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# A GUIDE TO AUSTRALASIA'S GAMBLING INDUSTRIES

Facts, Figures and Statistics

## CHAPTER FOURTEEN

Gambling Around the World

2015/16

# A Guide to Australasia's Gambling Industries

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



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# Chapter 14

## Gambling around the World

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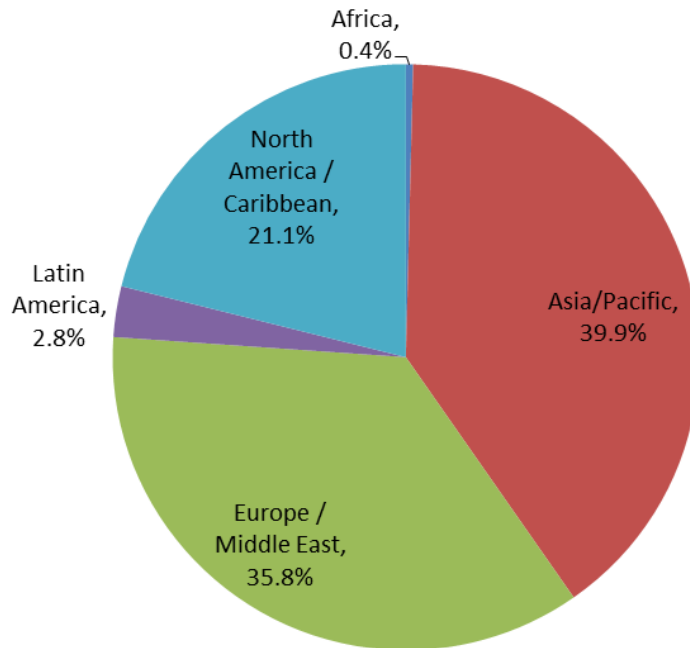
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## A SNAPSHOT OF GAMBLING FORMS AROUND THE WORLD

### Lotteries<sup>1</sup>

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)**

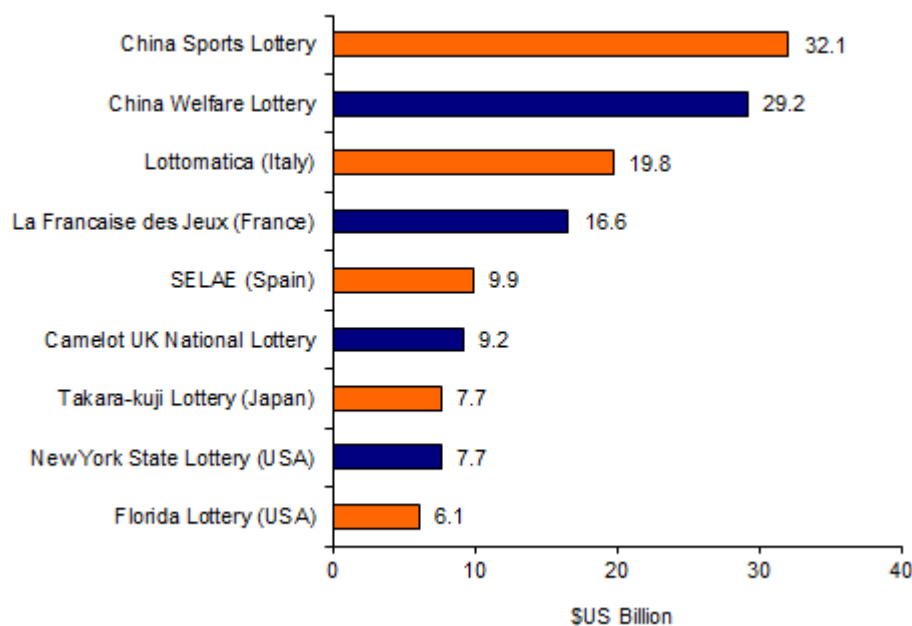
Region	Sales \$US Billion	Sales %
Africa	\$0.999	0.4%
Asia / Pacific	\$102.4	39.9%
Europe / Middle East	\$91.9	35.8%
Latin America	\$7.3	2.8%
North America / Caribbean	\$54.2	21.1%
<b>Total</b>	<b>\$256.8</b>	<b>100%</b>

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.<sup>2</sup>

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

<sup>2</sup> 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)<sup>3</sup>

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:<sup>4</sup>

### 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)

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.

<sup>3</sup> Lottery revenues only.

<sup>4</sup> 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. However 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.

