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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Welcome to Gambling Regulation – Global Developments 2018-19, the second annual report from IAGR’s Statistics Sub-Committee.

This year, we are presenting our report in two parts, a Markets report and a Themes report. These build on the results of the 2017 survey, providing fascinating analysis on the global approach to gambling regulation.

I really encourage you to spend some time reading the reports. The Themes report explores responsible gambling, gambling-related crime and, new for this year, regulatory cooperation. We also give the results of our ‘future trends’ survey questions. This year, the most pressing challenges for regulators were regulatory developments in other jurisdictions, cross-border marketing of online gambling, betting on eSports, social gaming and gambling with crypto currencies. As before, the results highlight both similarities and differences in our work. In my view, it is from understanding this diversity that we can learn how best to tackle the challenges many of us face.

I offer my sincere thanks to all IAGR members who responded to our survey. We proudly received contributions from a broad range of jurisdictions, forming a rich picture of the international gambling market and the issues facing our members. Two-thirds of IAGR members answered the survey, twenty percent more than last year! Again, we believe this to be the largest voluntary international exchange of data between gambling regulators to date.

And, of course, I would like to thank all members of the Sub-Committee for their efforts in administering the survey and compiling the report. We are fortunate to have representatives from Australia, Denmark, South Africa and the USA, all of whom have provided valuable input. In particular, I would like to offer my personal thanks to James Green (Great Britain Gambling Commission), supported by Kasper Vestergaard Frandsen (Danish Gambling Authority) for their superb work drawing the contributions together.

Your active participation in growing IAGR is wonderful to see and we look forward to your contributions to our 2019 survey!

On behalf of the IAGR Statistics Sub-Committee,
Respectfully,
Birgitte Sand, Chair
IAGR Trustee and Patron
EXECUTIVE SUMMARY

Overview
This report is one of two reports presenting the findings from a survey conducted by the IAGR Statistics Sub-Committee between November 2018 and March 2019. It builds on the 2017 survey and includes new sections and some trend analysis. In total, 44 jurisdictions contributed data on their gambling markets.

Report structure
Analysis on responsible gambling is presented first. The report next turns to examining approaches to tackling illegal gambling. Findings are then presented on regulatory cooperation and future trends.

Key findings
For responsible gambling, the report looks at who is responsible for and who provides research, education and treatment, whether operators are required to contribute funding to address this issue, and the extent of self-exclusion programmes.

Tackling gambling-related crime is a key duty for all regulators. The top five areas of concern reported by jurisdictions were (in order): illegal gambling, money-laundering, cheating, match-fixing / spot-fixing and underage gambling.

Regulatory cooperation is also examined in brief. Almost all jurisdictions have formal cooperation arrangements with other regulatory agencies in some form. The most prevalent reasons for cooperation were to share expertise, to streamline licensing processes / burden on operators and to combat illegal gambling.

Finally, when asked about future trends, regulators responded that their most pressing concerns were (in order): regulatory development in other jurisdictions, cross border marketing of online gambling, betting on eSports, social gaming (with real money prizes) and gambling with crypto currencies.
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 2018-19 survey of international gaming regulators and provides an overview of thematic areas of interest to international gambling regulators. It builds on the 2017 survey and includes new sections and some trend analysis.

2 AIM

2.1 The aim of this report is to present the findings of the 2018 IAGR gambling regulation survey.

3 METHODOLOGY

3.1 The underlying data for this report was collected from a survey of IAGR member jurisdictions conducted between November 2018 and March 2019. 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, 44 jurisdictions contributed data on their gambling markets. There were 65 members of IAGR at the time of 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 RESPONSIBLE GAMBLING

4.1 Overview.
This section explores problem gambling in more detail, examining the extent of problem gambling; who is responsible for and who provides responsible gambling research, education and treatment; whether operators are required to contribute funding to address this issue; and, the extent of self-exclusion programmes. To provide context, 86% of jurisdictions work on problem gambling issues and 45% on gambling addiction issues.

4.2 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 81% of respondent jurisdictions. 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. Analysis of this area is not included in this report.

4.3 Research, education and treatment responsibility.
Research, education and treatment for gambling addiction and problem gambling is the responsibility of 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 responsible body for research, education and treatment (76% of jurisdictions), but there is a mix of responsibilities in 57% of jurisdictions. 39% of respondent jurisdictions reported that they had responsibility for problem gambling research, 59% for responsible gambling education and 7% held powers relating to the treatment of gambling addicts.

4.4 Research, education and treatment provision.
Provision of research, education and treatment for gambling addiction and problem gambling is delivered by a mix of public, private and charity sector bodies. Globally, the charity sector is the most prevalent provider of research, education and treatment (86% of jurisdictions), but two or more of the provider categories deliver these services in 63% of jurisdictions.

4.5 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 required in over half of respondent jurisdictions (66%).

Figure 1: Research, education and treatment provision (by percentage of respondents)

Charity
Private
State / Public

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Figure 2: Gambling-related community benefit contributions (by percentage respondents)

Contributions are required
Contributions are not required
4.6 Self-exclusion schemes.
To assist in the prevention and / or treatment of gambling addiction and problem gambling, operators or regulators offer self-exclusion schemes. 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 were reported to be available in 77% of jurisdictions. The most prevalent schemes are those operated by individual operators for land-based venues (62%). Multi-operator self-exclusion schemes for online gambling are present in 44% of respondent jurisdictions.

4.7 Self-exclusion permissions.
Across respondent jurisdictions, different approaches apply to self-exclusion schemes. In most (91%), it is the individual gambler who needs to apply for self-exclusion. But in others, a range of other individuals and organisations can apply for a gambler to be self-excluded.
5 TACKLING GAMBLING-RELATED CRIME

5.1 Overview.
Keeping crime out of gambling is a concern of all regulators, with 77% of jurisdictions working on this issue. 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.

5.2 Criminalisation of gambling.
a. Participation. Globally, certain aspects of participation in gambling activities are subject to criminal sanctions in most jurisdictions, with 82% 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 sixth of jurisdictions (18%), participation is not subject to criminal sanctions.

b. Provision. The provision of gambling is more controlled, with 97% of respondent jurisdictions having statutory/written law or case law in place that criminalises certain aspects of gambling provision.

c. Acting as a marketing affiliate. Affiliate marketing directs players to a gambling service (normally a website) operated by another business. There are laws prohibiting marketing affiliates, or certain elements of these, in 46% of respondent jurisdictions.

d. Junkets. A junket is an arrangement whereby a person or group of persons are introduced to a gambling operator by a junket promoter who receives a commission or other payment from the gambling operator for that service. There are laws prohibiting junkets, or certain elements of these, in 38% of respondent jurisdictions.

5.3 Crime categories.
Gambling-related crimes can be divided into three broad categories, acknowledging that some crime types can overlap one or more categories. These are (in order):

a. Illegal or unlicensed gambling. Illegal or unlicensed gambling is where either the type of gambling is prohibited by law or where the party is not licensed within the jurisdiction to offer the relevant gambling services.

b. Criminogenic crime. Criminogenic crime is where the act of gambling caused individuals or organisations to commit crime, for example theft in order to fund a gambling addiction.

c. Gambling-centred crime. Gambling-centred crime is where the provision of gambling services attracts crime, for example, betting shop robberies or bribery of officials.

Respondent jurisdictions reported that they were most concerned about illegal or unlicensed gambling (76%) and least concerned with gambling-centred crime (9%).
5.4 Crime types.
Of the broad range of gambling-related crime types, the top five areas of concern reported by jurisdictions were (in order):²

a. **Unlicensed gambling (black market).** Unsurprisingly, as illegal or unlicensed gambling was identified as the foremost crime category, black market activity topped the chart for gambling-related crime types. Almost half of respondents reported this as their primary concern, jointly with money laundering.

b. **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 second most concerning gambling-related crime type globally, 77% of jurisdictions reported that they have anti-money laundering (AML) regulations in place that cover gambling, or that they exist at a national level. The same percentage of jurisdictions (77%) reported that they work on AML related issues.

c. **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). Just under half of respondents reported cheating to be a primary crime type for them.

d. **Match-fixing / spot-fixing.** Also known as the manipulation of sports competitions, match-fixing 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. Whereas match fixing relates to the whole match, game or event outcome, spot-fixing relates to a specific part or parts only. 45% of jurisdictions work on match-fixing or spot-fixing related issues.

e. **Underage gambling.** Gambling by persons below the legal age to gamble is often a criminal offence. This can extend to operators inviting, causing or permitting a child or young person to gamble and, in some cases, allowing them to enter a gambling premises. A quarter of respondents reported underage gambling to be a primary concern.

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2 This assessment is based on the subjective responses of regulators, as just under half (49%) do not collect, or have access to, statistics for measuring gambling-related crime in their jurisdiction.
5.5 Anti-illegal gambling strategies.
Respondent jurisdictions were asked what they considered to be the most effective anti-illegal gambling strategies. Common answers were:

- Competitive / liberalised markets
- Licensing system
- Working with other regulators (nationally and internationally)
- Criminal investigation and prosecution
- Joint initiatives between gambling regulators and law enforcement
- Education and training
- Disqualification or removal of gambling licences
- Raiding and closing illegal or unlicensed gambling premises
- Blacklisting and access blocking of illegal gambling websites
- Dialogue with social media companies
- Working with Internet Service Providers

5.6 Cooperation with other agencies to combat illegal gambling.
Tackling gambling-related crime effectively requires coordination and collaboration between multiple government authorities. Cooperation with police authorities is the most common relationship to combat illegal gambling (100%). 39% of respondent jurisdictions have a dedicated taskforce within police authorities to combat illegal gambling. The next most common cooperation is with financial regulation authorities (62%) and then with intelligence agencies (56%).

![Figure 7: Cooperation with other agencies to combat illegal gambling (by percentage of respondents)](image-url)
5 TACKLING GAMBLING-RELATED CRIME CONTINUED

5.7 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 (71%). However, a third (48%) of jurisdictions apply two or more different approaches to restrict access.

![Figure 8: Most prevalent approaches to restricting access to online gambling (by percentage of respondents, who do not permit online gambling)](image-url)
6 REGULATORY COOPERATION

6.1 Overview.
This section examines what arrangements individual jurisdictions have in place to cooperate with other organisations, both domestic and international.

6.2 Cooperation arrangements.
Almost all jurisdictions (94%) have entered into formal cooperation arrangements with other regulatory agencies to improve their regulation of gambling. These often take the form of Memorandums of Understanding (MoUs) and information sharing agreements but can also extend to partnerships.

a. Organisations cooperated with are a mix of domestic and international.

b. The most prevalent reasons for formal cooperation arrangements by respondent jurisdictions are (in order):
   - To share expertise
   - To streamline licensing processes / burden on operators
   - To combat illegal gambling (see Section 5.5)

c. 91% of respondent jurisdictions also have informal lines of communication and engagement arrangements with other organisations.

d. Half (50%) of respondent jurisdictions have cooperation arrangements with non-governmental third parties (eg payment providers).
7 FUTURE TRENDS

7.1 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 a range of issues which have emerged as challenges for regulators. These were:

- Betting on eSports
- Blockchain based gambling platforms
- Cross-border marketing of online gambling services and products
- Fantasy sports / manager games.
- Gambling with crypto currencies
- Loot boxes
- Regulatory developments in other jurisdictions
- Skins betting
- Skill based gambling
- Social gaming (with real money prizes)
- Social gaming (without real money prizes)

7.2 Top 5 trends.
Of these trends, the most pressing challenge reported by regulators is regulatory developments in other jurisdictions. Examples of this are the liberalisation of a gambling market or the legalisation of online gambling in a neighbouring jurisdiction. Betting on eSports and social gaming (with real money prizes) were the top-rated trends in 2017. They are joint third/fourth/fifth place this year.

Figure 9: Future trends, graded by ‘most pressing challenge’ (1=Low, 5=High)
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**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.

**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.

**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.

**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.

**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.

**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.

**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.

**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.
Spot 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. Spot-fixing can be by an intentional arrangement, act or omission which is aimed to improperly alter the result or course of a sports competition. Whereas match fixing relates to the whole match, game or event outcome, spot fixing relates to a specific part or parts only.

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 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.

ACKNOWLEDGEMENTS

The survey was designed and produced by the IAGR Statistics Sub-Committee, comprising of:

Chair, Birgitte Sand
(The Danish Gambling Authority)

Carla Bastos
(Mpumalanga Economic Regulator, South Africa)

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(Gambling Commission, Great Britain)

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(The Danish Gambling Authority)

Shaila Hari
(Gauteng Gambling Board, South Africa)

Laurie Korpi
(Australian Communications and Media Authority)

Joan Matsumoto
(Massachusetts Gaming Commission, USA)

John Sealy
(Department of the Attorney-General and Justice, Northern Territory Government)

FUTURE WORK

The results of the survey will be presented at the annual IAGR Conference, to be held in Jamaica in September 2019. Copies of the survey report will be distributed to all IAGR jurisdictions and key findings will be communicated to gambling regulation media. A further survey of IAGR members will take place in late 2019 / early 2020. The topics will seek to build on the content of this survey and widen the survey base.

FEEDBACK AND IDEAS

We welcome feedback on the content of this report, or ideas for future IAGR statistics work. We are 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).