



## THE SOCIOECONOMIC IMPACTS OF CASINO TOURISM IN SLOVENIA'S OBALNO-KRAŠKA REGION

**BALAŽIČ Gregor**

*University of Primorska, Slovenia*

### **Abstract:**

*Casino gambling in the Obalno-kraška region has had a long tradition, its origins dating back to the beginning of the 20th century. Ever since its rebirth during Yugoslav times in the 1960s, casino tourism has contributed significantly to the development of the area. Until recently, casino tourism has been one of the most important forms of tourism in addition to 3S and congress tourism. The purpose of this paper is to determine the contribution of casino tourism to the regional development of the Slovene Istria. To this end, selected socioeconomic indicators were examined and compared with the average indicator rates of regional development at the national level. The results show that casino tourism is an important factor of regional development. However, casino tourism's future role in regional development remains an open question due to the impacts of the financial crisis and the consequent decline in the number of guests, as well as reduced levels of investment in the region.*

**Key words:** *casino tourism, regional development, socioeconomic impacts, Obalno-kraška region, gambling*

### **1. Introduction**

Gambling is a very important part of Slovenia's tourist offer (Pahor, 2007). Gambling in Slovenia began in 1913 in Portorož with the establishment of the Casino Society d'Étranger, which offered socializing and entertainment for people in the summer resort of Portorož. Society members were allowed to play board and other legal games. Soon after the breakout of World War I the society ceased to function. In 1946, the then Yugoslav Ministry of Finance determined that lotteries, bingo and other games of chance could be organized but only for humanitarian purposes. In 1962 a new gambling law was passed, allowing lotteries, bingo, sports pools, lotteries and other games in which the final outcome was not dependent on the skills of the participants, rather on mere chance (Mihelič, 1993). In post-war Yugoslavia, as elsewhere throughout the world, gambling became one of the fastest growing and most attractive activities in the last decades of the 20th century (Eadington, 1997).

Slovenian legislation distinguishes between two types of gaming facilities, casinos and slot halls. The slot halls can operate with 50 to more than 200 slot machines, while for casinos this restriction does not apply. The casinos also organize live games that are not allowed in slot halls (FURS, 2014).

Casino tourism became more widespread after the independence of Slovenia, more precisely since 2000, when small private companies obtained the right to open slot halls. Their aggressive entrance into the market resulted in attracting both domestic and foreign visitors and they quickly gained a significant market share (Zagoršek&Jaklič, 2007). According to the Register of Concessionaires for casinos and slot halls, in 2014 (FURS, 2014a) Slovenia had 9 casinos and 31 slot halls. This is a decrease from 2007, when there were 13 casinos and 31 gaming halls (Vlada Republike Slovenije, 2010).

The Obalno-kraška statistical region of Slovenia (the littoral, the karst) has 2 casinos owned by the state company Casino Portorož, one in Portorož and one in Lipica. In addition the region also has 11 slot halls, the locations of which can be seen on the map below. From this it is clear that the offer of casino tourism represents more than 1/5 of the casinos and more than 1/3 of the total slot halls in Slovenia. Only the Goriška statistical region (Nova Gorica seats on the Italian border) where the state company Hit, one of the biggest gaming companies in Europe, is located has more casinos and visitors (Hit is considered the most advanced and recognized casino company in Slovenia).

**Figure 1: Grand Casino Portorož**



Source: Gregor Balažič

In the field of studying the impact of casino tourism in Slovenia, most of the research work has been focused on the Goriška statistical region, the most developed casino tourism area, while the Obalno-kraška statistical region, where casino tourism has its roots and is certainly one of the most important types of tourism has been neglected. Since casino tourism is considered one of the major contributors of the tourist industry, we hereafter focus on the analysis of the socio-economic impacts of casino tourism in the Obalno-kraška statistical region.

Figure 2: Map of casinos and slot halls in Slovenia



Source: Gregor Balažič (content) and Nataša Kolega (map).

## 2. Literature review and methodology

In the field of studying the impact of casino tourism the lion's share of the foreign scientific and professional literature focuses only on one aspect; that is, the socioeconomic. The literature in most cases focuses on examples considering the impacts of casino tourism in the US and Asia, while that for other areas of the world is lacking or is in progress. In most cases, the impacts or effects of casino tourism have been studied by economists and sociologists. The same is true for Slovenia, but it is necessary to stress that previous studies, mostly articles and monographs, focus only on the case of the region of Nova Gorica. Consequently, the Obalno-kraška region has been neglected, despite the fact that its casino tourism is highly developed and has an impact on the economy, society and regional development. The world's scientific literature shows the complexity of the research of socioeconomic impacts of casino tourism, with a focus on the positive effects of gambling on the economy with higher salaries and jobs and the negative effect in society because of addiction to gambling and other social problems.

The literary review has turned up a number of similar studies that present the socioeconomic effects of casino tourism. Nothing listed below stands outside the particular methodology that is reflected by statistical measures of number of visitors, income, salaries, and various social ills such as divorce and gambling addiction in

areas where there is a concentration of casinos. This paper deals in particular with the littoral and kras regions of Slovenia, but otherwise falls into the same general category.

Some prominent scientific monographs dealing with the socioeconomic effects of casino tourism were edited by Eadington&Cornelius (1997), Hsu (1999) and Hsu (2006). Thus, in the monograph entitled *Gambling Public Policies and The Social Sciences* edited by Eadington& Cornelius (1997), appear numerous authors such as Truitt (1997), Rittvo (1997) and Anders (1997) that focus on economic effects of casinos in the United States. Social impacts were addressed by Albanese (1997), Long&Kang (1997) and Walker (1997). In the monograph entitled *Legalized Casino Gaming and the United States, The Economic and Social Impact*, edited by Hsu (1999) numerous authors such as Thompson (1999), Heneghan (1999) and Stokowski (1999) deal with the economic effects of casino, while social impacts are studied by Oh (1999), Rudd (1999) and Hsu (1999a). The monograph titled *Casino Industry in the Asia Pacific, Development, Operation and Impact*, which was published in 2006 and also edited by Cathy H. C. Hsu, deals with the economic and social effects of casino tourism. Authors like Buultjens&Hsu (2006) focus on economics, while Hing (2006) on the social aspect of effects of casinos. Some authors, such as Deller&Chen (1997) and Back&Lee (2006) deal with both the economic as well as social effects of casinos.

There are numerous foreign scientific articles on the socioeconomic impact of gambling. We will focus only on the most recent and significant. In an article entitled *Perceived Impacts of Gambling: Integration of Two Theories* in the journal *UNLV Gaming Research & Review Journal* the authors Chhabra&Gursoy (2007) discuss the impact of gaming on the attitude of the local population towards the development of casino gambling. In an article entitled *Changes and Residents' Gambling Attitudes and Perceived Impacts at the Fifth Anniversary of Macau's Gaming Deregulation* in the *Journal of Travel Research* author Vong (2009) examines the impact of the amended legislation on the habits and behavior of the local population in Macau after 2002. In the article, entitled *The Social, Economic and Environmental Impacts of Casino Gaming and Macau: the Community Leader Perspective* in the *Journal of Sustainable Tourism* author Wan (2012) deals with social, economic and environmental impacts of gambling in Macau, while the authors Wu&Chen (2015) in an article titled *The Social, Economic, and Environmental Impacts of Casino Gambling on the Residents of Macau and Singapore* in the journal *Tourism Management* address the social, economic and environmental impacts of gambling on the people of Macao and Singapore.

The field of studying the impact of casino tourism has also generated a number of studies. Among the most notable are the study of the *National Gambling Impact Study Commission* (1999), which deals with economic and social impact of casino gambling in the USA and the study *Research on the Social Impacts of Gambling* by author Reith (2006), which deals with the issue of the social impact of casino gambling in Scotland. In Slovenia an important study entitled *Analysis of the Impact of Gaming Activities on the Economic and Social Environment in the Municipality of Nova Gorica* was made by authors Prašnikar, Pahor and Knežević (Prašnikar et al. 2005), which

examines the impact of casino gambling activities in the economic and social environment in the most prominent casino tourism municipality in Slovenia.

The purpose of this paper is not to divide the effects of casino tourism between positive and negative, but to highlight the contribution of the casinos to regional development. The fundamental question that we want to answer is what the effects of casino tourism are and how they affect the economy and society of the Obalno-kraška region. The article aims to analyze the socioeconomic effects of casino tourism and interpret their impacts on regional development. We used selected economic and social statistical indicators that are analyzed and compared with those at the municipal, regional or national level.

### **3. Analysis of the socioeconomic impacts**

Due its specificity casino tourism has specific socioeconomic effects in space and society, and these can be divided into positive and negative. Socioeconomic effects, which are analyzed below, are presented on the basis of available statistical indicators concerning the economic and social fields. They are analyzed separately. In addition to the analyzed socioeconomic effects there are also other effects in space and society that are difficult to measure or lack statistical data. Such effects from the economic point of view are the impact of gambling on other companies and the occurrence of personal bankruptcies and or indebtedness, while from the social point of view there are the phenomena of crimes including prostitution.

From the economic point of view, we analyze three indicators relating to the impact on economic development. These are the impact of gambling on employment and salaries, and the impact of casinos on the municipal budget, in this case the municipality of Piran.

The analysis includes an indicator of the amount of average salary based on ISCO 2008, valid for the last 12 months of the current year at the national level, an indicator of the number of visits to casinos and slot halls of the company Casino Portorož, which refers to all visits to casinos and slot halls owned by the company and the indicator of generated concession fee, which refers to the concession fee, paid by all casino companies in the gaming area in the region compared to the amount of the annual budget of the municipality of Piran.

**Table 1: Economic indicators**

<b>Average Salary/Year</b>	<b>Activities of casinos R92.001 (EUR)</b>		<b>All activities, ISCO 2008 (EUR)</b>	
<b>2010</b>	2103.45	1315.87	1494.88	966.62
<b>2011</b>	1978.13	1260.38	1524.65	987.39
<b>2012</b>	1881.29	1215.69	1525.47	991.44
<b>2013</b>	1894.77	1223.18	1523.18	997.01
<b>2014</b>	2251.15	1306.14	1540.25	1005.41

<b>Number of visits/arrivals/Year</b>	<b>Casinos and slot halls of Casino Portorož</b>	<b>Tourist arrivals</b>
<b>2005</b>	585,000	359,717
<b>2006</b>	593,000	360,786
<b>2007</b>	538,738	376,535
<b>2008</b>	467,918	399,406
<b>2009</b>	437,295	386,681
<b>2010</b>	374,439	-
<b>Revenue/municipality budget/Year</b>	<b>Concession fees from casinos and slot halls (EUR)</b>	<b>The budget of the municipality of Piran (EUR)</b>
<b>2006</b>	1,148,896.49	1,624,892.66
<b>2007</b>	1,125,838.73	20,940,913.11
<b>2008</b>	1,206,877.57	25,416,320.96
<b>2009</b>	1,259,043.18	39,650,358.52
<b>2010</b>	1,254,486.51	27,748,781.14
<b>2011</b>	1,183,458.07	26,233,345.33
<b>2012</b>	995,717.01	24,837,231.02
<b>2013</b>	1,027,484.27	22,914,080.94
<b>2014</b>	961,963.05	25,589,224.27

Source: OP, 2015; Casino Portorož d.d. 2015; SURS, 2015, SURS, 2015a).

From Table 1 it is evident that the average annual salaries within the field of gaming in the gaming area, from 2010 to 2014 were significantly higher than the average annual salaries related to all activities of the ISCO 2008 for the state level. Average salaries were, despite the financial and economic crisis, about one-third higher than the average salaries in other activities. This can be attributed to the business success of casino sector activities during high economic growth.

The indicator of visits to the casinos and slot halls of Casino Portorož shows that the financial economic crisis, which started in 2008, significantly affected the number of visits. Nevertheless, the visits to casinos and slot halls as a portion of tourist visits remained high. We must consider the fact that the data regarding the visits to casinos and slot halls of Casino Portorož includes all the operating casinos and slot halls across Slovenia, and not only those in the Obalno-kraška region. Consequently the number of visitors for only the Obalno-kraška region is slightly lower. Apart from this we can assume that even in times of crisis, casinos and slot halls represented a key tourist attraction.

The indicator of the generated concession fee shows that the fee represents around 5% of the municipality budget, or a little less. There has been a decline in the amount of revenues from concession duties mainly due to the financial and economic crisis and, consequently, the decline in visits to casinos and slot halls. Apart from that the fee represents to the municipality a fresh flow of money, which the municipality can spend on the maintenance and development of general, municipal or road infrastructure.

The analysis shows that the economic effects reflect the positive impact on the economic and social environment, as shown by the indicators presented in the tables.

From a social point of view, we analyze four indicators. These are the indicator of the number of employees at Casino Portorož, the indicator of estimated sponsorships and donations of Casino Portorož to the region and beyond, the indicator of the number of divorces and the indicator of the final diagnosis of pathological gambling.

**Table 2: Social indicators**

<b>Number of employees/Year, 31st December</b>	<b>Casino Portorož d.d. (in Obalno-kraška region)</b>	<b>Obalno-kraška region</b>
<b>2009</b>	315	32296
<b>2010</b>	282	31320
<b>2011</b>	272	30116
<b>2012</b>	152	28880
<b>2013</b>	116	28115
<b>2014</b>	102	-
<b>Number of divorces per 1000 residents/Year</b>	<b>Obalno-kraška region</b>	<b>Slovenia</b>
<b>2009</b>	1.5	1.1
<b>2010</b>	1.4	1.2
<b>2011</b>	0.9	1.1
<b>2012</b>	1.7	1.2
<b>2013</b>	1.3	1.1
<b>2014</b>	1.5	1.2
<b>Final diagnosis of pathological gambling/Year</b>	<b>Number of patients in Obalno-kraška region</b>	<b>Number of patients in Slovenia</b>
<b>2009</b>	1	41
<b>2010</b>	7	97
<b>2011</b>	12	86
<b>2012</b>	13	171
<b>2013</b>	13	169
<b>2014</b>	15	228
<b>Year</b>	<b>Sponsorship and donation of Casino Portorož to the region and beyond (EUR)</b>	<b>Concession fees from casinos and slot halls (EUR)</b>
<b>2008</b>	4,335	1,206,877.57
<b>2009</b>	4,335	1,259,043.18
<b>2010</b>	32,600	1,254,486.51
<b>2011</b>	-	1,183,458.07
<b>2012</b>	11,500	995,717.01
<b>2013</b>	28,600	1,027,484.27
<b>2014</b>	8,055	961,963.05
<b>2015</b>	6,800	-

Source: Casino Portorož d.d. 2015; SURS, 2015b; SURS, 2015c; CZZ Nova Gorica, 2015; OP, 2015

The indicator of the number of employees in Table 2 shows that the proportion of employees in the company Casino Portorož represents less than 1% of all employees in the region. The data show that the number of employees began to decline with the outbreak of the financial and economic crisis, when the company was forced to reduce the number of employees cut costs. Despite the significant reduction of employees in 2014 the company was ranked among medium-sized enterprises.

The indicator of the number of divorces per 1000 population in the Obalno-kraška region compared with the number of divorces at the state level shows slightly higher numbers. Deviations from the state average divorces in each year are not great, and therefore cannot be assumed to result from the proximity of legalized gambling venues.

The indicator of the final diagnosis of pathological gambling is recorded by the Centre for Addiction Treatment (CZZ Nova Gorica), which operates within the Health Centre in Nova Gorica and is the only specialized institution for healing addiction to gambling in Slovenia. The final diagnosis of pathological gambling and related problems (F63.0) according to International Classification of Diseases (ICD-10) is defined as a disorder characterized by frequent, repeated episodes of gambling that dominate the patients' life and harm their social, employment, material and family values and commitments. It should be noted that in Slovenia, addiction to gambling is not recognized as an illness, as it is in the Netherlands, Switzerland, the USA, Canada and Australia, and therefore does not fall into a category of illness for which the medical services financed by the state would pay. It is also true that the diagnosis is not statistically managed systematically (Spazzapan, 2016). The data on the final diagnosis does not yet represent the addiction, so from these data one cannot conclude anything addiction. The data show that between 2009 and 2014 the number of individuals who sought medical help and were diagnosed as pathological gamblers in Slovenia as well as in the Obalno-kraška region has increased. The data on the numbers of positioned final diagnosis of pathological gambling for the period 2009-2014 in Obalno-kraška region represents surprisingly less than a tenth of all diagnoses in the country. The largest number of patients with diagnoses in the period 2009-2014 was in the Goriška region where casino gambling is more developed than in the Obalno-kraška region. The number represented one third of all diagnoses in the country (CZZ Nova Gorica, 2015). As addiction to gambling is not recognized as an illness and the statistics for such a diagnosis is non-systematic patients may have one or more diagnosis - chemical or non-chemical (but not diagnosed pathological gambler) -, we can assume that in the Obalno-kraška region and in Slovenia in general there are many more individuals who are pathological gamblers than are known or reported to exist.

The indicator of the amounts of donations and sponsorships relates to financial assets for various sports, cultural and entertainment events, and for other purposes through associations and federations associations in Obalno-kraška region and Slovenia. Major sponsorships and donations of Casino Portorož were granted to the Avditorij Portorož, Festival Melodije morja in sonca, Obalne galerije Piran and



individual associations in the municipality of Piran, Obalno-kraška region and Slovenia. Casino Portorož was a Golden sponsor of Olympic Committee and sponsor of several annual ski events at Zlata lisica (Golden Fox) in Maribor. They financially supported sailing regattas and Lipica Stud (Casino Portorož d.d., 2015). Financial assets in the period 2008-2015 varied significantly as a result of the financial and economic crisis, which forced the company to lower the amounts of donations and sponsorships. Notwithstanding this, the amounts for grants represent approximately 0.33% to 2.6% of the annually paid concession fee to the municipality of Piran.