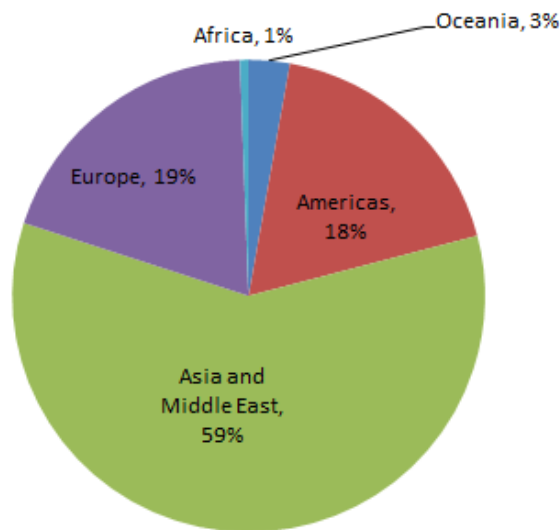
**Number of gaming machines worldwide<sup>5</sup>**

**Table 14-2 Number of gaming machines worldwide by region (2016)<sup>6</sup>**

Region	Number of machines
Oceania	217,376
Americas	1,417,067
Asia and Middle East	4,638,284
Europe	1,525,607
Africa	51,008
Total <sup>7</sup>	7,871,287

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

**Figure 14-3 Proportion of gaming machines by region (2016)**



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

<sup>5</sup> Does not include unregistered or illegal machines.  
<sup>6</sup> Figures exclude EGMs on cruise ships.  
<sup>7</sup> Total number of legal gaming machines, including EGMs on cruise ships.

With over 4.6 million machines, the Asia and Middle East region accounted for 58.9% of gaming machines worldwide, followed by Europe (19.4%) and the Americas (18%). Oceania and Africa accounted for only 2.8% and 0.6% of the worldwide total respectively.

**Table 14-3 Top ten countries (all machines) (2016)**

Country	Number of machines
Japan	4,575,545
USA	865,807
Italy	456,367
Germany	277,325
Spain	212,153
<b>Australia</b>	<b>197,122</b>
United Kingdom	167,839
Canada	98,902
Argentina	98,717
Mexico	90,000

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

Japan has by far the greatest number of gaming machines (nearly 4.6 million) – over five times as many as the country with the next highest number, the United States at 865,807 machines. Italy follows next with 456,367, while Australia, in sixth place, has 197,122 machines.

**Table 14-4 Top ten jurisdictions (all machines) (2016)**

Jurisdiction	Number of casino-style machines
Japan	4,575,545
Italy	456,367
Germany	277,325
Spain	212,153
Nevada, USA	171,101
United Kingdom	167,839
Argentina	98,717
<b>New South Wales, Australia</b>	<b>94,361</b>
Mexico	90,000
Peru	89,874

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

**Table 14-5 Top ten number of machine per capita by country (2016)**

Country	Persons per Machine
Sint Maarten	13
Aland Islands	16
Japan	28
Monaco	31
Aruba (Netherlands)	32
China, Macao Special Administrative Region	43
Curacao	64
United States Virgin Islands	79
Antigua and Barbuda	115
St Kitts and Nevis	118

