

Evolution of online gambling practices in France over the past 5 years: lessons for the regulation and prevention of problem gambling.



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Legal framework before 2010

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Gambling legal framework in France **before 2010**

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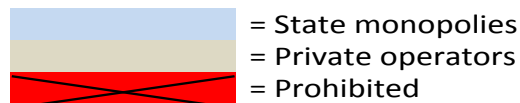
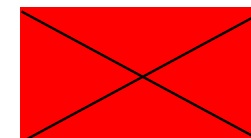
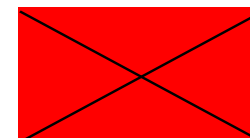
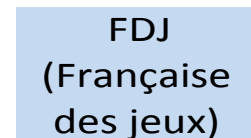
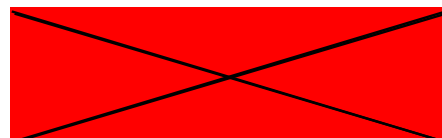
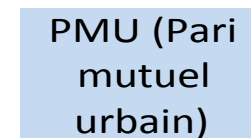
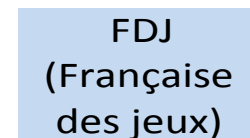
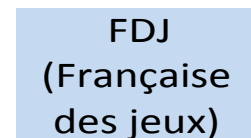
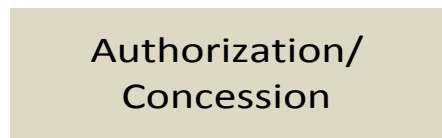
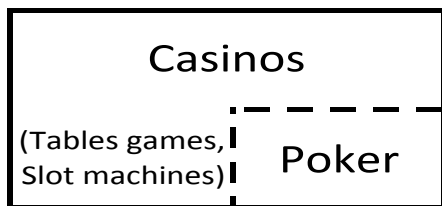
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Off line

On line



Legal framework after 2010

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Gambling legal framework in France **after 2010**

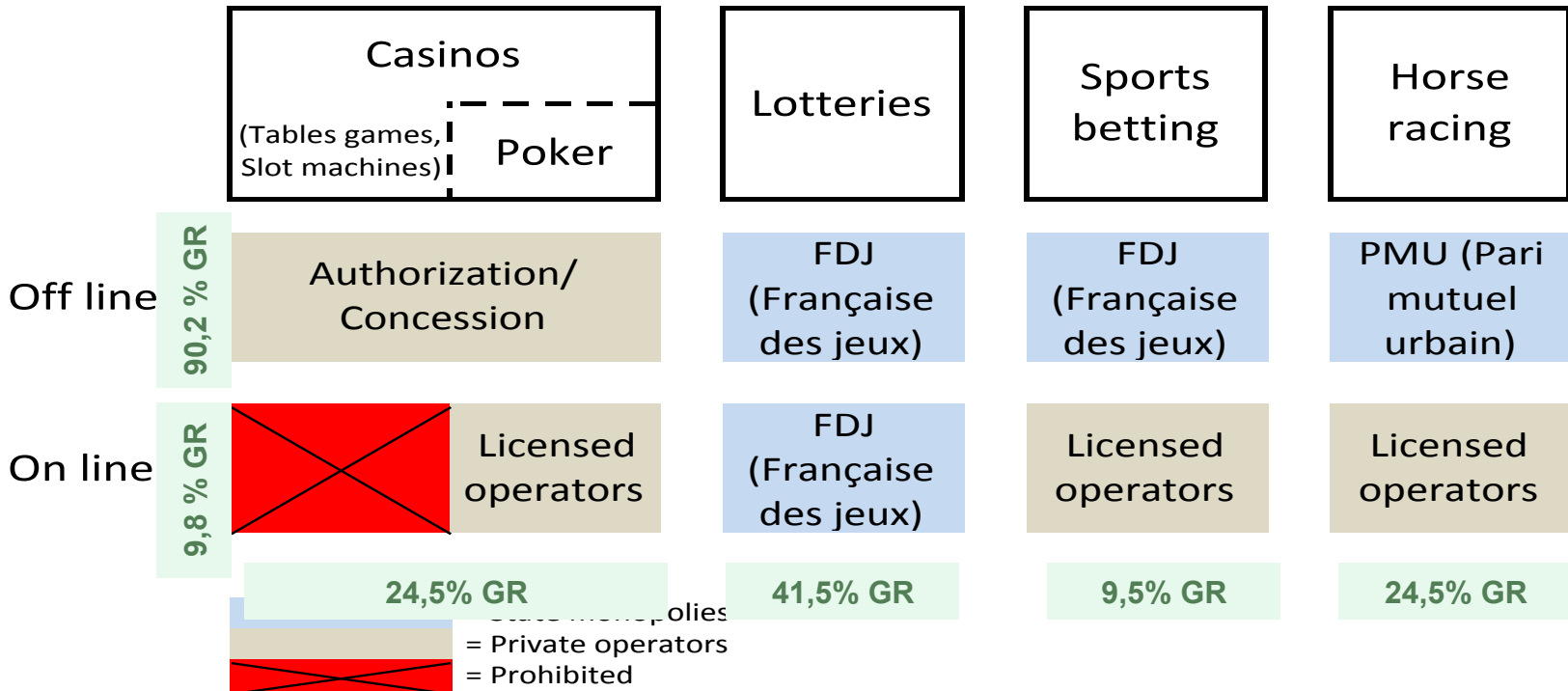
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Gambling expenditure in France

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Online gambling in France

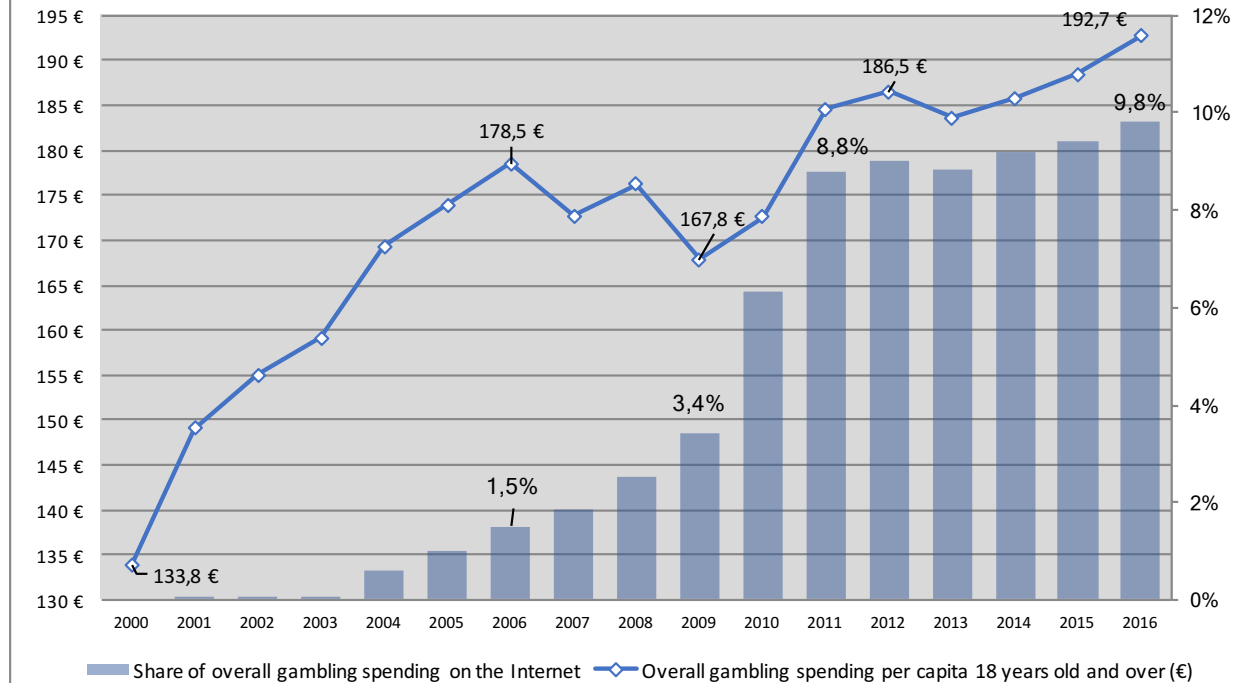
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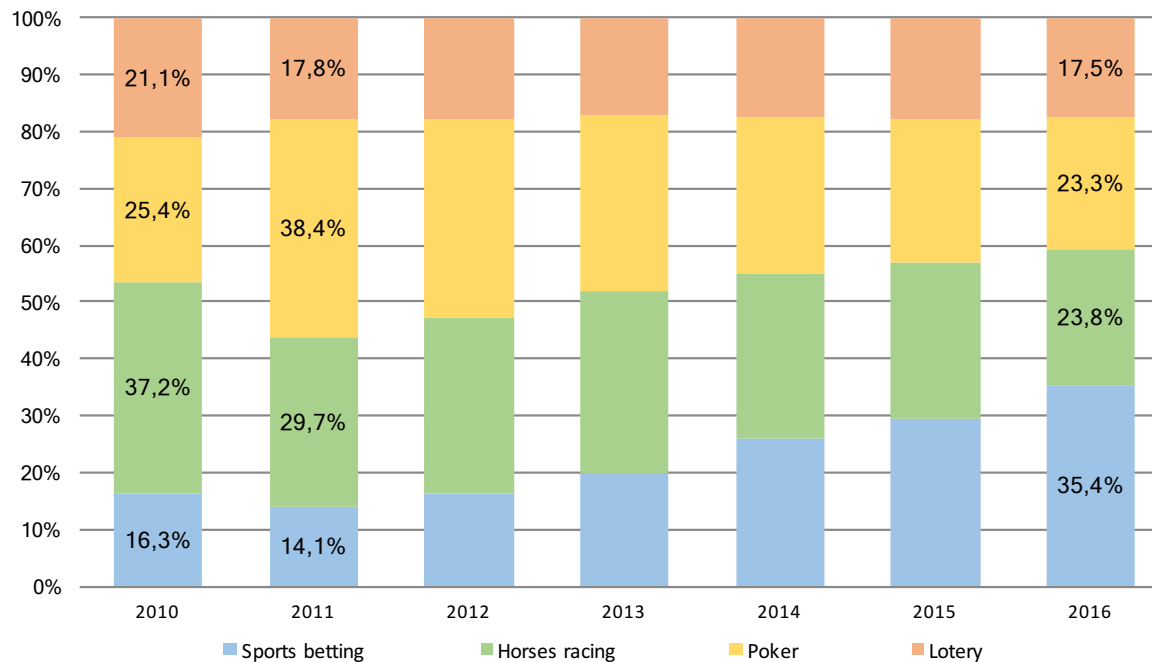
Spending per capita gambling expenditure (GGR) and share of Internet spending



