



GOVERNMENT
OF MALTA

MINISTRY FOR ECONOMY,
EUROPEAN FUNDS AND LANDS
PARLIAMENTARY SECRETARIAT FOR
EUROPEAN FUNDS



RESPONSIBLE
GAMING
FOUNDATION



EU funds
for Malta
2014-2020

NATIONAL SURVEY REPORT

Results of the Awareness Campaign Impact Evaluation



TAKE **ACT!**ON

Be a winner.
Know your limits.

ACT



Operational Programme II - European Structural and Investment Funds 2014-2020
"Investing in human capital to create more opportunities and promote the well-being of society"
Project part-financed by the European Social Fund
Co-financing rate: 80% European Union, 20% National Funds





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TAKE ACTION

Be a winner.
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INTRODUCTION

misco International was commissioned by Communiqué Ltd to carry out a national survey targeting at least five thousand respondents all over the Maltese islands. The key objectives of this exercise were to complement the Take Action Campaign and evaluate and understand the impact of the Campaign, while determining the perceptions of gambling and gaming amongst the Maltese population.

The information obtained has been divided into six sections, each one covering a different aspect of the research study carried out. They relate to the gaming activity in Malta, the incidence of gambling activity in Malta, gambling within the family, the perceptions of gambling, awareness of the Responsible Gaming Foundation, and awareness of the Take Action Campaign. Comparison is made to the results achieved as part of the research carried out in 2019 and presented in the following documents:

- Take Action Research Report
- Quantitative Research Project 1: A study on the social impact of gaming in Malta on self-barred gamblers
- Quantitative Research Project 2: A study on the social impact of gaming in Malta
- Quantitative Research Project 3: A study on the social impact of gaming amongst youths in Malta
- Qualitative research Report



METHODOLOGY

This research was carried out by means of a Computer Aided Telephone Interviewing (CATI) method, with a total of 5017 respondents, aged 18 years and over, across Malta and Gozo, according to a quota representative of the population in Malta and Gozo by age and gender and by location, and who by national law can participate in online and / or land-based gaming. Fieldwork was conducted between October 2022 and December 2022, following the Take Action Campaign.

Respondents were chosen at random, and the estimated margin of error is +/-1.4%, with 95% confidence limits. Telephone numbers were randomly selected using a random digit dialling system.

The questionnaire adopted for this research project was designed by the Responsible Gaming Foundation, reviewed by **misco** and eventually approved by the Responsible Gaming Foundation.

Interviewers involved in the project were selected from **misco's** pool of interviewers, who are all experienced and have been trained to carry out market research interviews. All interviewers were briefed on the purpose and method of the research before initiating fieldwork. A purposely trained coordinator supervised all fieldwork to ensure that it was carried out according to specifications.

The interviews were carried out between November and December 2022. Fieldwork hours for household surveys take place between 16:00 and 20:30 during weekdays and between 09:00 to 13:00 on Saturdays. Once fieldwork was completed the questionnaires were checked, coded, and passed on for data analysis. The data was analysed using misco proprietary software.



CONFIDENTIALITY

misco International assures clients that the results of this research are treated with strict confidentiality and anonymity. Raw data submitted personally will not be submitted to any third parties.

We are 100% committed to protecting confidentiality and will be forwarded to the Responsible Gaming Foundation and afterwards all research-related material will be deleted in a secure manner.

misco is a member of ESOMAR and undertakes its work in accordance with the code of practice of this organisation.

In addition to being completely voluntary, participation in this study was dependent on the respondent's informed consent and respondents were given the option to withdraw from the survey at any point.

OVERVIEW

Gaming is seen as an important leisure activity by a significant part of the Maltese population, with 41% (2052 individuals from a sample of 5017), having played virtual games not for money in the last year. Of these, 57% do so daily. As such 23% of all persons aged 18 and over play virtual games not for money on a daily basis. The extent to which gaming is an important leisure activity is that 85% of those who play virtual games do not believe it interferes with other aspects of their life.

30% of respondents (1503 individuals) stated that they have gambled for money in the last twelve months, with a higher level of incidence among males, as opposed to females. The data indicates that playing virtual games does not appear to lead to gambling. There was a noticeable drop in the incidence of gambling between 2019 and 2022.

Most gambling activities take place in gambling parlours (83%), followed by online iGaming (13%) and bingo halls (11%). Older males prefer gambling parlours, young persons prefer online iGaming while older females prefer bingo halls. On average there appears to have been a decrease in the amount spent on gambling. 8% (410 individuals) noted that members of their immediate family gamble.

Gambling is perceived to be an activity that persons conduct more out of habit, although a fun element is also seen in such an activity. Three out of four respondents believe gambling addiction to be a problem in Malta.

54% of respondents believe that it is easy to find help in Malta for gambling addiction. Awareness of the National Gambling Support Line is at 42%, 40% heard of the Responsible Gaming Foundation and 24% have heard of the online gambling chat support. Even among those who are aware of such support initiatives, there is not full awareness of what their role really is.

Just under two-fifths (1913 individuals) of the sample population were aware of the awareness campaign on excessive gaming and gambling carried out in the last months by the Responsible Gaming Foundation.



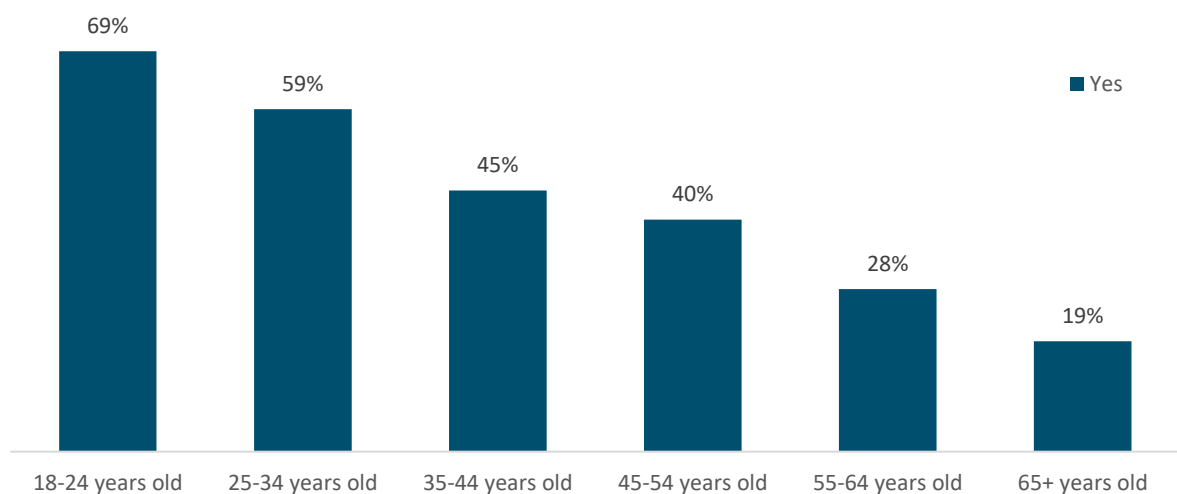
A positive outcome from the Campaign is that just over a half of respondents who stated to be aware of the Responsible Gaming Foundation and the Take Action Campaign, had not heard of the Foundation prior to the campaign, thus the awareness campaign was effective. However, just under three-fifths of respondents believe there is not enough awareness on excessive gaming and gambling in Malta and Gozo.