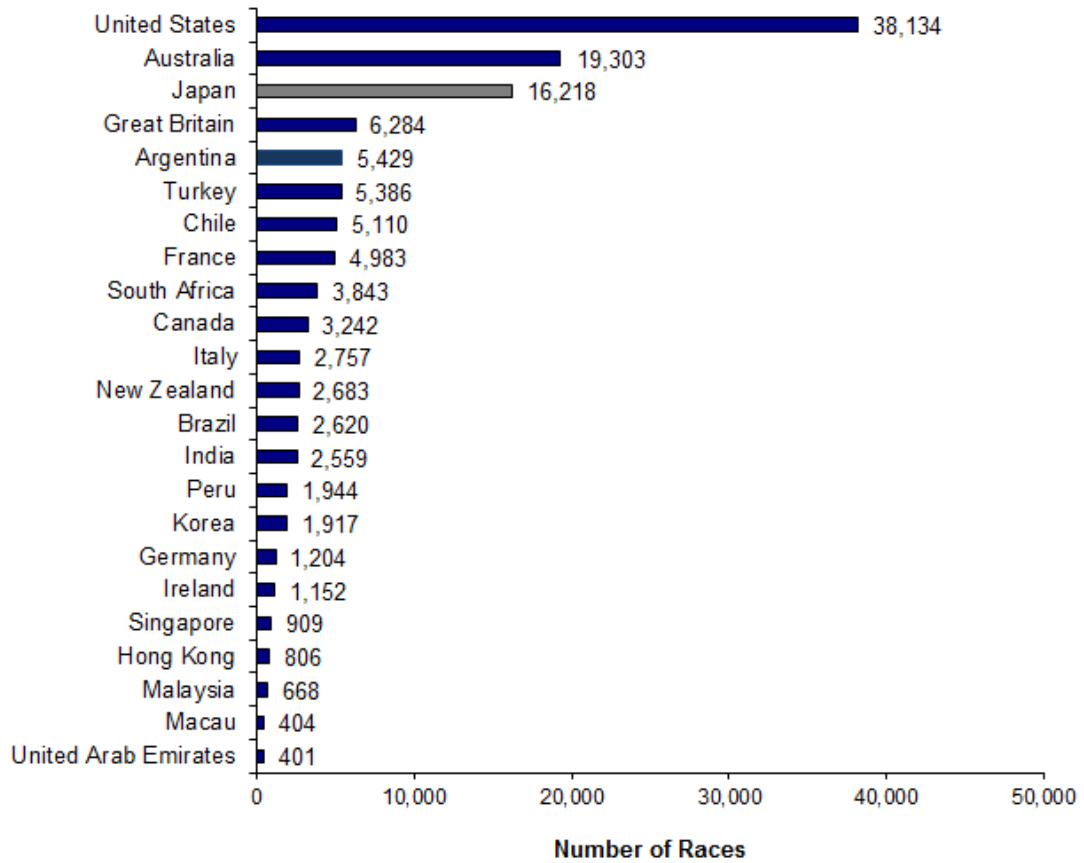
Source: Ziolkowski, S. (2017) *The World Count of Gaming Machines 2016*, Gaming Technologies Association.

## Racing

### International horse races

Figure 14-4 shows the number of thoroughbred flat horse races held throughout the world in 2016.

Figure 14-4 International comparison of horse races held (2016)



Source: International Federation of Horseracing Authorities (2016) Facts and Figures.

