



A GUIDE TO AUSTRALASIA'S GAMBLING INDUSTRIES

Facts, Figures and Statistics

CHAPTER FOURTEEN

Gambling Around the World

2017/18

A Guide to Australasia's Gambling Industries

Published and Prepared by the Australasian Gaming Council (AGC).



GPO Box 99,
Melbourne 3001
Victoria Australia
+61 3 9670 4175

info@austgamingcouncil.org.au

www.austgamingcouncil.org.au

DISCLAIMER

Whilst a great deal of care has been taken in the preparation of this publication, it is nevertheless necessary to caution users with regard to its accuracy.

The information contained in this publication has been obtained from external sources and has not been independently verified by the Australasian Gaming Council ("the Council").

The Council expressly disclaims all and any liability (including all liability from or attributable to any neglect or wrongful act or omission) to any persons in respect of anything done or omitted to be done by any person in reliance whether in whole or in part upon any material in this publication.

The Australasian Gaming Council welcomes comments and suggestions on this publication. Please contact info@austgamingcouncil.org.au

This publication is copyright. No part may be reproduced by any process except in accordance with the provisions of the Copyright Act 1986.

Chapter 14

Gambling around the World

A SNAPSHOT OF GAMBLING FORMS AROUND THE WORLD	2
LOTTERIES	2
GAMING MACHINES	3
RACING	6
COUNTRY PROFILES	9
CANADA	9
UNITED STATES	15
UNITED KINGDOM	20
SOUTH AFRICA	22
CHINA	23
HONG KONG	24
MACAU	24
SINGAPORE	27
REPUBLIC OF KOREA	29
JAPAN	30
MALAYSIA	31
PHILIPPINES	31
VIETNAM	31
CAMBODIA	32

Version Control

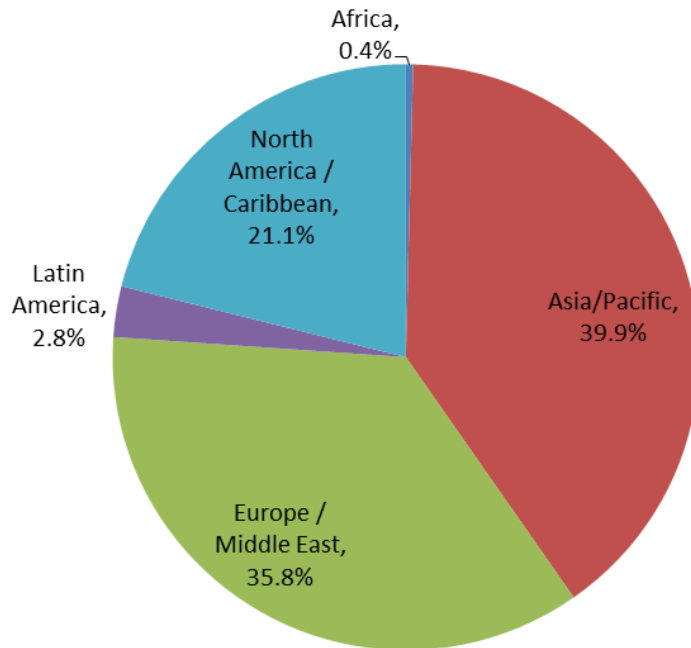
Version	Date	Explanation
2015-16 (1.0)	January 2017	2015-16 Edition.
2015-16 (2.0)	July 2018	2015-16 Edition updated.
2017-18 (1.0)	July 2020	2017-18 Edition.

A SNAPSHOT OF GAMBLING FORMS AROUND THE WORLD

Lotteries¹

Lotteries can be found in approximately 200 jurisdictions around the world, providing both entertainment for the public and an effective way to raise funds for many purposes including education, healthcare and public projects.

Figure 14-1 Worldwide lottery sales by region 2015 (\$US billion)



Source: World Lottery Association (2016) *The WLA Global Lottery Data Compendium 2016*.

Table 14-1 Worldwide lottery sales by region 2015 (\$US billion)

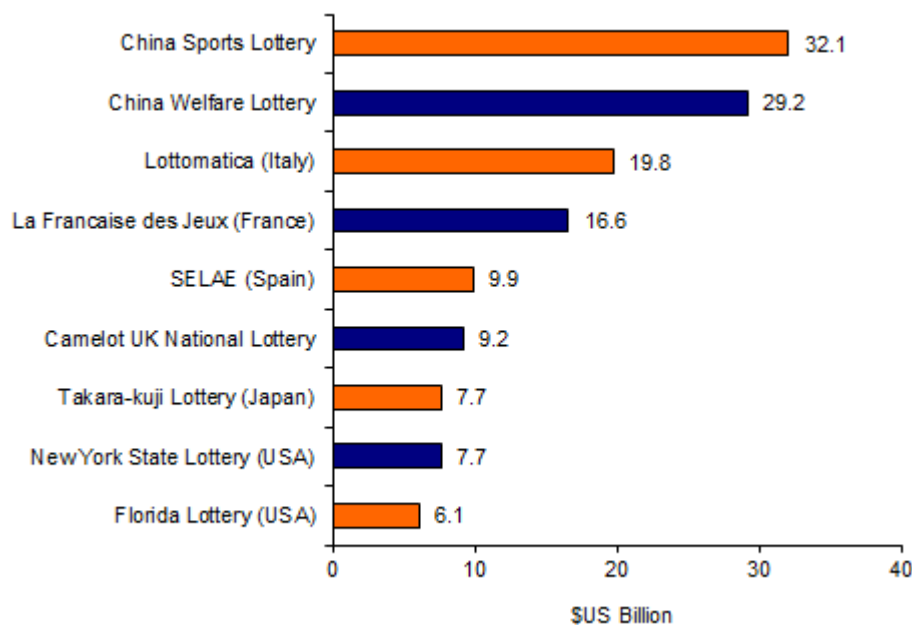
Region	Sales \$US Billion	Sales %
Africa	\$0.999	0.4%
Asia / Pacific	\$102.4	39.9%
Europe / Middle East	\$91.9	35.8%
Latin America	\$7.3	2.8%
North America / Caribbean	\$54.2	21.1%
Total	\$256.8	100%

Source: World Lottery Association (2016) *The WLA Global Lottery Data Compendium 2016*.

According to World Lottery Association (WLA) data, global sales for the state-regulated lottery sector amounted to approximately \$US279.9 billion in 2015, as reported by WLA Lottery Members.²

¹ World-wide lottery statistics obtained from World Lottery Association (WLA) as collated from data provided by 135 lottery industry members only.

² World Lottery Association (2016) *The WLA Global Lottery Data Compendium 2016*. Total sales figure adjusted for global coverage is estimated to amount to US \$279.9 billion in 2015.

Figure 14-2 Top 9 lotteries by total sales (2016)³

Source: CalvinAyre.com China's sports lottery sales enjoy double-digit gains in 2016; <https://www.lottomaticaitalia.it/en/about-us/company/games-services>; FDJ records a 46% increase in sales to €14.3 billion in 2016 and enters third year of its FDJ 2020 project (2017); Camelot UK Lotteries Ltd Company annual report and financial statements for the year ended 31 March 2017; Directorate-General for the Regulation of Gambling 2016 annual report (Spain); <http://www.asahi.com/ajw/articles/AJ201709070004.html>; New York State Lottery Financial Statements Years ended March 31, 2017 and 2016; Florida Lottery annual report Fiscal Year 2016-17.

Gaming Machines

Gaming machines can be found in thousands of locations globally, from casinos to cruise boats, in clubs and local bars, racing venues, amusement parlours, and even in corner stores or cafes. A wide variety of gaming machine types are available internationally. The Gaming Technologies Association (GTA) provides the following explanations of the various gaming machines available:⁴

Slot Machines

The basic game of a slot machine requires that a minimum of three reels be put in motion with the result being determined by the combination of objects displayed when the reels come to a stop. In general, should the objects match the player wins. The winning amount may vary depending on the ranking of the particular object pictured compared to the other objects on the reel. Slot Machines are also known as "fruit machines", "pokies", or "jackpot machines". Modern slot machines use computer generated images, rather than mechanical reels, however the principle of the game is the same.

Video Lottery Terminals (VLTs) and Video Gaming Machines (VGMs)

Video lottery terminals (VLTs) and Video Gaming Machines (VGMs) provide multi-game platforms that often offer slot games as part of their repertoire. Other games may include video poker, video blackjack, video bingo, video lotto etc. In some jurisdictions VLTs operate on a networked system rather than by individual machine. This can allow a payout to be larger than if the machine were operating on its own.

³ Lottery revenues only.

⁴ Ziolkowski, S. (2017) *The World Count of Gaming Machines 2016*, Gaming Technologies Association.

Amusements with Prizes (AWPs)

In the United Kingdom, Italy, Germany, the Czech Republic and other European jurisdictions, many gaming machines can be considered to be amusements with prizes (AWP), due to the relatively small amount that they pay out. In some jurisdictions these AWP machines fall outside of gambling legislation so are not regulated by a governing body. They can be found in amusement parlours, bars and restaurants, and other locations.