INTERPRETATION OF RESULTS AND DISCUSSION

GAMING ACTIVITY

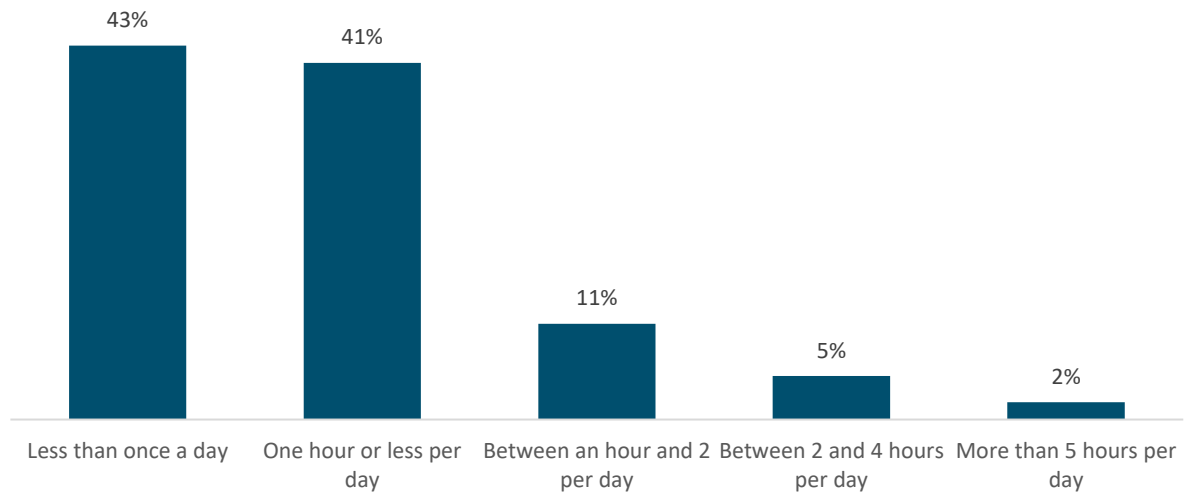
Across the Maltese population, just over two-fifths of individuals (41%) played virtual games, not for money, in the last year. The younger the individual, the more likely they are to game, particularly among males aged between 18 and 34. Most individuals game in order to have something to do (63%) or because they find it relaxing (33%). Whereas, among those who did not game in the last year, 72% noted that this is because they are not interested in such gaming activity. Particularly those aged 35 and over seem significantly more likely not to be interested in such activity.

Chart 1: Q101. Did you play any virtual games (not for money making) on a computer, mobile, tablet or other gaming console in the last year?



Among those who game, 43% do so less than once a day, whereas 41% game for one hour or less everyday. Males aged 18 to 34 and females aged 55 years and older are significantly more likely than other cohorts to game for two to four hours a day.

Chart 2: Q104. How much time do you spend gaming per day?



Most individuals (67%) noted that playing such online games has never taken time away from work, studies, family, friends, or relationships, however 18% noted this hardly ever happened, 14% said sometimes and for 1% this happens very often. When compared to 2019, a significant decrease is noted in the percentage share of individuals whose work or relationships have never been impacted by their gaming habits (76% in 2019; 67% in 2022). Among those who noted that playing such games sometimes takes time away from other responsibilities or relationships, a significantly higher percentage of single individuals and males aged between 18 and 34 can be seen.

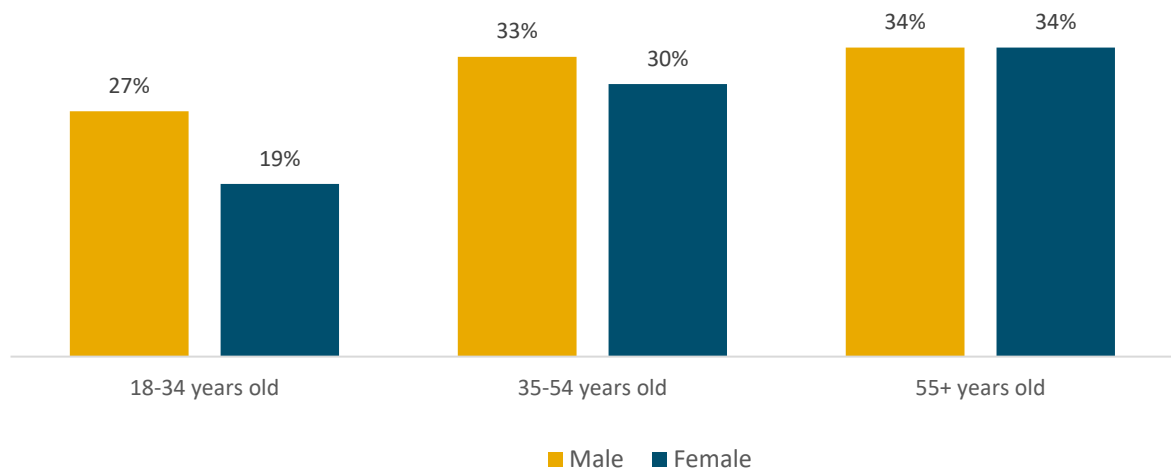
GAMBLING INCIDENCE

Just under a third of respondents (30%) have gambled for money in the past 12 months. Overall, males (32%) seem slightly more likely to gamble than females (28%). It is interesting to note that part of the fieldwork was conducted during the 2022 FIFA World Cup, which could have had an impact on this imbalance between the different genders. When compared to other cohorts, females aged between 18 to 34 are significantly less likely to have gambled in the last 12 months, whereas those living in the Southern Harbour region are slightly more likely to gamble when compared to other regions.



There seems to be no impact on ones' likelihood to game with their likelihood to gamble. 31% of those who have played virtual games in the past year have gambled for money, while 29% of those who have not played virtual games have gambled for money. As such, playing virtual games does not appear to lead to gambling.

Chart 3: Q106. In the past 12 months, have you gambled (not necessarily online) for money? ('Yes' percentage)



When compared to the data collected in 2019, a significant drop is noted in the percentage share of those who gamble within the population. Decreasing from 42% reported in 2019 to 30%. This drop could be due to the lower level of disposable income given the current rate of inflation and the global events that occurred between 2019 and 2022.