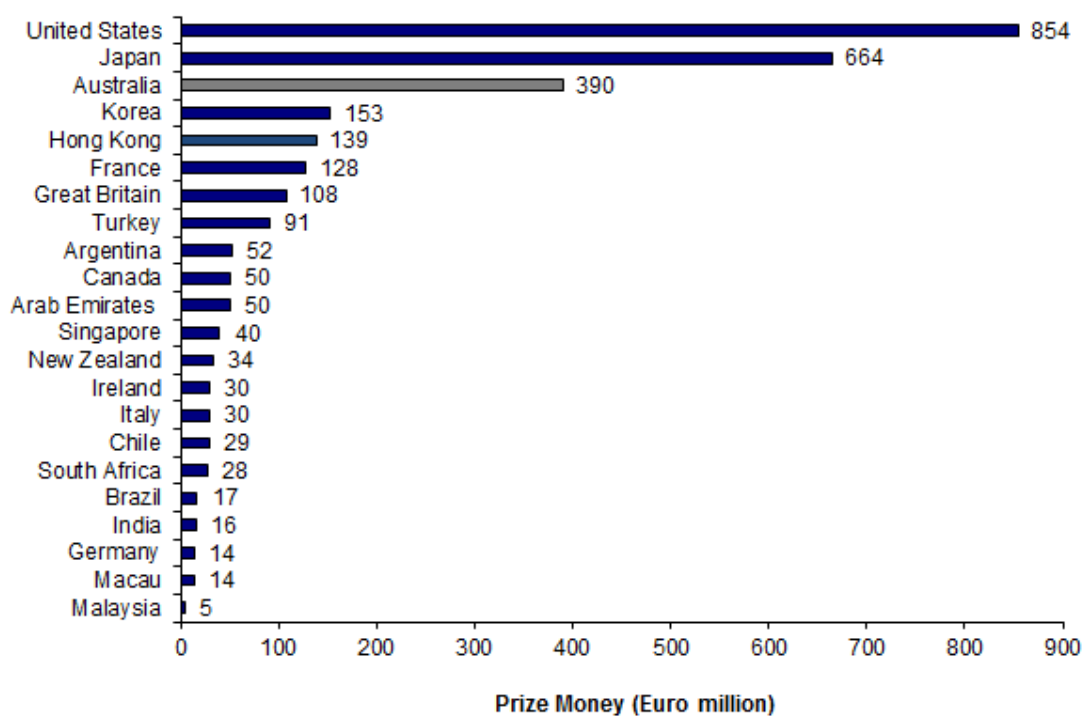


Table 14-6 World-wide race comparisons 2009-16<sup>8</sup>

Country	2009	2010	2011	2012	2013	2014	2015	2016
Argentina	5,378	5,528	5,834	5,558	5,525	5,727	5,708	5,429
<b>Australia</b>	<b>19,326</b>	<b>19,281</b>	<b>18,802</b>	<b>19,534</b>	<b>19,534</b>	<b>19,427</b>	<b>18,949</b>	<b>19,303</b>
Brazil	4,564	4,555	4,627	4,153	3,967	3,673	3,340	2,620
Canada	4,753	4,539	4,376	4,295	3,675	3,363	2,567	3,242
Chile	N/A	5,172	4,872	4,821	4,892	4,954	5,059	5,110
France	4,237	4,778	4,792	4,878	4,887	4,908	4,908	4,983
Germany	1,433	1,316	1,343	1,314	1,253	1,341	1,294	1,204
Great Britain	6,254	6,309	6,270	6,107	6,396	6,308	6,257	6,284
Hong Kong	733	767	769	769	771	777	784	806
India	3,156	2,969	3,312	3,235	2,534	3,188	3,188	2,559
Ireland	1,032	993	951	1,084	1,104	1,087	1,113	1,152
Italy	N/A	4,185	3,938	3,160	3,094	2,905	2,952	2,757
Japan	17,568	17,563	16,984	16,717	15,992	15,812	16,049	16,218
Korea	1,833	1,794	1,810	1,873	1,904	1,939	1,926	1,917
Macau	569	557	564	498	452	470	411	404
Malaysia	756	699	731	737	696	699	595	668
New Zealand	2,950	2,996	2,934	2,949	2,894	2,777	2,745	2,683
Peru	N/A	1,951	1,928	2,143	1,935	1,868	1,929	1,944
Singapore	822	916	990	993	994	993	928	909
South Africa	3,756	3,880	3,901	3,833	3,809	3,717	3,969	3,843
Turkey	2,277	3,920	4,272	2,357	2,546	2,933	2,898	5,386
United Arab Emirates	199	321	334	320	356	381	397	401
United States	49,196	46,220	45,253	44,929	42,975	41,120	38,941	38,134

Source: International Federation of Horseracing Authorities (2016) Facts and Figures.

<sup>8</sup> 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 (2016) – (€million)<sup>9</sup>**

Source: International Federation of Horseracing Authorities (2016) Facts and Figures.

**Table 14-7 International horse racing betting turnover (2015 & 2016) – (€million)<sup>10</sup>**

Country	2015	2016
Argentina	159	161
<b>Australia</b>	<b>14,554</b>	<b>16,107</b>
Brazil	67	88
Canada	978	906
Chile	236	271
France	9,083	8,951
Germany	78	68
Great Britain	14,778	12,531
Hong Kong	12,580	14,365
India	478	582
Ireland	3,238	5,050
Italy	637	608
Japan	22,935	25,565
Korea	5,127	5,185
Macau	185	131
Malaysia	108	86
New Zealand	420	442
Peru	25	25
Singapore	909	844
Turkey	1,304	1,199
United States	9,805	10,193

Source: International Federation of Horseracing Authorities (2016) Facts and Figures.

<sup>9</sup> These figures are representative of the prize money for flats racing only.

<sup>10</sup> 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 2015-16, the gambling industries in Canada comprised various legalised gambling forms in 10 provinces.

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 (2015-2016)**

	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 (2017) Canadian Gambling Digest 2015-2016.

**Table 14-9 Electronic Gaming Machine Venues in Canada (2015-16)**

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	895	923
British Columbia	17	18	0	0	35
Manitoba	5	1	1	494	501
New Brunswick	2	0	0	218	220
Newfoundland and Labrador	0	0	0	397	397
Nova Scotia	2	0	0	325	327
Ontario	11	0	14	0	25
Prince Edward Island	2	0	0	37	39
Quebec	6	0	0	1,783	1,789
Saskatchewan	8	0	0	607	615

Source: Canadian Partnership for Responsible Gambling (2017) Canadian Gambling Digest 2015-2016.

