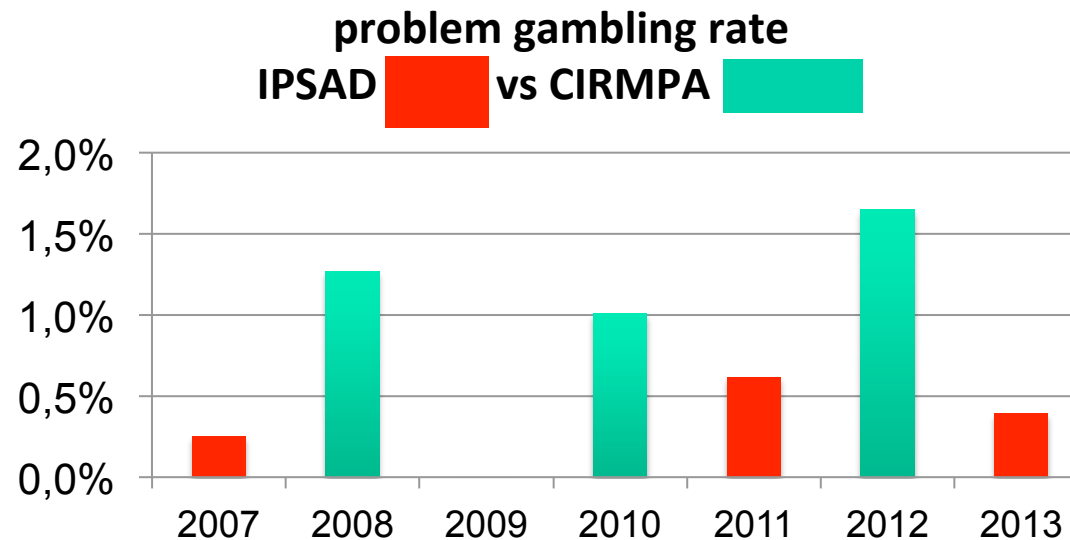
Researchers use players rate provided by other surveys (market survey Eurisko) to calculate problem gambling rate vs total adult population



Data: Survey researchers's articles Lexandgaming, Eurisko survey reports

- **Problem gambling rate increases, albeit fluctuations**
- **Player rate is around 50% and fall in 2012 while problem gamblers increase**

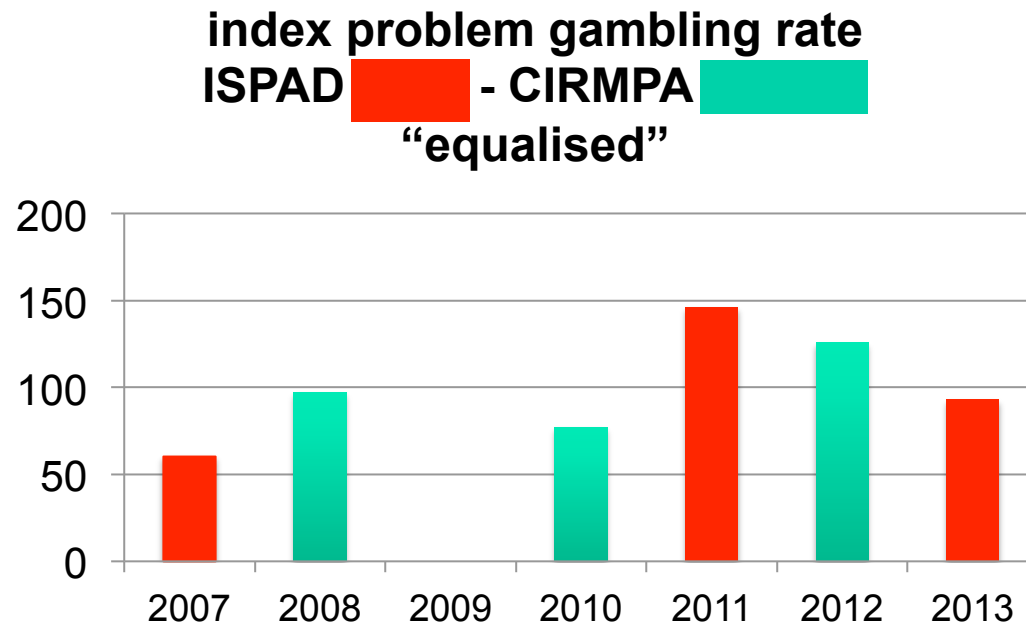
IPSAD vs CIRMPA



- **CIRMPA provides a problem gambling rate higher than IPSAD:**
 - CIRMPA classifies as problem gamblers those in that class by both SOGS and PGSI**
 - Postal questionnaire vs phone interview to collect answers**
 - Ranges of age are different: 15-64 vs 18-74**
 - CIRMPA sample is more little and it interviews only players, selecting them by a preliminary question**
 - IPSAD is a multi-purpose survey**

IP SAD vs CIRMPA "EQUALISED"

- Results from the 2 surveys seems not directly comparable, but we can try to "equalize" them, as for two different unit of measure ...*



- It seems confirmed trend of problem gambling changed in 2011, coinciding with the change in public opinion attitude**

INDUSTRY AND CONSUMER NEED

ESPAD, IPSAD, CIRMPA surveys are carried out by qualified entities and professionals, consistently with the best practices

... but what they provide is not enough:

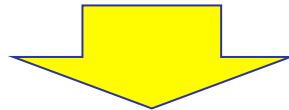
- ❑ Gambling business and related economical interest are relevant**
- ❑ Social and Health risk and danger for minors and vulnerable people is unacceptable, and unaccepted**

Both Operators and Consumers need more

FROM RESEARCH TO APPLICATION

It is over 20 years since pioneer studies and earliest surveys had been developed ...

... there must now have enough knowledge and experience to fix a set of satisfactory rules for measurement and analysis rules



To fix at European and at International level a set of strict operational standards, both for index definition and its application, as well as for analysis pattern. That must ensure:

- 1. Reliability**
- 2. Meaningfulness**
- 3. Consistency**
- 4. Repeatability**
- 5. Comparability**

of gambling prevalence data

Thank you for your attention

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