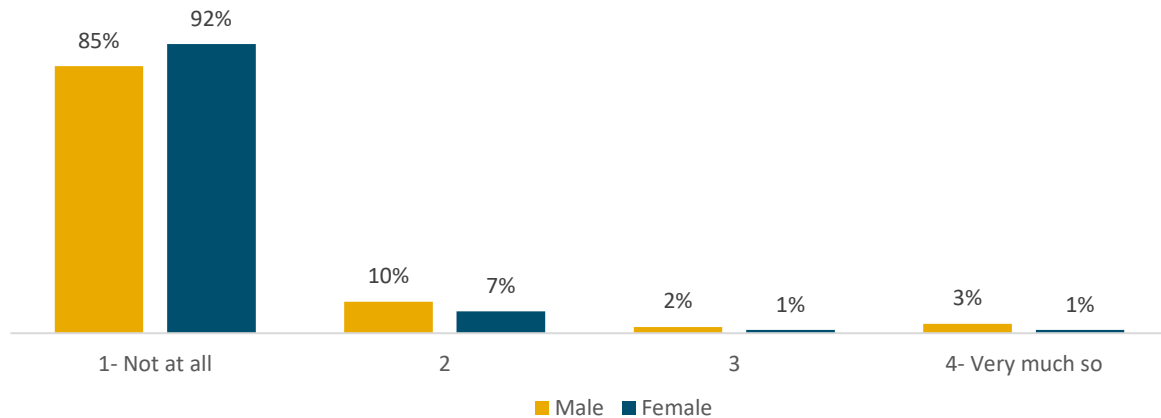
Chart 4: Gambling incidence 2019 vs 2022



Among those who have gambled in the last 12 months, 88% consider themselves not at all addicted to gambling. Only 3% consider themselves addicted to an extent.

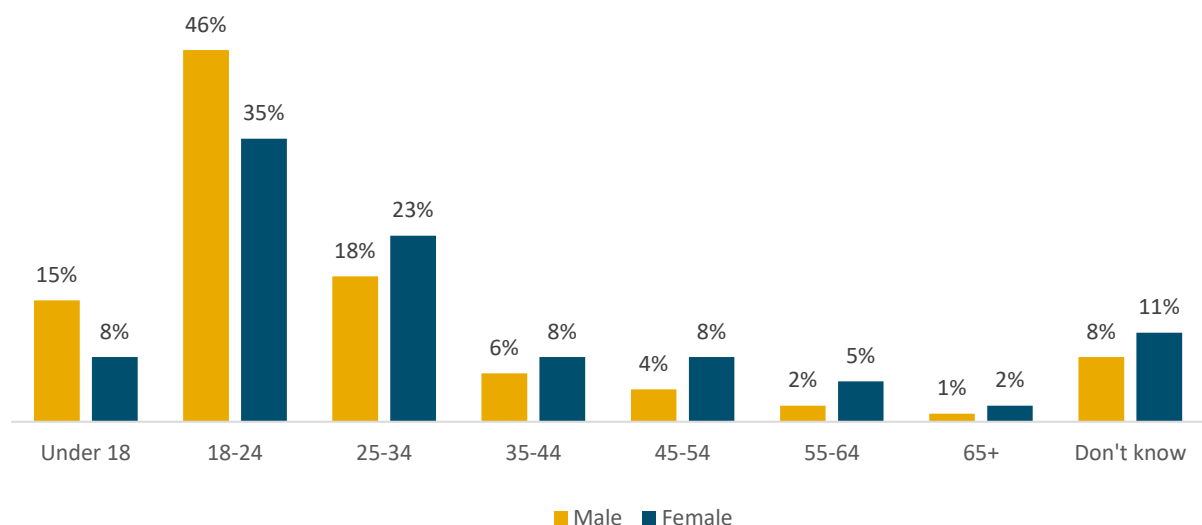
Overall, males are more likely to consider themselves addicted to gambling to an extent when compared to females.

Chart 5: Q107. On a scale of 1 to 4 where 1 means "not at all" and 4 means "very much so", to what extent would you consider yourself to be addicted to gambling?



More than one-tenth of those who gamble (12%) started when they were under the age of 18. Some commented that they were as young as 10 years old. Males are significantly more likely to have started gambling before the legal age of 18. Just over one-fifth of respondents (41%) started gambling between the age of 18 and 24. This age bracket seems most common among both Maltese and foreign individuals.

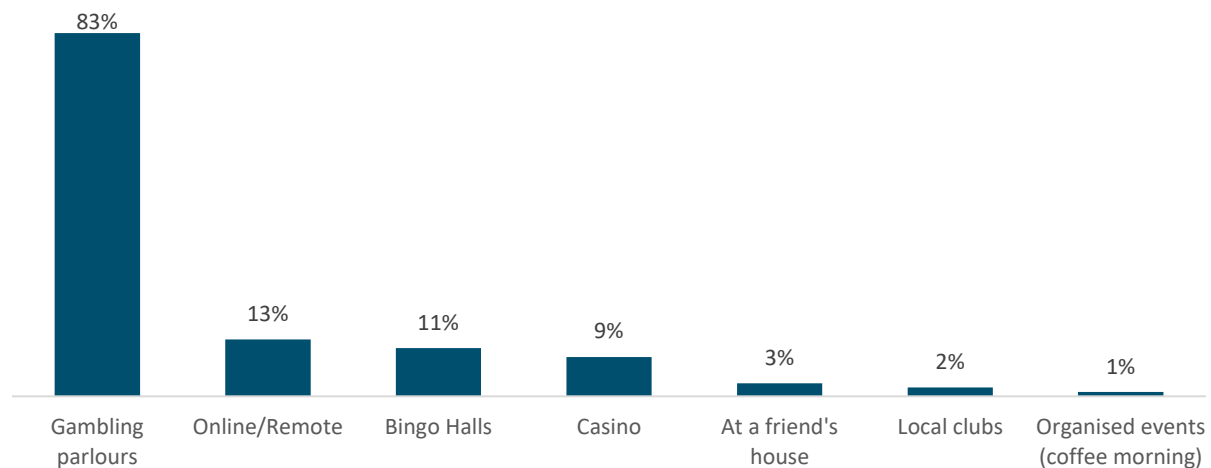
Chart 6: Q108. At what age did you start gambling?





Most gambling activities take place in gambling parlours (83%), followed by online iGaming (13%) and bingo halls (11%). Males aged 55 and older seem significantly more likely to opt to gamble in gambling parlours, whereas online or remote gambling is more common among males aged 18 to 34. Alternatively, bingo halls are significantly more common among females.

Chart 7: Q109. Where have you participated in a gambling activity?



Similar to the results obtained in 2019, 19% of those who have gambled for money, feel anxious when playing such games. Moreover, this study concluded that this was more likely among students and males aged 18 to 34.

Chart 8: Q110. Do you feel anxious when playing such games?

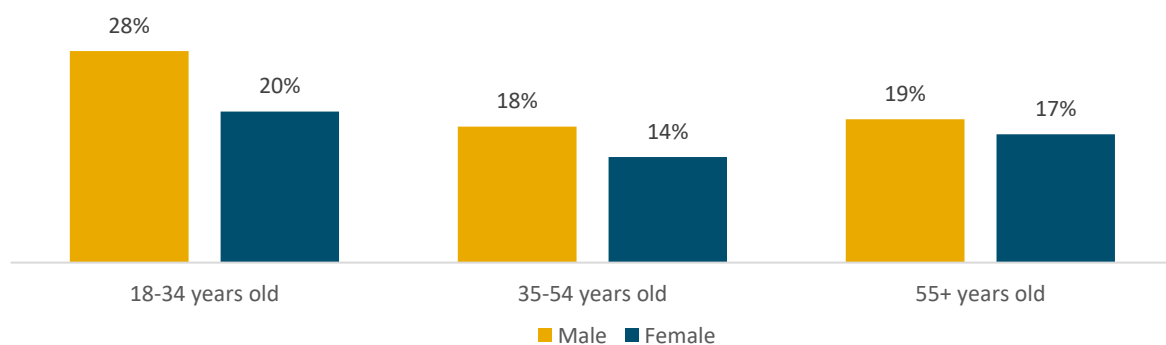
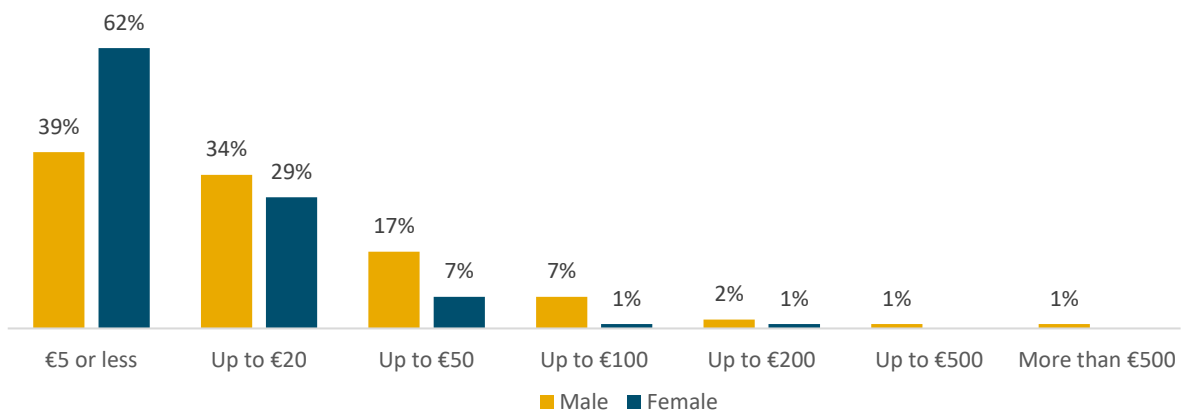


Chart 9: Anxious feeling 2019 vs 2022



Half of those who gamble, spend €5 or less per month. Such low amount is more common among females. Males seem more likely to spend a higher amount on a monthly basis. Just under one-tenth (8%) of males aged 18 to 34 who gamble, spend over €100 a month on this activity.

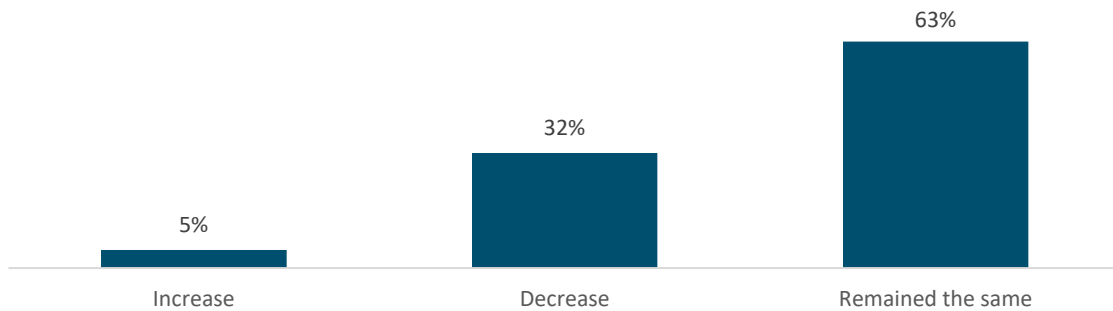
Chart 10: Q111. Approximately, how much money do you spend per month on gambling?



During the past 12 months, most individuals (63%) did not change their gambling expenditure. Just under a third of individuals (32%) decreased the amount gambled, increasing significantly when compared to 2019, where only 21% of the nationwide population noted a decrease in the amount spent. Moreover, most respondents (71%) do not reserve any funds from their income to spend on gambling, whereas 22% reserve less than 1%.



Chart 11: Q112. During the past 12 months, did you increase or decrease your gambling expenditure?

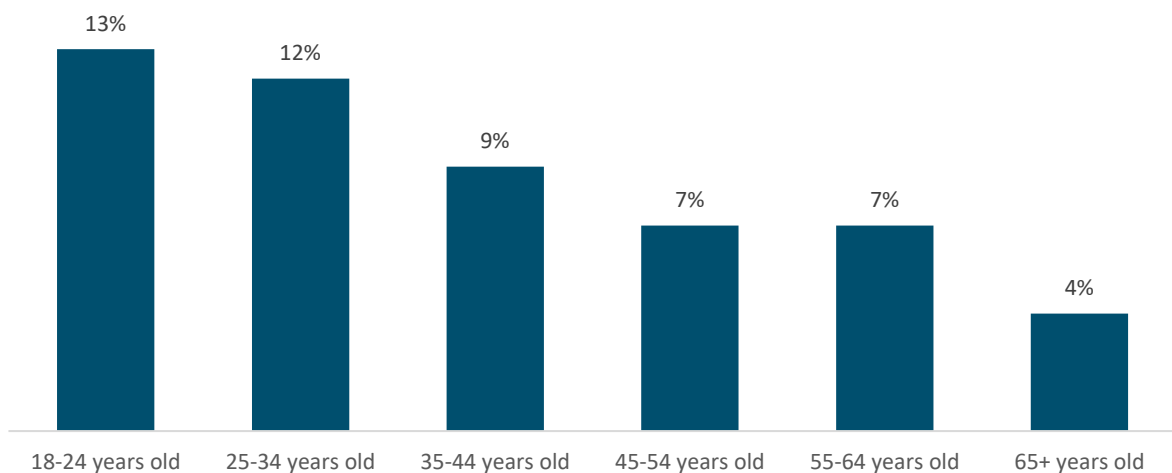


Among those 70% of respondents who do not gamble, 58% choose not to do so because they are not interested. Another 14% find gambling to be a waste of money and 6% noted that they avoid gambling because it is very difficult to win.

GAMBLING WITHIN THE FAMILY

Across all respondents, 8% noted that members of their immediate family gamble. The younger the respondent the more likely they are to have immediate family members who gamble. Gozitans are significantly less likely to have family members who gamble. Around half (48%) of those who have immediate family members who gamble, consider them to have a gambling problem and 43% would suggest to them to contact the Responsible Gaming Foundation for support.

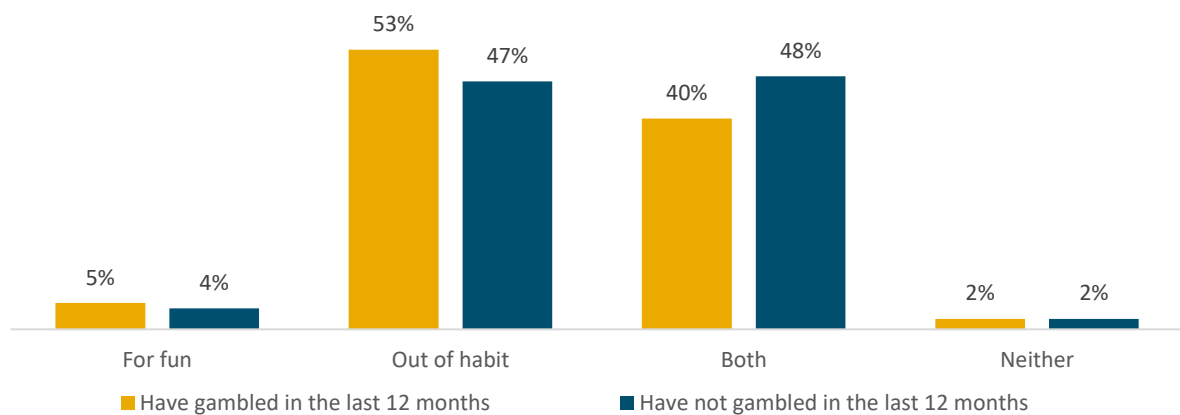
Chart 12: Q132. Do members of your immediate family gamble?



GAMBLING PERCEPTIONS

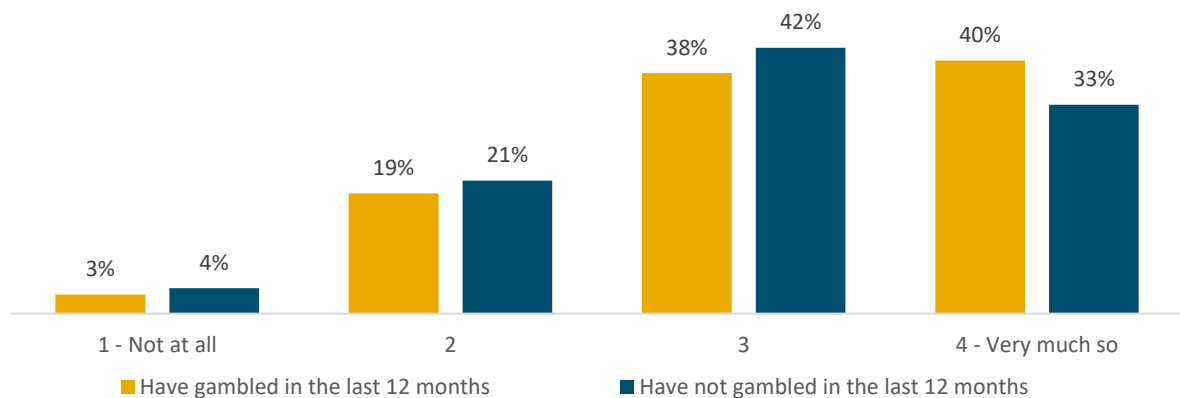
Just under half of the respondents (49%) think people who gamble do so out of habit, whereas only 4% believe people gamble for fun. Moreover, 45% believe people gamble for fun and out of habit. Those who have gambled in the last 12 months are slightly more likely to think people gamble out of habit.

Chart 13: Q115. Do you think people who gamble do so for fun or out of habit?



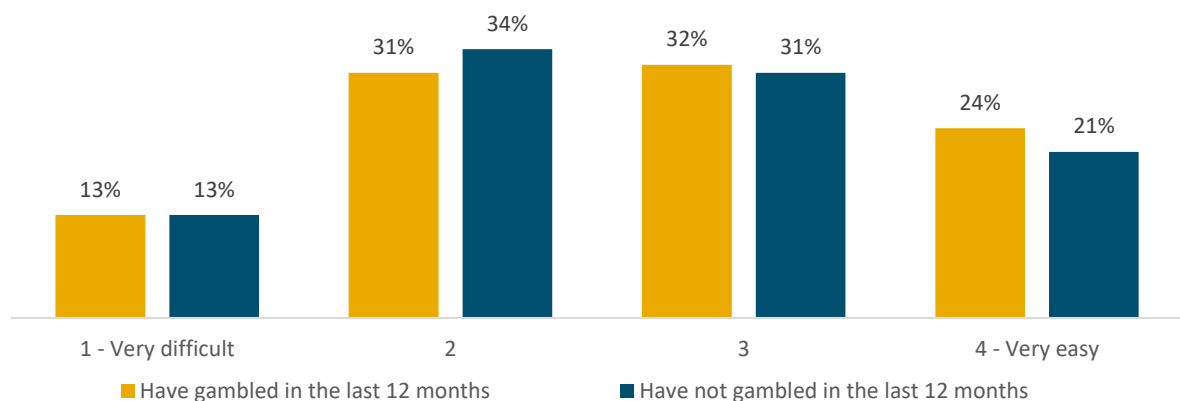
Just over three-quarters (76%) of respondents think that gambling addiction is a problem in Malta with 41% rating a score of 3 and 36% rating a score of 4 on a scale of one to four, where one meant not at all and four meant very much so. A significant increase when compared to the 56% of respondents who considered excessive gambling to be a problem in Malta in 2019. Data gathered in 2022 shows that those who gamble seem significantly more likely to perceive gambling addiction in Malta to be very much so a problem.

Chart 14: Q116. How much of a problem do you think the gambling addiction is in Malta?



Moreover, respondents were asked to determine how easy they think it is for someone with a gambling problem to find support in Malta. Just over half of the respondents (54%) believe it is very easy or rather easy. Those who have gambled in the last 12 months seem slightly more likely to believe finding help is very easy in Malta.

Chart 15: Q117. How easy do you think it is for someone with a gambling problem to find support in Malta?



RESPONSIBLE GAMING FOUNDATION

Across all respondent groups, 42% have heard of the National Gambling Support Line 1777, 40% heard of the Responsible Gaming Foundation and 24% have heard of the online gambling chat support. Moreover, 40% had heard of none of these.



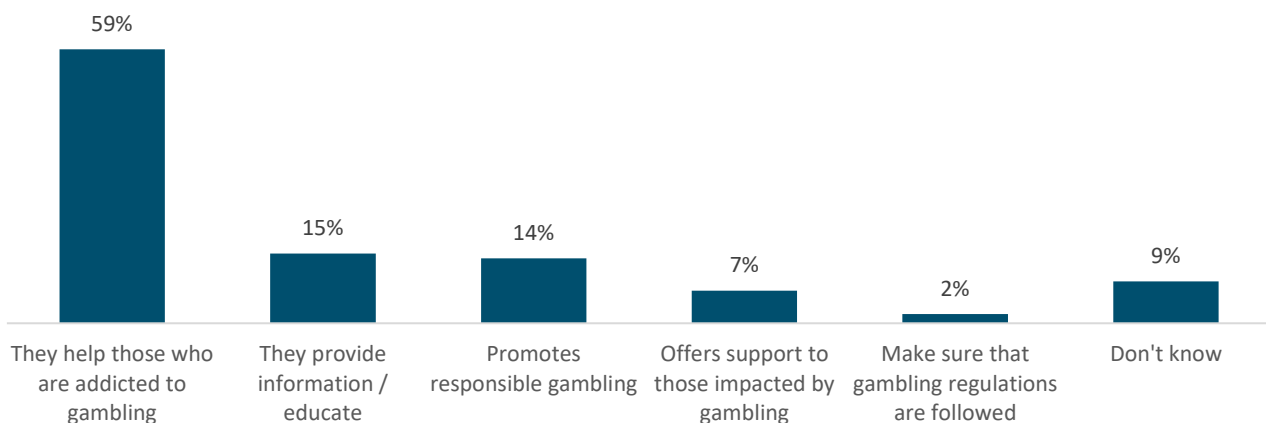
Individuals living in Gozo seem significantly more likely to have never heard of the Responsible Gaming Foundation or its functions. From those who have heard of the National Gambling support line, only 1% have made use of it.

Chart 16: Q118. Have you heard of any of the following?



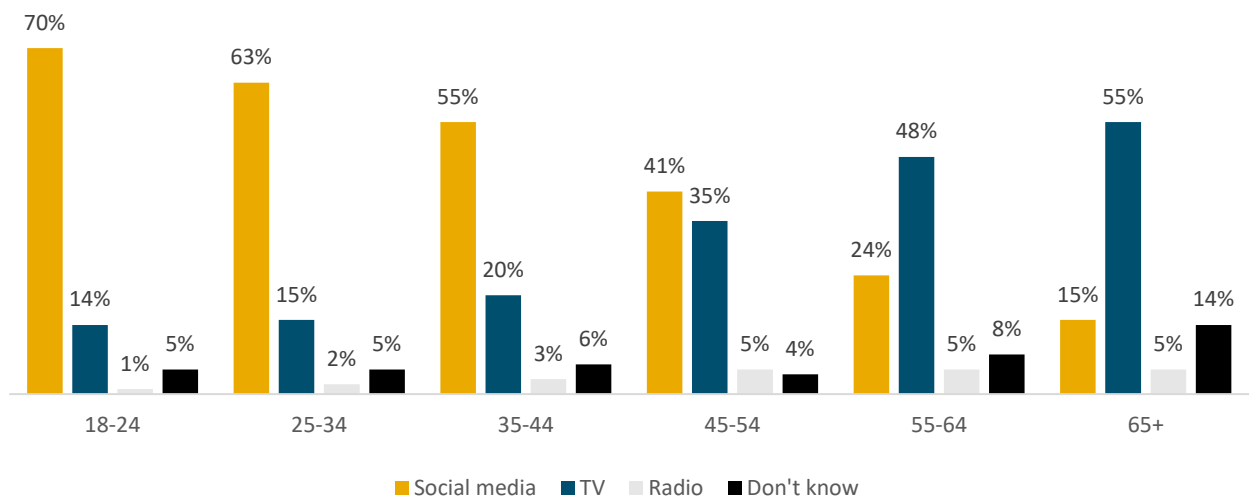
Among those who have heard of the Responsible Gaming Foundation, 59% believe that the role of the Foundation is to help those who are addicted to gambling. Moreover, 15% believe their role is to provide information and education on gambling and 14% think it aims to promote responsible gaming. Just under one-tenth (9%) are not aware of the Foundation's role. Those aged 65 and older seem significantly more likely to not be aware.

Chart 17: Q120. What do you think is the role of the Responsible Gaming Foundation?



Respondents were asked to determine which method they think would be most effective to share information about excessive gaming and gambling. Just over two-fifths of respondents (42%) mentioned using different social media platforms, whereas 33% mentioned sharing information on the television. The younger the respondent the more likely they were to mention using social media whereas the older the respondent the more likely they were to mention television. Moreover, during data collection, many commented that different platforms must be used to reach different audiences.

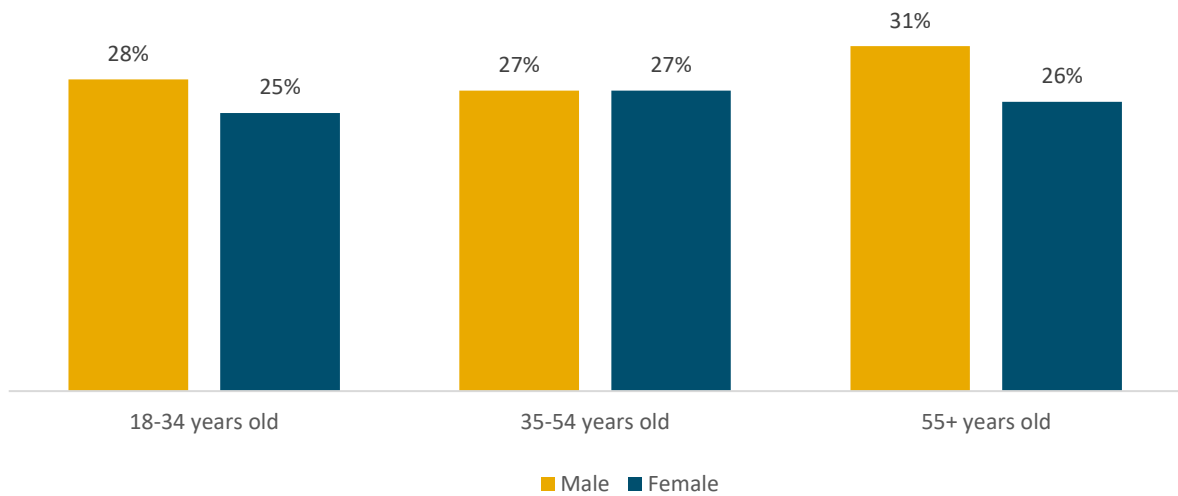
Chart 18: Q129. What method do you think would be most effective to share further information about excessive gambling and excessive gaming?



Just over a quarter of respondents (29%) have heard of the self-exclusion form. A significant increase when compared to 2019 (19%). Males aged between 35 to 54 years seem more likely to have heard of such forms. Additionally, when comparing those who gamble against those who have not in the past 12 months, those who have gambled, are significantly more likely to have heard of such exclusion forms. However, when analysing those who consider themselves very much so addicted to gambling, only half of such individuals are aware of the self-exclusion form.

Among those aware of the self-exclusion form, only 22% knew that the Responsible Gaming Foundation was responsible of processing such forms.

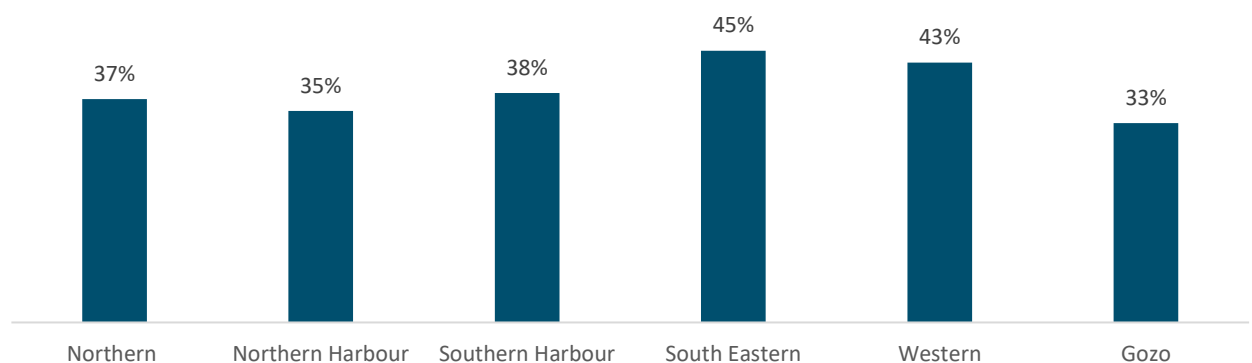
Chart 19: Q130. Have you ever heard of a self-exclusion form that excludes you from land-based gaming parlours? ('Yes'- percentage)



TAKE ACTION CAMPAIGN AWARENESS

Just under two-fifths of respondents (38%) were aware of the awareness campaign on excessive gaming and gambling carried out in the last months by the Responsible Gaming Foundation. Younger males are significantly less likely to have heard of this campaign whereas those living in the south-eastern region are most likely to have heard. In contrast, whereas 40% of Maltese individuals had heard of the campaign, only 13% of foreigners had heard of the Take Action Campaign.

Chart 20: Q121. Are you aware of an awareness campaign on excessive gaming and gambling that was carried out in the last months by the RGF? ('Yes'- percentage)





Two-thirds of those who have heard of the Take Action Campaign, saw it on TV, whereas 21% heard of it on the radio. The older the individual, the more likely they are to have heard of the campaign through the TV, whereas younger individuals were significantly more likely to have seen the campaign on social media.

Chart 21: Q122. Where did you hear or see the campaign?

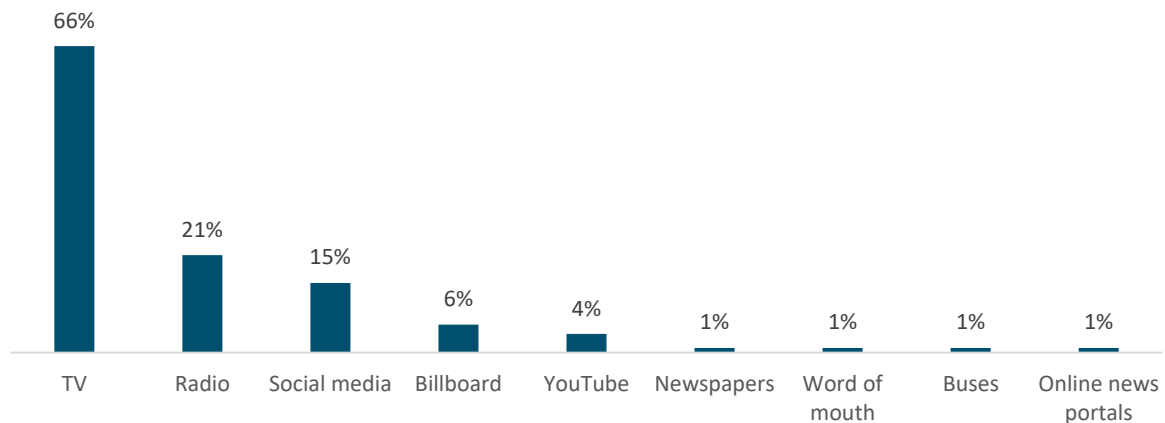
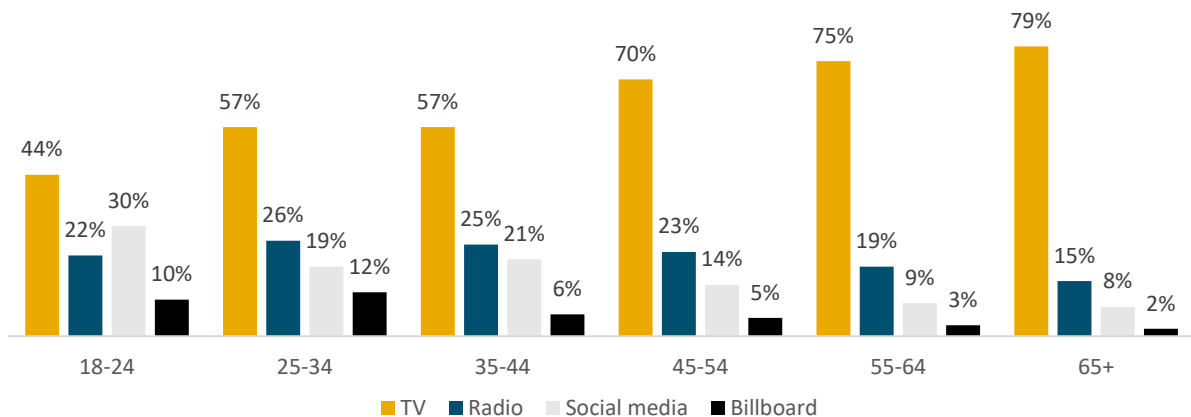


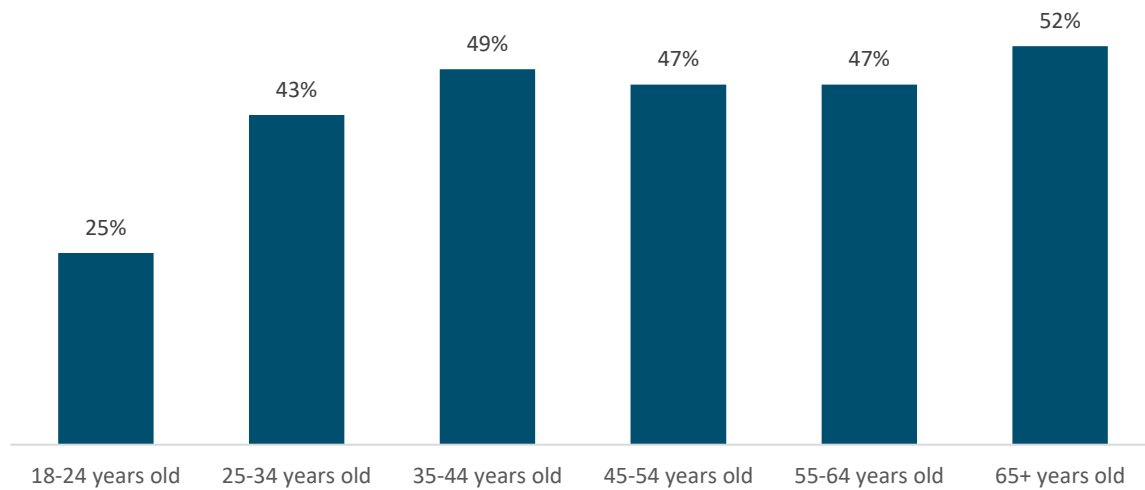
Chart 22: Q122. Where did you hear or see the campaign? - by age



Just over a half of respondents (54%) who stated to be aware of the Responsible Gaming Foundation and the Take Action Campaign, had not heard of the Foundation prior to the campaign. The campaign served to introduce the Responsible Gaming Foundation to many, particularly to those aged 18 to 24.