**Table 14-10 Other Gambling Forms/Venues in Canada (2015-16)**

Jurisdiction	Racetracks	Teletheatres <sup>11</sup>	Poker Rooms	Lottery Ticket Outlets	Bingo Facilities
Alberta	6	53	n/a	2,722	21
British Columbia	3	40	11	3,873	25
Manitoba	5	8	4	898	2
New Brunswick	1	4	1	881	0
Newfoundland and Labrador	2	1	0	951	0
Nova Scotia	3	3	2	1,072	0
Ontario	19	63	9	9,839	71
Prince Edward Island	2	0	1	170	0
Quebec	8	9	4	8,534	66
Saskatchewan	1	3	6	890	10

Source: Canadian Partnership for Responsible Gambling (2017) Canadian Gambling Digest 2015-2016.

**Table 14-11 Electronic Gaming Machines in Canada (2015-16)**

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	12,832	0	1,304	5,956	20,092
British Columbia	10,167	2,782	0	0	12,949
Manitoba	3,587	0	140	6,372	10,099
New Brunswick	711	0	0	2,000	2,711
Newfoundland and Labrador	0	0	0	1,912	1,912
Nova Scotia	823	0	0	2,698	3,521
Ontario	11,758	0	10,352	0	22,110
Prince Edward Island	214	0	0	280	494
Quebec	6,243	0	0	11,249	17,492
Saskatchewan	3,106	0	0	3,992	7,098

Source: Canadian Partnership for Responsible Gambling (2017) Canadian Gambling Digest 2015-2016.

**Table 14-12 Casino facilities in Canada (2015-16)**

	Number of tables <sup>12</sup>	Number of slots
Alberta	Unavailable	12,832
British Columbia	563	10,167
Manitoba	105	3,587
New Brunswick	28	711
Newfoundland and Labrador	0	0
Nova Scotia	41	823
Ontario	665	11,758
Prince Edward Island	9	214
Quebec	245	6,243
Saskatchewan	90	3,106
<b>Total</b>	<b>1,746</b>	<b>49,441</b>

Source: Canadian Partnership for Responsible Gambling (2017) Canadian Gambling Digest 2015-2016.

<sup>11</sup> In teletheatre betting an existing race track 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.

<sup>12</sup> Gaming tables includes both electronic and live gaming tables.

**Table 14-13 Gaming Venues per 100,000 People 18+ in Canada (2015-2016)**

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 (2017) Canadian Gambling Digest 2015-2016.

### Expenditure and Revenue

**Table 14-14 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
<b>Canada</b>	<b>180</b>	<b>217</b>

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

**Table 14-15 Canadian gambling expenditure per household comparison (2015-16)**

Expenditure	2015		2016	
	Average Expenditure	Percentage of Total Expenditure	Average Expenditure	Percentage of Total Expenditure
	\$CA	%	\$CA	%
Education	1,540	1.9	1,688	2.0
Food	8,629	10.4	8,784	10.4
<b>Games of Chance (net)</b>	<b>180</b>	<b>0.2</b>	<b>217</b>	<b>0.3</b>
Health Care	2,361	2.9	2,574	3.0
Household Operation	4,490	5.4	4,704	5.6
Reading materials and other printed matter	168	0.2	156	0.2
Recreation	3,981	4.8	3,935	4.7
Tobacco and Alcohol	1,336	1.6	1,406	1.7
Transportation	11,761	14.2	11,909	14.1
<b>Total Expenditure<sup>13</sup></b>	<b>82,697</b>		<b>84,489</b>	

Source: Statistics Canada (2017) Table 203-0021 - Survey of household spending (SHS): Canada, regions and provinces (2012 to 2016).

<sup>13</sup> 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 2016 was \$CA 217. 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 14-16 Gross gambling revenue in Canada by type and province (2015-16)**

	Govt Run Bingo	Govt Run Casino	Govt Run EGM	Govt Internet Gaming	Govt Run Lottery	Horse Racing	Charitable Gaming
\$CA thousands							
Alberta	11,634	1,207,303	n/a	0	n/a	31,500	419,934
British Columbia	269,047	1,498,878	1,206,558	n/a	589,015	34,016	71,091
Manitoba	3,396	267,750	568,758	n/a	116,246	6,254	77,820
New Brunswick	0	n/a	n/a	2,849	84,109	921	30,222
Newfoundland and Labrador	0	0	147,041	4,644	118,337	236	23,021
Nova Scotia	0	69,667	189,686	4,320	103,549	2,499	39,486
Ontario	127,961	1,659,301	2,850,569	n/a	1,705,100	208,792	316,982
Prince Edward Island	0	13,862	31,023	592	16,150	1,744	n/a
Quebec	19,344	810,369	1,432,116	66,177	861,753	18,944	52,896
Saskatchewan	0	356,186	575,006	0	108,395	2,504	51,164

Source: Canadian Partnership for Responsible Gambling (2017) Canadian Gambling Digest 2015-2016. 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 gambling revenue in Canada in 2015-16 was approximately \$CA 4,548,255,000, a decrease of roughly \$CA 23.5 million on revenues reported in 2014-15. This figure is in part due to figures not being available for more provinces in 2015-16.