#### **4. Conclusion**

Analysis of statistical socioeconomic indicators showed that casino tourism generates positive effects on the economy and on the region, as evidenced by the significantly higher average annual salaries compared to salaries in other economic activities, a relatively high number of visitors to casinos and slot halls and paid concession fee which accounts for around 5% of the municipal budget of the municipality of Piran. Casino tourism also generates a positive effect in society and in the region, employing almost 1% of the population only in the company Casino Portorož, while the number of divorces per 1000 inhabitant compared to the number of divorces in the country does not derogate significantly.

An undeniably positive impact on society has shown the amounts of donations and sponsorships, which refers to funds intended for various sports, cultural and entertainment events, and for other purposes through associations in the Obalno-kraška region and Slovenia. The economic crisis forced Casino Portorož to lower amounts of donations and sponsorships, but these figures despite the crisis in comparison with the paid concession fee reached approximately 0.33% to 2.6% for the Piran municipality.

In addition to the measurable effects of casino tourism, for which it is possible to obtain statistical data (and we have analyzed them), the economy and society are also affected by such economic and social effects that the competent institutions statistically do not record or can only measure imprecisely. One such impact is that of casino tourism on other economic activities. It is well known that casino guests use many tourist and other basic services such as hotel accommodation, restaurant services, petrol stations, taxi services and nautical services, such as marinas. It is difficult to precisely identify and measure the individual effects of casino tourism on the above mentioned services.

In a negative sense, casino tourism is reflected in society by the final diagnosis of pathological gambling among local inhabitants. Although the number of diagnoses in Obalno-kraška region represents just one-tenth of the country, we have to consider the fact that addiction to gambling in Slovenia is not recognized as a disease, which is also reflected by non-systematic statistics. It follows that there are likely many more

individuals with this diagnosis. Since the factors involved in determining this negative impact of gambling are likely to vary insignificantly from nation to nation, studies from, for instance, the United States and Macau, would likely apply to Slovenia. Given that Slovenia is a predominantly Catholic country, however, the impact of gambling on the family is unlikely to be accurately measured by divorce rates. In addition, there are what may be called micro-economic factors involved in determining the negative effects of gambling. For instance, Slovene gambling, like that in Las Vegas, draws a high number of foreign visitors, yet like some of the venues in the United States on the Mississippi River a much higher number of visitors are local. Slovene casinos, it may be intuited, are likely to be a combination of both, so that impacts on the local population are greater than in Las Vegas, which is built primarily for tourists and not locals and less than in the local casinos of the US.

The link between organized crime and gambling has been well-established, though a process exists whereby casino lobbies perpetually deny this link and seek to present it as a sort of historical artefact, perhaps a necessary growth stage (Denton&Morris, 2001). The corruption at the highest end of the business has historically been rampant, the money made concentrated among a relative few, which is itself disadvantageous to an economy. It is also commonly known that prostitution in Slovenia is linked to Casino gambling and is an impetus for the international trade in women from poorer countries, mostly of Europe. But an additional question arises here: is there in fact any impact at all in this regard on the Slovene population?

It is generally accepted that tourism and casino tourism are important and rapidly growing economic activities that require careful planning at the local, regional and national levels. Interference in the environment and society can cause positive and negative consequences, which is particularly why planning should take into account all factors, and include a wide range of stakeholders in the area and society. Economic and tourism development should be based on a comprehensive consideration of development potentials and preliminary studies that have been completed for a particular area, region or destination (Jurinčič, 2009). Thus, the study of the socioeconomic effects of casino tourism will continue to be in the researcher's focus, which will help toward a better understanding and planning of the development of casino tourism. In doing so, the results of such research will be useful for both the country, as well as the region and gaming companies. Finally, Slovene casino companies have adjusted to the financial and economic crisis and will adjust again if there will be a need, which will cause new and different socioeconomic effects that will challenge researchers. In the meantime means to study the negative impacts of casino tourism in Slovenia and the Obalno-Kraško region need to be developed so that a fuller understanding of this form of tourism can be projected into the future.

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