Online gambling spending by games

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Breakdown of online gambling spending by gaming activity



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e-Games France 2017 survey, ODJ

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Online
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- eGames international project: France, Canada, Germany, Italy, Switzerland, Poland (gambling & related gaming)

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eGames 2017 France

- Based on “Web Users Panel - « Le Carré des Médias » Médiamétrie - nearly 1 million internet users
- Time survey: 7 weeks, from 5 January to 24 February 2017
- **Sample: 22,700 French Internet users aged 18 and over**
- **Quotas** to ensure its representativeness (on the criteria: sex, age) based on data from the Monitoring survey of Internet use by the French population (Médiamétrie, 4th quarter 2016)
- Final sample was weighted according the initial quotas
- Scope of these analyze on **gamblers' sample**: Internet users who reported having gambled on the Internet at least one time in the last 12 months (N = 6,200; **6,380** weighted)

Online gamblers in France in 2017

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2.4 to 2.9 million of online gamblers in 2017 in France

Online gambling in France

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	Internet Users	Gamblers	Non-gamblers	Test dif. gamblers vs nongamblers
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Gender				
man	50,2	65,4	44,3	***
woman	49,8	34,6	55,7	***
Age				
1-[18-34[28,4	37,8	24,7	***
2-[35-54[39,0	43,7	37,1	***
3-[55 +[32,7	18,5	38,2	***
Professional activity				
No	35,7	24,0	40,3	***
Yes	64,3	76,0	59,7	***
Graduation				
< Highschool	17,9	15,1	18,9	***
Highschool to college + 2	43,7	45,3	43,0	*
At least college + 3	24,8	24,8	24,8	NS
Household Financial Ressources (monthly)				
≤ 1 500 €	25,2	22,4	26,4	***
[1 500 € ; 3 000 €]	36,7	36,9	36,6	NS
≥ 3 000 €	38,1	40,7	37,0	***

Activities practiced in 2017

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Online gambling in France

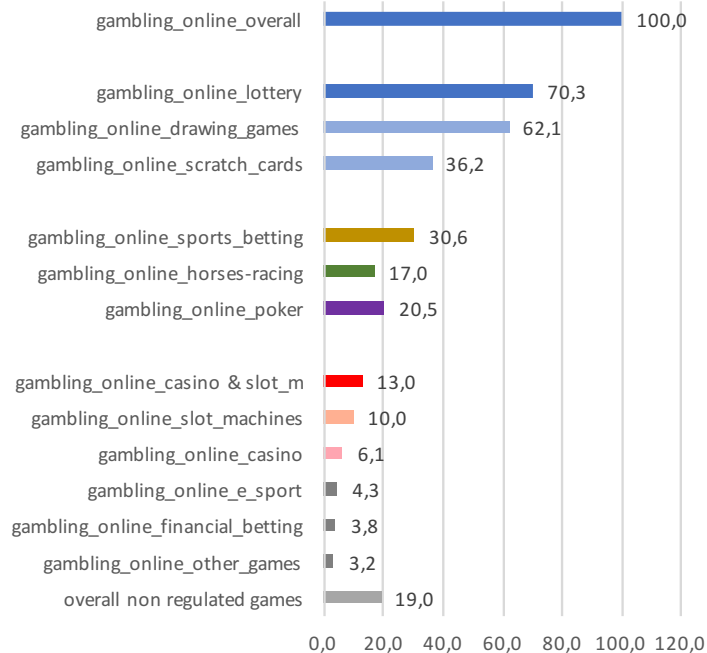
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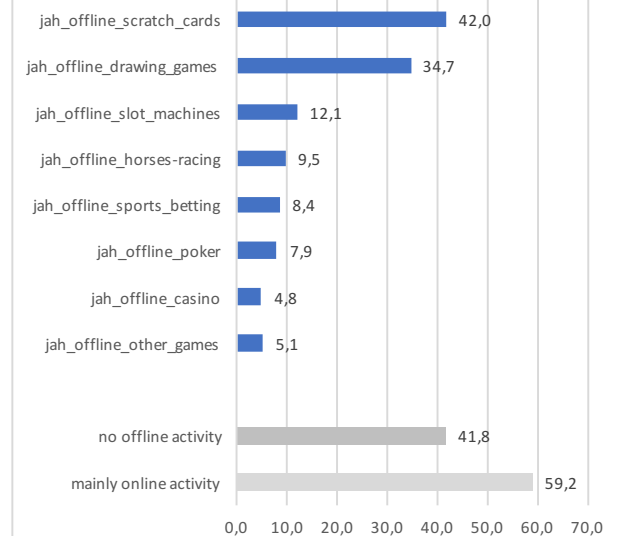
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Activities practiced online



Activities practiced offline



Intensity of practices

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Intensity of practices according to the type of game, in France, in 2017

Type of games	Frequency (nbr of sessions p.)				Spending (in € per year)				Playing duration (in h. per year)			
	mean	median	Q90	Gini	mean	median	Q90	Gini	mean	median	Q90	Gini
Lottery	61	26	156	0,60	494	156	1340	0,71	170	4	57	0,96
Slot machines	107	52	210	0,64	1510	451	3120	0,78	572	20	253	0,94
Poker	78	26	210	0,58	871	180	2600	0,76	313	39	315	0,86
Other casino games	75	26	210	0,61	1307	260	2600	0,79	697	15	227	0,96
Horses racing	77	26	210	0,60	908	260	2100	0,74	57	10	130	0,82
Sports betting	74	26	210	0,64	1145	156	2612	0,80	72	5	130	0,87
e-sports betting	92	52	210	0,55	1205	260	3120	0,74	98	19	193	0,77
Financial betting	110	52	210	0,53	4453	780	10463	0,80	112	34	268	0,70
Overall gambling activities	118	38	290	0,69	1483	240	3120	0,83	324	9	223	0,94
Free games	108	26	210	0,73					92	10	130	0,87
PayToWin games	415	210	1040	0,56	188	42	390	0,76	389	117	895	0,76

Intensity of practices

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Online gambling in France

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Free games

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Online gambling in France

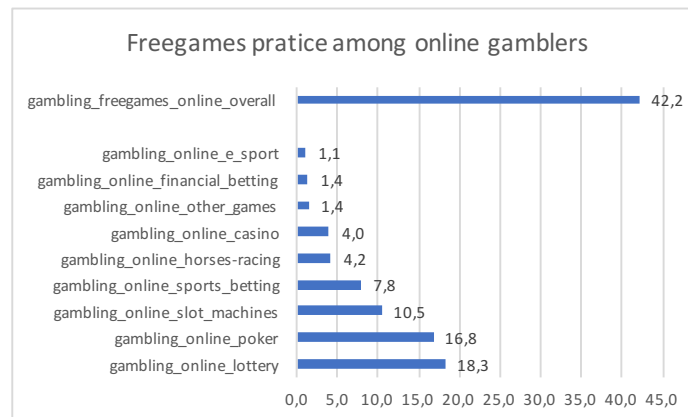
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Freegames practice among online gamblers	
Prevalence	42,2
Micro payment	
No	80,8
Yes	19,2
Time sequence: freegames/real gambling	
Before gambling	24,8
After gambling	45,6
At the same time as gambling	29,6
Links: freegames lead to playing real money?	
Yes	39,9
No	51,1
Don't know	9,0



PayToWin gaming

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Pratiques PayToWin games			
Play these games			
	59,2 %		
Spend money on these games			
		15,4 %	

PayToWin gaming –

is a social gaming activity characterized by the possibility to make payments during the game to significantly increase players' chances to win or to help players better progress or faster progress in the game compared to players not paying; that is, players do not have to spend money to stay in the game, but they can pay to get privileges to increase their chances to win or advance to higher levels in the game.

Legal status of activities

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Gamblers activity according to the legal status of the sites practiced					
in % *	Type de jeu **				Overall activities
	Lottery	Poker	Sports betting	Horses racing	
Play on at least one regulated site	0,0	0,0	0,0	0,0	0,0
Play on at least one unregulated site	0,0	0,0	0,0	0,0	0,0
Play on both types of sites	0,0	0,0	0,0	0,0	0,0
<i>where the nature of the activity is undetermined</i>	<i>0,0</i>	<i>0,0</i>	<i>0,0</i>	<i>0,0</i>	<i>0,0</i>
* % calculated on individuals for whom the nature of the activity is determined					
** Only games for which there is a regulated offer are present: lottery, poker, sports betting or horses racing on at least one licensed website. The other games are 100% played on unregulated websites.					
website (here, the website of the FDJ), 13.0% on at least one unregulated lottery website . The sum of these two figures is greater than 100 because 3.2% play on both types of site. Whatever the nature of the game played, 33.8% of players play on at least one unregulated website, including games for which there is no regulated offer.					

Online problem gambling in 2017

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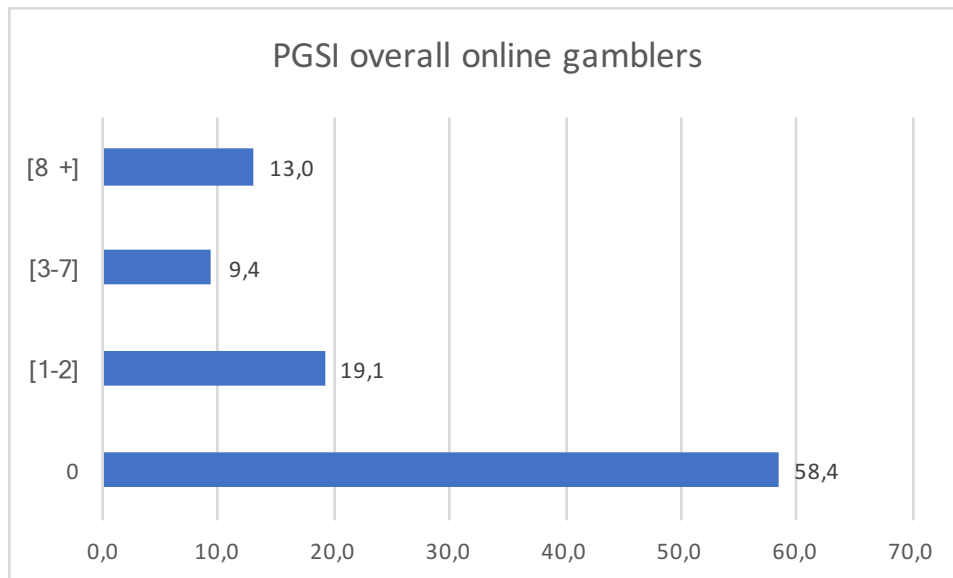
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Problem gambling and intensity

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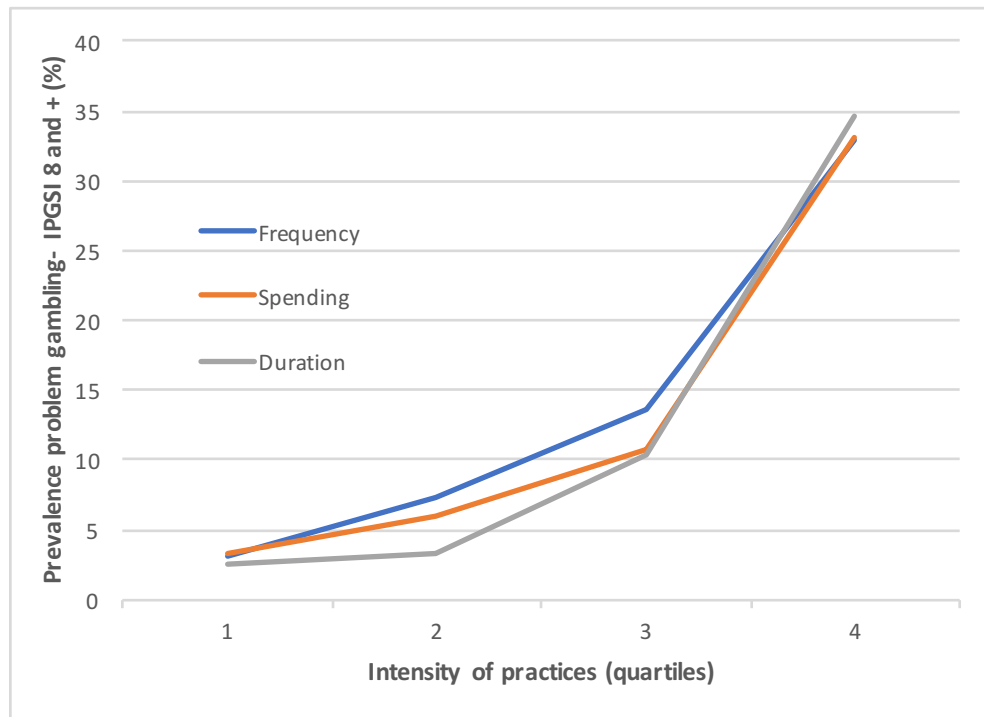
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Problem gambling and games

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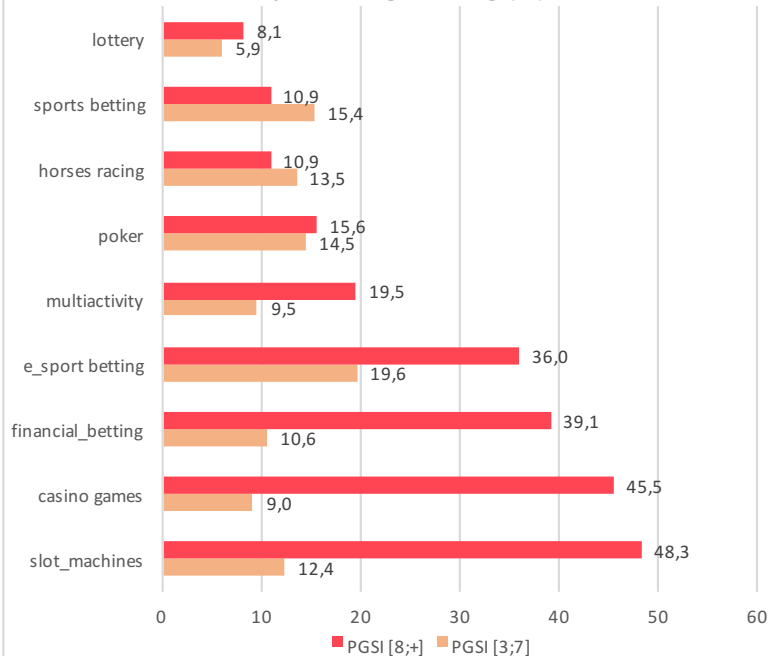
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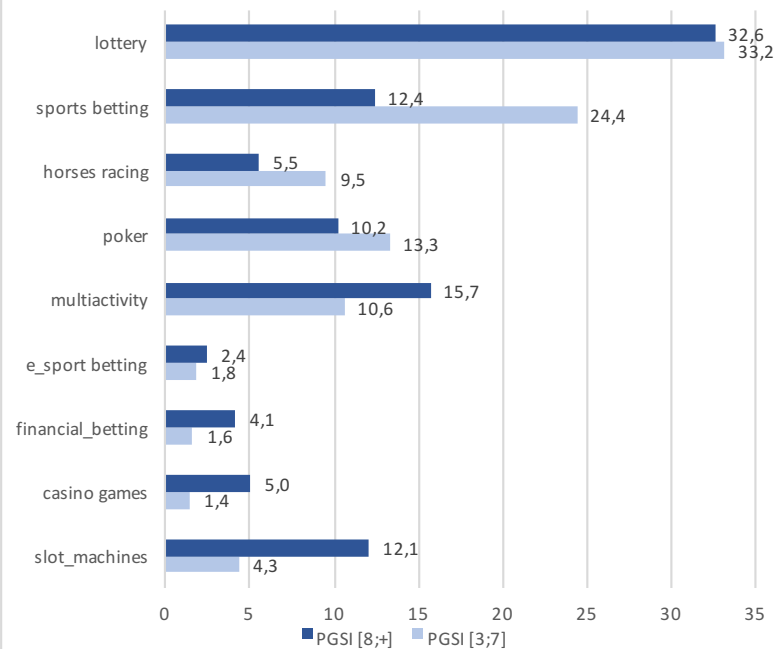
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PGSI and main activity played: prevalence of problem gambling (%)



PGSI and main activity played: share of the total number of gamblers (%)



Problem gambling related factors

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Associated factors for PGSI 8 and more		Problem gambling prevalence (%)	OR	Test	Associated factors for PGSI 8 and more		Problem gambling prevalence (%)	OR	Test
Gender	woman	9,9	ref.	-	Main game practiced	lottery	8,1	ref.	-
	man	14,7	1,57	***		horses racing	10,9	1,39	ns
Age	18-34 years	21,1	6,64	***		sports betting	10,9	1,39	*
	35-54 years	10,0	2,75	***		poker	15,6	2,10	***
	55 years and more	3,9	ref.	-		casino games	45,5	9,50	***
Education level	< Highschool	10,5	ref.	-		slot machines	48,2	10,61	***
	Highschool to college + 2	15,3	1,54	***		e_sport betting	35,9	6,37	***
	At least college + 3	13,2	1,29	*		financial betting	39,1	7,31	***
Marital status	Single	13,0	ref.	-		multiactiviy	19,5	2,76	***
	Divorced or separated	14,7	1,16	ns		Use bonus	No	9,5	ref.
	Widowed	6,4	0,45	**	Yes		32,5	4,59	***
	Marital Life	13,4	1,04	ns	Practice freegames	No	4,6	ref.	-
Professional activity and social category	Actifs_lower prof.	14,3	5,00	***		Yes	24,5	6,71	***
	Actifs_higher prof.	16,2	5,79	***	Practice offline gambling activities	No	10,6	ref.	-
	Actifs_median prof.	14,3	5,01	***		Yes	14,8	1,47	***
	Inactifs_unemployed	9,2	3,03	***	Spend money on PayToWin games	No	11,5	ref.	-
	Inactifs_students	21,0	7,96	***		Yes	27,4	2,91	***
	Inactifs_retired	3,2	ref.	-					
Income	less than 1500 €	22,3	2,86	***					
	1500-3000 €	14,1	1,64	***					
	more than 3000 €	9,1	ref.	-					

Evolutions on online gambling

2012-2017

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- ✓ Players' profile moves: more masculine, more active, more privileged social backgrounds
- ✓ The activities practiced evolve: sports betting in strong progression, unregulated activities
- ✓ Internet activity becomes predominant (among online gamers)
- ✓ Practices intensify, problems increase

Evolution on PGSI 2012-2017

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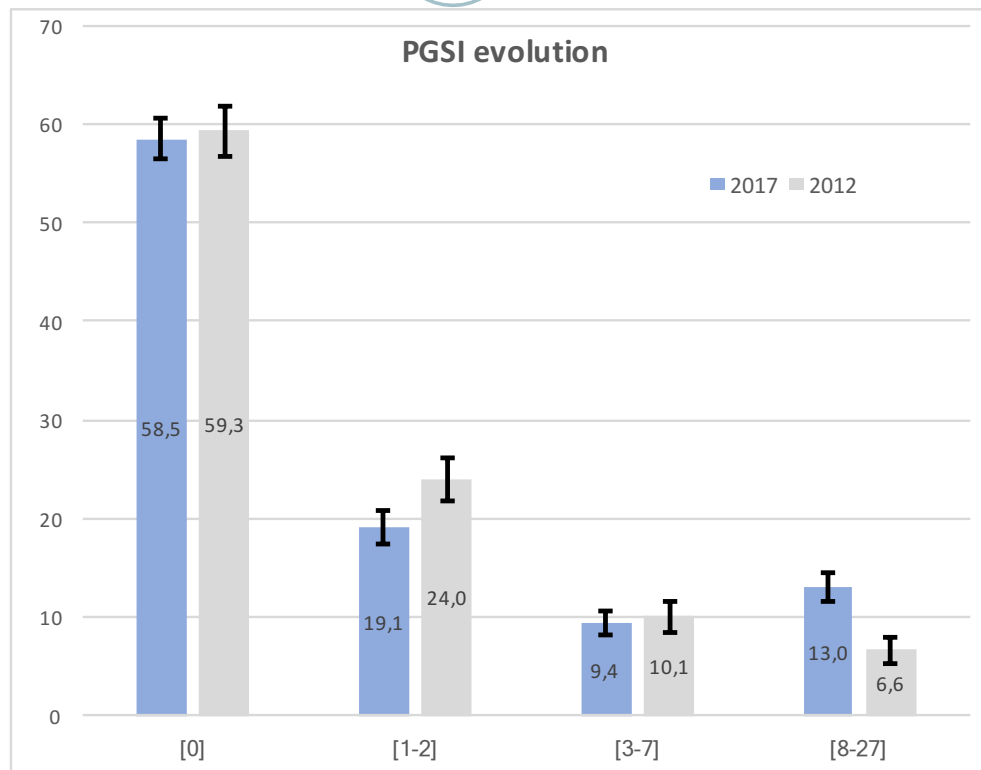
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In 5 years, the profile of players has changed, practices have been intensifying and problems related have been increasing

These results question the current strategies for preventing problem gambling online. We should think about it seriously and change it deeply.

Why is our strategy not more effective?

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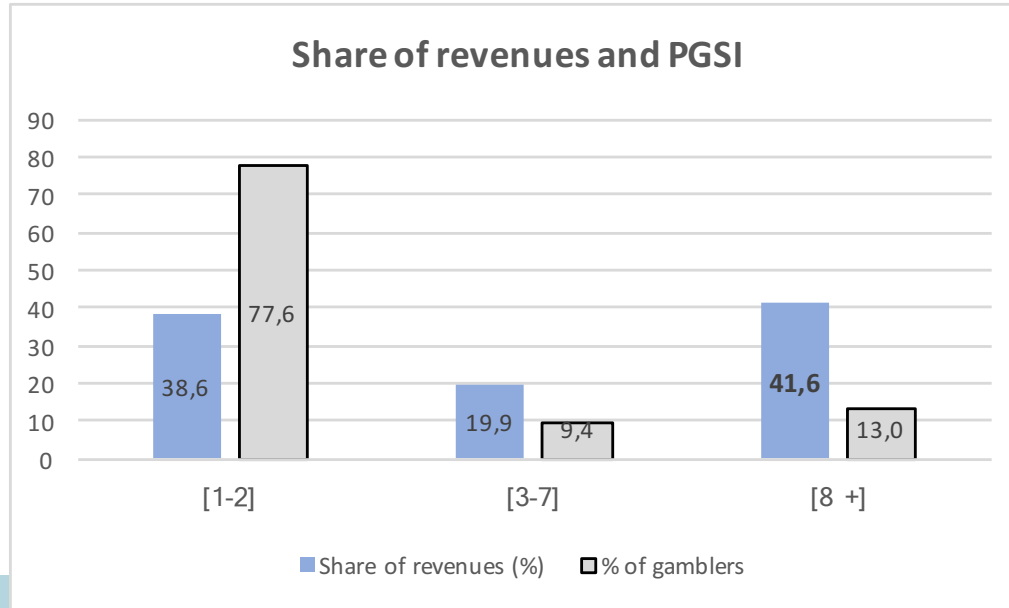
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- ✓ Current system is based on the goodwill of the operators, these are only means obligations



Why is our strategy not more effective?

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Conclusions

- ✓ Current system is based on the goodwill of the operators, these are only means obligations
- ✓ If certain measures, which have proved their effectiveness, have been deployed
- ✓ However, others which are equally effective, have not been implemented
- ✓ And, some measures with weak effectiveness or ineffectiveness have been widely deployed

Effectiveness and efficacy of problem gambling prevention measures

(24)

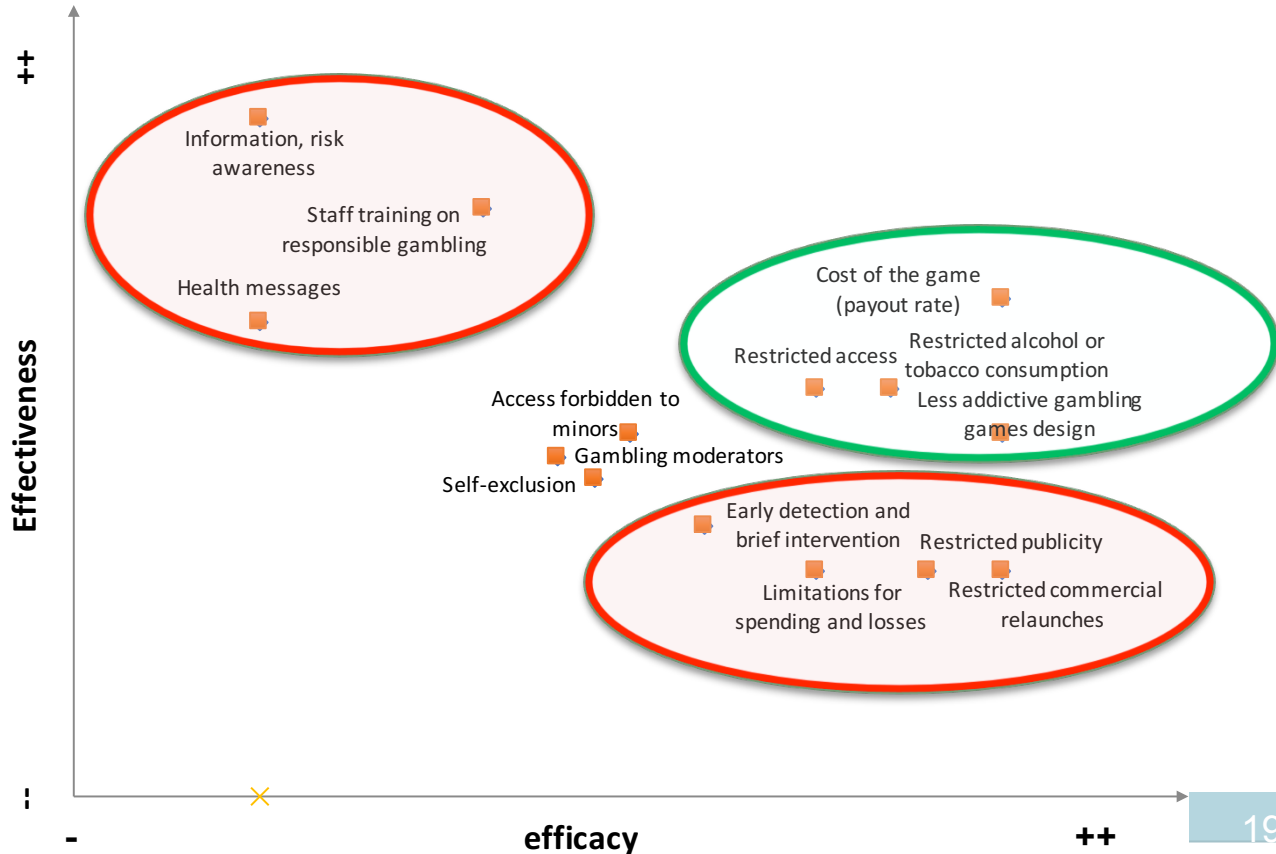
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How to improve our regulation?

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- 1) A strong regulation / limitation of gambling advertising.
- 2) A regulation based on an obligation of results. The digitized data of gaming activities offer us very good indicators of the results of the strategies "responsible game" of the operators
- 3) More restrictive devices of limitations of bets or time spent
- 4) The systematic provision when opening a tracking tools account of his gaming behaviour
- 5) The systematic detection of excessive players to offer relevant help and effective evidence based.

References

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