Pachinko and Pachislot

Pachinko and Pachislot are gaming machines found in Japan. Pachinko is similar to a vertical pinball game where the ball cascades down through various pins and into certain locations that can result in more balls being released. The more balls that are obtained the larger the value of the prize.

A Pachislot game is similar to a slot machine game, however the player can also press buttons to stop the reels from spinning. Gambling is illegal in Japan, however both Pachinko and Pachislot are not considered gambling devices as the players can only win tokens or balls to be exchanged for merchandise. The winning tokens or balls are capable of exchange for merchandise at the parlour and then in turn for cash from businesses that operate nearby.

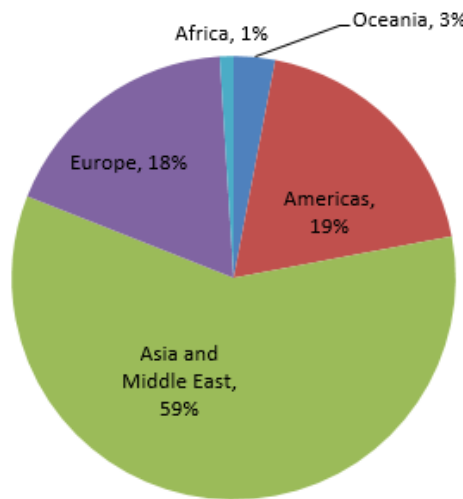
Number of gaming machines worldwide⁵

Table 14-2 Number of gaming machines worldwide by region (2018)⁶

Region	Number of machines
Oceania	215,796
Americas	1,386,502
Asia and Middle East	4,375,764
Europe	1,350,980
Africa	53,332
Total	7,382,374
Cruise Ships	21,301
Total including Cruise ships	7,403,675

Source: Ziolkowski, S. (2018) *The World Count of Gaming Machines 2018*, Gaming Technologies Association.

Figure 14-3 Proportion of gaming machines by region (2018)



Source: Ziolkowski, S. (2018) *The World Count of Gaming Machines 2018*, Gaming Technologies Association.

⁵ Does not include unregistered or illegal machines.
⁶ Region figures exclude EGMs on cruise ships.

With over 4.3 million machines, the Asia and Middle East region accounted for 59.3% of gaming machines worldwide, followed by Americas (18.8%) and the Europe (18.3%). Oceania and Africa accounted for only 2.9% and 0.3% of the worldwide total respectively.

Table 14-3 Top ten countries (all machines) (2018)

Country	Number of machines
Japan	4,302,731
USA	898,974
Italy	320,000
Germany	277,700
Australia	196,301
United Kingdom	183,813
Spain	183,409
Canada	99,521
Argentina	98,117
Colombia	86,629

Source: Ziolkowski, S. (2018) *The World Count of Gaming Machines 2018*, Gaming Technologies Association.

Japan has by far the greatest number of gaming machines (over 4.3 million). This is almost five times as many as the country with the next highest number, the United States, at 898,974 machines. Italy follows next with 320,000, while Australia, in fifth place, has 196,301 machines.

Table 14-4 Top ten jurisdictions (all machines) (2018)

Jurisdiction	Number of casino-style machines
Japan	4,302,731
Italy	320,000
Germany	277,700
United Kingdom	183,813
Spain	183,409
Nevada, USA	164,413
Argentina	98,117
New South Wales, Australia	93,620
Colombia	86,629
Peru	84,396

Source: Ziolkowski, S. (2018) *The World Count of Gaming Machines 2018*, Gaming Technologies Association.

Table 14-5 Top ten number of machine per capita by country (2018)

Country	Persons per Machine
Sint Maarten	13
Aland Islands	17
Japan	29
Monaco	31
Aruba	33
Curacao	65
United States Virgin Islands	82
St Kitts and Nevis	119
Australia	128
Antigua and Barbuda	156

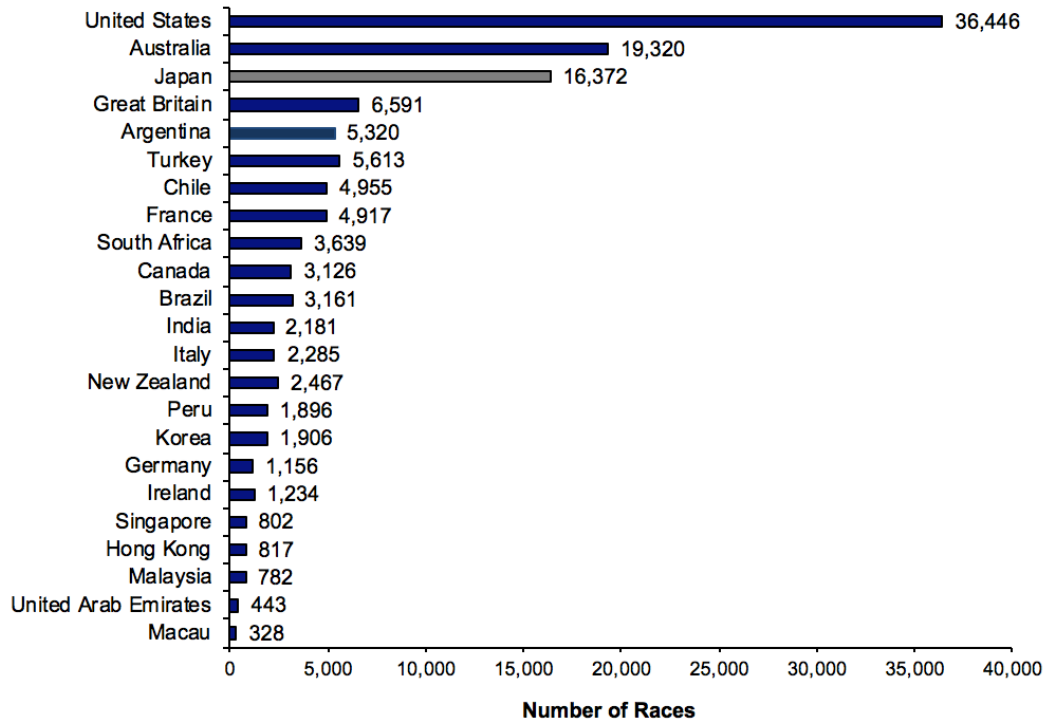
Source: Ziolkowski, S. (2018) *The World Count of Gaming Machines 2018*, Gaming Technologies Association.

Racing

International horse races

Figure 14-4 shows the number of thoroughbred flat horse races held throughout the world in 2018.

Figure 14-4 International comparison of horse races held (2018)



Source: International Federation of Horseracing Authorities (2018) Facts and Figures.

Table 14-6 World-wide race comparisons 2011-18⁷

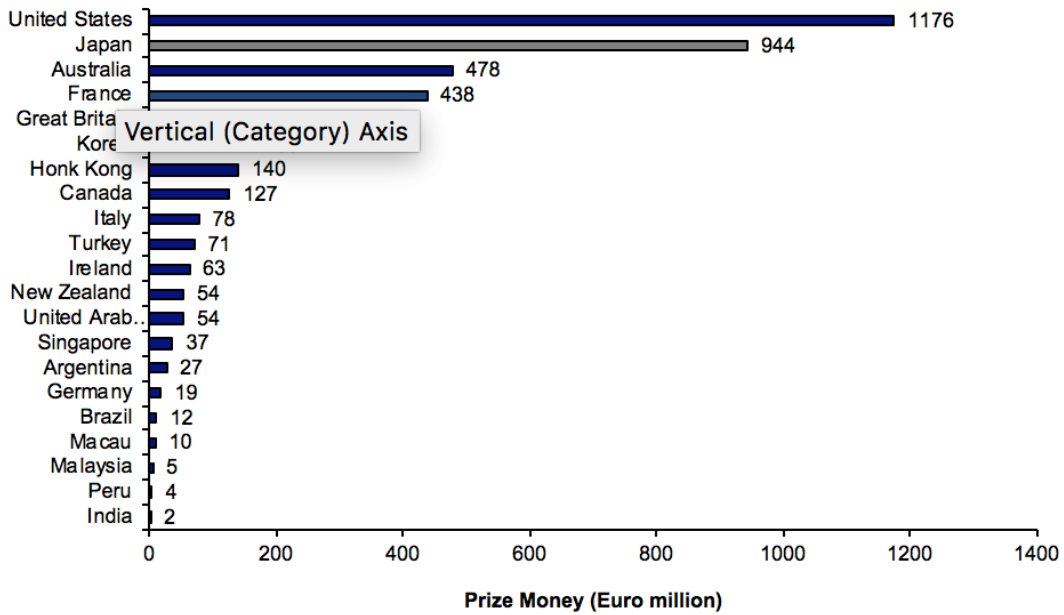
Country	2011	2012	2013	2014	2015	2016	2017	2018
Argentina	5,834	5,558	5,525	5,727	5,708	5,429	5,604	5,320
Australia	18,802	19,534	19,534	19,427	18,949	19,303	19,303	19,320
Brazil	4,627	4,153	3,967	3,673	3,340	2,620	3,131	3,161
Canada	4,376	4,295	3,675	3,363	2,567	3,242	3,137	3,126
Chile	4,872	4,821	4,892	4,954	5,059	5,110	4,978	4,955
France	4,792	4,878	4,887	4,908	4,908	4,983	4,954	4,917
Germany	1,343	1,314	1,253	1,341	1,294	1,204	1,177	1,156
Great Britain	6,270	6,107	6,396	6,308	6,257	6,284	6,284	6,591
Hong Kong	769	769	771	777	784	806	807	817
India	3,312	3,235	2,534	3,188	3,188	2,559	2,756	2,181
Ireland	951	1,084	1,104	1,087	1,113	1,152	1,172	1,234
Italy	3,938	3,160	3,094	2,905	2,952	2,757	2,595	2,285
Japan	16,984	16,717	15,992	15,812	16,049	16,218	16,218	16,372
Korea	1,810	1,873	1,904	1,939	1,926	1,917	1,899	1,906
Macau	564	498	452	470	411	404	339	328
Malaysia	731	737	696	699	595	668	679	782
New Zealand	2,934	2,949	2,894	2,777	2,745	2,683	2,460	2,467
Peru	1,928	2,143	1,935	1,868	1,929	1,944	1,913	1,896
Singapore	990	993	994	993	928	909	859	802
South Africa	3,901	3,833	3,809	3,717	3,969	3,843	3,673	3,639
Turkey	4,272	2,357	2,546	2,933	2,898	5,386	5,463	5,613
United Arab Emirates	334	320	356	381	397	401	405	443
United States	45,253	44,929	42,975	41,120	38,941	38,134	38,134	36,446

Source: International Federation of Horseracing Authorities (2018) Facts and Figures.

⁷ These figures are representative of the number of flats races conducted in each nation and exclude jumps races held.

International horse racing prize money

Figure 14-5 International comparison of horse racing prize money (2018) – (€ million)⁸



Source: International Federation of Horseracing Authorities (2018) Facts and Figures.

Table 14-7 International horse racing betting turnover (2017 & 2018) – (€ million)⁹

Country	2017	2018
Argentina	154	91
Australia	17,746	16,931
Brazil	82	80
Canada	825	876
Chile	269	254
France	9,127	8,883
Germany	67	67
Great Britain	13,057	15,713
Hong Kong	13,261	13,917
India	541	152
Ireland	5,211	5,180
Italy	553	536
Japan	24,492	26,692
Korea	5,231	5,103
Macau	93	97
Malaysia	94	90
New Zealand	372	361
Peru	21	21
Singapore	737	700
South Africa	253	211
Turkey	1,103	938
United States	9,096	9,841

Source: International Federation of Horseracing Authorities (2018) Facts and Figures.

⁸ These figures are representative of the prize money for flats racing only.

⁹ Total turnover covers figures for both on-course and off-course betting as applicable for each nation.

COUNTRY PROFILES

The following section provides information on the gambling industry of nations comparable to Australia with a major focus on Asian nations. Where possible an industry profile detailing gambling forms and numbers of venues is provided. Expenditure or revenue data and participation statistics are also included where available.

Canada

Industry Profile

In 2016-17, the gambling industries in Canada comprised various legalised gambling forms in 10 provinces. 2016-17 are the latest available figures.

Major gambling forms available include wagering venues/horse racing tracks (note that horse racing tracks can sometime be co-located with EGM venues and may be known by the term 'racino'). Other gambling forms include VLT's and slots at bars and casinos, lottery products, bingo and non-EGM casino gambling.

There are differing types of casinos in Canada. Commercial or destination casinos offer large scale activities and amenities when compared to other facilities and charity casinos from which revenue is directed towards charity. In addition, some casinos are based on Canadian First Nation reserves and referred to as First Nation casinos. Revenue from these venues is directed to the benefit the local indigenous community.

Table 14-8 Casino facilities in Canada (2016-2017)

	First Nation (On Reserves)	Non-First Nation	Total Casinos
Alberta	5	19	24
British Columbia	1	16	17
Manitoba	3	2	5
New Brunswick	1	1	2
Newfoundland and Labrador	0	0	0
Nova Scotia	0	2	2
Ontario	2	9	11
Prince Edward Island	0	2	2
Quebec	0	6	6
Saskatchewan	6	2	8

Source: Canadian Partnership for Responsible Gambling (2018) Canadian Gambling Digest 2016-2017. (Latest figures available)

Table 14-9 Electronic Gaming Machine Venues in Canada (2016-17)

Jurisdiction	Casinos with slots	Bingo facilities with slots or VLT's	Racetracks with slots or VLT's	Bars and lounges with VLT's	Total EGM Venues
Alberta	24	0	4	854	882
British Columbia	17	18	0	0	35
Manitoba	5	1	1	479	486
New Brunswick	2	0	0	219	221
Newfoundland and Labrador	0	0	0	389	389
Nova Scotia	2	0	0	323	323
Ontario	11	0	14	0	25
Prince Edward Island	2	0	0	37	39
Quebec	6	0	0	1,737	1,743
Saskatchewan	8	0	0	591	599

Source: Canadian Partnership for Responsible Gambling (2018) Canadian Gambling Digest 2016-2017. (Latest figures available)

Table 14-10 Other Gambling Forms/Venues in Canada (2016-17)

Jurisdiction	Racetracks	Teletheatres ¹⁰	Poker Rooms	Lottery Ticket Outlets	Bingo Facilities
Alberta	7	40	n/a	2,744	22
British Columbia	3	40	11	3,519	25
Manitoba	5	8	4	897	2
New Brunswick	2	7	2	870	0
Newfoundland and Labrador	0	0	0	926	0
Nova Scotia	3	4	2	1,056	0
Ontario	18	66	10	9,839	69
Prince Edward Island	2	0	1	165	0
Quebec	8	10	4	8,479	66
Saskatchewan	1	3	6	909	10

Source: Canadian Partnership for Responsible Gambling (2018) Canadian Gambling Digest 2016-2017. (Latest figures available)

Table 14-11 Electronic Gaming Machines in Canada by location (2016-17)

Jurisdiction	Slots at Casinos	Slots or VLT's at bingo facilities	Slots or VLT's at racetracks	VLT's at bars and lounges	Total EGMs
Alberta	12,996	0	1,315	5,992	20,273
British Columbia	10,167	2,782	0	0	12,949
Manitoba	3,581	0	140	6,349	10,070
New Brunswick	740	0	0	2,000	2,740
Newfoundland and Labrador	0	0	0	1,896	1,896
Nova Scotia	823	0	0	2,694	3,517
Ontario	12,658	0	10,323	0	22,981
Prince Edward Island	214	0	0	280	494
Quebec	6,468	0	0	11,000	17,468
Saskatchewan	3,134	0	0	3,996	7,130

Source: Canadian Partnership for Responsible Gambling (2018) Canadian Gambling Digest 2016-2017. (Latest figures available)

Table 14-12 Electronic Gaming Machines in Canada (2016-18)¹¹

Jurisdiction	2016	2017	2018
Alberta	20,092	20,619	20,582
British Columbia	13,289	13,128	12,949
Manitoba	9,940	10,004	10,070
New Brunswick	2,750	2,800	2,840
Newfoundland and Labrador	1,912	1,954	1,926
Nova Scotia	3,539	3,548	3,576
Ontario	21,776	23,579	22,981
Prince Edward Island	518	530	520
Quebec	17,851	17,201	16,477
Saskatchewan	7,171	7,164	7,536
Yukon	64	64	64

Source: Gaming Technologies Association (2018) World Count of Gaming Machines 2018

Table 14-13 Casino facilities in Canada (2016-17)

¹⁰ In teletheatre betting an existing racetrack sends its races via satellite to designated centres where patrons can wager on races viewed on screens or TV sets. The wagering is supervised by the Canadian Pari-Mutuel Agency, a division of Agriculture Canada, and bets are electronically transmitted to the host track.

¹¹ Numbers in Tables 14-11 and 14-12 may differ due to different reference sources

	Number of tables¹²	Number of slots
Alberta	Unavailable	12,966
British Columbia	563	10,167
Manitoba	105	3,581
New Brunswick	33	740
Newfoundland and Labrador	0	0
Nova Scotia	41	823
Ontario	695	12,658
Prince Edward Island	5	214
Quebec	242	6,468
Saskatchewan	130	3,134
Total	1,814	44,751

Source: Canadian Partnership for Responsible Gambling (2018) Canadian Gambling Digest 2016-2017. (Latest figures available)

¹² Gaming tables includes both electronic and live gaming tables.

Table 14-14 Gaming Venues per 100,000 People 18+ in Canada (2016-2017)

Jurisdiction	Casinos	EGMs	EGM Venues	Horse Racing Venues	Lottery Ticket Outlets
Alberta	0.7	614.2	28.2	1.8	83.2
British Columbia	0.4	336.1	0.9	1.1	100.5
Manitoba	0.5	1,006.9	50.0	1.3	89.5
New Brunswick	0.3	437.3	35.5	0.8	142.1
Newfoundland and Labrador	0.0	437.5	90.8	0.7	217.6
Nova Scotia	0.3	451.4	41.9	0.8	137.4
Ontario	0.1	198.9	0.2	0.7	88.5
Prince Edward Island	1.7	415.1	32.8	1.7	142.8
Quebec	0.1	259.8	26.6	0.3	126.7
Saskatchewan	0.9	811.2	70.3	0.5	101.7

Source: Canadian Partnership for Responsible Gambling (2018) Canadian Gambling Digest 2016-2017. (Latest figures available)

Expenditure and Revenue

Table 14-15 Average household expenditure Canadian Provinces (2015 & 2016)

Jurisdiction	Expenditure Games of Chance (net)	
	\$CA	
	2015	2016
Alberta	230	180
British Columbia	153	168
Manitoba	221	215
New Brunswick	254	245
Newfoundland and Labrador	304	281
Nova Scotia	207	174
Ontario	172	303
Prince Edward Island	122	142
Quebec	148	127
Saskatchewan	288	259
Canada	180	217

Source: Statistics Canada (2017) Table 203-0021 - Survey of household spending (SHS): Canada, regions and provinces (2015 to 2016). (Latest figures available)

Table 14-16 Canadian gambling expenditure per household comparison (2016-17)

Expenditure	2016		2017	
	Average Expenditure	Percentage of Total Expenditure	Average Expenditure	Percentage of Total Expenditure
	\$CA	%	\$CA	%
Education	1,688	1.9	1,777	2.1
Food	8,784	10.4	8,527	9.9
Games of Chance (net)	217	0.2	200	0.2
Health Care	2,574	2.9	2,579	3.0
Household Operation	4,704	5.4	4,827	5.6
Reading materials and other printed matter	156	0.2	158	0.2
Recreation	3,935	4.8	3,986	4.6
Tobacco and Alcohol	1,406	1.6	1,497	1.7
Transportation	11,909	14.2	12,707	14.8
Total Expenditure¹³	82,489		86,070	

Source: Statistics Canada (2018) Table 203-0021 - Survey of household spending (SHS): Canada, regions and provinces (2013 to 2017). (Latest figures available)

¹³ Please note that the table contents will not add to be total expenditure as the expenditure items are a selection of key categories from the complete Statistics Canada statistics.

The average expenditure of a Canadian household on games of chance in 2017 was \$CA 200. Games of chance made up 0.2% of total Canadian household expenditure; this is broadly comparable with the level of spending on reading materials and other printed material.

Table 14-17 Gross gambling revenue in Canada by type and province (2016-17)

	Govt Run Bingo	Govt Run Casino	Govt Run EGM	Govt Internet Gaming	Govt Run Lottery	Horse Racing	Charitable Gaming
\$CA thousands							
Alberta	11,432	1,133,302	n/a	0	n/a	29,045	398,579
British Columbia	287,338	1,524,629	1,277,928	n/a	590,633	36,169	82,001
Manitoba	3,612	265,950	577,592	n/a	105,733	6,167	73,740
New Brunswick	0	n/a	n/a	3,126	80,374	1,090	35,006
Newfoundland and Labrador	0	0	141,691	4,783	110,091	0	n/a
Nova Scotia	0	68,852	191,673	4,488	97,016	2,574	45,892
Ontario	153,044	1,733,744	2,914,525	n/a	1,645,396	215,526	348,682
Prince Edward Island	0	14,625	31,496	497	15,032	1,761	n/a
Quebec	19,233	839,973	1,443,640	87,748	840,286	17,947	54,093
Saskatchewan	0	350,770	556,627	0	101,839	2,484	118,551

Source: Canadian Partnership for Responsible Gambling (2018) Canadian Gambling Digest 2016-2017. (Latest figures available) For further details go to: <http://www.cprg.ca/Digests/ViewMainCards?yearId=e0e02df2-2ea4-e511-97fa-1abbb38a3094>

Gross gambling profit is measured as wagers less prize payouts, before operating expenses are deducted.

The total amount of government operated gross gambling revenue in Canada in 2016-17 was approximately \$CA 13,699,589,000.

Table 14-18 Net Gaming Revenue to Government in Canada (2015-16 versus 2016-17)

Jurisdiction	2015-16 (CA\$ thousands)	2016-17 (CA\$ thousands)
Alberta	n/a	n/a
British Columbia	n/a	1,339,000
Manitoba	422,431	422,657
New Brunswick	n/a	n/a
Newfoundland and Labrador	n/a	n/a
Nova Scotia	159,357	163,412
Ontario	2,264,307	n/a
Prince Edward Island	n/a	n/a
Quebec	n/a	n/a
Saskatchewan	388,660	452,821

Source: Canadian Partnership for Responsible Gambling (2018) Canadian Gambling Digest 2016-2017. (Latest figures available) For further details go to: <http://www.cprg.ca/Digests/ViewMainCards?yearId=e0e02df2-2ea4-e511-97fa-1abbb38a3094>

Participation

Table 14-19 Participation by gambling form Canadian Provinces (various years)

Survey Details ¹⁴	BC	AB	SK	MB	ON	QC	NB	NS	PE	NL
Age of sample	18+	18+	19+	18+	18+	18+	19+	19+	18+	19+
Year of survey	2013-14	2009	2001	2017	2010-11	2012	2014	2013	2005	2009
Percentage of the population participating (%)										
Bingo	5.7	4.8	8.4	9.1	4.6	4.2	7.7	6.7	6.9	8.7
Bookies	¹⁵	-	0.2	-	-	-	⁻¹⁵	-	0.4	⁻¹⁵
Cards	22.2 ¹⁶	21.8	10.8	10.3	⁻¹⁷	2.4	5.0	-	12.2	6.5 ¹⁸
Casino slots		15.4 ¹⁹	20.3	25.4	20.5		13.5	13.8	15.5	6.1
Casino table games	28.0	7.0	7.3	7.9	5.9			4.0	3.7	4.8 ²⁰
Charities	45.8	-	63.7	48.1	49.7	26.2	51.3 ²¹	46.1	50.4	39.4
EGM (non-casino)	3.3	11.7 ²²	17.7	16.5	⁻²³	4.1	7.7	5.7	8.4	8.2
Games of skill ²⁴	⁻²⁵	⁻²⁵	6.8	⁻²⁵	15.7	4.9	3.8	-	2.3	3.3
Horse racing	5.4	3.5	2.7	4.3	4.2	0.6	0.9	0.7	7.4	0.4
Internet	3.7	3.1	0.2	1.5	1.9	1.5	0.7	1.8	0.7	0.4 ²⁶
Scratch tickets ²⁷	⁻²⁸	33.0	27.5	⁻²⁸	30.4	31.7	28.6	24.4	50.4	28.0
Speculative investments ²⁹	7.7	8.6	8.4	-	4.6	-	2.3	-	-	1.2
Sports events	12.3	7.9	9.3	-	9.0	2.5	5.1	-	5.5	4.0
Sports lotteries	3.9		5.3	11.1			3.3	-	2.8	2.4
Ticket lotteries ³⁰	81.6	62.3	62.6	53.5	61.4	60.6	58.4	46.9	66.6	61.3
Any Activity	72.5	73.5	86.6	74.2	82.9	66.6³¹	85.0	72.8	82.0	77.0

Source: Canadian Partnership for Responsible Gambling (2018) Canadian Gambling Digest 2016-2017. (Latest figures available)

The three most popular forms of gambling identified in the provincial surveys are Ticket lotteries, Charities and Casino Slots.

¹⁴ Please note within this table the following provincial abbreviations apply – BC= British Columbia, AB= Alberta, SK= Saskatchewan, MB= Manitoba, ON= Ontario, QC= Quebec, NB= New Brunswick, NS= Nova Scotia, PE= Prince Edward Island and NL= Newfoundland and Labrador.

¹⁵ Contained in Sporting Events.

¹⁶ Includes private games and games of skill.

¹⁷ Contained in Games of Skill.

¹⁸ Does not include participation in board games or poker.

¹⁹ Includes participation in racetrack slot machines.

²⁰ Participation in casino gambling out of province.

²¹ Participation in draws was 50.9%. Participation in fundraising tickets was 51.8%.

²² Participation in VLTs in bars and lounges only. Participation in racetrack slot machines is included in Casino Slots.

²³ Contained in Casino Slots.

²⁴ Generally refers to pool, bowling, darts, golf, and other similar activities.

²⁵ Contained in Cards.

²⁶ Does not include participation in poker. Poker participation rate was 1.5%.

²⁷ Generally includes break open tickets (Nevada strips, Pull tabs). The three exceptions are in NS, NB and NL.

²⁸ Contained in Lotteries.

²⁹ Generally refers to stocks, options and commodities.

³⁰ May or may not include daily lotteries.

³¹ Past year participation.

United States

Industry Profile

The American Gaming Association lists the following gambling types as legal in the United States³²:

- Card Rooms, both public and private
- Charitable Games and Bingo
- Bookmaking, Pari-mutuel Wagering
- Electronic Gaming Devices
- Commercial and Tribal Casinos
- Sports Betting
- Lotteries, iLottery
- iGaming

Commercial casino gaming has been legal in Nevada for more than seven decades and in Atlantic City, N.J., for more than a quarter century. It was not until the late 1980s and early 1990s that other jurisdictions across the United States began to introduce commercial casino gaming.

The other major form of casino gaming is on Native American reservations. As sovereign nations, Native American tribes have used this legal protection to open casinos.

Table 14-20 Commercial casinos in the United States (2018)

	Number of casinos	Casino category
Colorado	33	Land-based
Delaware	3	Racetrack casinos
Florida	8	Land-based, Racetrack casinos
Illinois	10	Riverboat casinos
Indiana	13	Land-based, Riverboat & Racetrack casinos
Iowa	19	Land-based, Riverboat & Racetrack casinos
Kansas	4	Land-based
Louisiana	20	Land-based, Riverboat & Racetrack casinos
Maine	2	Land-based & Racetrack casinos
Maryland	6	Land-based & Racetrack casinos
Massachusetts	2	Land-based, Racetrack casinos
Michigan	3	Land-based
Mississippi	28	Land-based & Riverboat casinos
Missouri	13	Riverboat casinos
Nevada	217	Land-based
New Jersey	9	Land-based
New Mexico	5	Racetrack casinos
New York	13	Land-based & Racetrack casinos
Ohio	11	Land-based & Racetrack casinos
Oklahoma	2	Racetrack casinos
Pennsylvania	12	Land-based & Racetrack casinos
Rhode Island	2	Land-based
South Dakota	25	Land-based
West Virginia	5	Land-based & Racetrack casinos
Total	465	

Source: American Gaming Association (2019) *State of the States 2019: The AGA Survey of Casino Entertainment*.

In 2018, the commercial casino industry in the United States consisted of 465 casinos in 24 states.

³² AGA *State of the States 2019*

Table 14-21 Casinos in the United States (2018)

	Land based or riverboat casino	Racetrack casino	Tribal casino	Card room	Non-casino locations with electronic gaming devices
Alabama			3		
Alaska			2		
Arizona			25		
California			76	73	
Colorado	33		2		
Connecticut			2		
Delaware		3			
Florida	4	4	7	16	
Idaho			10		
Illinois	10				6,773
Indiana	11	2	1		
Iowa	17	2	4		
Kansas	4		5		
Louisiana	16	4	5		1,674
Maine	1	1			
Maryland	5	1			
Massachusetts	1	1			
Michigan	3		24		
Minnesota			40	2	
Mississippi	28		3		
Missouri	13				
Montana			13	150	1,418
Nebraska			5		
Nevada	217		4		1,982 ³³
New Jersey	9				
New Mexico		5	27		
New York	4	9	16		
North Carolina			3		
North Dakota			9		
Ohio	4	7			
Oklahoma		2	139		
Oregon			10		2,200
Pennsylvania	6	6			
Rhode Island	2				
South Dakota	25	12			1,336
Texas			2		
Washington			34	45 ³⁴	
West Virginia	1	4			1,245
Wisconsin			27		
Wyoming			4		
Total	414	51	514	286	16,628
Number of states	21	14	29	5	7

Source: American Gaming Association (2019) *State of the States 2019: The AGA Survey of Casino Entertainment*.

³³ Locations have 15 or fewer machines.

³⁴ Card rooms operate blackjack & other house or player-banked games in addition to poker.

Expenditure and Revenue**Table 14-22 Consumer Spending on Commercial Casino Gaming (2017-18)**

State	2017 Gross Revenues (\$US millions)	2018 Gross Revenues (\$US millions)	% Change
Colorado	828.06	842.10	+1.70
Delaware	428.80	432.51	+0.87
Florida	546.59	569.02	+4.10
Illinois	1,407.10	1,373.46	-2.45
Indiana	2,239.90	2,240.84	+0.04
Iowa	1,462.92	1,467.33	+0.30
Kansas	389.66	408.57	+4.85
Louisiana	2,561.26	2,561.46	+0.01
Maine	136.71	143.73	+5.14
Maryland	1,614.34	1,746.36	+8.18
Massachusetts	164.79	273.07	+65.71
Michigan	1,400.54	1,444.10	+3.11
Mississippi	2,080.09	2,142.06	+2.98
Missouri	1,737.56	1,754.47	+0.97
Nevada	11,571.11	11,917.37	+2.99
New Jersey	2,659.01	2,903.48	+9.19
New Mexico	227.50	235.45	+3.49
New York	2,348.83	2,587.74	+10.17
Ohio	1,776.36	1,863.94	+4.93
Oklahoma	124.87	139.61	+11.80
Pennsylvania	3,226.92	3,251.20	+0.75
Rhode Island	624.85	656.55	+5.07
South Dakota	105.45	106.32	+0.83
West Virginia	624.64	623.76	-0.14
Total	40.289 billion	41.684 billion	+3.46

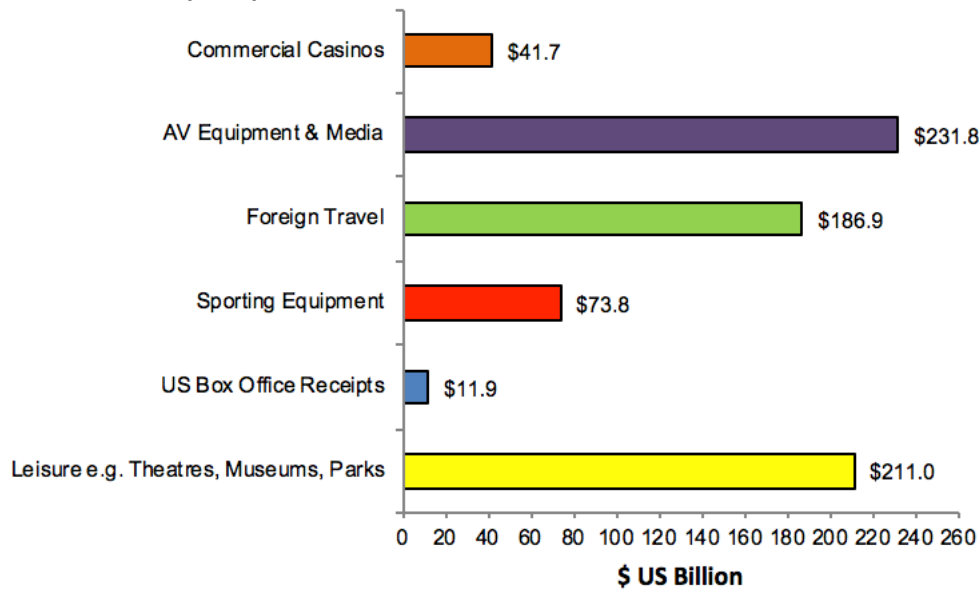
Source: American Gaming Association (2019) *State of the States 2019: The AGA Survey of Casino Entertainment*.

Economic conditions in the Casino gaming market in the United States has improved with 22 of 24 states experiencing increased gross revenue over the twelve month period from 2017 to 2018.

Consumer spending at commercial casinos was highest in Nevada at \$US11.92 billion (+2.99% on 2017 figures) and lowest in South Dakota with a reported \$US106.32 million in gross revenue (up 0.72% on previous figures nonetheless).

The largest increase in consumer spending was in Massachusetts. It increased by 65.71% over a twelve month period, from \$US164.79 million in 2017 to \$US273.07 million in 2018.

Figure 14-6 Commercial Casino Expenditure (US) versus Other Spending Choices (2018)



Source: American Gaming Association (2019) State of the States 2019; boxofficemojo.com; FRED Economic Data (2018) Table 2.4.5 Personal Consumption by Type of Product.

Table 14-23 Commercial Casino Tax Revenue by State in the United States (2017-18)

Jurisdiction	2017 Taxation (US\$ million)	2018 Taxation (US\$ million)	% Change
Colorado	121.03	125.53	+3.71
Delaware	209.27	207.81	-0.70
Florida	191.31	199.16	+4.10
Illinois	475.45	462.17	-2.79
Indiana	603.35	599.64	-0.62
Iowa	336.05	339.25	+0.95
Kansas	105.21	110.33	+4.87
Louisiana	602.46	607.68	+0.87
Maine	54.57	57.97	+6.23
Maryland	658.15	709.98	+7.87
Massachusetts	80.75	109.45	+35.55
Michigan	340.54	349.63	+2.67
Mississippi	252.09	257.62	+2.19
Missouri	445.72	446.51	+0.18
Nevada	867.19	850.62	-1.91
New Jersey	247.96	276.54	+11.53
New Mexico	105.22	108.89	+3.49
New York	1,022.54	1,101.63	+7.73
Ohio	593.98	622.62	+4.82
Oklahoma	55.69	63.10	+13.30
Pennsylvania	1,432.86	1,478.16	+3.16
Rhode Island	314.09	322.09	+2.55
South Dakota	15.48	14.71	-5.01
West Virginia	293.01	289.97	-1.04
Total	9.424 billion	9.711 billion	+3.05

Source: American Gaming Association (2019) State of the States 2019: The AGA Survey of Casino Entertainment.

Revenue**Table 14-24 Gambling Revenues by Category in the United States (2018)**

Gambling Category	Gross Revenue (\$billions)
Commercial Casinos	51.4
Tribal Casinos	32.8
Poker Rooms	1.9
Lotteries	72
Legal Bookmaking	430.6
Online Gambling	306.5
Pari-Mutuel	299
Charitable Games/Bingo	2.1
Total Revenue	161.24

Source: *OnlineUnitedStatesCasinos.com*(2019) USA Gambling Facts and Revenue <https://www.onlineunitedstatescasinos.com/usa-gambling-facts/>

United Kingdom

Industry Profile

The major permissible gambling forms in the United Kingdom are wagering, bingo, casino gambling, gaming machine and fruit machine gambling, lotteries and remote gambling.

Table 14-25 Gambling venues/operators in the United Kingdom (March 2018)

Gambling Form	Number in the United Kingdom
Betting shop	8,559
Bingo clubs	657
Casinos	152
Arcades	1,639

Source: UK Gambling Commission (2020) Industry Statistics April 2015 to September 2019.

The UK Gambling Commission estimate that there are 183,813 gaming machines in Great Britain (October 2017 – September 2018).³⁵

Expenditure and Revenue

The Gross Gambling Yield (GGY) of the Great Britain gambling industry (Oct 2017 – September 2018) was £14.5bn. (a 0.4% decrease from Apr 2017 – Mar 2018).

The Gross Gambling Yield for the remote sector (October 2017 – September 2018) was £5.6bn. (2.9% increase from Apr 2017 – March 2018).³⁶

Table 14-26 Household expenditure on games of chance in the United Kingdom (2015-2018)

Year	£ million
2015	10,152
2016	10,525
2017	10,745
2018	11,009

Source: Office of National Statistics (2019) Consumer trends, UK October to December 2018

³⁵UK Gambling Commission (2018) Gambling Industry Statistics: Oct 2017 – Sept 2018.

³⁶ UK Gambling Commission (2018) Gambling Industry Statistics: Oct 2017 – Sept 2018.

Participation³⁷**Table 14-27 Participation by gender and age in Great Britain (2018)**

Gambling participation by gender and age	Percentage Participation (%)
Male respondents	51
Female respondents	41
16-24 years old	36
25-34 years old	46
35-44 years old	44
45-54 years old	52
55-64 years old	55
65+	42

Source: UK Gambling Commission (2019) *Gambling participation in 2018: behaviour, awareness and attitudes. Annual Report 2019.*

Table 14-28 Past 4 week participation by gambling type in Great Britain (2018)

Gambling Activity	Percentage Participation (%)
Lotteries and related products	
National Lottery tickets	28
Scratchcards	11
Other Lotteries	11
Machines / games	
Football pools	1.4
Bingo	2.6
Slot machines	3.7
Machines in bookmakers	1.5
Casino table games	1.6
Poker in pubs or clubs	0.8
Online games/instant wins	1.2
Betting activities	
Football	5.7
Betting exchange	1
Horse races	3.8
Dog races	0.8
Sports betting	6.6
Other sports	2.3
Spread-betting	0.3
Private betting	6.1
Other gambling activity	
Online Gambling	18

Source: UK Gambling Commission (2019) *Gambling participation in 2018: behaviour, awareness and attitudes Annual report*

Overall, 10% of all respondents had participated in any betting activity in the previous four weeks. The most popular betting activity in 2018 was football (5.7%), followed by horse races (3.8%) and other sports (2.3%)

³⁷ The UK Gambling Commission provides quarterly statistics to monitor gambling participation supplementary to their periodic, large scale prevalence surveys: <http://www.gamblingcommission.gov.uk/Gambling-data-analysis/Statistics.aspx>

South Africa

Industry Profile

On-track betting on horse races was the only legal form of gambling permitted in South Africa until 1996. In 1996 the *National Gambling Act* instituted a system of licensed casinos and a single national lottery.

Table 14-29 Casinos operating in South Africa by province (2018)

Jurisdiction	No. of Casinos
Eastern Cape	5
Free State	4
Gauteng	7
KwaZulu-Natal	5
Limpopo	3
Mpumalanga	3
North West	4
Northern Cape	3
Western Cape	5
Total	39

Source: Casino Association of South Africa (2018) 2018 Survey of Casino Entertainment in South Africa.

The Casino Association of South Africa has reported a total of 922 operational gaming tables and 24,508 gaming machines at their casinos.³⁸

Expenditure and Revenue

Table 14-30 Casino taxation revenue in South Africa by province (2018)

Jurisdiction	Revenue (R)
Eastern Cape	93.0 million
Free State	28.8 million
Gauteng	758.4 million
KwaZulu-Natal	416.8 million
Limpopo	35.6 million
Mpumalanga	51.5 million
North West	87.2 million
Northern Cape	13.4 million
Western Cape	425.7 million
Total	1,909.8 million

Source: Casino Association of South Africa (2018) 2018 Survey of Casino Entertainment in South Africa.

Table 14-31 Gambling incidence by gender in South Africa (2017)

Mode	Male	Female
		%
National Lottery	53.9	46.1
Lucky Draws	48.9	51.1
Scratch Cards	45.6	54.4
Horse/Sports Betting	76.5	23.3
Casinos	48.0	52.0
LPMS	56.5	43.5
Bingo	32.4	67.6
All Unregulated/Unlicensed/Illegal	52.3	47.7

Source: South Africa National Gambling Board (2018) Socio-economic impact of gambling in South Africa 2017

³⁸ The Casino Association of South Africa represents 36 of 38 operational casinos in South Africa. Figures for two casinos in the Northern Cape region that are not affiliated with the Casino Association of South Africa are not included.

Table 14-32 Gambling Participation by Type in South Africa (2017)

Gambling Mode	%
National Lottery	81.3
Lucky Draws	14.3
Scratch Cards	13.9
Sports Betting in Person at a Course, Betting Outlet or Bookmaker	12.6
Fafi/iChina/mo-China/fhafee	9.5
Slot machines at a licensed casino	9.5
Card Games for Money (not at a casino or online)	7.8
Dice Games for Money (not at a casino or online)	6.3
Sports betting not at a Course, betting Outlet or Bookmaker	5.1
Online Gambling Games for Money	3.7
Bingo at licensed premises	2.4
Limited Pay-Out Machines at licensed premises	2.0
Racing	0.6

Source: National Gambling Board South Africa (2017) Socio-economic impact of gambling in South Africa, 2017

Participation

Table 14-34 Participation by gambling form in South Africa (2018)

Type of Game	2018 Participated (%)
Bingo	2.4
Casino Gambling	14.2
Horse Racing / Sports Betting	12.6
Illegal / Informal	27
Limited Payout Machines	2
National Lotteries	81.3

Source: National Gambling Board of South Africa (2018) Annual Report 2017/18

Gambling participation by South Africans declined substantially from 56.8% of South Africans aged 18+ years in 2002 to 30.6% in 2017.³⁹

³⁹ National Gambling Board of South Africa (2017) Research Bulletin Issue Seven.

China

Industry Profile

Lotteries are currently the only form of legalised gambling in China outside of Hong Kong and Macau. China operates two lotteries; the Chinese Welfare Lottery and China Sports Lottery. These lotteries operate under a provisional lottery law which was introduced in 2002.

Hong Kong

Industry Profile

Gambling in Hong Kong is restricted to a limited number of authorised and regulated outlets. At present, such authorised gambling outlets include horse racing organised by the Hong Kong Jockey Club, the Mark Six Lottery, authorised football betting and gaming activities authorised by the government under the Gambling Ordinance (e.g. mah-jong parlours).

Table 14-35 Participation by gambling form in Hong Kong (2016)

Type of Game	Participated (%)	Monthly Spend (HKD)
Mark Six Lottery	54.9	159.9
Horse Racing	12.5	5,610.6
Football Betting	6.6	1,598.7
Macau Casinos	8.4	7,938.8
Mahjong House	0.5	1,842.9
Social Gambling (Mahjong or Poker)	31.6	423.8
Casino Ships (departing from Hong Kong)	0.6	45,259.6

Source: Hong Kong Polytechnic University (2017) Report on the study of Hong Kong people's participation in gambling activities in 2016. (These are the latest available statistics)

Mark Six lottery was the most popular gambling activity among Hong Kong people (54.9%), followed by social gambling (31.6%), horse racing (12.5%), Macau casinos (8.4%) and football betting (6.6%) respectively.

Macau

Industry Profile

Gambling in Macau plays an important role in the economy and revenue of the city. The Macau government collected a total of MOP106.78 billion (US\$13.21 billion) in revenue from direct taxes from gaming in 2018 (up 13.6% from the previous year). Direct taxes from gaming brought in nearly 80% of the Macau government's total revenue in 2018.⁴⁰

Tourists from neighboring Asian nations gamble there. Gamblers visiting Macau are largely from Hong Kong or China.⁴¹ 9.1% of repeat visitors cited gambling as their reason for returning.⁴²

Legalised gambling in Macau can be divided into three different categories: casino games, horse racing and greyhound racing. There is also sports betting and instant lotteries, sports lotteries and a Chinese lottery.

Casinos are operated by the winners of a concession bidding process begun in 2001. The concessions for all casinos expire in 2022.⁴³

⁴⁰ GGRAsia (2019) Macau gaming tax revenue up 14pct in full year 2018

⁴¹ "How China's middle class will drive Macau's next gaming boom" (2017) <https://stansberrychurchouse.com/asia-wealth-investment-daily/how-chinas-middle-class-will-drive-macaus-next-gaming-boom/>

⁴² <https://calvinayre.com/2019/01/18/casino/7-million-tourists-cant-get-enough-macau/>

⁴³ South China Post (2019) <https://www.scmp.com/business/companies/article/3001800/macau-extends-gambling-licenses-sim-and-mgm-china-until-2022>

Table 14-36 Number of casinos in Macau (2011-18)

Concessionaries	2011	2012	2013	2014	2015	2016	2017	2018
S.J.M	20	20	20	20	20	20	22	22
Galaxy Casinos	6	6	6	6	6	6	6	6
Venetian Macau	3	4	4	4	4	4	5	5
Wynn Resorts (Macau)	1	1	1	1	1	1	2	2
Melco Crown Jogos (Macau)	3	3	3	3	4	4	4	4
MGM Grand Paradise	1	1	1	1	1	1	1	2
Total	34	35	35	35	36	36	40	41

Source: Gaming Inspection and Coordination Bureau, Macao SAR (2018).

Table 14-37 Number of gaming tables and gaming machines in Macau (2013-18)

Item	2013	2014	2015	2016	2017	2018
Gaming Tables	5,750	5,711	5,957	6,287	6,419	6,588
Slot Machines	13,106	13,018	14,578	13,826	15,622	16,059

Source: Gaming Inspection and Coordination Bureau, Macao SAR (2018).

Expenditure and Revenue

Table 14-38 Betting amount from pari-mutuels and lotteries in Macau (2017-18)

Item	2017 (MOP million)	2018 (MOP million)
Greyhound Racing	218	110
Horse Racing	517	504
Chinese Lottery	39	49
Instant Lottery	0.0007	0.0016
Sports Lottery – Football	5,500	6,361
Sports Lottery – Basketball	2,643	2,692
Total	8,917	9,716

Source: Gaming Inspection and Coordination Bureau, Macao SAR (2018).

Table 14-39 Gross revenue from various gaming activities in Macau (2017-18)

Item	2017 (MOP million)	2018 (MOP million)
Games of Fortune	265,743	302,846
Greyhound Racing	46	23
Horse Racing	104	101
Chinese Lottery	10	13
Instant Lottery	0.0001	0.0014
Sports Lottery – Football	519	674
Sports Lottery – Basketball	185	222
Total	266,607	303,879

Source: Gaming Inspection and Coordination Bureau, Macao SAR (2018).

Table 14-40 Gross revenue from various games of fortune in Macau (2017-18)

Item	2017 (MOP million)	2018 (MOP million)
VIP Baccarat	150,673	166,097
Baccarat	84,283	102,397
Slot Machines	13,164	15,048
Cussec	7,480	8,251
Black Jack	2,662	2,714
Stud Poker	1,170	1,258
Roulette	1,143	1,129
Mahjong	118	137
3-Card Baccarat Game	504	597
Texas Holdem Poker	322	340
Live Multigame	2,431	2,728
Craps	214	270
Other ⁴⁴	1574.5	1880
Total	265,738.5	302,846

Source: Gaming Inspection and Coordination Bureau, Macao SAR (2018).

Baccarat in its various forms constitutes the dominant gambling form in Macau and accounts for over 80% of the total revenue from Games of Fortune.

⁴⁴ This includes Fantan, Paikao, 3 Card Poker, Tombola, Fish-Prawn-Crab, Lucky Wheel, Mark 8, Casino War, Fortune 8 and Fortune 3 Card Poker.

Singapore

Industry Profile

Gambling is legal in Singapore. Two casinos have been constructed with the stated aim of bringing tourism to the country. The first, Singapore's Resorts World at Sentosa, opened on January 2010. The second, Marina Bay Sands, opened on April 2010.⁴⁵

Singapore's casinos produced a combined \$US4 billion in gross gaming revenue for H1 2018.⁴⁶

In an effort to regulate local gambling involvement, there is an entry levy for Singapore citizens and permanent residents of \$S150 for 24 hours or \$S3,000 for an annual casino membership.⁴⁷ Singapore residents may also apply for a *Casino Visit Limit* option which restricts the number of visits per month an individual can make to the casinos in Singapore.⁴⁸

In 2018 there were 6,200 slot machines in the Singaporean casinos.⁴⁹

Private clubs with 500 or more members, that have been in operation for at least 3 years, are permitted to install jackpot/fruit machines. A club may operate jackpot/fruit machines if it has at least two other recreational facilities. As of May 2018, there were 42 clubs operating fruit machines, down 31% (from 61) in October 2017. There were fewer than 1,500 fruit machines across all private clubs. This is a decrease of 20% from October 2017, when there were more than 1,800.⁵⁰

The Singapore Tote Board was established in 1988 with the remit to conduct horse racing and totalisator operations through its agent the Singapore Turf Club. The Tote Board also controls lotteries through its subsidiary Singapore Pools.

In 2016, both Singapore Pools and the Singapore Turf Club were given permission to run online betting platforms, having been granted exemption from the *Remote Gambling Act* which outlaws online and phone gambling.⁵¹

Gaming surpluses generated by Singapore Pools and the Singapore Turf club are distributed to the community by way of grants and funding for community programs and events.⁵²

Expenditure and Revenue

Table 14-41 Monthly median and average Betting Amount (\$) in the last 12 months in Singapore (2008, 2011, 2014 & 2017)

Monthly Betting Amount	2008	2011	2014	2017
Median	\$100	\$40	\$20	\$30
Average	\$176	\$212	\$70	n/a

Source: Singapore National Council on Problem Gambling (2018) Report of survey on participation in gambling activities among Singapore residents 2017.

⁴⁵ Casino News Daily (2015) Singapore: Gross Gaming Revenue Analysis, 26/5/15.

⁴⁶ Chart of the Day: Gaming revenue in Singapore slipped in H1 after 2017 growth (2019)

⁴⁷ Straits Times (2019) New rules on advance payment of entry levies from August

⁴⁸ Singapore National Council on Problem Gambling (2016) <http://www.ncpg.org.sg/en/Pages/home.aspx>

⁴⁹ Ziolkowski, S. (2019) The World Count of Gaming Machines 2018, Gaming Technologies Association.

⁵⁰ Gaming Law 2019 Singapore <https://practiceguides.chambers.com/practice-guides/gaming-law-2019/singapore>

⁵¹ <http://www.straitstimes.com/singapore/online-betting-to-be-allowed-in-next-two-months-via-singapore-pools-singapore-turf-club>

⁵² <http://www.toteboard.gov.sg>

Participation

Table 14-42 Gambling participation rates by type of gaming in the last 12 months in Singapore (2008, 2011, 2014 & 2017)

Types of Games	2008 (%)	2011 (%)	2014 (%)	2017 (%)
All Games	54	47	44	52
4D	47	38	35	42
TOTO	33	28	27	36
Social Gambling	23	13	10	21
Singapore Sweep	17	16	16	18
Sports Betting	9	2	2	2
Jackpot Machines in Local Casinos	NA	3	2	1
Jackpot Machine in Local Clubs		2	1	1
Jackpots Machine in Cruises/Outside Singapore	8	3	2	2
Table Games in Local Casinos	NA	4	1	1
Table Games in Cruises/Outside Singapore	9	4	2	1
Horse Betting	6	1	1	1
Online Gambling	1	1	1	1

Source: Singapore National Council on Problem Gambling (2018), Report of Survey on Participation in Gambling Activities Among Singapore Residents, 2017.

Republic of Korea

Industry Profile

The Korean gambling industry is currently made up of sports betting, casinos, boat racing, horse racing, cycle racing, lotteries and bullfighting.⁵³

The casino industry is comprised of a single casino which allows Korean citizens to gamble and a further 16 casinos open to foreigners only, which are supervised by the Ministry of Culture and Tourism. Only tourists with proof of foreign citizenship are permitted to enter.⁵⁴

In 2018, there were 4,309 slot machines in South Korea.⁵⁵

Expenditure and Revenue

Table 14-43 Turnover by sector in South Korea (2018)

Gambling Sector	2018 Turnover (100 million won)
Casino	30,254
Horse racing	75,376
Bicycle racing	20,515
Motorboat racing	6,210
Lottery	43,848
Sports Lotto	47,428
Bullfight	273

Source: *The National Gambling Control Commission – Korea (2018)*, <http://www.ngcc.go.kr/Eng/stats/scale.do>

⁵³ *The National Gambling Control Commission – Korea (2016)*

⁵⁴ *Haps Magazine Korea (2019), Foreigner-only Casinos in South Korea See Increased Turnover in 2018*

⁵⁵ Ziolkowski, S. (2019) *The World Count of Gaming Machines 2018*, Gaming Technologies Association.

Japan

Industry Profile

The Japanese Penal Code prohibits gambling in Japan. A small number of gambling forms have been allowed to operate outside the provisions of the Penal Code including lotteries, mah-jong and horse racing.

Horse racing is legal in Japan and is an extremely popular form of gambling, however the Japanese gaming industry is primarily based on pachinko and pachinko machines.

The pachinko/pachislo industry does not attract the penalties applicable to gambling under the Japanese Penal Code, as the activity is not defined as gambling because players are awarded non-cash prizes. Players may then take their prizes to an independent shop that will purchase the prize in exchange for cash. The independent shop subsequently sells prizes back to the pachinko/pachislo gaming parlour from which the transaction originated.

There are an estimated 4,302,731 pachinko/pachislo machines in Japan in 2018.⁵⁶ The number of pachinko halls has fallen to about 9,600 (2018) from over 17,000 two decades ago, according to statistics collected by the National Police Agency which regulates the industry⁵⁷

Changes enacted in 2018 reduced maximum payouts on pachinko/pachislo machines by 37.5% to ¥50,000 per ¥4 game.

After much debate, the Japanese parliament passed legislation on 14 December 2016 legalising casino gambling in integrated resorts. A second bill to decide implementation details, such as the number and location of any casino resorts and their regulation, was finalised and passed by the government in 2018.⁵⁸

Expenditure and Revenue

Although no formal expenditure statistics are available, media reports suggest around US\$180 billion was wagered in 2018 on pachinko machines.⁵⁹

The Japanese Family Income and Expenditure Survey⁶⁰, does not collect expenditure data on gambling as a single item. It is part of a line item data-set on admission fees and game charges.⁶¹

In 2016 the average household expenditure on admission fees and games charges was 31,613 Yen (approximately \$376 Australian dollars). This compares to a household average expenditure of 2,909,095 Yen (approximately \$34,644 Australian dollars) on all consumption expenditures.⁶²

⁵⁶ Ziolkowski, S. (2019) *The World Count of Gaming Machines 2018*, Gaming Technologies Association.

⁵⁷ *Japan Times* (2018) *Already in decline, Japan's pachinko industry now braces for gambling-addiction regulations*

⁵⁸ *Japan Times* (2019) *Japan is going all-in on casinos. Will the gamble pay off?*

⁵⁹ *Reuters* (2018) *Japan's pachinko industry braces for anti-addiction legislation*

⁶⁰ Japanese Ministry of Internal Affairs and Communications (2017) *Family Income and Expenditure Survey 2016*.

⁶¹ This category of the survey is made up of lift and elevator charges, boat-riding and sightseeing flight charges, horse riding charges at tourist spot, pachinko, mah-jongg, billiard charges, karaoke fees and jukebox fee.

⁶² Currency conversion carried out from www.x-rates.com on June 5, 2018 and current at that date.

Malaysia

Industry Profile

Gambling in most forms is legal throughout Malaysia, but local Muslims are not allowed to gamble for religious reasons. Malaysia offers casino gambling, slot machines, lottery and pari-mutuel betting on horse races. An attempt to introduce sports betting in 2010 was short-lived with the only license issued being revoked. There are several legal lottery companies in Malaysia including Sports Toto, Magnum 4D, Da Ma Cai and Sabah88. Malaysia's first and only casino, Casino de Genting, was established in 1971 and is one of Asia's oldest legal casinos.

There were an estimated 3,000 gaming machines in Malaysia in 2018.⁶³

Philippines

Industry Profile

The Filipino gaming industry operates casinos, gaming halls, bingo parlours and sports lotteries. These are largely controlled by the state-owned operator, the Philippine Amusement and Gaming Corporation (PAGCOR).

PAGCOR owns and operates 28 casinos, 5 VIP clubs and 2 slot machine arcades.⁶⁴ Starting in 2018, PAGCOR operated casinos were privatized. There were 19,905 slots machines in operation in the Philippines in 2018.⁶⁵

PAGCOR is also the official government regulator of gambling establishments in the Philippines, including private casinos such as Resorts World Manila, Entertainment City Manila, City of Dreams and Solaire.

PAGCOR's Gross Gambling Revenue (GGR) grew by 18.3% to approximately PHP67.85 billion in 2018, from its P57.34 billion revenues in 2017.⁶⁶

Gross Gambling Revenue (GGR) from government and private casinos for 2018 was PHP187.54 billion, up 22.9% from 2017.⁶⁷

Vietnam

Industry Profile

The Vietnamese gambling industry largely consists of casinos, lotteries and slot machine centres. The government imposes a 35% tax rate on all gambling operations.⁶⁸

There are 7 licensed casinos and 22 electronic gaming clubs (slot parlours).⁶⁹

⁶³ Ziolkowski, S. (2019) *The World Count of Gaming Machines 2018*, Gaming Technologies Association.

⁶⁴ *World Casino Directory (2018)* www.worldcasinodirectory.com

⁶⁵ Ziolkowski, S. (2019) *The World Count of Gaming Machines 2019*, Gaming Technologies Association.

⁶⁶ *Business World Online (2018)* PAGCOR gaming revenue rise 18.3% in 2018, 5 February 2019.

⁶⁷ *GGRAsia (2019)* Philippines Casino GGR up 23pct in full 2018: Pagcor 19/2/19

⁶⁸ *Asia Times (2018)* Short on cash, Vietnam punts on gambling 8 October 2018

⁶⁹ *Success Dragon (2016)* Vietnam Gaming Market Study.

In 2017 the Vietnamese government announced that it is prepared remove the longstanding ban on locals gambling in casinos by approving a three-year trial that will allow residents to gamble at selected casinos. The trial includes conditions stipulating that only locals (21 and over) with a monthly income of at least \$450 are permitted to gamble. A daily casino entry fee or monthly pass has also been suggested. Further, operators will be required to invest a minimum of \$2 billion in order to obtain the gambling license required.⁷⁰

The Bai Dai Integrated Resort Project on Phu Quoc island has been confirmed as the first casino to be granted authority to participate in the pilot program. A project currently in development in Quang Ninh province has been tipped to be the second location.⁷¹

The Vietnamese government does not disclose gross gaming revenue (GGR) data from the existing gaming venues. Union Gaming estimates that nationwide GGR currently stands in the range of US\$800 million to US\$1.2 billion. The estimate is based on information released by three publicly traded companies with exposure to Vietnam's gaming market, "as well as via conversations" with operators in that market, said the brokerage.⁷²

There were 1,966 gaming machines in operation in Vietnam in 2018.⁷³

Southern Vietnam's traditional lottery firms are gaining ground on against computerized lotteries. Revenue from lotteries in Vietnam's south reached VND91.9 billion (US\$4.1 billion) in 2017, up 7.2% on 2016. The 21 companies contributed approximately VND24.2 billion (US\$1.1 billion) to the State budget.⁷⁴

Cambodia

Industry Profile

Cambodia operates casino gaming and lotteries.

In 1994 the Cambodian government allowed tenders for a resort casino. This was established in the Phnom Penh region under a regional monopoly arrangement. Additional casinos have been established in the border zones, away from the Cambodian capital of Phnom Penh. By the end of 2018, the Cambodian government granted 52 new casino licences to take the total to 150.⁷⁵ Cambodian nationals are barred from gambling in casinos.

There were 7,660 gaming machines in operation in Cambodia in 2018.⁷⁶

In 2018, casinos paid a total of \$46 million in taxes to the MEF (Ministry of Economy and Finance).⁷⁷

⁷⁰ World Casino News (2017) Vietnamese legislation could spell "death knell" for Cambodian border casinos.

⁷¹ Calvin Ayre (2018) Vietnam identifies first casino to take part in locals gambling trial, 18 June 2018.

⁷² Ggrasia (2017) Vietnam's casino market worth up to US\$1.2bln, 9 August 2017.

⁷³ Ziolkowski, S. (2019) The World Count of Gaming Machines 2018, Gaming Technologies Association.

⁷⁴ Vietnamese lottery firms make bigger revenues in 2017, http://www.xinhuanet.com/english/2018-01/23/c_136917734.htm

⁷⁵ Phnom Penh Post (2019) Number of casinos jumps by 53% in 2018 2 January 2019

⁷⁶ Ziolkowski, S. (2019) The World Count of Gaming Machines 2018, Gaming Technologies Association.

⁷⁷ Speiss, R. (2019) Show me the money <https://southeastasiaqlobe.com/show-me-the-money/>