**Table 14-17 Net Gaming Revenue to Government in Canada (2014-15 versus 2015-16)**

Jurisdiction	2014-15 (CA\$ thousands)	2015-16 (CA\$ thousands)	% Change
Alberta	1,754,637	n/a	n/a
British Columbia	1,313,500	n/a	n/a
Manitoba	289,156	422,431	46.09
New Brunswick	n/a	n/a	n/a
Newfoundland and Labrador	n/a	n/a	n/a
Nova Scotia	138,863	159,357	14.76
Ontario	1,960,118	2,264,307	15.52
Prince Edward Island	n/a	n/a	n/a
Quebec	1,115,797	n/a	n/a
Saskatchewan	322,650	388,660	20.46

Source: Canadian Partnership for Responsible Gambling (2017) Canadian Gambling Digest 2015-2016. For further details go to: <http://www.cprg.ca/Digests/ViewMainCards?yearId=e0e02df2-2ea4-e511-97fa-1abbb38a3094>

## Participation

Table 14-18 Participation by gambling form Canadian Provinces (various years)

Survey Details <sup>14</sup>	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
<b>Percentage of the population participating (%)</b>										
Bingo	5.7	4.8	8.4	10.1	4.6	4.2	7.7	6.7	6.9	8.7
Bookies	<sup>15</sup>	-	0.2	-	-	-	<sup>-15</sup>	-	0.4	<sup>-15</sup>
Cards	<sup>22.2</sup> <sub>16</sub>	21.8	10.8	11.1	<sup>-17</sup>	2.4	5.0	-	12.2	6.5 <sup>18</sup>
Casino slots	28.0	<sup>15.4</sup> <sub>19</sub>	20.3	35.0	20.5	13.5	13.8	15.5	6.1	4.8 <sup>20</sup>
Casino table games		7.0	7.3	6.4	5.9			4.0	3.7	
Charities	45.8	-	63.7	51.6	49.7	26.2	51.3 <sup>21</sup>	46.1	50.4	39.4
EGM (non-casino)	3.3	<sup>11.7</sup> <sub>22</sub>	17.7	-	<sup>-23</sup>	4.1	7.7	5.7	8.4	8.2
Games of skill <sup>24</sup>	<sup>-25</sup>	<sup>-25</sup>	6.8	<sup>-25</sup>	15.7	4.9	3.8	-	2.3	3.3
Horse racing	5.4	3.5	2.7	6.3	4.2	0.6	0.9	0.7	7.4	0.4
Internet	3.7	3.1	0.2	1.4	1.9	1.5	0.7	1.8	0.7	0.4 <sup>26</sup>
Scratch tickets <sup>27</sup>	<sup>-28</sup>	33.0	27.5	<sup>-28</sup>	30.4	31.7	28.6	24.4	50.4	28.0
Speculative investments <sup>29</sup>	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 <sup>30</sup>	81.6	62.3	62.6	55.3	61.4	60.6	58.4	46.9	66.6	61.3
<b>Any Activity</b>	<b>72.5</b>	<b>73.5</b>	<b>86.6</b>	<b>77.3</b>	<b>82.9</b>	<b>66.6</b> <sup>31</sup>	<b>85.0</b>	<b>72.8</b>	<b>82.0</b>	<b>77.0</b>

Source: Canadian Partnership for Responsible Gambling (2017) Canadian Gambling Digest 2016-2017.

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

<sup>14</sup> 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.

<sup>15</sup> Contained in *Sporting Events*.

<sup>16</sup> Includes private games and games of skill.

<sup>17</sup> Contained in *Games of Skill*.

<sup>18</sup> Does not include participation in board games or poker.

<sup>19</sup> Includes participation in racetrack slot machines.

<sup>20</sup> Participation in casino gambling out of province.

<sup>21</sup> Participation in draws was 50.9%. Participation in fundraising tickets was 51.8%.

<sup>22</sup> Participation in VLTs in bars and lounges only. