IAGR International Association of Gaming Regulators

Gambling Regulation
– Global Developments 2018-19 (Markets)

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.

CONTENTS

FOREWORD

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. This year's *Markets* report explores the regulation of gambling markets, our regulatory powers and the issues we are especially focused on. It is an excellent resource for understanding which markets are permitted, licence models, sales channels, age restrictions for participation across jurisdictions, who benefits from gambling revenues and whether foreign involvement is allowed in domestic markets. 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.

Birgitte Sand, Chair IAGR Trustee and Patron

James Green, IAGR statistics sub-committee member

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

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: number games (lotteries and bingo), casino games (including slot machines and casino games outside casinos) and betting.

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 policy development.

The leading **gambling-related issues** member regulators work on are problem gambling, consumer protection, and the regulation of gambling product marketing.

The number of **people employed** by IAGR members, who work with gambling-related matters is also detailed, highlighting the varied nature of the IAGR membership. The most common numbers at a jurisdictional level are between 50 and 250 persons.

At a global level, the **most permitted gambling market (land-based)** is number games (allowed by 100% of respondent jurisdictions), followed by casinos (95%) and betting (92%). For online channels, the most permitted market is betting (67%).

The most common **licensing models** are, broadly equally, a state monopoly, an unrestricted number of licences, or a restricted number of licences.

Types of **sales channels** are examined for each market, providing useful data on the growth of online gambling globally.

Globally, the **legal age to gamble** follows the age of majority (18 years, modal average), but with a wider range of permitted ages (16 to 25) across jurisdictions and markets.

The **tax/duty base** for most gambling in the world is typically Gross Gambling Revenue (GGR). This is used in 63% of respondent jurisdictions (average, across all markets).

We found, unsurprisingly, that the primary beneficiary of **post-tax gambling revenues** (once taxes/duties have been paid out) is the private/commercial sector.

With respect to **foreign involvement** in domestic gambling, markets are generally open, with only 17% of respondent jurisdictions not permitting foreign operators.

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 international gambling regulation, examining the types of gambling permitted within jurisdictions and how the markets operate. 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]

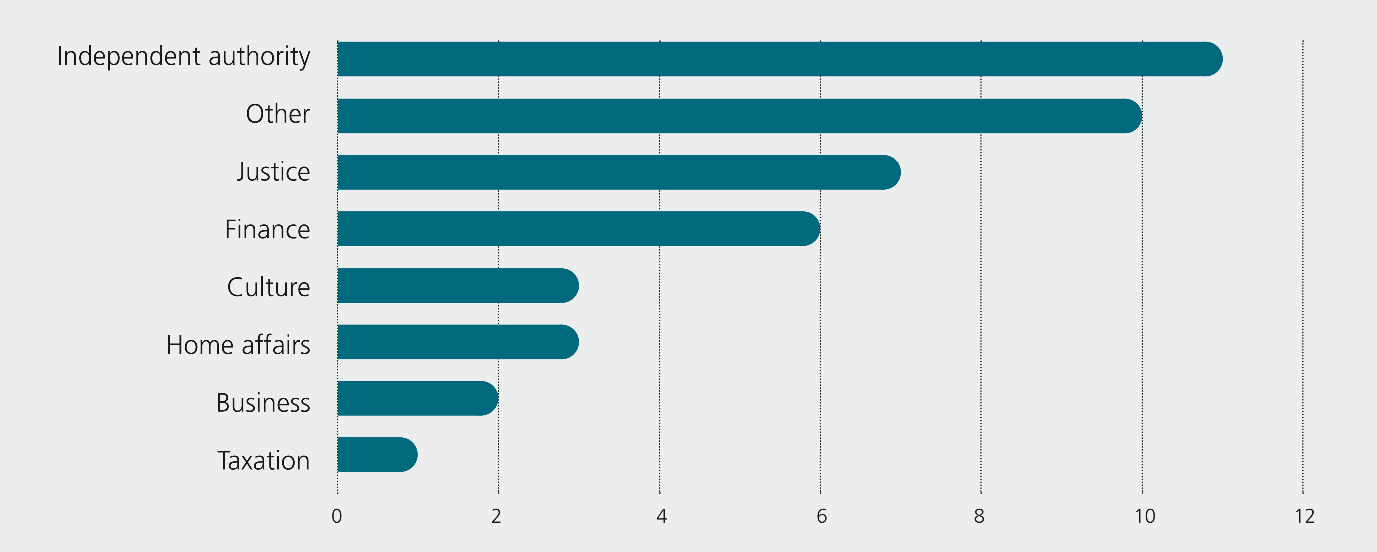
1 Note that the survey was conducted at jurisdictional level and not at country level. According to the IAGR by-laws (s3.1) jurisdictional memberships consist of qualified agencies, which can be a regulatory body, a commission, or statutory body responsible for regulating the gaming industry within its 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 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 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 Responsible government ministries / departments.
Some regulators are independent authorities while others are part of, or report to, government ministries or departments within their jurisdictional area.
The distribution of these is shown in Figure 1. Around a quarter of regulators are independent authorities (26%) or aligned to Justice ministries or departments (16%). The remainder are spread across Finance, Taxation, Culture, Home Affairs, Business or other ministries or departments (eg Tourism).

Figure 1: Responsible ministries / departments for gambling regulators (by number of responses)



4.3 Mission statements. (See figure 2)

Gambling regulators have a myriad of different mission statements or purposes, reflecting the unique circumstances of their respective jurisdiction. Common words and themes are shown in figure 2.

Figure 2: Word cloud of mission statements from gambling regulators

4.4 Regulatory powers. (See figure 3)

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 (93%), licensing of gambling operators (89%), and policy development (86%).

Figure 3: Regulatory powers held by gambling regulators (by percentage of respondents)

4.5 Gambling issues. **(See figure 4)**

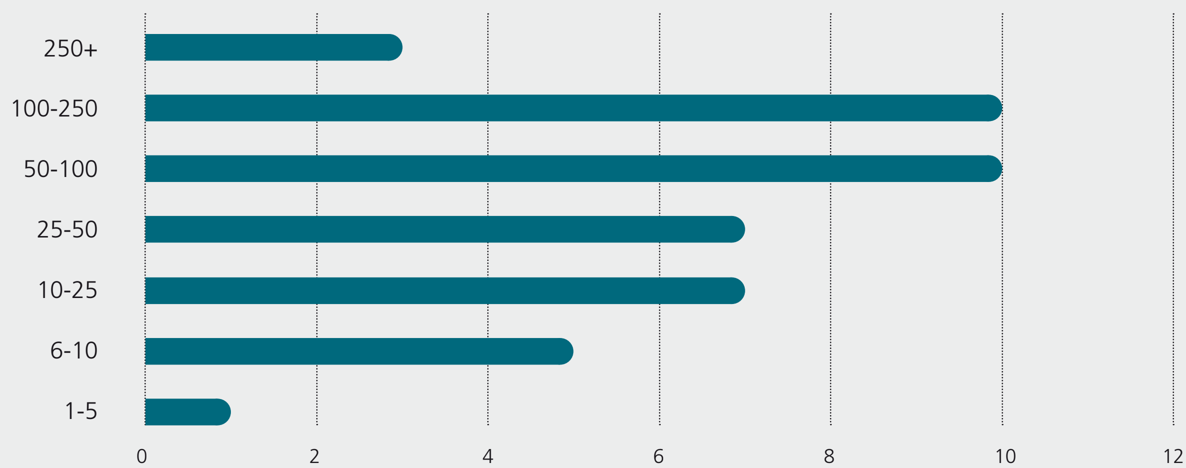
Regulators work with a variety of gambling-related issues. The most common issues are problem gambling (89%), consumer protection (86%) and the regulation of gambling product marketing (84%). The least common issues which our regulators work with are gambling addiction (53%) and match-fixing / sports integrity (45%), 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, while match fixing / sports integrity issues may fall under sports governing bodies / culture ministries.

4.6 Employees. **(See figure 5)**

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. Some 47% of jurisdictions have offices with between 50 and 250 staff members.

Figure 4: Gambling issues worked on by gambling regulators (by percentage of respondents)

Figure 5: Number of employees in gambling jurisdiction organisations



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, how services are sold, age restrictions for participation in gambling, the tax/duty base for gambling, who benefits from gambling revenues (post-tax distributions), and whether foreign involvement in domestic markets is allowed. Detailed analysis of each area is provided in the market sections of this report.

5.2 Permitted markets. (See figure 6 & 7)

Some domestic gambling markets are more restricted than others. At a global level, the most permitted land-based gambling market is number games (allowed by 100% of respondent jurisdictions), followed by casinos (95%) and betting (92%). The most permitted gambling market sold via online channels is betting (allowed by 67% of jurisdictions), followed by number games (63%), then casinos (38%). A chart showing permitted markets by jurisdiction is at Annex A.

5.3 Licence models. (See figure 8)

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. The most common licensing models are a state monopoly, an unrestricted number of licences, or a restricted number of licences (each 22-23%, average across all jurisdiction and markets).

Figure 6: Permitted gambling markets – land-based gambling (by percentage of respondents).

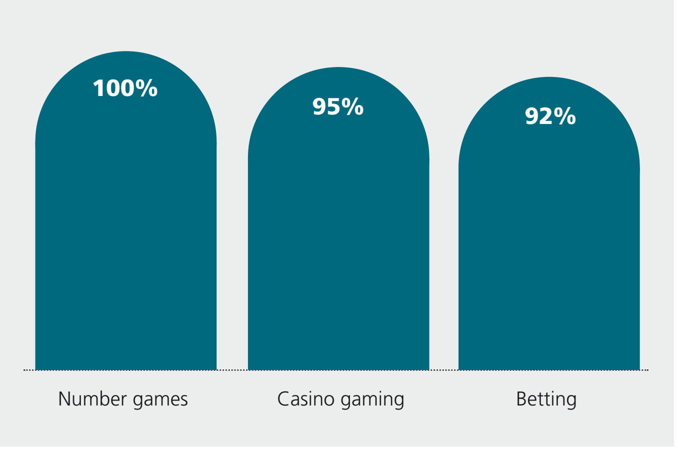


Figure 7: Permitted gambling markets – online gambling (by percentage of respondents)

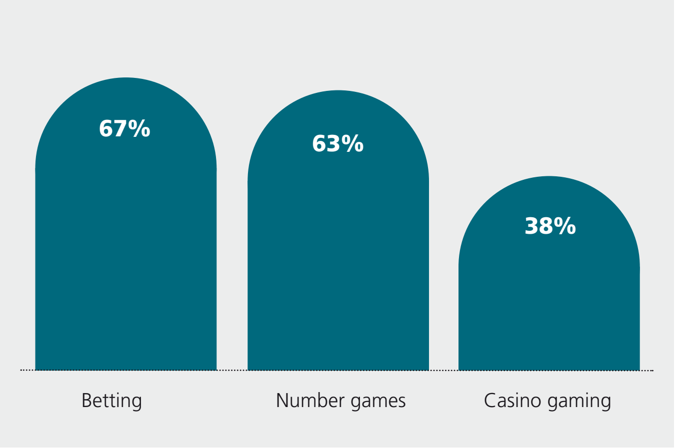
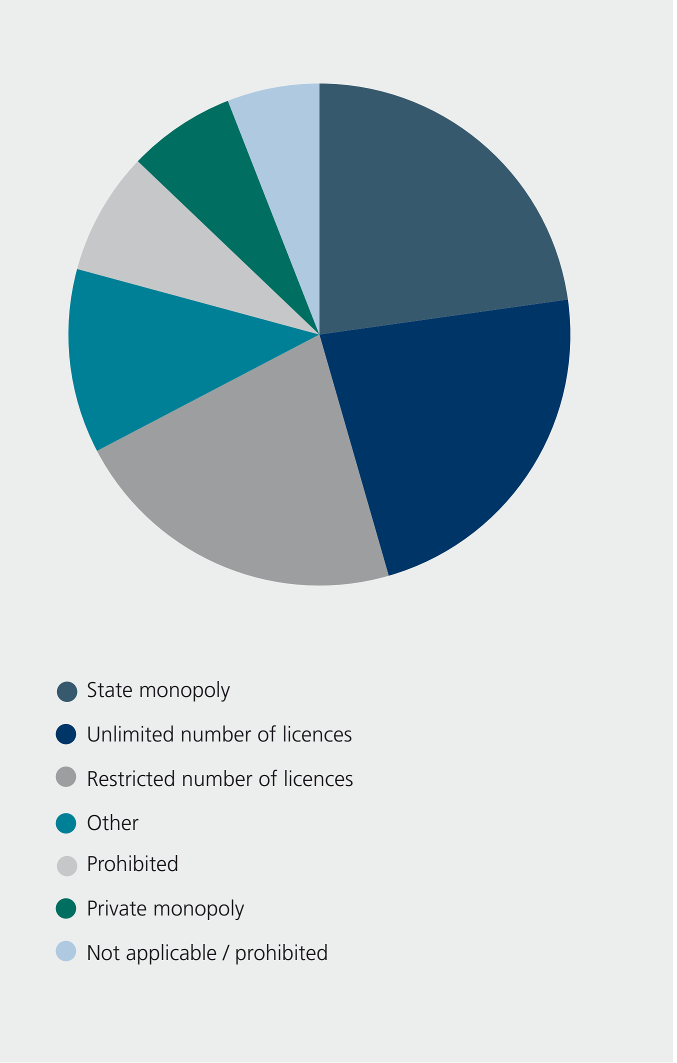


Figure 8: Licence models for gambling (by percentage of respondents)



5.4 Sales channels.

Gambling services are normally sold across four channel types. Land-based premises operated by the licence holder, or land-based premises with gambling products 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). Further analysis of sales channels is provided in the market sections of this report.

5.5 Age restrictions. (See figure 9)

The average (modal) 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 market presents, either to consumers or wider society. On this basis, casinos (+3.2%) could be deemed to pose the most risk, with number games (-3.2%) the least. A chart listing the legal age to gamble in each respondent jurisdiction, by markets, is at Annex B.

5.6 Tax / duty base.

The tax/duty base for most gambling in the world is typically Gross Gambling Revenue (GGR). This is used in 63% of respondent jurisdictions (average, across all markets)

5.7 Gambling revenue distributions (post-tax). (See figure 10)

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 private/commercial, government/treasury, local or tribal government, or charities, sport or culture. Across all markets the primary beneficiary is the private/commercial sector (44%). The next most prevalent beneficiary is a jurisdiction's government/treasury (25%, average, across all markets). There are exceptions to this however, with charities, sport or culture the second most prevalent beneficiary in the number games market.

5.8 Foreign involvement.

In some countries, foreign involvement in gambling markets is either prohibited, or there are restrictions on investors (including requiring them to have a physical presence in the jurisdiction or to partner with a domestic operator). Whether overseas engagement is allowed can also be dependent on the market concerned. Globally, the most common approach in respondent jurisdictions is that foreign operators are required to acquire a licence to operate (48%, average across all jurisdictions). An average of 17% respondent jurisdictions do not permit foreign operators to operate gambling business in domestic markets.

Figure 9: Gambling market age restrictions (by percentage variation from the age of majority)

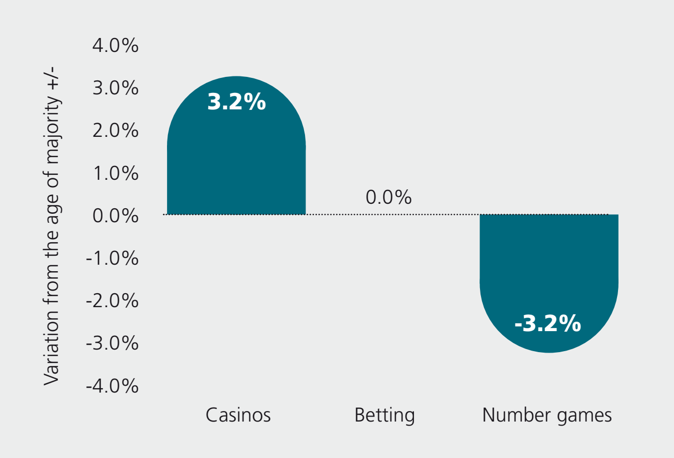
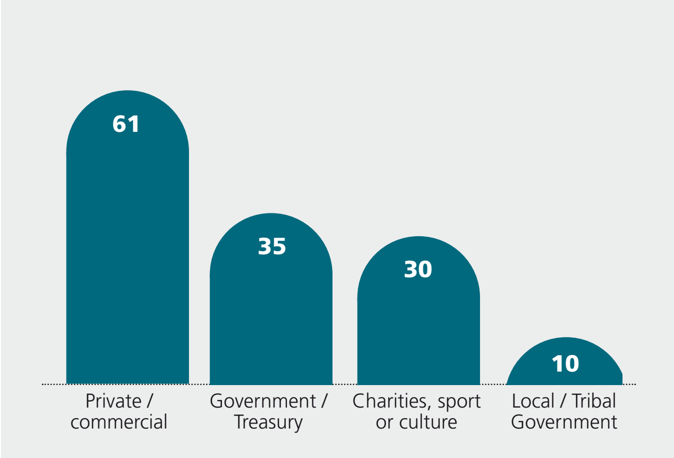


Figure 10: Gambling revenue distributions (post tax) (average across all markets, by number of responses)



6 NUMBER GAMES

6.1 Overview.

Number games are the most permitted gambling market in the world, allowed by 100% of respondent jurisdictions. Lotteries and bingo are the most common types of number games. 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. Bingo 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. This section also covers Keno and class / Dutch lotteries.

6.2 Licence models. (See figure 11 &12)

Across the various types of number game operations and across jurisdictions, different licence models are used. For lotteries, the most prevalent models are for a state (52%) or private (16%) monopoly to be in place. For bingo, most respondent jurisdictions offer an unlimited (42%) or restricted (26%) number of licences.

6.3 Sales channels. (See figure 13)

The most prevalent sales channel for number game products is land-based licensed retailers (80%). The use of resellers (eg supermarkets) and online sales channels are also prominent, both 67% of respondent jurisdictions. Telephone sales channels are available in 23% of jurisdictions.

6.4 Permitted gambling types. (See figure 14)

The range of games on offer differs across jurisdictions and sale channels. Lotto and scratchcards are the most permitted land-based game types. Likewise, these are also the most permitted online game types, alongside online bingo. Class/Dutch lotteries are allowed more via online sales channels than through land-based channels.

6.5 Age restrictions.

Permission to participate in number games is typically set at the age of majority, or lower (down to 16). There are no jurisdictions where people need to be over the age of majority to play number games. Globally, the average legal age to play number games is 18. The variation from the average age of majority is -3.2%. This is the largest negative variance of all the markets, indicating that number games may be perceived as posing less risk of harm than other gambling markets in most jurisdictions.

Figure 11: Licence models for lotteries (by percentage of respondents)

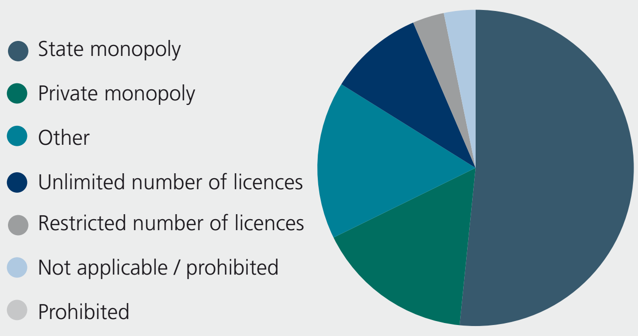


Figure 12: Licence models for bingo (by percentage of respondents)

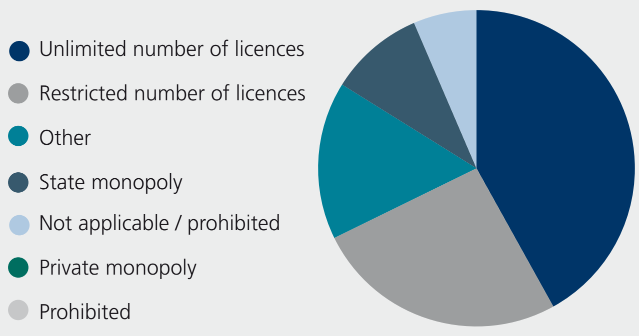


Figure 13: Sales channels for number games (by percentage of respondents)

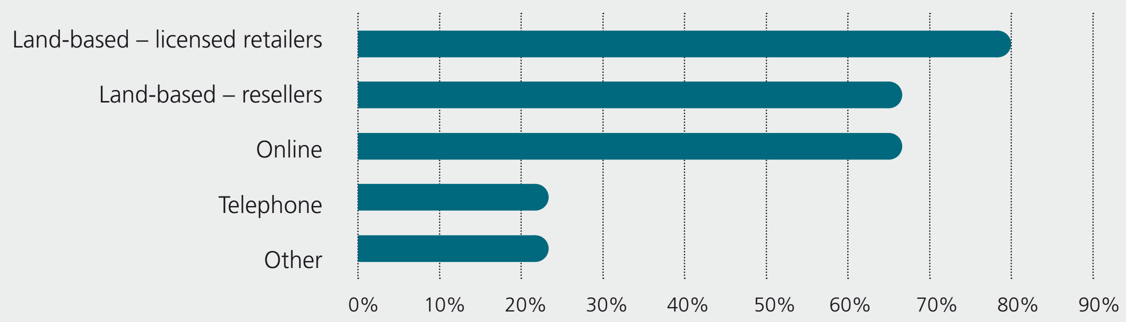


Figure 14: Permitted gambling types for number games (by percentage of respondents)

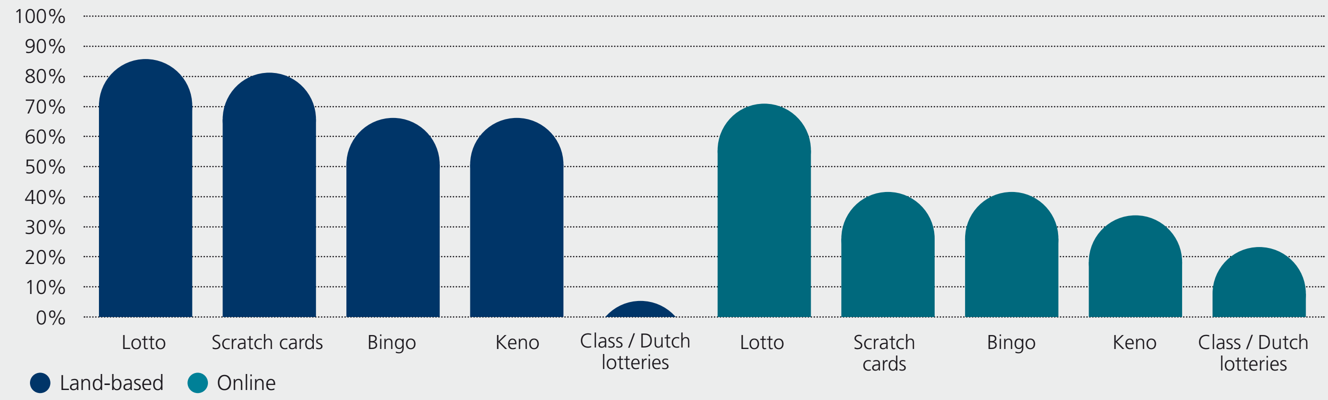


Figure 15: Gambling revenue distributions (post-tax) for number games (by number of responses)

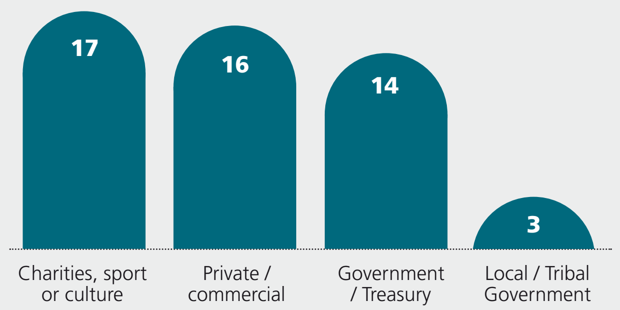
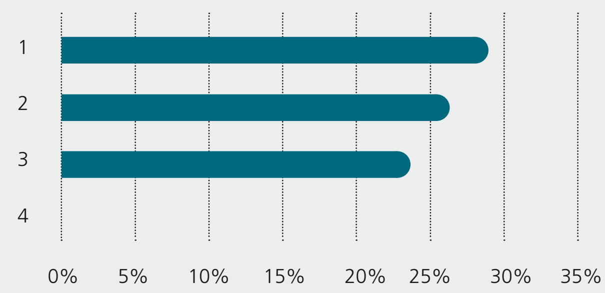


Figure 16: Foreign involvement in domestic number games provision (by percentage of respondents)



1 Foreign operators may partner with domestic operators to acquire a licence to operate

2 Foreign operators are not prohibited to operate in jurisdiction with or without a licence

3 Foreign operators are required to acquire a licence to operate

4 Foreign operators are permitted to operate without acquiring a licence

6.6 Tax / duty base.

The tax/duty base for number games is typically Gross Gambling Revenue (GGR). This is used in 57% of respondent jurisdictions. Other approaches are used in 21% of jurisdictions while some use prizes (9%), stakes (4%) or do not apply a specific tax or duty on number games (9%).

6.7 Gambling revenue distributions (post-tax). (See figure 15)

After taxes/duties have been paid and prizes paid out, gambling revenues from number games go to various types of beneficiary. Charities, sport or culture (34%) and the private/commercial sector (32%) are the main beneficiaries of revenues. Governments and government treasuries are the third most common beneficiary (28%), with local or tribal governments benefiting to a lesser degree (6%).

6.8 Foreign involvement. (See figure 16)

For number games, non-domestic operators / foreign investors are most likely to partner with domestic operators to acquire a licence (29%). In other jurisdictions it is legal for non-domestic operators to acquire a licence to provide number games without partnering (24%). However, foreign operators are prohibited from operating number games in 26% of jurisdictions.

6.9 Other.

a. Betting on lottery results. Betting is permitted on lottery results in 39% of respondent jurisdictions. It is allowed, on both domestic and foreign lottery results, in 56% of these jurisdictions and on foreign lottery results only in the other 44%.

7 CASINOS

7.1 Overview.
At a global level, casinos are the second most permitted gambling market. They are allowed by 95% of respondent jurisdictions. Casinos take several forms. For the purposes of this assessment, we have grouped together land (or ship) based venues and online casinos with non-casino venues where casino-type gambling may take place (eg a hotel hosting a poker tournament). Slot machines sited outside casinos are also included within this section.

7.2 Licence models. **(See figure 17 & 18)**
Across the various types of casino operations and across jurisdictions, different licence models are used. For land-based casinos, the most prevalent models are for licence numbers to be restricted (53% of jurisdictions) or for a state monopoly to be in place (17%). Online casinos are prohibited by 34% respondent jurisdictions but where they are permitted, licence models are mostly either an unlimited number of licences (20%) or a state monopoly (17%).

7.3 Sales channels. **(See figure 19)**
The most prevalent sales channel for casino products is land-based casinos (91% respondent jurisdictions). Online casinos are much less prevalent (44%). Casino-type activity also takes place in land-based venues other than casinos (47%), in other places (18%) and via remote means (15%).

7.4 Permitted gambling types. **(See figure 20)**
The primary casino game types are card games (eg poker), other table games (eg roulette), slot machines, and other games of chance. These are on offer, in various forms and to varying degrees across the range of sales channels. The most permitted types of casino gambling are land-based card games, other table games and slot machines, all permitted in over 85% respondent jurisdictions. Online slots and slot machines in non-casino land-based venues (eg gaming/gambling arcades) are the fourth and fifth most permitted casino games.

7.5 Age restrictions.
Permission to participate in casino games is typically set at the age of majority, or higher (up to 25). Globally, the average legal age to play casino games is 19.2. The variation from the average age of majority is +3.2%. This is the largest positive variance of all the markets, indicating that casino games may be perceived as posing more risk of harm than other gambling markets in most jurisdictions.

Figure 17: Licence models for land-based casinos (by percentage of respondents)

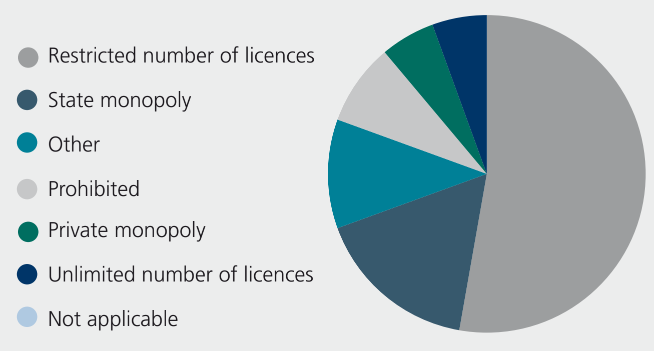


Figure 18: Licence models for online casinos (by percentage of respondents)

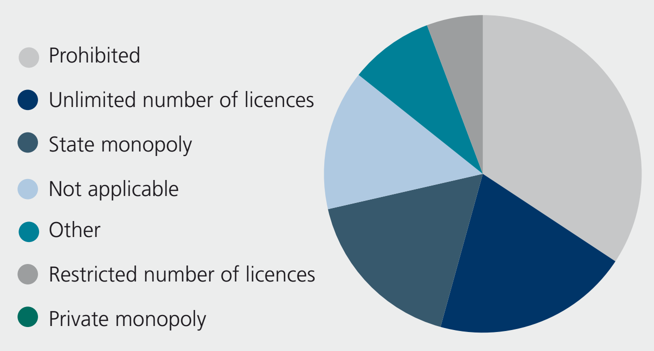


Figure 19: Sales channels for casinos (by percentage of respondents)

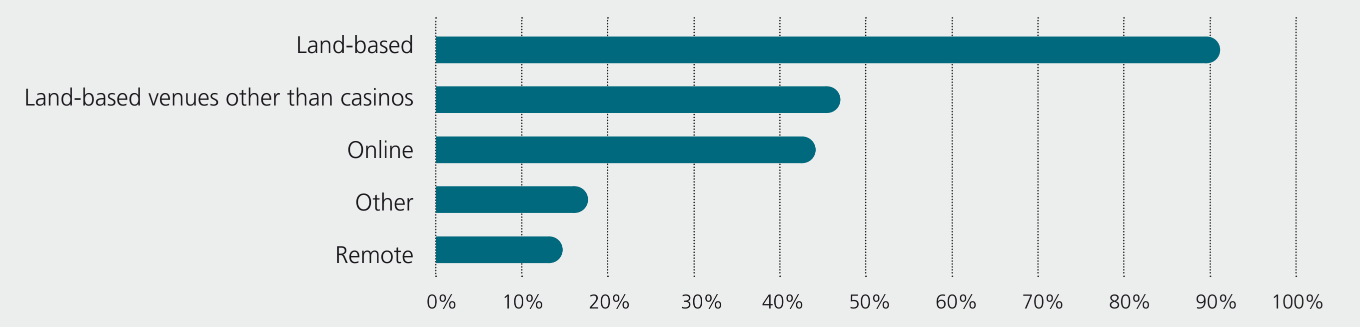


Figure 20: Permitted gambling types for casinos (Top 5) (by percentage of respondents)

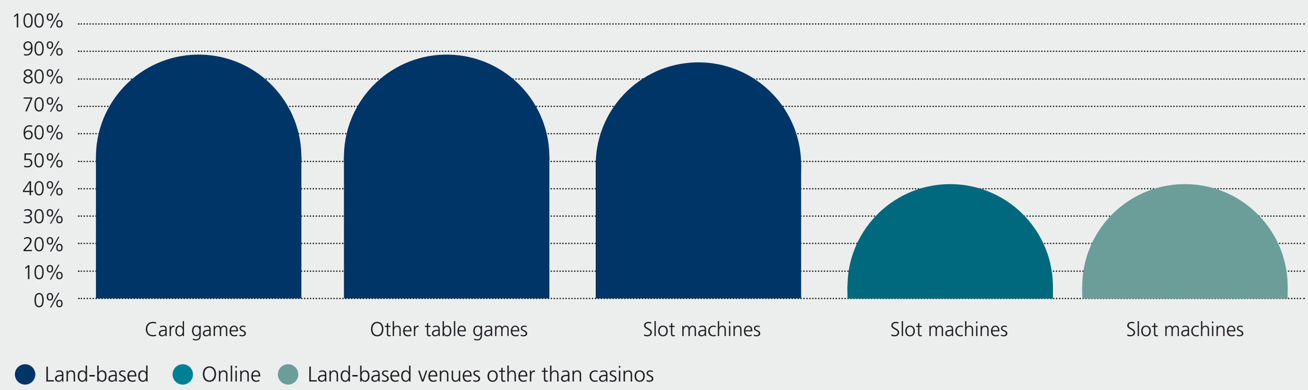
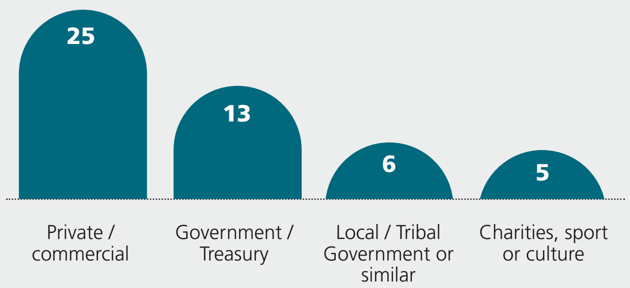


Figure 21: Gambling revenue distributions (post-tax) for casinos (by number of responses)



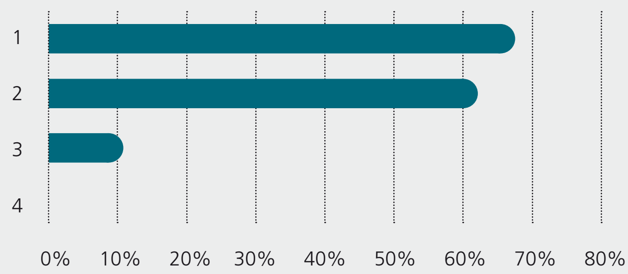
7.6 Tax / duty base.

The tax/duty base for casino games is typically Gross Gambling Revenue (GGR). This is used in 72% of respondent jurisdictions. Other approaches are used in 15% of jurisdictions while some use prizes (3%), stakes (3%) or do not apply a specific tax or duty on casino games (7%).

7.7 Gambling revenue distributions (post-tax). (See figure 21)

After taxes/duties have been paid and prizes paid out, gambling revenues from casino games go to various types of beneficiary. The private/commercial sector is the main beneficiary of revenues (50%). Governments and government treasuries are the second most common beneficiary (26%), presumably due to state-owned or operated casinos. Local or tribal governments also benefit (12%). The least common beneficiary is charities, sport or culture.

Figure 22: Foreign involvement in domestic casino provision (by percentage of respondents)



1 Foreign operators are required to acquire a licence to operate

2 Foreign operators may partner with domestic operators to acquire a licence to operate

3 Foreign operators are not prohibited to operate in jurisdiction with or without a licence

4 Foreign operators are permitted to operate without acquiring a licence

7.8 Foreign involvement. (See figure 22)

In most jurisdictions it is legal for non-domestic operators to acquire a licence to provide casino games (68%). In others, non-domestic operators / foreign investors must partner with domestic operators to acquire a licence (62%). However, foreign operators are prohibited from operating casinos with or without a partner in 11% of jurisdictions.

7.9 Other.

a. Types of land-based casinos. Land-based casinos take several forms. They will be typically be standalone venues (59%, respondent jurisdictions) but may exist within large-scale integrated resort developments (44%) or be integrated inside hotels (41%).

b. Links to economic development. In some jurisdictions (61%), casinos are built in specific locations with the purpose of encouraging economic development or precinct regeneration in that area.

8 BETTING

8.1 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 third most permitted gambling market. It is allowed by 92% of respondent jurisdictions.

8.2 Licence models. **(See figure 23 & 34)**
Across jurisdictions, different licence models are used for betting. Over a third of jurisdictions offer an unlimited number of licences for land-based betting (36%) and online betting (37%). Licence numbers are restricted in 26% of jurisdictions for land-based betting and 13% in online betting. Betting (land-based or online) is operated within a state or private monopoly in 5-20% of jurisdictions.

8.3 Sales channels. **(See figure 25)**
The most prevalent sales channels for betting products are licensed venues (eg betting shops) and online, both available in 76% of respondent jurisdictions. Trackside (48%) is the third most prevalent channel. Some betting also takes place via telephone, in casinos or via resellers (eg supermarkets).

Figure 23: Licence models for betting (land-based) (by percentage of respondents)

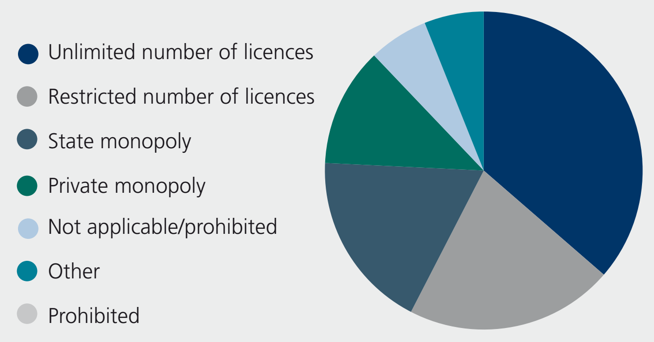


Figure 24: Licence models for betting (online) (by percentage of respondents)

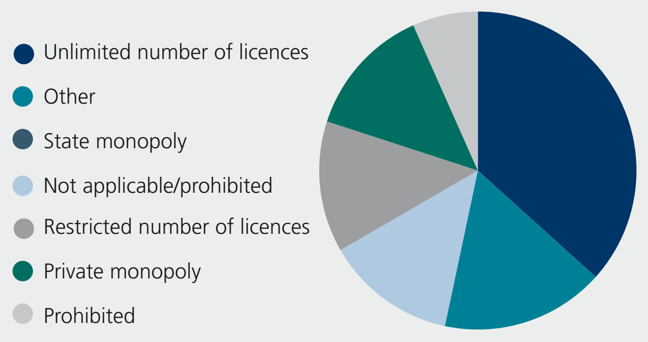


Figure 25: Sales channels for betting (by percentage of respondents)

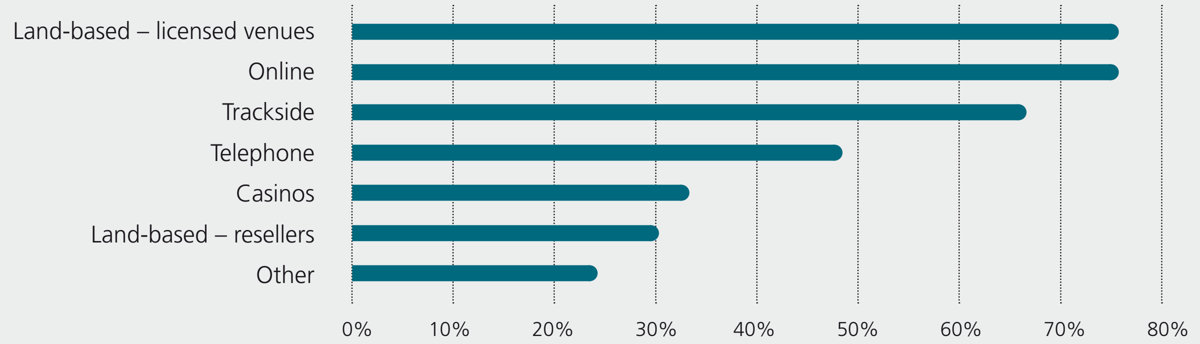
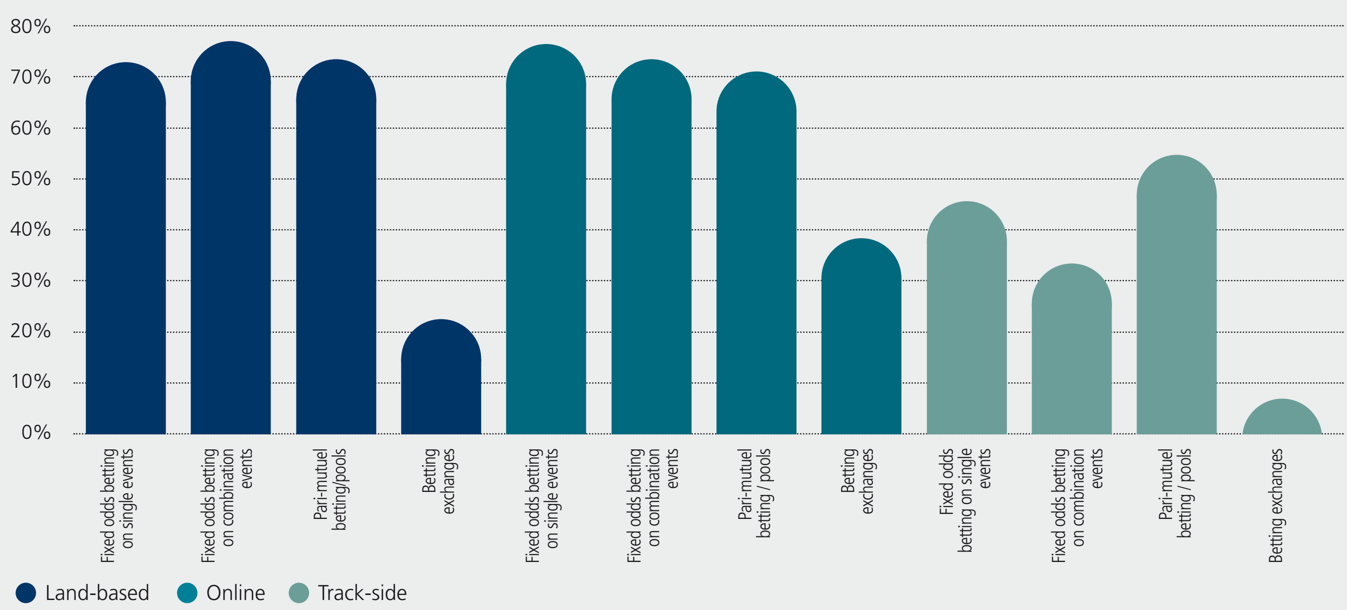


Figure 26: Permitted gambling types for betting (by percentage of respondents)



8.4 Permitted gambling types. (See figure 26)

The primary types of betting are fixed odds betting on single events, fixed odds betting on a combination of events (eg accumulator bets), pari-mutuel betting (or pools) and betting exchanges. Across land-based, online and trackside sales channels (aggregated), the most permitted activity is pari-mutuel betting (or pools) (66% of respondent jurisdictions), followed by fixed odds betting on single events (65%) and combination events (61%). Betting exchanges are the least permitted type of betting (22%).

8.5 Age restrictions.

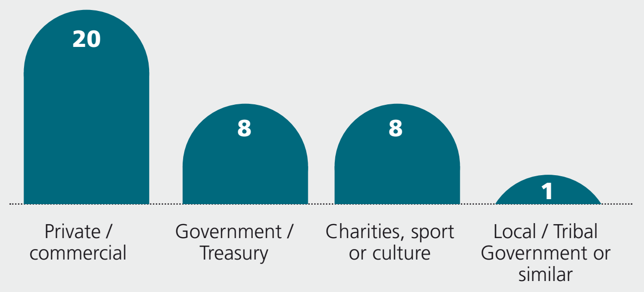
Permission to participate in betting is typically set at the age of majority, or higher (up to 21). There is only one jurisdiction where people need to be over the age of majority to bet. Globally, the average legal age to bet is 18.6 matching the variation from the average age of majority.

8.6 Tax / duty base.

The tax/duty base for betting is typically Gross Gambling Revenue (GGR). This is used in 58% of respondent jurisdictions. Other approaches are used in 18% of jurisdictions while some use stakes (8%), prizes (4%) or do not apply a specific betting tax or duty (12%).

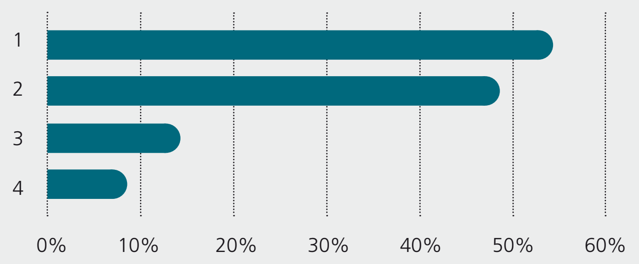
8.7 Gambling revenue distributions (post-tax).
After taxes/duties have been paid and prizes paid out, gambling revenues from betting go mostly to the private/commercial sector (54% respondent jurisdictions). Governments/ government treasuries and charities, sport or culture are, equally (22%), the next most common beneficiaries.

Figure 27: Gambling revenue distributions (post tax) for betting (by number of responses)



8.8 Foreign involvement.
In most jurisdictions it is legal and allowed for non-domestic operators to acquire a licence to provide betting (54%). In others non-domestic operators / foreign investors must partner with domestic operators to acquire a licence (49%). In some jurisdictions, foreign betting operators do not require a licence to operate there (9%). However, foreign operators are prohibited from operating betting businesses in 14% of jurisdictions.

Figure 28: Foreign involvement in domestic betting provision (by percentage of respondents)



1 Foreign operators are required to acquire a licence to operate

2 Foreign operators may partner with domestic operators to acquire a licence to operate

3 Foreign operators are not prohibited to operate in jurisdiction with or without a licence

4 Foreign operators are permitted to operate without acquiring a licence

8.9 Other.

a. In-play betting. In-play betting is permitted in 69% of respondent jurisdictions. Where it is permitted, 90% of jurisdictions allow in-play bets on the result of a match and 85% allow bets on contingencies within a match (eg next scorer, next corner).

b. Betting on eSports. Betting on eSports is not legal in 60% of respondent jurisdictions.

c. Electronic simulated events. Gambling on electronically simulated events is permitted in 63% of respondent jurisdictions. Where it is legal, it is considered a form of betting. In some jurisdictions (31%), where it is legal, electronic simulated event betting is considered akin to a slot machine (because the systems use a random number generator).

d. Operator financial contributions to sports.
Operators are required to make a specific financial contribution to the sports they take bets on in only a third (33%) of jurisdictions. Of these, the contribution is made through a fee payable to the relevant sports governing body in 56% jurisdictions and through a levy or a tax in 44% jurisdictions.

ANNEXES

ANNEX A: PERMITTED GAMBLING MARKETS

Country / jurisdictional area	Number games (land-based)	Number games (online)	Casinos (land-based)	Casinos (online)	Betting (land-based)	Betting (online)
Alderney	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted
Australia – Federal	Permitted	Permitted	Permitted	Not Permitted	Permitted	Permitted
Australia - Australian Capital Territory	Permitted	Permitted	Permitted	Not Permitted	Permitted	Permitted
Australia - New South Wales	Permitted	Permitted	Permitted	Not Permitted	Permitted	Permitted
Australia – Northern Territory	Permitted	Permitted	Permitted	Not Permitted	Permitted	Permitted
Australia – Queensland	Permitted	Permitted	Permitted	Not Permitted	Permitted	Permitted
Australia – Victoria	Permitted	Permitted	Permitted	Not Permitted	Permitted	Permitted
Australia - Western Australia	-	-	-	-	-	-
Brazil	Permitted	Permitted	Not Permitted	Not Permitted	Not Permitted	Not Permitted
Canada – British Columbia	-	-	Permitted	Not Permitted	-	-
Canada – Manitoba	Permitted	Not Permitted	Permitted	Permitted	Permitted	Permitted
Canada – Ontario	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted
Denmark	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted
Finland	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted
Gibraltar	-	-	-	-	-	-
Great Britain	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted
Isle of Man	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted
Jamaica	Permitted	-	Not Permitted	Not Permitted	Permitted	Permitted
Jersey	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted
Korea, Republic of	Permitted	Permitted	Permitted	Not Permitted	Permitted	Not Permitted
Malawi	Permitted	Permitted	Permitted	Not Permitted	Permitted	Not Permitted
Malta	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted
Mauritius	Permitted	Not Permitted	Permitted	Not Permitted	Permitted	Not Permitted
New Zealand	-	-	-	-	-	-
Norway	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted
Singapore, Republic of	Permitted	Not Permitted	Permitted	Not Permitted	Permitted	Not Permitted
South Africa – Federal	Permitted	Not Permitted	Permitted	Not Permitted	Permitted	Permitted
South Africa – Gauteng Province	Permitted	Permitted	Permitted	Not Permitted	Permitted	Permitted
South Africa – Limpopo Province	Permitted	Not Permitted	Permitted	Not Permitted	Permitted	Permitted
South Africa – Mpumalanga Province	Permitted	Permitted	Permitted	Not Permitted	Permitted	Permitted
South Africa – North West Province	Permitted	Not Permitted	Permitted	Not Permitted	Permitted	Permitted
Sweden	Permitted	Permitted	Permitted	Permitted	Permitted	Not Permitted
Switzerland	Permitted	Permitted	Permitted	Not Permitted	Permitted	Not Permitted
USA – California	Permitted	Not Permitted	Permitted	Not Permitted	Permitted	Not Permitted
USA – Colorado	Permitted	Not Permitted	Permitted	Not Permitted	Permitted	Not Permitted
USA – Delaware	Permitted	Not Permitted	Permitted	Permitted	Not Permitted	Permitted
USA – Maryland	Permitted	Not Permitted	Permitted	Not Permitted	Permitted	Not Permitted
USA – Massachusetts, Commonwealth of	Permitted	Not Permitted	Permitted	Not Permitted	Permitted	Not Permitted
USA – Michigan	-	-	-	-	-	-
USA - New Jersey, State of	Permitted	Not Permitted	Permitted	Permitted	Permitted	Permitted
USA – Pennsylvania	Permitted	Not Permitted	Permitted	Permitted	Permitted	Permitted
USA – Sovereign tribal lands in Indiana and Michigan	Permitted	Not Permitted	Permitted	Not Permitted	Not Permitted	Not Permitted

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	Number games	Casino	Betting
Alderney	18	18	18	18
Australia – Federal	18	-	-	-
Australia - Australian Capital Territory	18	18	18	18
Australia - New South Wales	18	18	18	18
Australia – Northern Territory	18	18	18	18
Australia – Queensland	18	18	18	18
Australia – Victoria	18	18	18	18
Australia - Western Australia	18	-	-	-
Brazil	18	18	-	-
Canada – British Columbia	19	-	19	-
Canada – Manitoba	18	-	18	18
Canada – Ontario	18	18	-	-
Denmark	18	16	18	18
Finland	18	18	18	18
Gibraltar	18	-	-	-
Great Britain	18	16*	18	18
Isle of Man	18	16	18	18
Jamaica	18	18	18	18
Jersey	18	18	18	18
Korea, Republic of	19	19	19	19
Malawi	18	18	18	18
Malta	18	18	25*	18
Mauritius	18	18	21	18
New Zealand	18	-	-	-
Norway	18	18	18	18
Singapore, Republic of	18	-	21	-
South Africa - National	18	18	18	18
South Africa – Gauteng Province	18	18	18	18
South Africa – Limpopo Province	18	-	-	-
South Africa - Mpumalanga Province	18	18	18	18
South Africa - North West Province	18	-	18	18
Sweden	18	18	18	18
Switzerland	18	18	18	18
USA – California	21	21	21	21
USA – Colorado	21	-	21	-
USA – Delaware	21	18	21	21
USA – Maryland	18	18	21	18
USA – Massachusetts, Commonwealth of	21	21	21	21
USA – Michigan	21	-	-	-
USA - New Jersey, State of	18	-	21	21
USA – Pennsylvania	21	-	21	21
USA – Sovereign tribal lands in Indian and Michigan	21	18	21	-

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
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 – Northern Territory	Licensing NT Department of Attorney-General and Justice
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
Brazil	Ministry of Finance
Canada – British Columbia	Gaming Policy and Enforcement Branch
Canada – Manitoba	Liquor and Gaming Authority of Manitoba
Canada – Ontario	Alcohol and Gaming Commission of Ontario
Denmark	The Danish Gambling Authority
Finland	National Police Board of Finland, Gambling Administration
Gibraltar	Gambling Division, Government of Gibraltar
Great Britain	Gambling Commission
Isle of Man	Isle of Man Gambling Supervision Commission
Jamaica	Betting, Gaming & Lotteries Commission
Jamaica	The Casino Gaming Commission
Jersey	Jersey Gambling Commission
Korea, Republic of	National Gambling Control Committee
Malawi	Gaming Board and National Lotteries Board
Malta	Malta Gaming Authority
Mauritius	Gambling Regulatory Authority
New Zealand	Gambling Commission
Norway	The Norwegian Gaming and Foundation Authority
Singapore, Republic of	Casino Regulatory Authority of Singapore
South Africa – Federal	National Gambling Board
South Africa – Gauteng Province	Gauteng Gambling Board
South Africa – Limpopo Province	Limpopo Gambling Board
South Africa – Mpumalanga Province	Mpumalanga Gambling Board
South Africa – North West Province	North West Gambling Board
Sweden	Swedish Gambling Authority
Switzerland	Federal Gaming Board
Switzerland	Camlot, Swiss Lottery and Betting Board
USA – California	California Gambling Control Commission
USA – Colorado	Colorado Division of Gaming
USA – Delaware	Delaware Division of Gaming Enforcement
USA – Maryland	Maryland Lottery and Gaming Control Agency and Maryland Lottery and Gaming Control Commission
USA – Massachusetts, Commonwealth of	Massachusetts Gaming Commission
USA – Michigan	Michigan Gaming Control Board
USA – New Jersey, State of	New Jersey Division of Gaming Enforcement
USA – Pennsylvania	Pennsylvania Gaming Control Board
USA – Sovereign tribal lands in Indiana and Michigan	Pokagon Band of Potawatomi Indians Gaming Commission

LIST OF CHARTS

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 land (or ship)-based venue 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.

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.

Gambling revenue distributions (post-tax)
The destination of gambling revenues once gambling taxation has been levied.

Gross Gambling Revenue (GGR)
GGR is the amount wagered or staked minus the winnings returned to the player(s). It is used to measure the economic value of gambling as it determines the level of earnings from gambling operations before the deduction of taxes, salaries and other expenses (ie it is more broadly equivalent to "sales" than "profit").

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.

Number games
Number games are forms of gambling involving selecting numbers. Lotteries and bingo are the most common types of number game but this classification also covers Keno and class / Dutch lotteries.

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.

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

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.

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.

ACKNOWLEDGEMENTS

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

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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).

International Association of Gaming Regulators

www.iagr.org

September 2019