Chart 23: Q123. Have you heard of the Responsible Gaming Foundation before the campaign? ('Yes'- percentage)

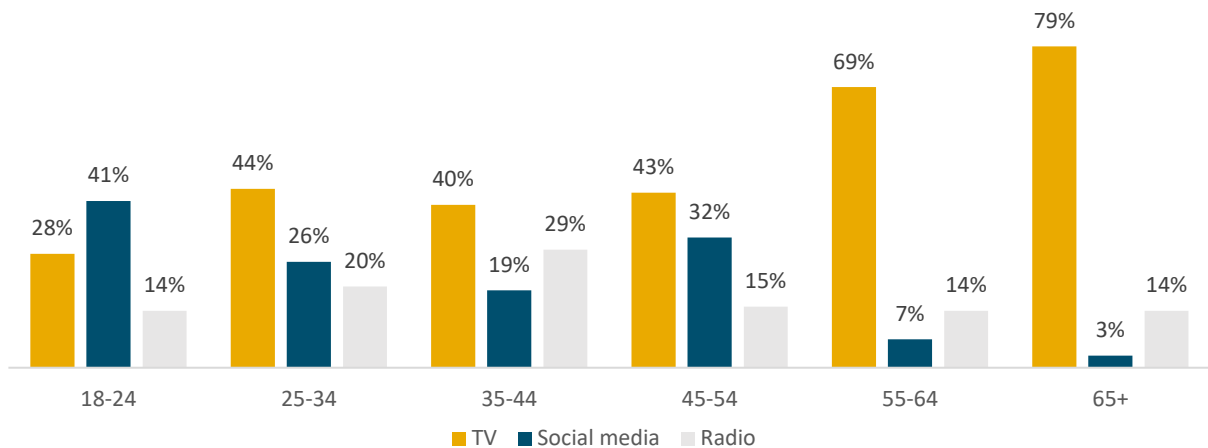


For 19% of those who were aware of the excessing gaming and gambling campaign, found that the campaign provided them with new information. The younger the individual, the more likely they are to have learnt new information from the campaign. Moreover, among those who found the Take Action Campaign to have provided them with new information, only 19% shared such information with others.

Just under half (47%) of those who found the campaign to have provided them with new information, found that the TV campaign medium to be most informative. This medium was followed by social media (24%) and the radio (19%). As expected, older individuals were more likely to have found the information shared in TV to be most informative, whereas those aged 18 to 24 were more likely to have considered social media as most informative.



Chart 24: Q126. Which campaign medium do you think provided the most information?



All respondents were asked to what extent they agreed with various statements used in the Take Action Campaign. Most respondents strongly agreed with all five statements however, most respondents (76%) strongly agreed with the statement *"Be responsible. Be in control of your gambling activity."*

Chart 25: Q127. On a scale of 1 to 4, where 1 means "strongly disagree" and 4 means "strongly agree", to what extent do you agree with the following?

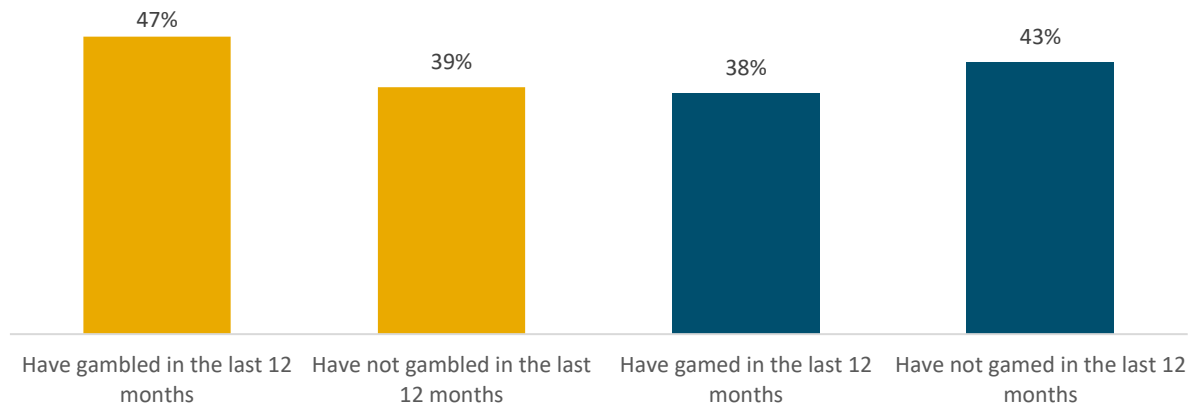


Just under three-fifths of respondents (59%) believe there is not enough awareness on excessive gaming and gambling in Malta and Gozo. Those who gambled in the last 12 months are more likely to think there is enough awareness however among



those who play virtual games, they are more likely to think there is not enough awareness.

Chart 26: Q128. Do you think there is enough awareness on excessive gaming and gambling in Malta and Gozo? ('Yes' percentage gamblers vs non-gamblers)



CONCLUSION

When comparing findings of this study to that carried out in 2019, a number of conclusions can be drawn.

In this wave of the project, a drop is noted in both gaming and gambling incidence. In comparison to the 48% reported in 2019, 41% of the general population play online games for fun. Although the overall percentage decreased, the incidence of gaming among the younger cohort remained overall stable. The percentage of gamblers among the nationwide sample decreased significantly from 42% in 2019 to 30% however the percentage share of gamblers among the younger cohort remained stable at around 17%.

The majority of the population have heard of either the Responsible Gaming Foundation or one of its functions. Gamblers were significantly more likely to be aware of the foundation or one of its functions which may possibly serve to highlight effective outreach among its target groups. Lower awareness levels can be noted in Gozo when compared to other regions. A slightly higher percentage of the population have heard of the Support Line.

Just under one fourth of respondents were aware of the campaign which potentially highlights effective outreach. Throughout the campaign, the TV and social media where among the most effective mediums. Different means were effective among different age cohorts. It is evident that the awareness campaign was effective in introducing the Responsible Gaming Foundation to many.

Just under three-fifths of individuals do not believe there is enough awareness on excessive gambling in Malta and Gozo. This may serve to show the need for further campaigns potentially on a bigger scale to reach a bigger share of individuals.