



IAGR STATISTICS SUB-COMMITTEE

The IAGR Statistics Sub-Committee was established on a trial basis by the IAGR Board of Trustees at their meeting in Lima, Peru in 2015. The aim of the sub-committee is to collect and present an overview of the following statistics on a yearly basis:

- size of the gambling market in different countries;
- comparable data for the gambling market in different countries; and
- regulated gambling types in different countries.

At the IAGR Board of Trustees meeting in February 2018, the Board approved the continuation of the Statistics Sub-Committee on a permanent basis. For further information on the Statistics Sub-Committee, see the inside back cover.



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FOREWORD



Birgitte Sand

Part of IAGR's success comes from focusing upon where we as gambling regulators can agree, rather than where we disagree; and there is much we can agree upon in IAGR. From the fight against illegal gambling and our responsibilities to vulnerable groups such as children and problem gamblers, to the importance of market supervision and licensing procedures, gambling regulators face common challenges. Though the nature of these challenges and tasks may vary, and our approaches and backgrounds differ, we can learn from each other.

It is in this spirit that this report, *Gambling Regulation – Global Developments 2017*, has been prepared. As chair of IAGR's Statistics Sub-Committee, which both gathered data for the report and drafted its content, it is with great pleasure and pride that I present our findings.

Statistics are invaluable to understanding the global gambling landscape and this report provides a rich picture of the different regulatory approaches taken by jurisdictions to common issues. The report builds upon the results of IAGR's first gambling regulation survey, which ran from July to October 2017.

It is based on responses from thirty-seven IAGR jurisdictions and is believed to be the largest voluntary international exchange of data between gambling regulators to date.

I do hope that not only the respondents, but all IAGR members, will enjoy reading the report and find it useful. I encourage you to explore the results in greater depth, through reaching out to other regulators/fellow IAGR members to further exchange regulatory models and solutions. Who knows, it might be the beginning of a strong and fruitful network!

I would like to thank all members of the Sub-Committee for their efforts, but a few individuals stand out. I would like to make reference to the excellent work done by Michael Herborn of the Danish Gambling Authority and James Green of the Gambling Commission (Great Britain) for their efforts in administering the survey and compiling this report. And alongside the core team, in 2017, we also had members from Norway, Massachusetts, and the Netherlands, who were joined by representatives from Australia, South Africa, and Ghana in 2018.

However, none of this would have been possible without the responses submitted by IAGR members from across the globe, to which I offer my profound thanks. Through active participation in IAGR, together, we have created the first gambling regulation survey of its kind and made way for more to follow, demonstrating both IAGR's potential and growing maturity as an organisation. To me, it's a professional dream come true!

Enjoy the report – and please do contribute to the 2018 survey! In doing so, you can help us take the 2018 survey to the next level, and we all come out more knowledgeable.

On behalf of the IAGR Statistic Sub-Committee,

respectfully,

Birgitte Sand, chair
IAGR trustee and patron

EXECUTIVE SUMMARY

Overview

This report presents findings from a survey conducted by the IAGR Statistics Sub-Committee between July and October 2017. In total, 37 jurisdictions contributed data on their gambling markets.

Report structure

Regulator information is presented first. The report next turns to examining the regulation of gambling at a global, aggregated level. It details which markets are permitted across jurisdictions, and age restrictions for participation in gambling. Findings are then presented for each gambling market: casino games, slot machines, number games (lotteries and bingo) and betting. Further sections examine responsible gambling, fighting illegal gambling, legislative developments and future trends.

Key findings

Among respondents, we found that the top **regulatory powers**, common to most regulators, are: compliance/auditing of gambling operators, licensing of gambling operators and issuing of fines. The leading **gambling-related issues** member regulators work on are consumer protection, problem gambling and the regulation of gambling product marketing. The number of **people employed** by IAGR members, who work with gambling-related matters is addressed, highlighting the varied nature of the IAGR membership.

At a global level, the most **permitted gambling market** is lotteries (allowed by 97% of respondent jurisdictions), followed by bingo, casinos, slot machines and betting, which are each permitted by over 80% of jurisdictions. For online channels, the most permitted market is betting (73%), followed by lotteries, casinos, and then bingo, which is available online in 35% of jurisdictions.

Globally, the **legal age to gamble** follows the age of majority, but with a wider range of permitted ages (16 to 25) across jurisdictions and markets. With respect to **foreign investment** (in betting and land-based/online casinos) there are no restrictions in most jurisdictions (59%). **Ownership and licensing approaches** for gambling provision, **gambling revenue beneficiaries**, and **sales channels** are also set out.

For **responsible gambling**, the report looks at who provides research, education and treatment, whether operators are required to contribute funding to address this issue, (85% are, in some form), and the extent of self-exclusion programmes (available in 92% of jurisdictions).

Tackling **gambling-related crime** is a key duty for all regulators. The top five areas of concern reported by jurisdictions were (in order): money-laundering, illegal gambling, fraud, cheating and gambling addicts stealing to carry on gambling.

Recent **legislative changes** in jurisdictions are also set out. The top areas where legislation has been enacted in the last five years are: land-based casinos (market), anti-money laundering (theme) and licensing (regulatory powers).

Finally, when asked about **future trends**, regulators responded that their most pressing concerns were (in order): betting on eSports, social gaming (with real money prizes), skins betting, fantasy sports games and social gaming (without real money prize).

GAMBLING REGULATION – GLOBAL DEVELOPMENTS 2017

SURVEY RESPONSES BY CONTINENT



MOST PERMITTED GAMBLING MARKET



PERMITTED BY **97%** OVER OF JURISDICTIONS

MOST PERMITTED ONLINE GAMBLING MARKET

BETTING

PERMITTED BY OVER **73%** OF JURISDICTIONS

LEGAL AGE TO GAMBLE
(GLOBAL AVERAGE)

18

TOP REGULATORY POWERS

- 1 Compliance/auditing of operators
- 2 Licencing of gambling operators
- 3 Issuing fines

TOP GAMBLING RELATED ISSUES

- 1 Consumer protection
- 2 Problem gambling
- 3 Gambling product marketing

TOP AREAS OF CONCERN

GAMBLING-RELATED CRIME

- 1 Money-laundering
- 2 Illegal gambling
- 3 Fraud

FUTURE TRENDS

- 1 Betting on eSports
- 2 Social gaming
(with real money prizes)
- 3 Skins betting

1 INTRODUCTION

1.1

The International Association of Gaming Regulators (IAGR) consists of representatives from gambling regulatory organisations throughout the world. Our mission is to advance the effectiveness and efficiency of gambling regulation.

1.2

This report contributes to that mission. It presents the findings of our 2017 survey of international gaming regulators and provides an overview of international gambling regulation, examining the types of gambling permitted within jurisdictions and how the markets operate. It includes sections on responsible gambling, tackling gambling-related crime, legislative developments and future trends.

2 AIM

2.1

The aim of this report is to present the findings of the 2017 IAGR gambling regulation survey.

3 METHODOLOGY

3.1

The underlying data for this report was collected from a survey of IAGR member jurisdictions conducted in late summer and early autumn 2017. The survey was compiled, administered and analysed by the IAGR Statistics Sub-Committee, chaired by Birgitte Sand (IAGR Board of Trustees member and Director of the Danish Gambling Authority). It was conducted via an online survey.

3.2

In total, 37 jurisdictions contributed data on their gambling markets. There were 69 members of IAGR at the time of the survey distribution.¹

¹ Note that the survey was conducted at jurisdictional level and not at country level. According to the IAGR by-laws (s3.1) jurisdictional memberships consist of qualified agencies, which can be a regulatory body, a commission, or statutory body responsible for regulating the gaming industry within its jurisdiction. Each state or province within a country may be considered a jurisdiction. One jurisdiction can have more than one jurisdictional member if the jurisdiction has more than one qualifying agency.

4 REGULATOR INFORMATION

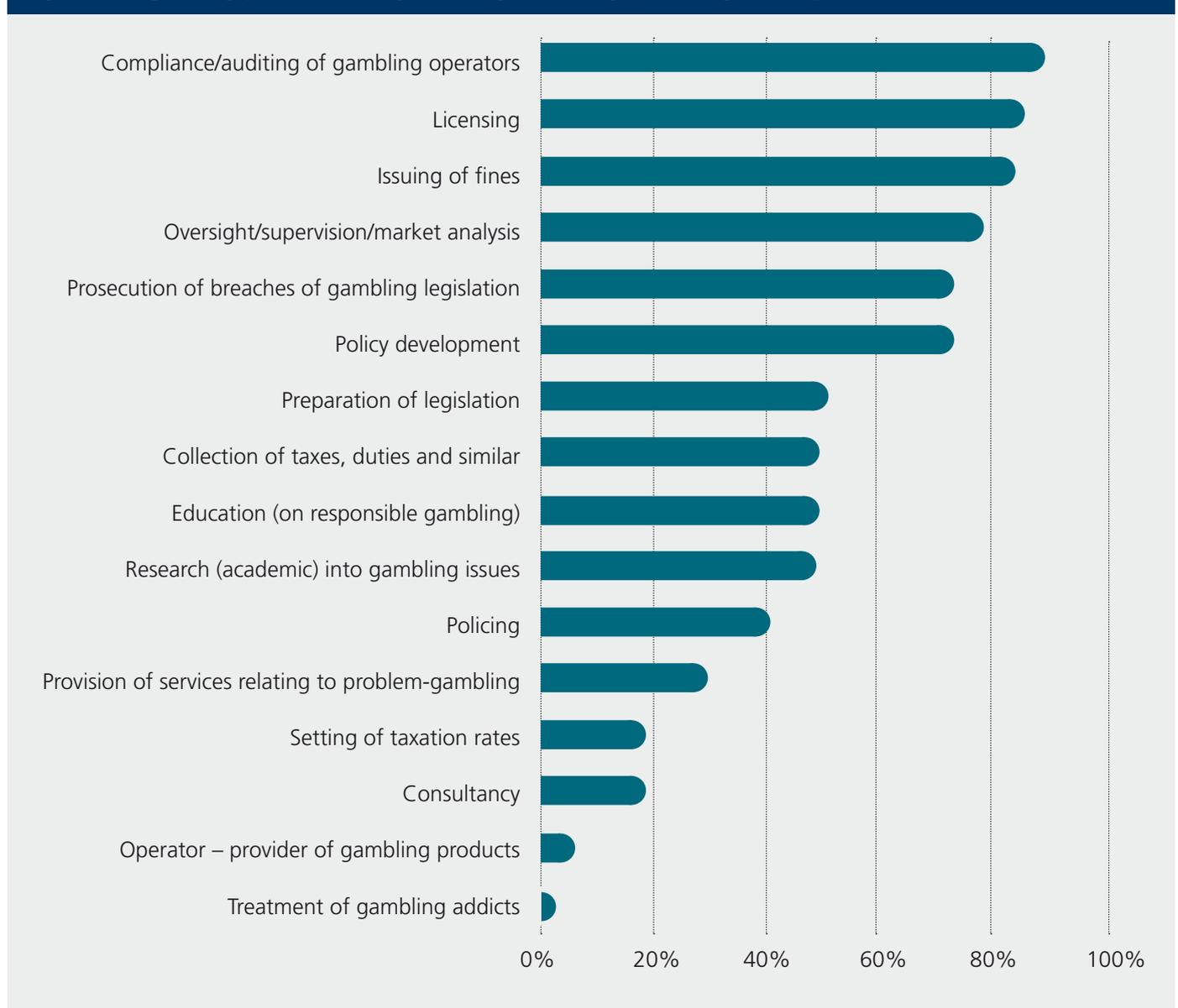
4.1 Overview.

Member jurisdictions operate within a wide variety of gambling markets and regulatory contexts, having evolved as a result of different political, economic, social and legislative dynamics. Consequently, they differ both in the regulatory powers assigned to them, and also their organisational size and structure. This is important to bear in mind when reading the comparative analysis of gambling regulators that follows. Furthermore, caution is advised against drawing conclusions at a country or jurisdictional level, as gambling regulation is carried out by multiple organisations in many countries.

4.2 Regulatory powers.

IAGR's members have a broad range of regulatory powers. The top three powers among respondents, and common to most regulators, are: compliance / auditing of gambling operators (89%), licensing of gambling operators (86%), and issuing of fines (84%). This aligns with the typical regulatory model of licensing, supervision and enforcement. The least common powers or responsibilities are: consultancy (19%), providing gambling products (as an operator) (5%), and treatment of gambling addiction (3%).

Figure 1: Regulatory powers held by IAGR regulators (by percentage of respondents)



4.3 Gambling issues. (See figure 2)

IAGR's members work with a variety of gambling-related issues. The most common issues are: consumer protection (89%), problem gambling (84%), and the regulation of gambling product marketing (84%). The least common issues which our regulators work with are: gambling addiction (59%)² and match-fixing/sports integrity (34%), although again, it should be noted that other organisations may have responsibility for managing these issues within each jurisdiction. For example, the treatment of gambling addiction may be the remit of a public health authority, whilst match fixing/sports integrity issues may fall under sports governing bodies/culture ministries.

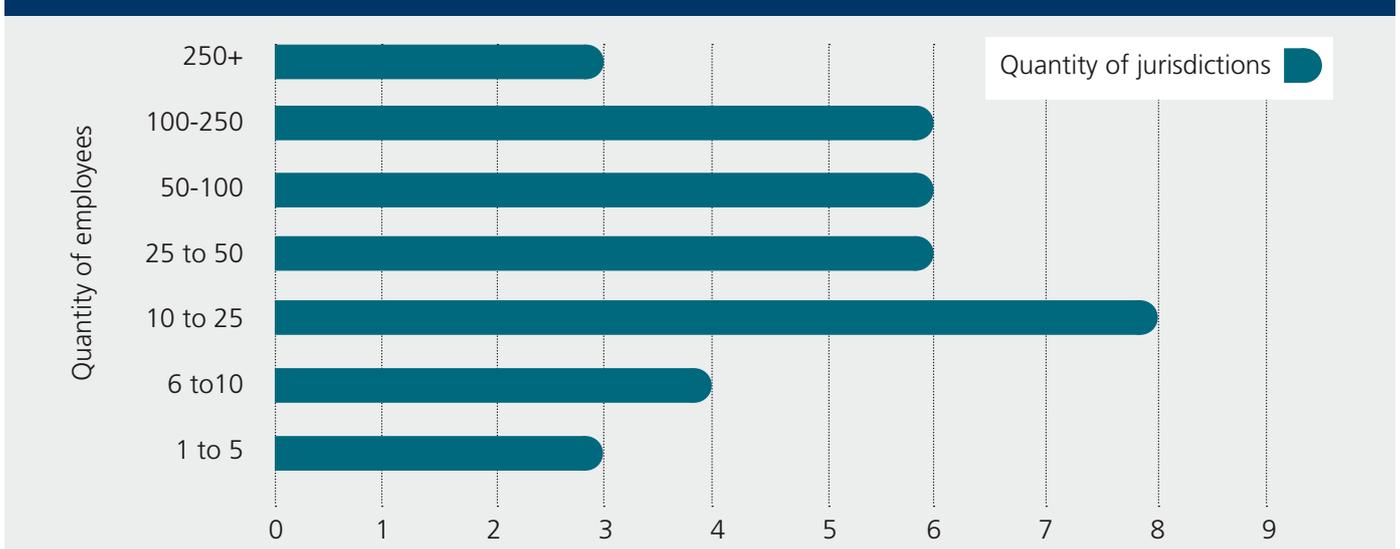
4.4 Employees. (See figure 3)

The number of people employed within jurisdictional organisations working on gambling-related matters varies from small offices of 1-5 employees, to larger offices of 250+. Note also, that in some jurisdictions, multiple organisations may have responsibility for gambling regulation.

Figure 2: Gambling issues worked on by IAGR regulators (by percentage of respondents)



Figure 3: Number of employees in gambling jurisdiction organisations



² Although, note that work on wider problem gambling issues is one of the top issues regulators work with.

5 GLOBAL MARKET ANALYSIS

5.1 Overview.

This part of the report looks at the regulation of gambling at a global level, across markets. It sets out which markets are permitted across jurisdictions, licence models, who benefits from gambling revenues (post-tax revenue distributions), how services are sold, age restrictions for participation in gambling, and whether foreign investment is allowed.

5.2 Gambling market participation rates.

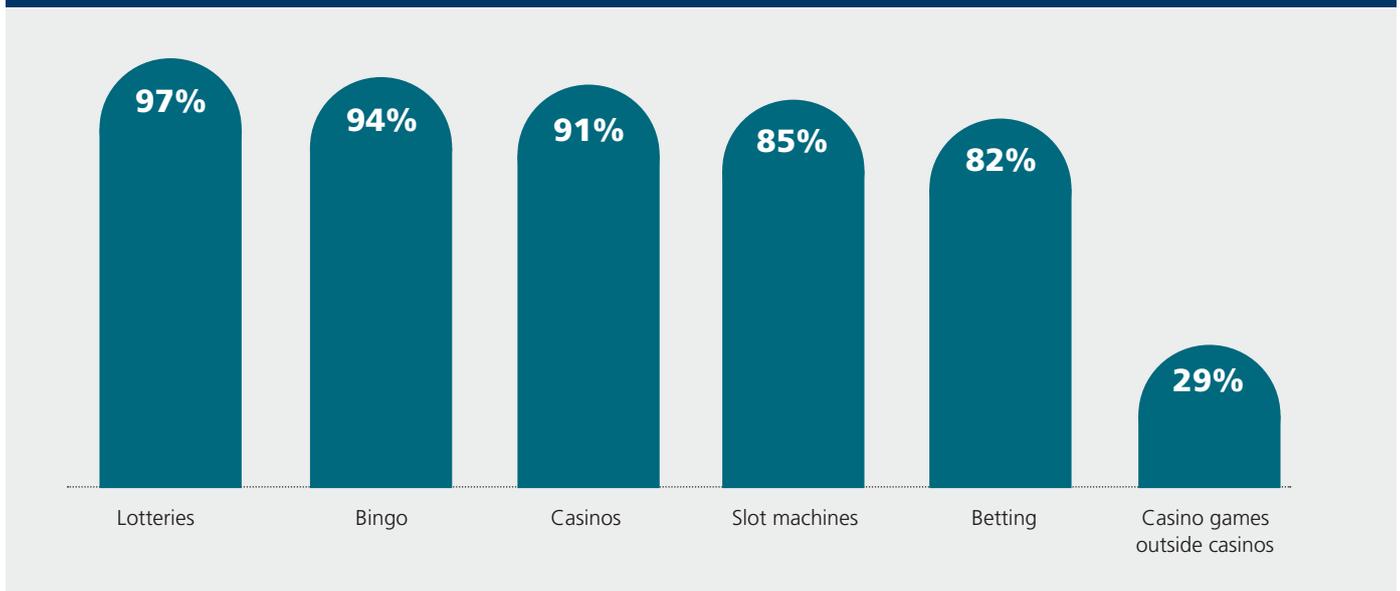
Assessing gambling participation rates is a problematic area. Less than half of respondents (48%) measure participation rates in their home jurisdictions (ie the total number of gamblers in their gambling markets); and of these different methodologies are used.³ Further work is required to build a picture of participation rates across jurisdictions and, given the difficulty in comparing of data sets, analysis of this area is not included in this report.

5.3 Permitted markets (land-based). (See figure 4)

Some gambling markets are more restricted than others. At a global level, the most permitted land-based gambling market is lotteries (allowed by 97% of respondent jurisdictions), followed by bingo, casinos, slot machines and betting, which are each permitted by over 80% of jurisdictions. The least permitted land-based activity is casino games outside of casinos⁴ (eg commercial poker tournaments conducted in arenas or conference centres); which are only allowed in 29% of jurisdictions.

A detailed chart showing permitted markets by jurisdiction is at Annex A.

Figure 4: Permitted gambling markets (land-based) (by percentage of all jurisdictions)



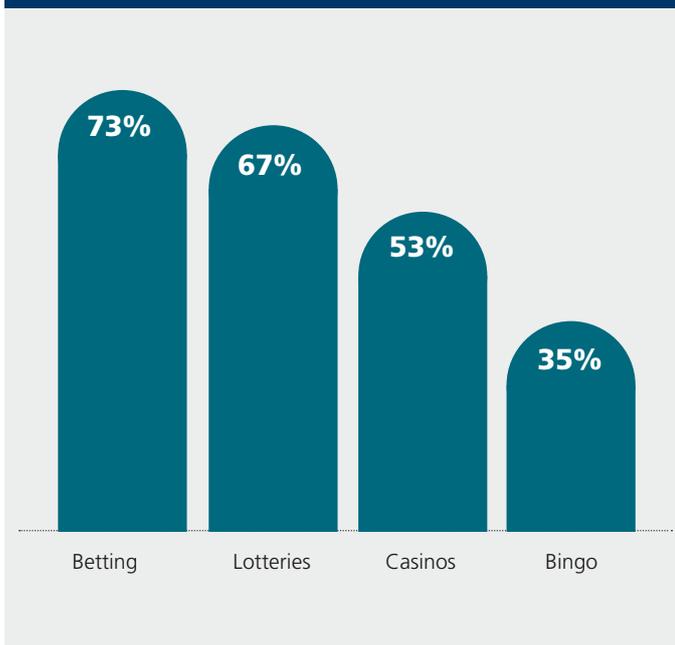
³ Most contract out the collection of these statistics, or acquire them from third party sources.

⁴ Casino games outside casinos are typically considered a sub-set of casinos and not a market in itself.

5.4 Permitted markets (online).

The most permitted gambling market sold via online channels is betting (allowed by 73% of jurisdictions), followed by lotteries (67%), then casinos, which is permitted by just over half of the respondent jurisdictions (53%). Bingo is the least permitted online market (35%), although in some jurisdictions this is classified within the lotteries market, or is offered by licensed casinos that are permitted to provide online gambling services.

Figure 5: Permitted gambling markets (online) (by percentage of all jurisdictions)



5.5 Ownership and licence models.

Gambling jurisdictions permit the provision of gambling services via a variety of approaches. These include the operation of a state monopoly, a private monopoly, or by the issuing of licences to commercial operators (the number of which may be restricted). Alternatively, some gambling provision may be permitted without a licence, or by another arrangement. Detailed analysis of licence models is provided in the market sections of this report.

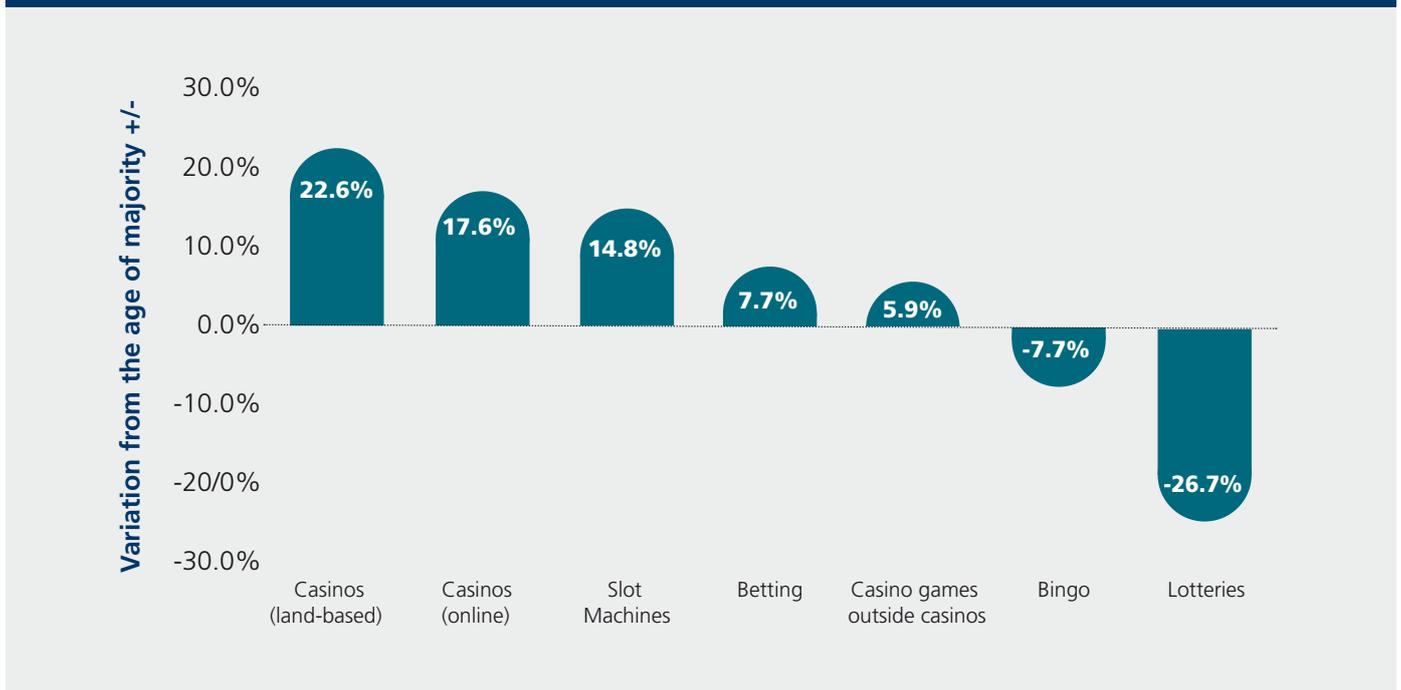
5.6 Post-tax revenue distributions.

The beneficiaries from post-tax gambling revenues (once taxes/duties have been paid out) differ by jurisdiction and by market. Beneficiaries can be broadly categorized as public (ie state), private (ie commercial), charity sector (ie charitable), or other (eg non-charitable sport or culture). Detailed analysis of post-tax revenue distributions is provided in the market sections of this report.

5.7 Sales channels (land-based/online/remote).

Gambling services are normally sold across four channel types. Land-based shops operated by the licence holder, or land-based shops with bets sold by resellers have long-dominated gambling provision. In recent years, at a global level, there has been an expansion in online sales channels for gambling services, marking a shift from land-based operations. Some jurisdictions permit these, but they are not universally allowed. In addition, gambling services can be sold via remote channels (eg bets can be placed over the telephone). Detailed analysis of sales channels is provided in the market sections of this report.

Figure 6: Gambling market age restrictions (by percentage variation from the age of majority)



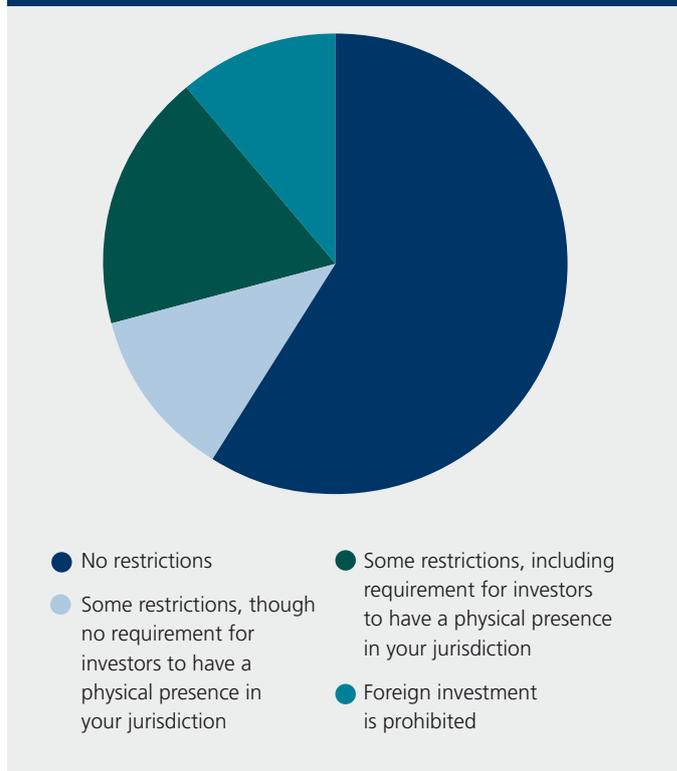
5.8 Age restrictions for participation. (See figure 6)

The average age of majority across all respondent jurisdictions is 18 years. In most jurisdictions, the legal age for participation in gambling activities aligns with the age of majority. Therefore, globally, the average (modal) legal age to gamble is 18 across all markets, but with a wider range of permitted ages (16 to 25) across jurisdictions and markets. The level of variation between the legal age to gamble and the age of majority, is perhaps indicative of the actual or perceived risk of harm that a particular market presents, either to consumers or wider society. On this basis, land-based casinos (+22.6%) could be deemed to pose the most risk, with lotteries (-26.7%) the least. The average variation across all markets is 5.4% over the age of majority. More details on age restrictions are provided in the market sections of this report and an overview chart is at Annex B.

5.9 Foreign investment. (See figure 7)

In some countries, foreign investment in the gambling industry is either prohibited, or there are restrictions on investors (including relating to them needing to have a physical presence in the jurisdiction). Whether foreign investment is allowed can also be dependent on the market concerned. Globally, amongst those jurisdictions who responded to the survey, most (59%) land-based casino, online casino and betting markets do not have restrictions in place for foreign investment.⁵

Figure 7: Foreign investment restrictions (by percentage of jurisdictions, aggregated markets)



As the chart illustrates, in most jurisdictions (59%) there are no restrictions on foreign investment. There are some restrictions in 30% of jurisdictions, but foreign investment is only prohibited in 11%.

⁵ The survey did not cover foreign investment in other markets.

6 CASINOS

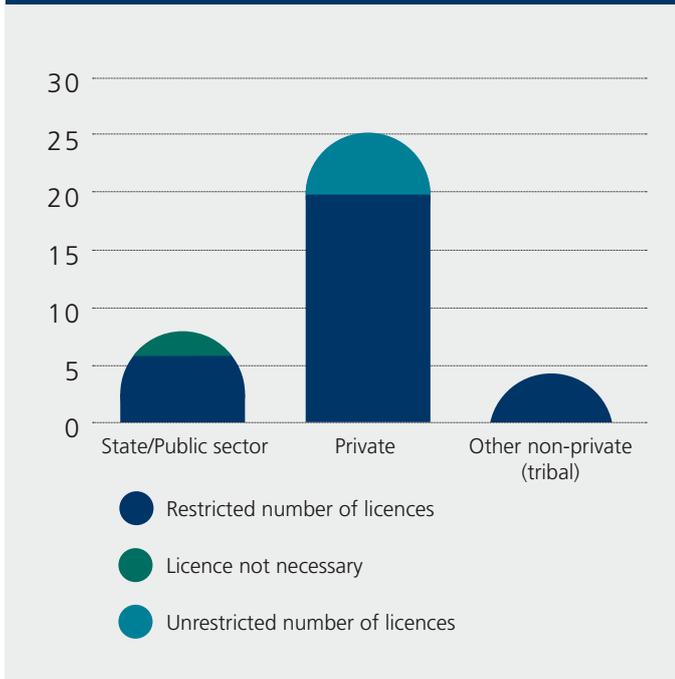
6.1 Overview.

Casinos are typically defined as land (or ship)-based venues where casino games such as slot machines and table games (for example roulette and poker) are available. Online casinos, also known as internet casinos or remote casinos, are internet-based platforms on which players can access casino games. Online casinos can host games generated by software, such as simulated slot machines; or live casino games, which are streamed from studios in which real gambling equipment, such as roulette wheels, are used to facilitate the online gambling. At a global level, land-based casinos are the third most permitted gambling market, after lotteries and bingo, allowed by 91% of respondent jurisdictions. Online casinos are less prevalent and are only permitted by 53% of jurisdictions.

6.2 Ownership and licence models.

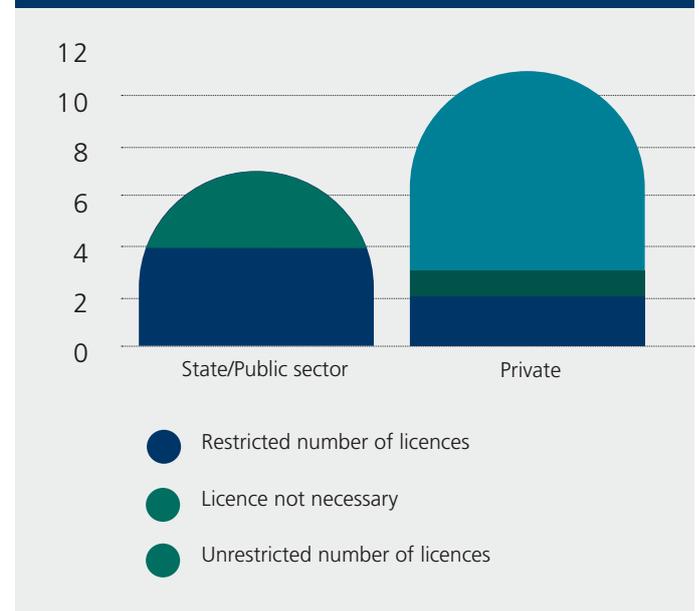
Of the 31 jurisdictions where land-based casinos are permitted, private/commercial operators can be licenced to run casinos in 81% of jurisdictions. In 26% of jurisdictions, the state/public sector may operate casinos and non-private (eg tribal) operators can run casinos in 13% of jurisdictions.⁶ The operation of online casinos is primarily in the hands of the private sector (61% of jurisdictions), with the state/private sector running online casinos in the remaining 39% of jurisdictions.

Figure 8: Licence models for land-based casinos (number of responses)



For each of these types of operator ownerships, different licence models are used. For land-based private/commercial operator ownerships, the most prevalent licence model is for licences to be restricted (80% of jurisdictions), although in the remainder there are no restrictions on the number of licences that can be granted. State/public and non-private (eg tribal) ownerships similarly operate a restricted number of licences model, although in 25% of jurisdictions, a licence is not necessary where land-based casinos are operated by the state/public sector.

Figure 9: Licence models for online casinos (number of responses)



For online casino ownerships, there is a more of a mixture of licence models. The most prevalent model for private/commercial ownership approaches is an unrestricted number of licences (73% of jurisdictions), but a restricted number of licences models applies in 18% of jurisdictions, and in 9% of jurisdictions a licence is not necessary. Where online casinos are owned by the state/public sector, in most cases the number of licences is restricted (57% of jurisdictions), but licences are not required for the remainder (43% of jurisdictions).

⁶ Jurisdictions can of course permit more than one licensing form in their jurisdiction, ie permitting private sector operators to run casinos need not mean that the public sector could not simultaneously operate a casino.

6.3 Post-tax revenue distributions. (See figures 10&11)

The survey responses indicate that the most prevalent beneficiaries of post-tax gambling revenues from land-based casinos are the private/commercial sector; mirroring the prevalence of private/commercial sector ownership. However, the government/treasury also benefits from post-tax gambling revenues generated by private/commercial operators in some jurisdictions. State/publicly operated land-based casinos tend to deliver post-tax gambling revenues to a wider range of beneficiaries, including charities, sport and culture. Other non-private operators (eg tribal) have a similar wider range of beneficiaries, but do not tend to direct revenues to sport or culture.

Post-tax gambling revenue beneficiaries for online casinos differ from that of land-based casinos. The private/commercial sector is the main beneficiary of revenues from private/commercial sector operated online casinos, whereas there is a range of beneficiaries for post-tax revenues from state/public sector owned or operated online casinos. Revenues from other non-private operators (eg tribal) online gambling are directed to a government/treasury beneficiary.

Figure 10: Post-tax gambling revenue destinations for land-based casinos (number of responses)

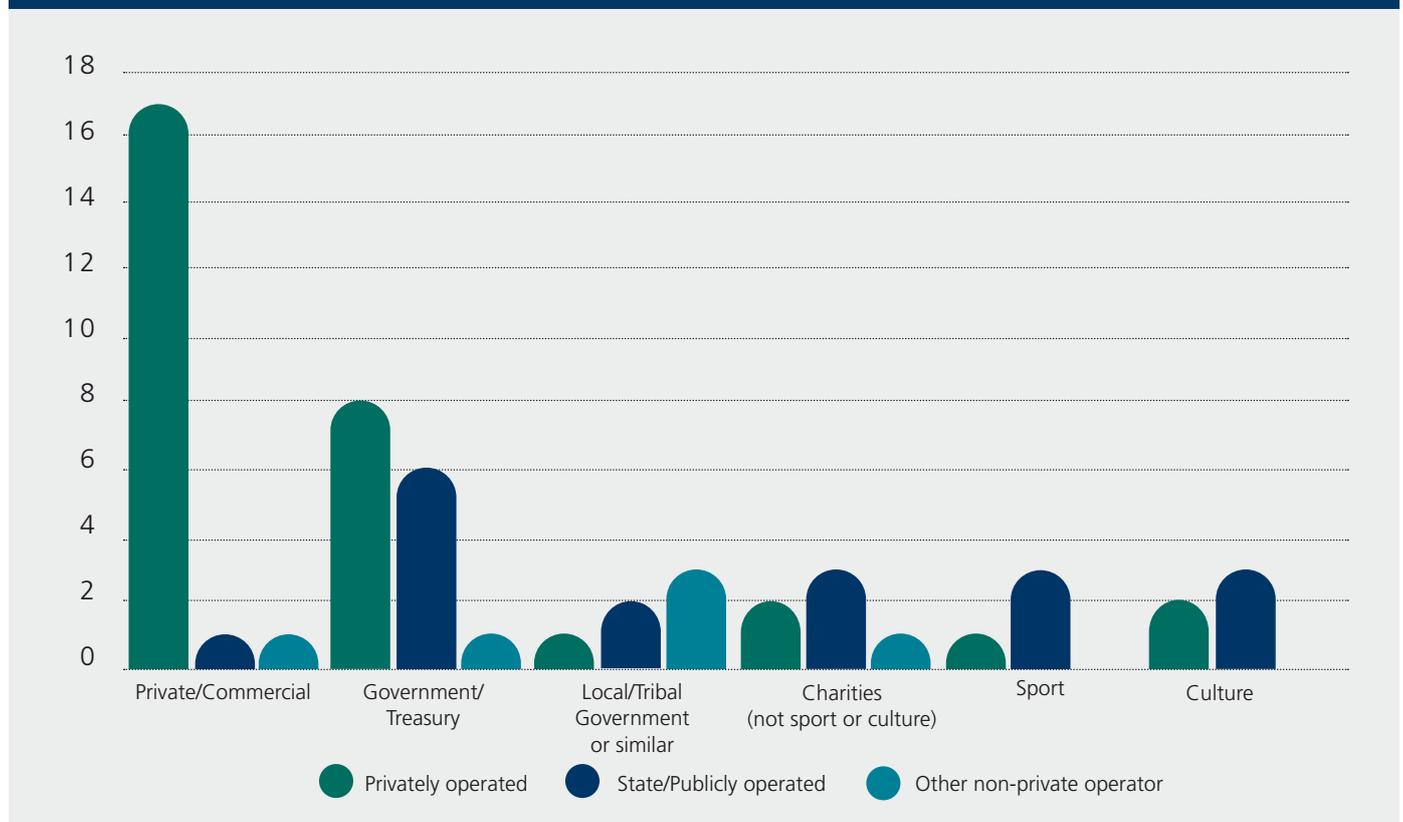
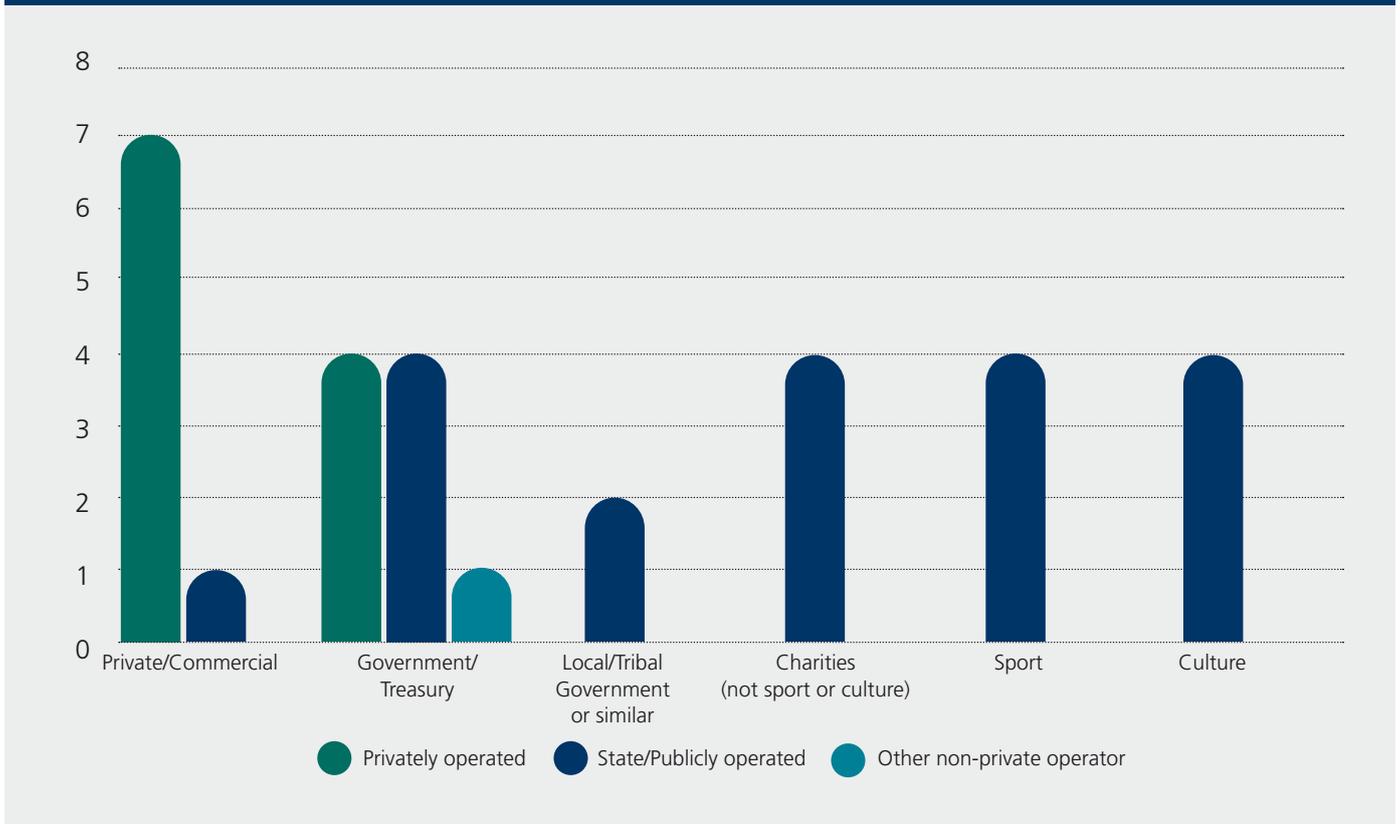


Figure 11: Post-tax gambling revenue destinations for online casinos (number of responses)



6.4 Sales channels.

Sales channels for casinos were not collected by the survey as the topic is broadly covered by the land-based/online casino analysis provided elsewhere in this section. However, respondents were asked to indicate whether there is a legal distinction between land-based casinos and gaming arcades in their jurisdictions. Most (87%) stated that there was a legal distinction, but in 13% of jurisdictions land-based casinos and gaming arcades were synonymous.

6.5 Permitted gambling types.

The range of games on offer in land-based casinos was remarkably consistent across respondents. Casinos in all respondent jurisdictions are permitted to offer card games. Slot machines, roulette (and similar table games), and electronic casino games were permitted in 97% of jurisdictions, and 43% of jurisdictions permitted other forms of gambling in land-based casinos (eg bingo and various forms of betting). Similarly, in online casinos, all jurisdictions permitted table games, simulated slot machines, roulette, and other similar games of chance.

6.6 Age restrictions.

Permission to participate in casino games (land-based and online) is typically set at the age of majority, or higher (up to 25). There are no jurisdictions where people under the age of majority are permitted to play in commercial casinos. Globally, the most common age to play casino games is 18. In the majority of jurisdictions age restrictions are the same for both land-based and online casinos; although in two jurisdictions the age restriction for online is less. The average variation from the age of majority is +22.6% for land-based casinos and +17.6% for online casinos. These are the first and second largest positive variances of all the markets, indicating that casinos may be perceived as posing more risk of harm than other gambling markets in most jurisdictions.

6.7 Foreign investment.

In 60% of jurisdictions with land-based casinos, there are no restrictions on foreign investment in domestic casinos. Of the other jurisdictions, most (33%) permit foreign investment, but with some restrictions (which can include a requirement for investors to have a physical presence in

the jurisdiction where the casino is sited); but 7% prohibit foreign investment. For online casinos, 59% of respondent jurisdictions do not restrict foreign investment, 25% apply some restrictions and the remainder prohibit foreign investment.

Figure 12: Foreign investment in land-based casinos (aggregated split)

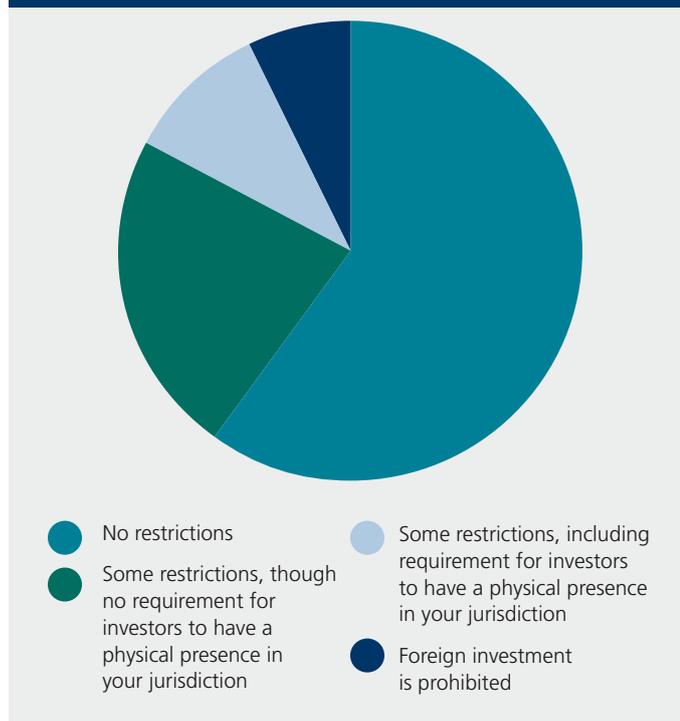
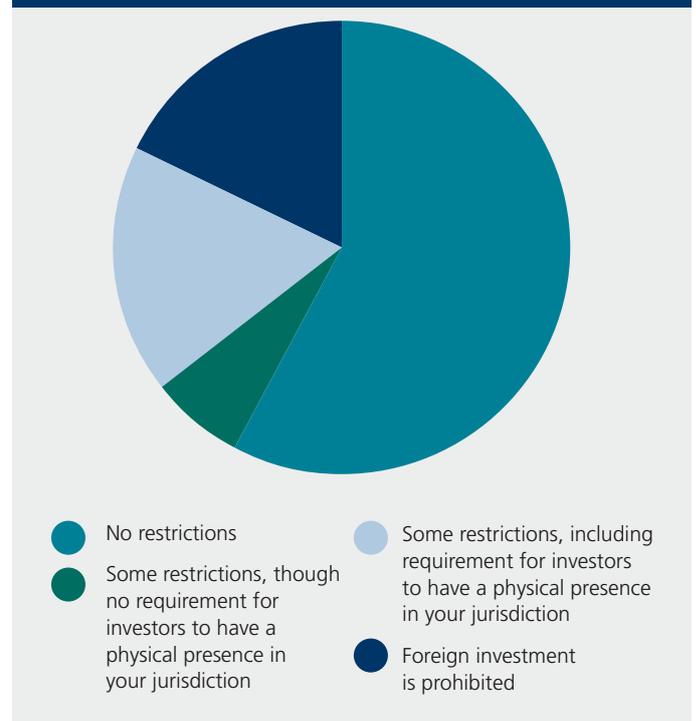


Figure 13: Foreign investment in online casinos (aggregated split)



7 CASINO GAMES OUTSIDE CASINOS

7.1 Overview.

Casino games outside casinos are casino games, such as poker, roulette and blackjack, played in venues where it is permissible to participate in casino games, but which are not classified as casinos in legislation. At a global level only 39% of respondent jurisdictions permit casino games outside casinos.

7.2 Ownership and licence models.

Ownership and licence models for casinos games outside of casinos were not collected by the survey.

7.3 Post-tax revenue distributions.

Post-tax revenue distribution for casinos games outside of casinos were not collected by the survey.

7.4 Sales channels.

Sales channels for casinos games outside of casinos were not collected by the survey.

7.5 Permitted gambling types.

The most prevalent type of casino game outside casinos was poker tournaments (64%), with other games (unspecified) comprising (36%).

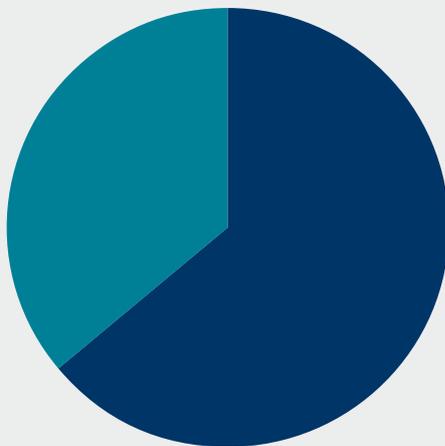
7.6 Age restrictions.

Age restrictions for players of casino games outside of casinos are, in almost all cases, set at the age of majority. Globally, the most common age to play casino games outside casinos is 18, but in a few jurisdictions it is higher (up to 21). The average variation from the age of majority is +5.9%.

7.7 Foreign investment.

Foreign investment restrictions for casinos games outside of casinos were not collected by the survey.

Figure 14: Casino games outside casinos (aggregated split)



● Poker tournaments ● Other casino games

8 SLOT MACHINES

8.1 Overview.

Slot machines are typically defined as machines that are designed or adapted for use by individuals to gamble. Also known as electronic gaming machines, fruit machines or jackpot machines, most slot machines are either of the reel-based type, or are computer-based. The analysis below relates primarily to slot machines sited outside of casinos. At a global level, slot machines are the fourth most permitted land-based gambling market, allowed by 85% of respondent jurisdictions.

8.2 Ownership and licence models.

Of the 28 jurisdictions where slot machines are permitted, 82% award licences to private/commercial operators. The state/public sector owns or operates licences for slot machines in 29% of respondent jurisdictions⁷ and non-private (eg tribal) operators can operate slots in 14% of jurisdictions. For each of these types of operators, different licence models are used.

Where slots are provided by the private/commercial sector, broadly half of jurisdictions restrict the number of licences awarded, whilst the other half have an unrestricted licences model. Where slot machine licences are owned or operated by the state/public sector, there is a restricted number of licences in 62% of jurisdictions, whilst in the remaining 38% a licence is not necessary. For non-private operators (eg tribal operators) the restricted licences model is used in all jurisdictions.

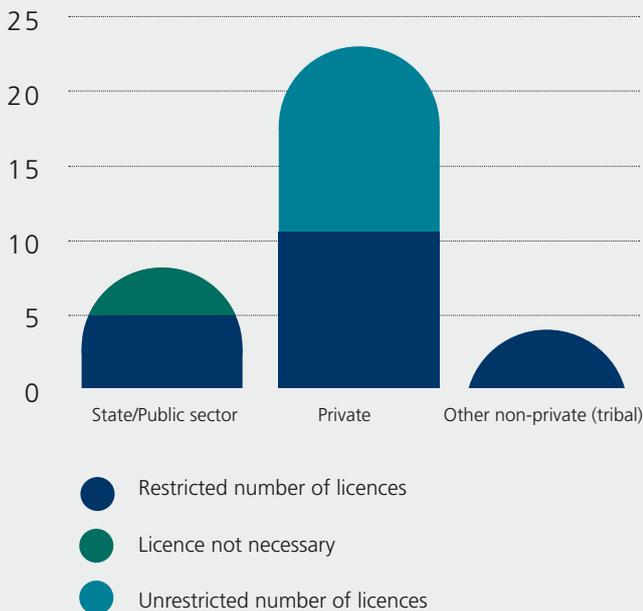
8.3 Post-tax revenue distributions. (See figure 16)

The most prevalent beneficiary of post-tax gambling revenues from slot machines is the private/commercial sector. However, charities (not sport and culture), sport, culture, government/treasury and local/tribal governments also benefit from slot machine operations in several jurisdictions.

8.4 Sales channels.

Many jurisdictions permit slot machines in venues other than land-based casinos. In order of prevalence globally, slot machines are permitted in: restaurants with a licence to serve alcohol (eg public houses), gaming arcades, and then restaurants without a licence to serve alcohol. A small number of jurisdictions also stated that slot machines could be approved at other venues, such as racetracks.⁸ With regard to restrictions on the number of machines a venue may host, 89% of jurisdictions reported that restrictions were in place. The nature of these restrictions varied significantly, with limits relating to the size, nature and location of the venue. Due to the similar nature of casinos and gaming arcades, respondents were also asked to indicate whether a distinction between the two types of venues was legally defined in their jurisdiction. Of those who responded, 87% of jurisdictions stated that there was a legal distinction between these two types of slot machine venue.

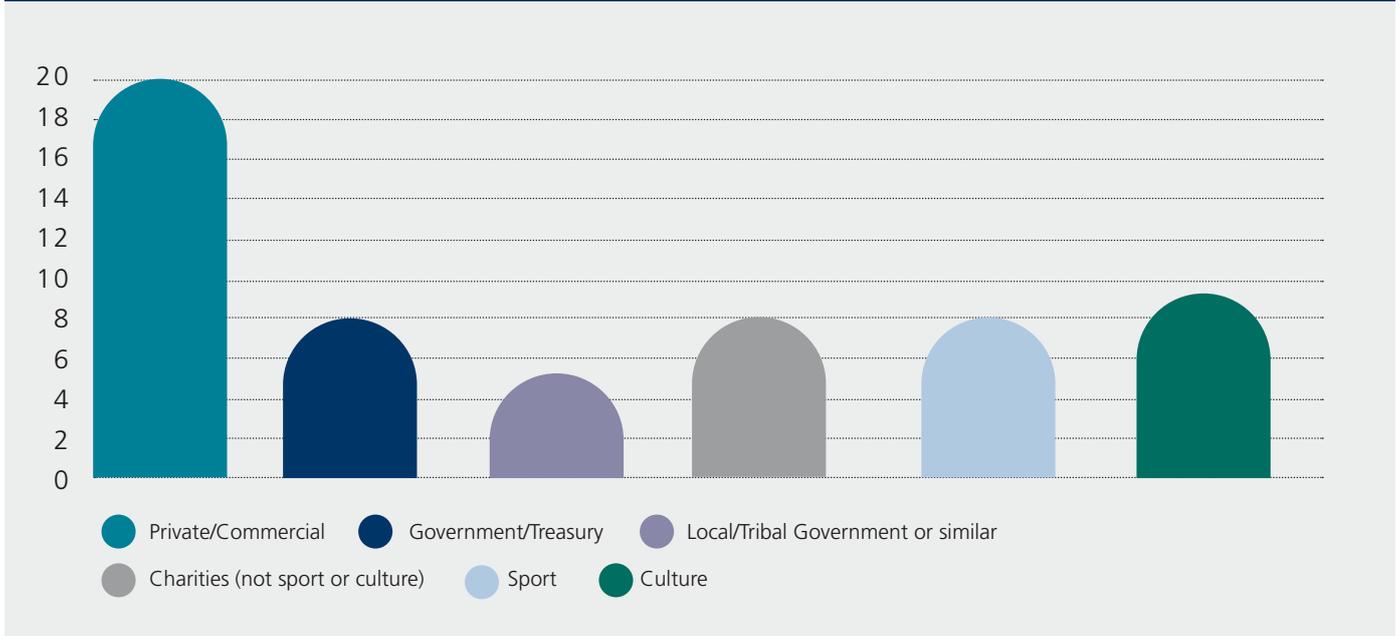
Figure 15: Licence models for slot machines (number of responses)



⁷ Jurisdictions can of course permit more than one licensing form in their jurisdiction, ie permitting private sector operators to operate slot machines need not mean that the public sector could not simultaneously operate slots.

⁸ Online slot machine-style games are covered in the land-based/online casinos section.

Figure 16: Post-tax gambling revenue destinations for slot machines (number of responses)



8.5 Permitted gambling types.

Permitted slot machine types were not covered by the survey.

8.6 Age restrictions.

Permission to play slot machines is typically set at the age of majority, or higher (up to 25); there are no jurisdictions where participants can be lower than the age of majority. Globally, the most common age to play a slot machine is 18. The average variation from the age of majority is +14.8%. This is the third largest positive variance of all the markets, indicating that slot machines may be perceived as posing more risk of harm than other gambling markets in most jurisdictions.

8.7 Foreign investment.

Foreign investment restrictions for slot machines were not collected by the survey.

9 LOTTERIES

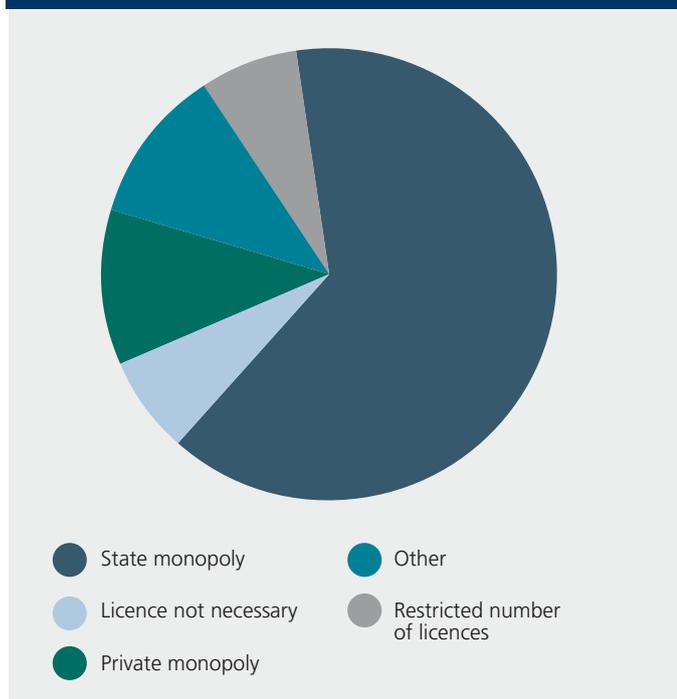
9.1 Overview.

Lotteries can be defined as all forms of games based upon the drawing of lots, including scratch-cards, with a pre-defined winnings pool from which prizes are awarded. At a global level, lotteries are the most permitted land-based gambling market, allowed by 97% of respondent jurisdictions. They are the second most permitted online market (67% of respondents).

9.2 Ownership and licence models.

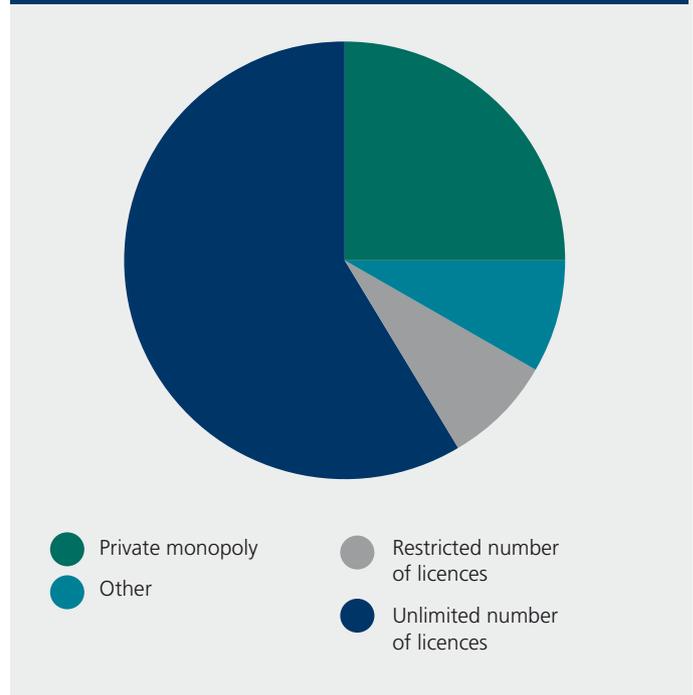
Of the 32 jurisdictions where lotteries are permitted, 84% award licences solely, or in part, to the state/public sector. Private/commercial operators can be licenced to run lotteries in 69% of respondent jurisdictions and non-private (eg tribal) operators can run lotteries in 44% of jurisdictions.⁹ For each of these types of operator ownerships, different licence models are used. For state/public sector models, the most prevalent approach is for the state to run lotteries on a state monopoly basis.

Figure 17: Licence models for lotteries – state/public sector (aggregated split)



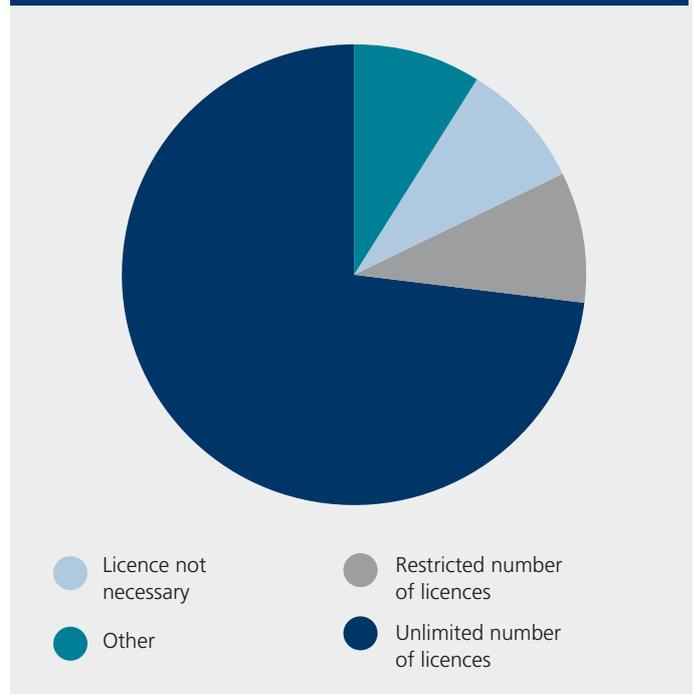
Where the lotteries market has been opened up to private/commercial operators, the most prevalent licence model is for the jurisdiction to permit an unlimited number of licences; reinforcing the liberalised market approach.

Figure 18: Licence models for lotteries – private/commercial sector (aggregated split)



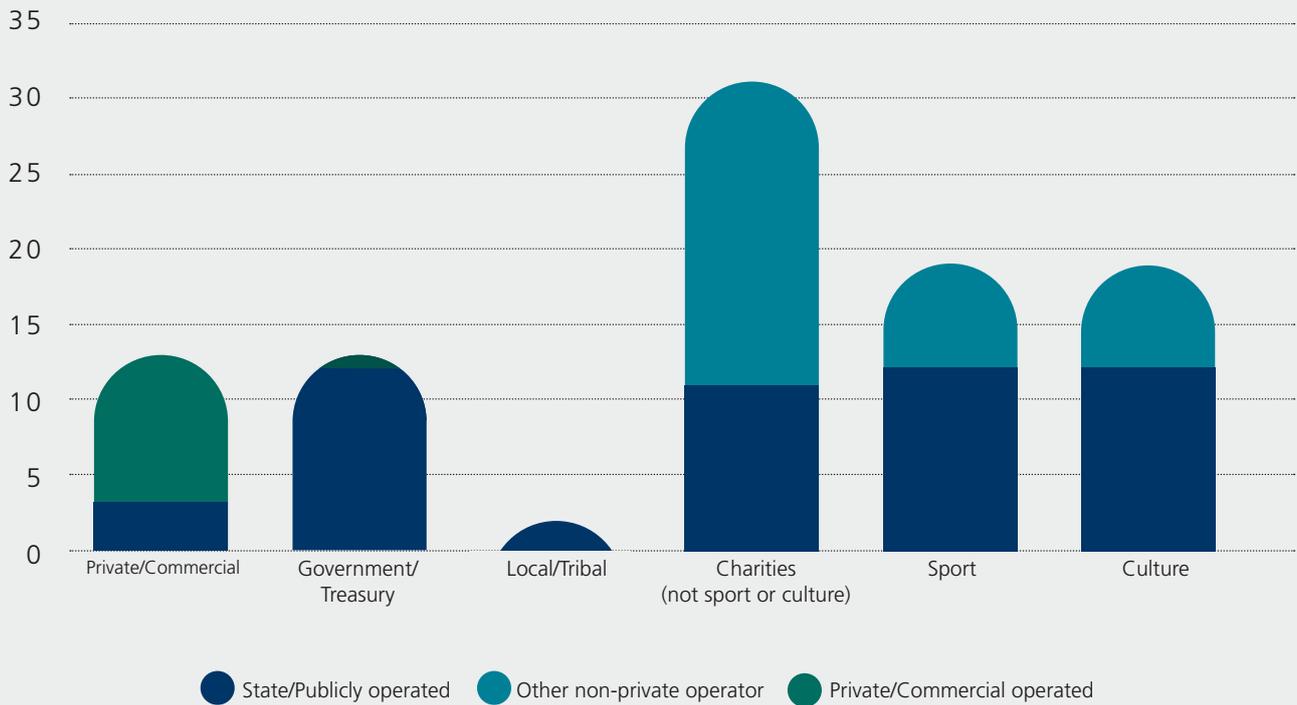
Similarly, when non-private operators (eg tribal operators) are permitted to operate lotteries, the most prevalent licence model is also to allow an unlimited number of licences.

Figure 19: Licence models for lotteries – non-private sector (aggregated split)



⁹ Jurisdictions can of course permit more than one licensing form in their jurisdiction, ie permitting private sector operators to operate lotteries need not mean that the public sector could not simultaneously operate lotteries.

Figure 20: Post-tax gambling revenue destinations for lotteries (number of responses)



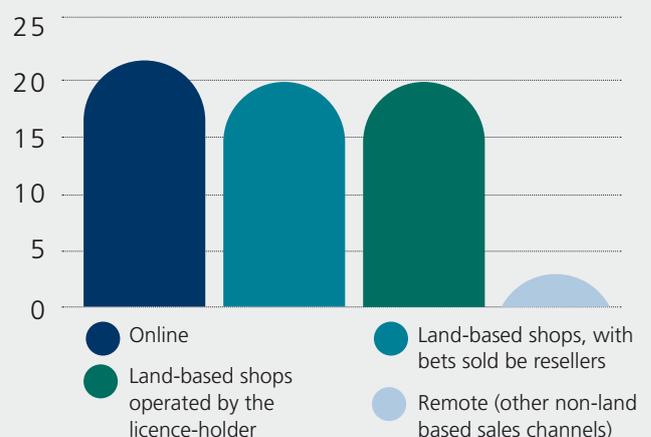
9.3 Post-tax revenue distributions.

The survey responses indicate that the most prevalent beneficiaries of post-tax gambling revenues from lotteries are charities, followed by sport and culture. However, private/commercial operators, the government/treasury and local/tribal governments also benefit from lotteries. State/public sector owned lotteries tend to deliver post-tax gambling revenues to all of these beneficiaries. But, post-tax revenues from local/tribal government lotteries are only directed to private/commercial and government/treasury beneficiaries; and, revenues from private/commercial lotteries only benefit charities, sport and culture.

9.4 Sales channels.

Online lottery ticket sales are available in 69% of jurisdictions that permit lotteries; compared with 63% for land-based shops operated by the licence-holder and 63% for land-based shops with tickets sold by resellers. In addition, tickets are available from other remote channels in 9% of jurisdictions.¹⁰

Figure 21: Sales channels for lotteries (number of responses)

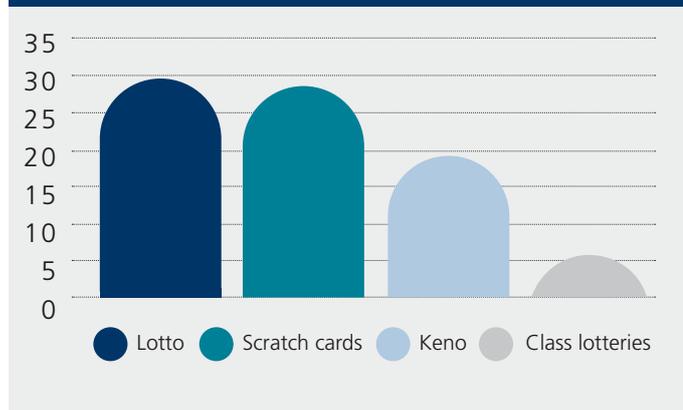


¹⁰ While the question provided options for sales through kiosks operated by lotteries or shops acting as resellers for lotteries, respondents also noted that some sales in their jurisdiction took place through door-to-door sales.

9.5 Permitted gambling types.

The most prevalent type of lottery game offered in jurisdictions (where lotteries are permitted) is lotto (91%), followed by scratch cards (88%), keno (59%), then class lotteries (19%).

Figure 22: Permitted lottery games (number of responses)



9.6 Age restrictions.

Permission to participate in lottery games is typically set at the age of majority, or lower. There are no jurisdictions where participants need to be over the age of majority. Globally, the most common age to play a lottery is 18. In some jurisdictions, there is no age restriction to play a lottery if it is for charitable purposes. The average variation from the age of majority is -26.7%, with lottery play permitted at age 16 in some jurisdictions. This is the largest negative variance of all the markets, indicating that lotteries may be perceived as posing less risk of harm than other gambling markets in most jurisdictions.

9.7 Foreign investment.

Foreign investment restrictions for the lotteries market were not collected by the survey.

10 BINGO

10.1 Overview.

Bingo is a numbers game. It is a game of chance where players pick numbers on a card, or an electronic representation of a card. Numbers are then drawn at random, with the winner being the person who first has all their numbers drawn. At a global level, bingo is the second most permitted land-based gambling market, after lotteries, allowed by 94% of respondent jurisdictions. However, it is the least permitted online market (35% of respondents).¹¹

10.2 Ownership and licence models.

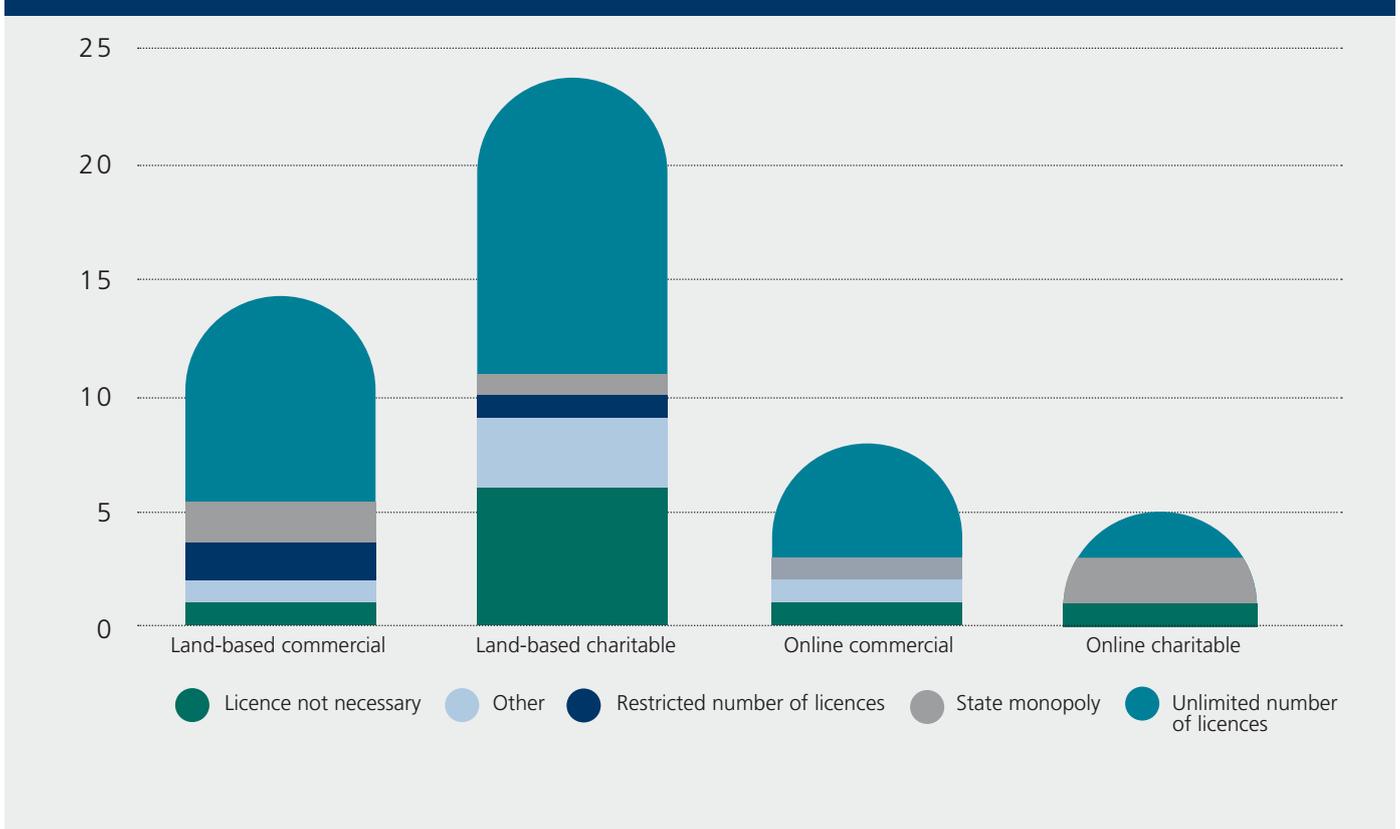
Of the 29 jurisdictions where bingo is permitted, 80% permit private/commercial operators to run bingo tournaments. In 43% of the respondent jurisdictions, bingo is hosted by the state/public sector, whilst 27% allow local/tribal government to deliver bingo games.¹² In the commercial bingo market, for both land-based and online sales channels, the most common licence model is for an unlimited number of licences to be available. This is mirrored in the charitable bingo market, apart from for online sales channels, where a state monopoly approach is equal in prevalence to the unlimited number of licences model.

10.3 Post-tax revenue distributions. (See figures 24 & 25)

The survey responses indicate that the most prevalent beneficiaries of post-tax gambling revenues from land-based bingo are charities, followed by private/commercial operators, and then sport and culture. In some cases, the charities themselves may be operating bingo tournaments.

For online bingo, the picture is more mixed, but the survey responses indicate that commercial / private operators, are the largest beneficiary of post-tax gambling revenue in jurisdictions that permit online bingo.

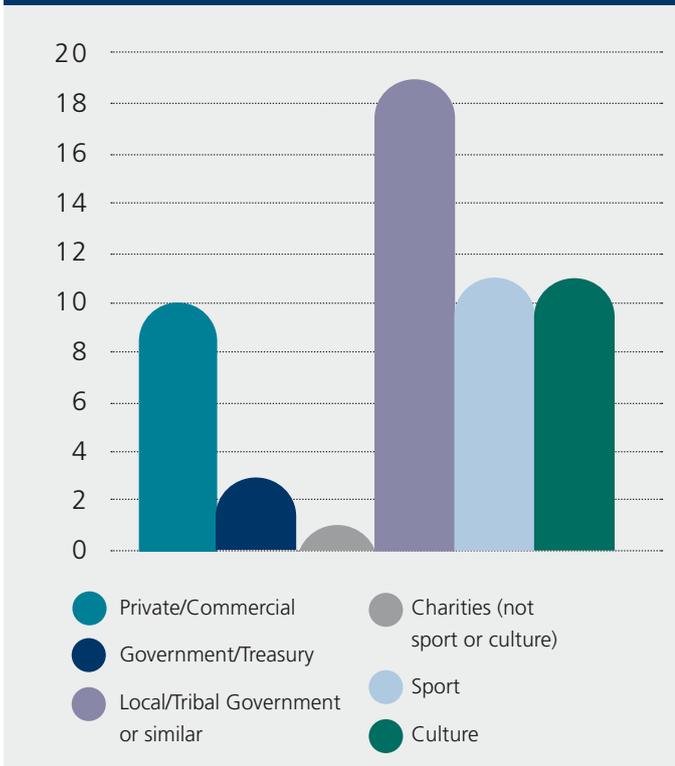
Figure 23: Licence models for bingo (number of responses)



11 Although note that in some jurisdictions bingo is classified within the lotteries market, or is offered by licensed casinos that are permitted to provide online gambling services.

12 Jurisdictions can, of course, permit more than one licensing form in their jurisdiction (ie permitting private sector operators to run bingo services need not mean that the public sector could not simultaneously operate a bingo service).

Figure 24: Post-tax gambling revenue destinations for land-based bingo (number of responses)



10.4 Sales channels.

Detailed sales channels for the bingo market were not collected by the survey.

10.5 Permitted gambling types.

Types of permitted bingo games were not collected by the survey.

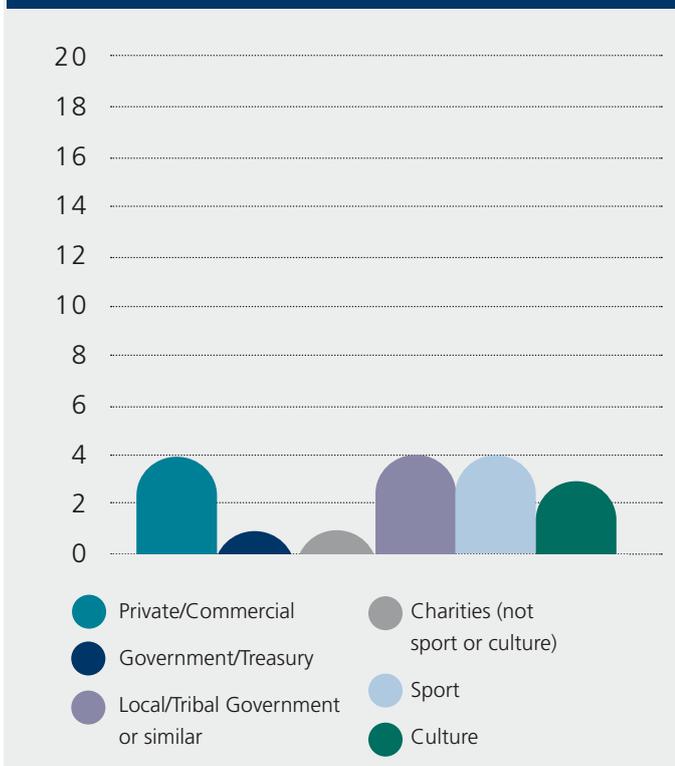
10.6 Age restrictions.

As with lotteries, permission to participate in bingo broadly follows the age of majority. Globally, the most common age to play bingo is 18, but in a few jurisdictions it is as low as 16 and in others as high as 21. The average variation from the age of majority is -7.7%, indicating that it may be perceived as posing less risk of harm than other gambling markets in most jurisdictions.

10.7 Foreign investment.

Foreign investment restrictions for the bingo market were not collected by the survey.

Figure 25: Post-tax gambling revenue destinations for online bingo (number of responses)



11 BETTING

11.1 Overview.

Betting is the staking or wagering money or something else of value on an uncertain event, such as a sports match, race or suchlike. At a global level, betting is the fifth most permitted land-based gambling market and is allowed by 82% of respondent jurisdictions. For online sales channels, betting is the most permitted market (73% of respondents).

11.2 Ownership and licence models.

For both land-based and online betting, the ownership and licence model most commonly seen amongst respondent jurisdictions was that of an unlimited number of licences with significant private/commercial sector provision. The next most common structure, for both land-based and online betting, was a state monopoly.

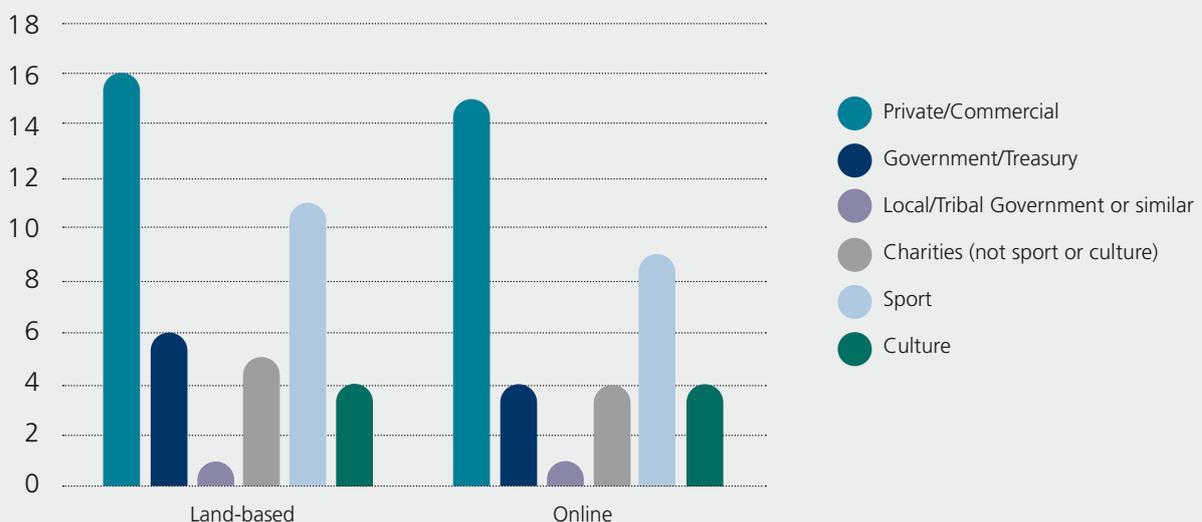
11.3 Post-tax revenue distributions. (See figure 27)

For both land-based and online betting, post-tax revenues from the betting market predominantly went to private/commercial interests, reflecting the liberalised market structure in place in many jurisdictions. Sport was the next major beneficiary of post-tax revenues, but government/treasury, charities, culture and local/tribal governments also benefited from some betting activities. There was a broad mirroring between the balance of beneficiaries for post-tax betting revenues between land-based and online sales channels.

Figure 26: Licence models for land-based and online betting (number of responses)



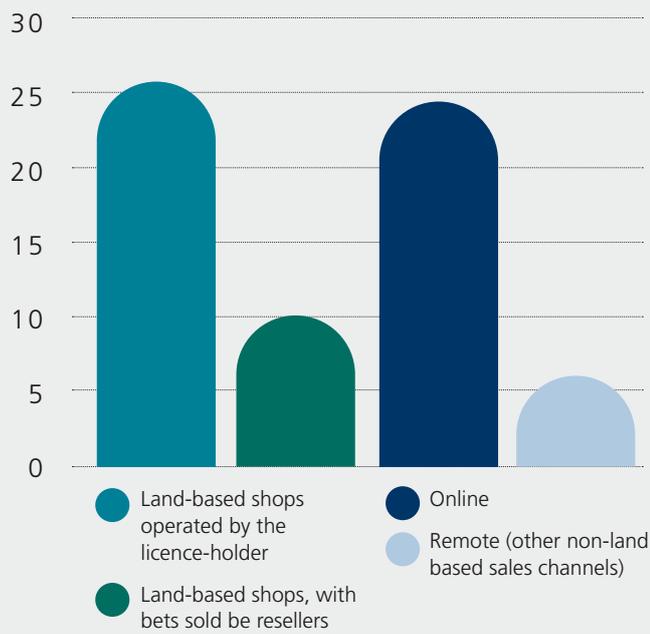
Figure 27: Post-tax gambling revenue destinations for betting (number of responses)



11.4 Sales channels.

The most prevalent sales channel for land-based betting is through shops operated by the licence-holder (93%), with 36% of jurisdictions also permitting betting sales through land-based resellers. Online sales channels are available in 89% of jurisdictions and some jurisdictions (21%) also allow sales via other remote means, such as through telephone betting.

Figure 28: Sales channels for betting (number of responses)



11.5 Permitted gambling types. (See figure 29)

Various types of betting are permitted in different jurisdictions. The majority of all jurisdictions (over 85%) allow fixed odds betting on single events, fixed odds betting on a combination of events (sometimes called accumulator bets) and pari-mutuel betting. Betting exchanges are less common and are only offered in 38% of those jurisdictions that permit betting.

11.6 Age restrictions.

Permission to participate in betting broadly follows the age of majority. Globally, the most common age to bet is 18, but in a few jurisdictions it is higher (up to 21). The average variation from the age of majority, across all jurisdictions, is +7.7%.

11.7 Foreign investment. (See figure 30)

The majority of jurisdictions (58%) reported that there were no restrictions on foreign investment in the betting market (where that market was permitted). There were some restrictions in 31% of jurisdictions, which in some cases required investors to have a physical presence in the jurisdiction. Foreign investment was only prohibited in 12% of jurisdictions.

Figure 29: Permitted betting types (number of responses)

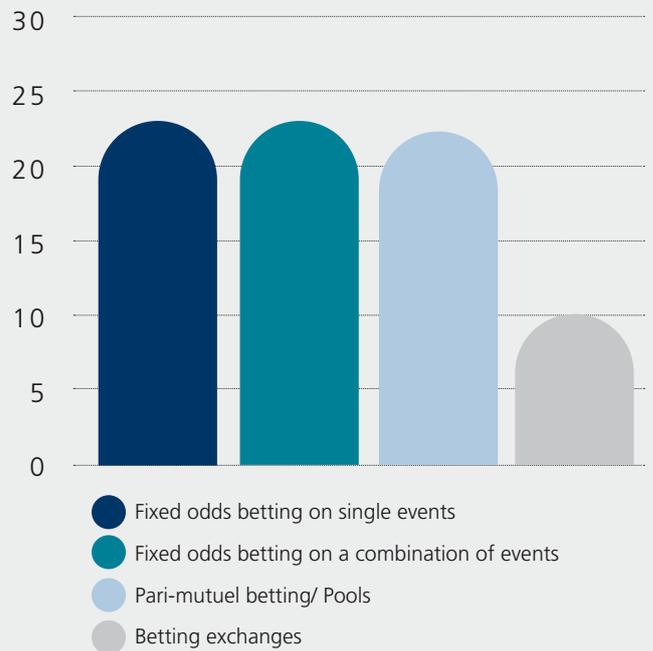
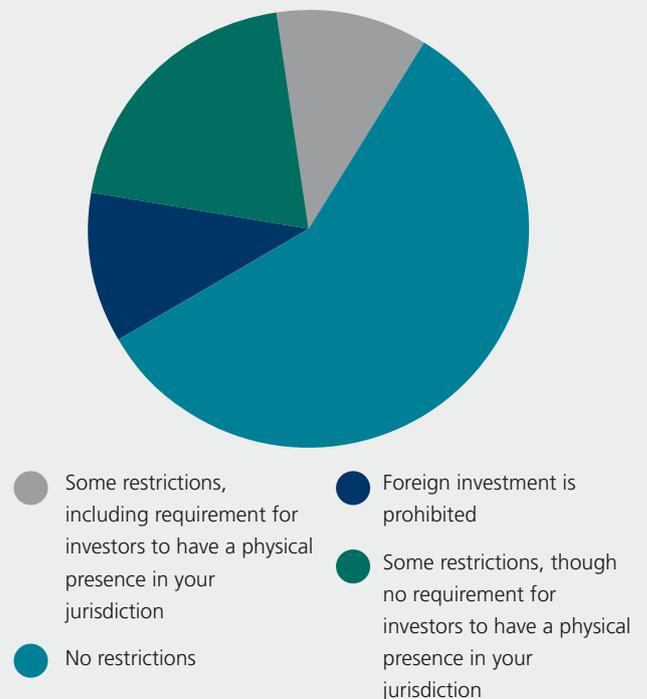


Figure 30: Foreign investment in betting (aggregated split)



12 RESPONSIBLE GAMBLING

12.1 Overview.

In the Regulator Information section of this report, it was stated that 84% of jurisdictions worked on problem gambling issues and 59% on gambling addiction issues. However, only 30% of jurisdictions had regulatory responsibility for the provision of services relating to problem gambling, and only 3% held powers relating to the treatment of gambling addicts.¹³ This section explores problem gambling in more detail, examining the extent of problem gambling; who provides research, education and treatment; whether operators are required to contribute funding to address this issue; and, the extent of self-exclusion programmes.

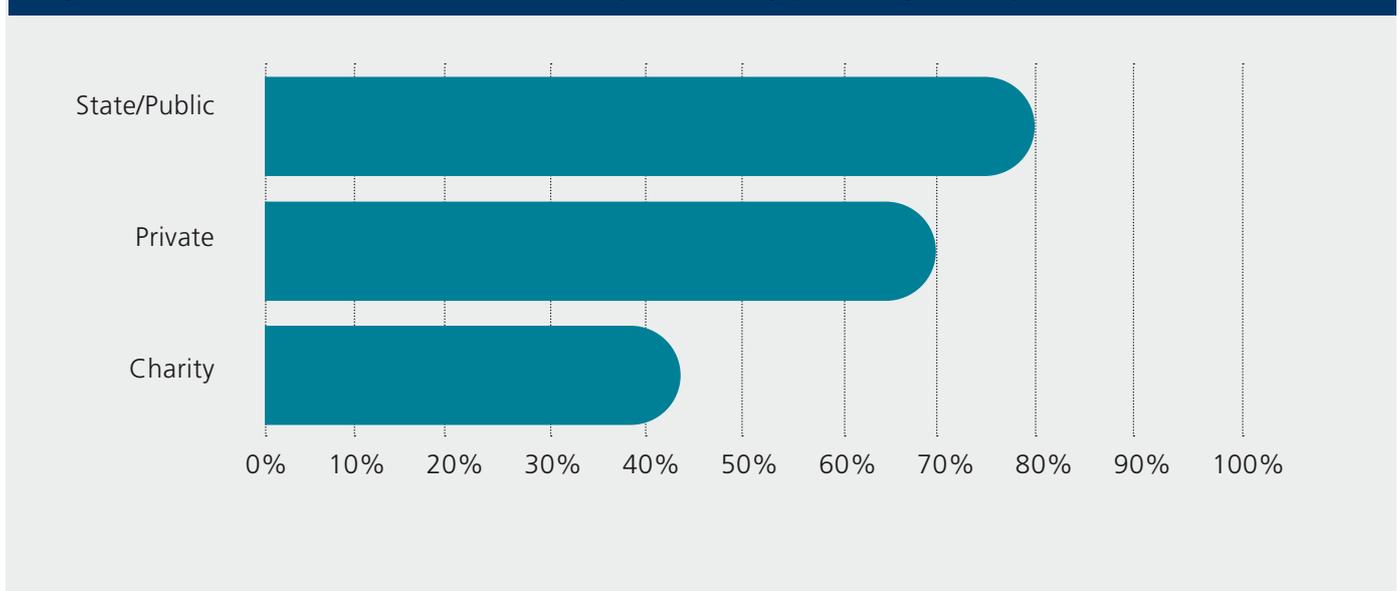
12.2 Addiction and/or problem gambling rates.

Measuring gambling addiction and problem gambling rates, or those at risk of developing problem gambling is carried out in 64% of respondent jurisdictions. In jurisdictions where measure these rates, most rely on a third party to collect these statistics. The methodologies used for measuring gambling addiction and problem gambling vary considerably, making comparisons between the data sets of different jurisdictions difficult, and lacking statistical robustness. Further work is required to build a picture of problem gambling rates across jurisdictions and analysis of this area is not included in this report.

12.3 Research, education and treatment provision.

Research, education and treatment for gambling addiction and problem gambling is provided by a mix of public (ie state), private (ie commercial) and charity sector (ie charitable or non-profit organisations) bodies. Globally, the state/public sector is the most prevalent provider of research, education and treatment (80% of jurisdictions), but there is a mix of provision from two or more of the provider categories in 63% of jurisdictions.

Figure 31: Research, education and treatment provision (by percentage of respondents)



¹³ Also see the 'Legislative developments in gambling legislation' section, which shows that only 5% of jurisdictions have made significant legislative changes to regulatory powers relating to services for the provision of problem gambling and 8% relating to the treatment of gambling addicts in recent years. Although, 32% of jurisdictions have made changes to wider legislation relating to problem gambling and 16% to gambling addiction.

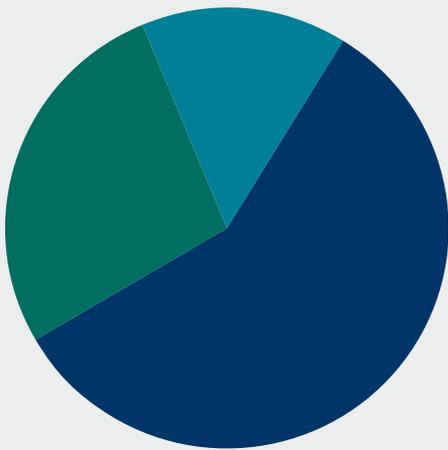
12.4 Gambling-related community benefit contributions.

In some jurisdictions, licensed operators are mandated to make contributions for research, education and treatment for gambling addiction and problem gambling, or other community programmes. Contributions are mandated in the majority of respondent jurisdictions (58%), voluntary contributions are made in 27%, and they are not mandated in 15%.

12.5 Self-exclusion programmes.

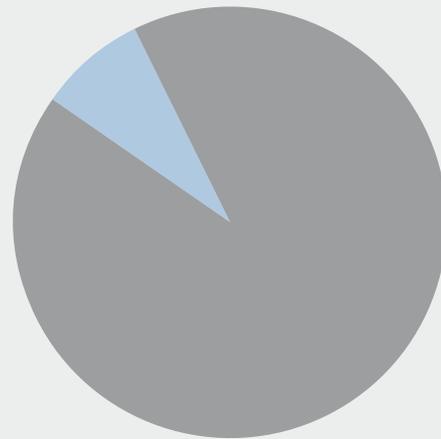
To assist in the prevention and/or treatment of gambling addiction and problem gambling, the majority of operators or jurisdictions offer self-exclusion programmes. These enable gamblers to exclude or restrict their access to gambling products and vary in scope from casino no-entry lists to online schemes across multiple gambling operators. They are available in 92% of jurisdictions.

Figure 32: Gambling-related community benefit contributions (aggregated split)



- Contributions are mandated
- Only voluntary contributions are made
- Contributions are not mandated

Figure 33: Self-exclusion programmes (aggregated split)



- Self-exclusion offered
- No self-exclusion options

13 TACKLING GAMBLING-RELATED CRIME

13.1 Overview.

Keeping crime out of gambling is a concern of all regulators, with 76% of jurisdictions working on this issue, although (anti-money laundering legislation aside) only 5% of jurisdictions have introduced significant legislation on crime related to gambling in recent years. This section looks at gambling-related crime on a global level. It examines the criminalisation of gambling and which gambling-related crimes are of most concern.

13.2 Criminalisation of gambling.

a. Participation. Globally, certain aspects of participation in gambling activities are subject to criminal sanctions in most jurisdictions, with 76% of respondents providing for this via statutory/written law and case law. A typical example of this is legislation setting minimum ages for playing certain types of game. In just under a quarter of jurisdictions (24%), participation is not subject to criminal sanctions.

b. Provision. The provision of gambling is more controlled, with 100% of respondent jurisdictions having statutory/written law or case law in place that criminalises certain aspects of gambling provision.

13.3 Crime types.

Of the broad range of gambling-related crime types, the top five areas of concern reported by jurisdictions were in order):¹⁴

a. Money-laundering. Money laundering is the concealment of the origins of illegally obtained money, typically by means of transfers involving foreign banks or legitimate businesses. Recognising that money-laundering is the top gambling-related crime concern globally, 94% of jurisdictions reported that they have anti-money laundering (AML) regulations in place, or that they exist at a national level. Of the remaining 6% of jurisdictions, all were aiming to have AML regulations in place by the close of 2018. The majority of jurisdictions (78%) work on AML related issues and 19% reported they had made significant legislative changes to AML legislation in recent years.

b. Illegal gambling. Illegal gambling has a wide variety of definitions. Broadly, gambling is illegal when unlicensed or prohibited gambling premises, products or services are provided. The growth of online gambling, and the supply of gambling services across jurisdictional boundaries, has created a new dimension to types of illegal gambling. Some jurisdictions have chosen to legalise aspects of online gambling, whilst this sales channel remains illegal in many others.

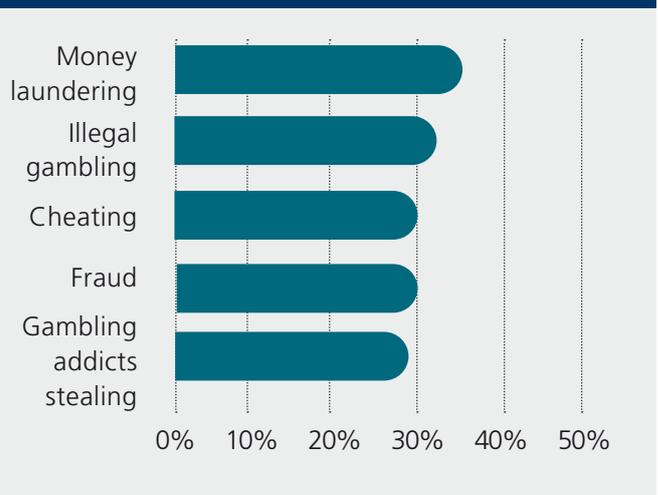
c. Fraud. Fraud is wrongful or criminal deception intended

to result in financial or personal gain. It can be fraud against a business (eg counterfeit betting slips or lotteries tickets), or against an individual (eg ID fraud). Alternatively, fraud can be committed by individuals against non-gambling related businesses or individuals (eg family members), perhaps to fund a gambling addiction.

d. Cheating. Cheating is typically a sub-set of illegal gambling and is a core gambling-related crime. It could be where the gambling provider cheats (eg using a rigged roulette wheel), or cheating by an individual (eg collusion in poker games).

e. Gambling addicts stealing to carry on gambling. Typically an example of criminogenic crime, gambling addicts stealing to carry on gambling is a widely prevalent gambling-related crime. Regulators are increasingly focused on this concern, although the crime of theft normally lies with other enforcement authorities.

Figure 34: Gambling-related crime concerns (by percentage of respondents)

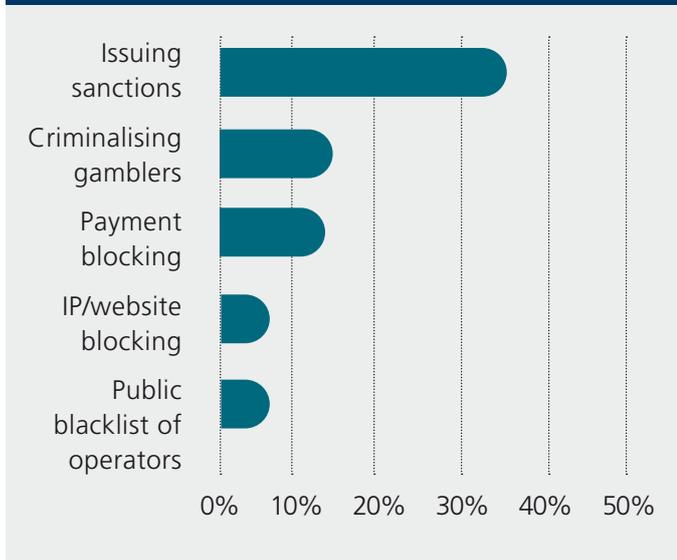


¹⁴ This assessment is based on the subjective responses of regulators, as most do not collect, or have access to, statistics for measuring gambling-related crime in their jurisdiction.

13.4 Approaches to restrict access to online gambling.

In jurisdictions where online gambling is prohibited, different approaches are taken to restrict access to online sales channels for gambling products. These include issuing sanctions (eg fines), criminalising gamblers who use illegal gambling sites, payment blocking, Internet Protocol (IP) blocking or website blocking, and publishing a public blacklist of operators. The most common approach is to issue sanctions. However, 50% of jurisdictions apply two or more different approaches to restrict access.

Figure 35: Most prevalent approaches to restricting access to online gambling, (by percentage of respondents, who do not permit online gambling)



14 LEGISLATIVE DEVELOPMENTS IN GAMBLING REGULATION

14.1 Overview.

In response to the changing gambling landscape, regulators have worked with relevant authorities to enact legislation to enable more effective and efficient regulation of the gambling industry and the protection of consumers. This section analyses recent (last 5 years) legislative changes by market, theme and regulatory power type.

14.2 Markets. (See figure 36)

The top three gambling markets where legislation has been enacted are: land-based casinos (35% of respondents), slot machines (32% of respondents), and online casinos and lotteries (30% of respondents each).

14.3 Thematic. (See figure 37)

The top three gambling themes where legislation has been enacted are: anti-money laundering and regulation of the marketing of gambling products (38% of respondents each) and consumer protection (35% of respondents).

Figure 36: Market legislative activity (by percentage of respondents)

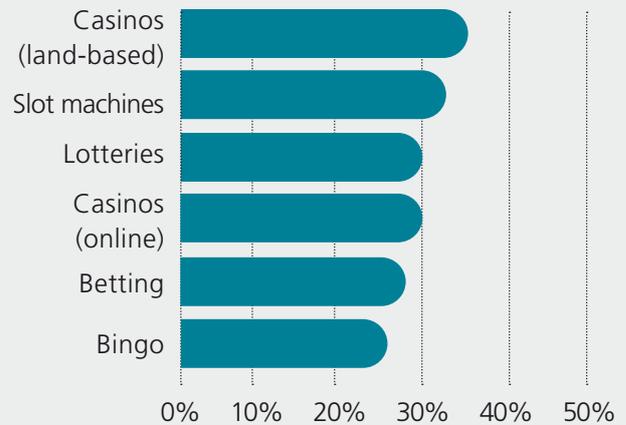


Figure 37: Thematic legislative activity (by percentage of respondents)



14.4 Regulatory powers.

The top three gambling-related regulatory powers where legislation has been enacted are: licensing (41% of respondents), compliance/auditing of gambling operators and policy development (38% of respondents each).

Figure 38: Regulatory powers legislative activity (by percentage of respondents)



15 FUTURE TRENDS

15.1 Overview.

In recent years, the gambling industry in many jurisdictions has been marked by innovation and change; typically driven by developments in technology, including the advent of online channels. The survey asked IAGR members to rate the following issues which have emerged as challenges for regulators: betting on eSports, skins betting, fantasy sports games and social gaming.

a. Betting on eSports. Betting on eSports is wagering on the playing of computer games, which can range from play by two individuals to professional competitions.

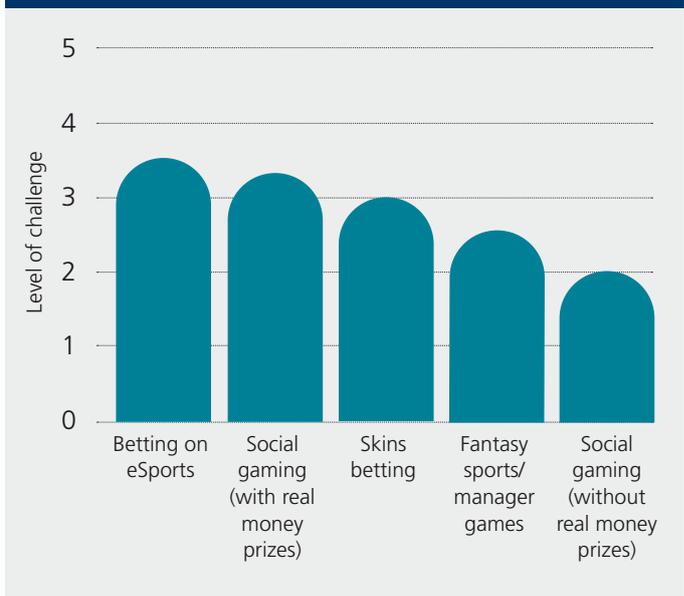
b. Skins betting. Skins betting refers to betting on the outcome of eSports or other forms of wagering or gambling using digital commodities or items (such as accessories or 'skins' for in-game weapons) which can be won or purchased within the confines of computer games. These so-called 'skins' can therefore be considered a form of virtual currency to wager with.

c. Fantasy sports/manager games. A fantasy sport is a type of online game where participants assemble imaginary or virtual teams of real players of a professional sport. These teams compete based on the statistical performance of those players' players in actual games or an entire playing season. Performance is converted into points that are compiled and totalled according to the team selected by the fantasy team's manager. Increasingly, opportunities exist to bet on the performance of these teams. A sub-category of fantasy sports is known as daily fantasy sports (DFS). DFS contests are based on performances over shorter period of time than for instance, an entire sports season. DFS first came to prominence in the United States, following the passing of the Unlawful Internet Gambling Enforcement Act of 2006, as that act expressly excluded fantasy sports participation from the definition of a 'bet or wager'.

d. Social gaming (with and without real money prizes). Social games, at the simplest level, are games that people play over the internet, often via mobile phones, and which are built on social networks. Some are focused on looking like gambling (eg free to play electronic roulette), and allow the player to win additional spins or credit or tokens, without the characteristics that would make them gambling (real money stakes or a prize of money). Some do offer real money prizes, or the ability to trade virtual items (eg points credited) as a form of digital currency, however, in such cases, another element which would qualify the game as gambling is absent (such as the element of chance).

Of these trends, the most pressing challenge reported by regulators is betting on eSports.

Figure 39: Future trends, graded by 'most pressing challenge' (1=Low, 5=High)



15.2 Other issues.

Other concerns highlighted by regulators were:

a. Digital currencies. Digital currencies, or cryptocurrencies are underpinned by blockchain/distributed ledger technology to form a new type of payments system which is not controlled by a central bank or other centralised authority. Digital currencies can be traded or used as a means to facilitate payments and are therefore usually considered money or money's worth. Bitcoin was the first and remains the most well-known of over 1,500 cryptocurrencies.

b. Virtual currencies. By contrast, virtual currencies are generally issued and controlled by their creators, and used and accepted among the members of a specific virtual community or game (eg a social casino). Where they can be exchanged for cash or traded for items of value, they are normally considered money or money's worth.

c. Miscellaneous. Some jurisdictions also highlighted concerns over:

- skills-based gaming (games which incorporate a skill-based element, rather than chance, often with variable pay-out percentages),
- proxy betting (where a person outside of a gambling venue, normally a casino, gives betting instructions to an agent inside),
- cross-border marketing of online gambling services and products, and
- general challenges posed in regulating online sales channels (whether they are permitted or not).



ANNEXES

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ANNEX A: PERMITTED GAMBLING MARKETS

Country/jurisdictional area	Casinos (land-based)	Casinos (online)	Casino games outside casino	Slot machines	Lotteries	Bingo	Betting
Alderney							
Antigua and Barbuda	-	-	-	-	-	-	
Australia – Federal	-		-	-			
Australia – Australian Capital Territory							
Australia – New South Wales							
Australia – Queensland							
Australia – Victoria							
Australia – Western Australia							
Bermuda							-
Brazil	-	-	-	-			
Canada – Manitoba							
Canada – Ontario							
Denmark							
Finland – excluding Åland							
Finland – Åland Islands							
Gibraltar							
Great Britain							
Isle of Man							
Jersey							
Malta							
The Netherlands							
Norway							
Seychelles							
Singapore, Republic of		-	-	-	-	-	-
South Africa – Federal							
South Africa – Eastern Cape					-	-	
South Africa – Mpumalanga Province							
South Africa – Western Cape							
Swaziland					-	-	
Sweden							
Switzerland						-	-
Turkish Republic of Northern Cyprus							
USA – California							
USA – Colorado							
USA – Delaware							
USA – Commonwealth of Massachusetts							-
USA – State of New Jersey							

Notes: This data was provided by jurisdictions as part of their survey return. It provides a high-level view of permitted/prohibited markets. Jurisdictions may or may not allow certain gambling activities outside of the permitted/prohibited definitions given above. The symbol ‘-’ indicates no survey response or not applicable.

	Permitted
	Not Permitted

ANNEX B: AGE RESTRICTIONS FOR PARTICIPATION

Country/jurisdictional area	Age of majority	Casinos (land – based)	Casinos (online)	Casino games outside casino	Slot machines	Lotteries	Bingo	Betting
Alderney	18	–	18	18	–	18	18	18
Antigua and Barbuda	18	–	–	–	–	–	–	–
Australia – Federal	18	–	–	–	–	–	–	–
Australia – Australian Capital Territory	18	18	–	–	18	18	18	18
Australia – New South Wales	18	18	–	–	18	18	18	18
Australia – Queensland	18	18	–	18	18	18	–	18
Australia – Victoria	18	18	–	18	18	18	18	18
Australia – Western Australia	18	18	–	18	–	16	16	18
Bermuda	18	18	–	–	–	–	18	–
Brazil	18	–	–	–	–	18	–	–
Canada – Manitoba	18	18	18	–	18	18*	18*	18
Canada – Ontario	18	19	19	19	19	18*	18	–
Denmark	18	18	18	18	18	16	18	18
Finland – excluding Åland	18	18	18	18	18	18	–	18
Finland – Åland Islands	18	18	18	18	18	18	18	–
Gibraltar	18	18	18	18	18	16*	18*	18
Great Britain	18	18	18	18	18*	16	18	18*
Isle of Man	18	18	18	–	–	16	18	18
Jersey	18	–	18	18	18	18	18	18
Malta	18	25*	18	–	18*	18	18	18
The Netherlands	18	18	–	–	18	18	18	18
Norway	18	–	18	18	18	18*	18	18
Seychelles	18	18	18	–	18	18	18	18
Singapore, Republic of	18	21	–	–	–	–	–	–
South Africa – National	21	21	–	21	21	18	21	21
South Africa – Eastern Cape	18	18	–	–	18	–	–	–
South Africa – Mpumalanga Province	18	18	–	–	18	18	18	18
South Africa – Western Cape	18	18	–	18	18	18	–	18
Swaziland	18	18	18	18	18	–	–	18
Sweden	18	20	20	18	18	18	18	18
Switzerland	18	18	–	–	–	–	–	–
Turkish Republic of Northern Cyprus	18	25	–	–	25	18	18	21
USA – California	18	21*	–	–	21*	18	18	18
USA – Colorado	21	21	–	–	21	18	–	–
USA – Delaware	18	21	21	–	21	18	18	21
USA – Commonwealth of Massachusetts	21	21	–	21	21	21	21	21
USA – State of New Jersey	21	21	21	–	–	18	18*	–

Notes: This data was provided by jurisdictions as part of their survey return. It provides a high-level view of market age restrictions and jurisdictions may operate exceptions to these. The symbol '–' indicates no survey response or not applicable. For some jurisdictions, there are different age restrictions depending on the type of activity undertaken. Where this is the case, ages in the table have been annotated with a '*'.

ANNEX C: LIST OF SURVEY RESPONDENTS

The IAGR Statistics Sub-Committee would like to thank the following gambling jurisdictions for responding to the survey:

Country	Jurisdiction
Alderney	The Alderney Gambling Control Commission
Antigua and Barbuda	Financial Services Regulatory Commission
Australia – Federal	Australian Communications and Media Authority
Australia – Australian Capital Territory	ACT Gambling and Racing Commission
Australia – New South Wales	Liquor and Gaming, New South Wales
Australia – Queensland	Office of Liquor and Gaming Regulation
Australia – Victoria	The Victorian Commission for Gambling and Liquor Regulation
Australia – Western Australia	Department of Local Government, Sport and Cultural Industries
Bermuda	Bermuda Casino Gaming Commission
Brazil	Ministry of Finance
Canada – Manitoba	Liquor and Gaming Authority of Manitoba
Canada – Ontario	Alcohol and Gaming Commission of Ontario
Denmark	The Danish Gambling Authority
Finland – excluding Åland	National Police Board of Finland, Gambling Administration
Finland – Åland Islands	Lotteriinspektionen
Gibraltar	Gambling Division, Government of Gibraltar
Great Britain	Gambling Commission
Isle of Man	Isle of Man Gambling Supervision Commission
Jersey	Jersey Gambling Commission
Malta	Malta Gaming Authority
The Netherlands	The Netherlands Gaming Authority
Norway	The Norwegian Gaming and Foundation Authority
Seychelles	Financial Services Authority
Singapore, Republic of	Casino Regulatory Authority of Singapore
South Africa – National	National Lotteries Commission
South Africa – Eastern Cape	Eastern Cape Gambling and Betting Board
South Africa – Mpumalanga Province	Mpumalanga Gambling Board
South Africa – Western Cape	Western Cape Gambling and Racing Board
Swaziland	Swaziland Gaming Board of Control
Sweden	Swedish Gambling Authority
Switzerland	Federal Gaming Board
Turkish Republic of Northern Cyprus	Ministry of Finance, Gaming Board
USA – California	California Gambling Control Commission
USA – Colorado	Colorado Division of Gaming
USA – Delaware	Delaware Division of Gaming Enforcement
USA – Commonwealth of Massachusetts	Massachusetts Gaming Commission
USA – State of New Jersey	New Jersey Division of Gaming Enforcement

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GLOSSARY

Age of majority

The age of majority is the threshold of adulthood as recognised or declared in law. It is the moment when minors cease to be considered children and assume legal control over their persons, actions, and decisions, thus terminating the responsibilities of their parents or guardian over them.

Betting

Staking or wagering money, or something else of value on an uncertain event, such as a sports match, race or suchlike.

Bingo

A game of chance where players pick numbers on a card, or an electronic representation of a card. Numbers are then drawn at random, with the winner being the person who first has all their numbers drawn.

Casino

A place where casino games such as slot machines, non-card table games (for example roulette) and card games (for example poker) are available. Also, see land-based casino and online casino definitions.

Casino games outside casinos

Casino style games, such as poker, roulette and blackjack, played in venues where it is permissible to participate in casino games, but which are not classified as casinos in legislation. An example is a hotel which holds poker tournaments. In this report, slot machines are excluded from this definition.

Cheating

Is a type of illegal gambling activity in which a gambling provider or player undertakes actions which are prohibited by gambling regulations. Cheating seeks to gain an unfair advantage. Cheating can include, using a rigged roulette wheel by a gambling provider, or players colluding or card marking.

Daily fantasy sports

A sub-category of fantasy sports/manager games where contests are based on performances over shorter period of time than, for instance, an entire sports season. These contests are usually held daily, or occasionally weekly.

Digital currencies

Also known as cryptocurrencies, digital currencies are underpinned by blockchain or distributed ledger technology to form a new type of payments system which is not controlled by a central bank or other centralised authority. Bitcoin was the first and remains the most well-known digital currency.

eSports

eSports, also known as esports or e-sports, are competitive video game matches between players or teams. Popular eSports include Call of Duty, Counter Strike and the FIFA Ultimate Team series.

Fantasy sports / manager games

Is a type of online game where participants assemble imaginary or virtual teams of real players of a professional sport. These teams compete based on the statistical performance of those participants' players in actual games, or an entire playing season. Performance is converted into points that are compiled and totalled according to the team selected by the fantasy team's manager. Increasingly, opportunities exist to bet on the performance of these teams.

Foreign investment

The flow of capital from an entity based in one country, to an entity based in another country.

Fraud

Conduct intended to deceive, usually for financial or personal gain.

Gambling addiction

Also known as gambling disorder, compulsive gambling or pathological gambling. The behaviour is a registered addiction in the Diagnostic and Statistical Manual of Mental Disorders (DSM-5).

Illegal gambling

Gambling which is unlicensed or prohibited by law.

Internet Protocol (IP) / website blocking

A restrictive tool to limit the supply of illegal online gambling. It can involve internet protocol (IP) blocking or domain name system (DNS) filtering. IP blocking prevents a connection between a server/website and one or more IP addresses. DNS filtering is where a system filters a pre-defined list of internet addresses. So-called 'black lists' or 'block lists' are usually required to indicate which websites to restrict access to.

Jurisdiction

In this report jurisdiction refers to a geographic area which has competence to regulate and enforce gambling laws and refers to an entity registered with IAGR.

Land-based casino

Land-based venues where casino games such as slot machines, non-card table games (for example roulette) and card games (for example poker) are available. Land-based casinos range from small stand-alone establishments, to hotel associated premises, to large-scale international resorts which have a range of entertainment, retail, accommodation and business facilities. Some jurisdictions also licence sea-based casinos (eg casinos on cruise ships) under this definition.

Licence models

The type of scheme in place to award gambling licences. Licence models can range from an unlimited commercial model in which there are no limits on licence numbers, to more restrictive models based on public ownership

requirements (state monopolies) or the requirement to be not-for-profit organisations (charitable licence models). Tribal-owned and run casinos in North America are considered in this report to be a type of non-private licence model.

Lotteries

All forms of games based upon the drawing of lots, including scratch-cards, with a pre-defined winnings pool from which prizes are awarded.

Match-fixing

Also known as the manipulation of sports competitions, is a type of corruption which threatens the integrity of sports in which sports results are manipulated. Match-fixing can be by an intentional arrangement, act or omission which is aimed to improperly alter the result or course of a sports competition.

Money-laundering

Is the processing of proceeds of crime to disguise their illegal origin. Money-laundering involves the placement of proceeds of crime into the financial system, the layering of criminal proceeds to convert or distance them from an illegal source, and the integration of criminal proceeds into the legitimate economy.

Online casinos

Also known as internet casinos or remote casinos, online casinos are internet-based platforms on which players can access casino-style games. Online casinos can host games generated by software, such as simulated slot machines; or live casino games, which are streamed from studios in which real gambling equipment, such as roulette wheels, are used to facilitate the online gambling.

Operator

A gambling operator typically describes an entity licensed to provide gambling products and services. Operators may be state/public, private (ie commercial) businesses or charities.

Payment blocking

A restrictive tool to limit the supply of illegal online gambling by imposing restrictions on payment service providers or financial institutions in facilitating the deposit or withdrawal of funds to and from illegal online gambling providers.

Post-tax revenue distributions

The destination of gambling revenues once gambling taxation has been levied.

Problem gambling

Problem gambling is gambling behaviour which causes distress or problems. It is usually characterised by a difficulty in limiting money or time spent gambling which has adverse consequences on the gambler, their family or community.

Return to Player

The percentage of money which some games of chance, such as slot machines, are required to return to players as winnings over time.

Self-exclusion

Self-exclusion, or voluntary exclusion, usually refers to a facility enacted by some gambling regulators, trade bodies and/or individual operators as a way of addressing the issue of problem gambling. In areas that operate self-exclusion schemes, an individual (or in some cases other persons on behalf of an individual) can request that their name be added to a self-exclusion scheme. The person in question would then be excluded from gambling.

Skins betting

Is the betting on the outcome of eSports or other forms of wagering or gambling using digital commodities or items (such as accessories or 'skins' for in-game weapons) which can be won or purchased within the confines of computer games. These so-called 'skins' can therefore be considered a form of virtual currency to wager with.

Slot machines

Slot machines are typically defined as machines that are designed or adapted for use by individuals to gamble. Also known electronic gaming machines, fruit machines or jackpot machines, most slot machines are either of the reel-based type, or are computer-based. Cash or credits are inserted into the machine and buttons or a lever are used to place bets. A random number generator determines the position of the symbols on the machine's play screen, which correlate to wins or losses for bets placed.

Social gaming

Are games that people play over the internet, often via mobile phones, and which are built on social networks. Some are focused on looking like gambling without the characteristics that would make them gambling (real money stakes or a prize of money). Some offer real money prizes, or the ability to trade virtual items. However, in such cases, another element which would qualify the game as gambling is absent (such as the element of chance).

Sports integrity

Sports integrity refers to the process of ensuring sporting competitions are honest and genuine in their results and dealings. Sports integrity seeks to combat match-fixing.

Virtual currencies

Are generally issued and controlled by their creators, and used and accepted among the members of a specific virtual community or game. Where they can be exchanged for cash or traded for items of value, they are normally considered money or money's worth.

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FUTURE WORK

A further survey of IAGR members will take place in September / October 2018. The topics will seek to build on the content of this survey and widen the survey base. The results of the survey will be distributed in early 2019 and presented at IAGR's 2019 Conference. Copies of the survey report will be distributed to all IAGR jurisdictions and key findings will be communicated to gambling regulation media.



FEEDBACK AND IDEAS

We welcome feedback on the content of this report, or ideas for future IAGR statistics work. We also open to new members joining the Statistics Sub-Committee.

If you would like to send us feedback, or volunteer to join the sub-committee, please email Birgitte Sand at the Danish Gambling Authority (bs@spillemyndigheden.dk)



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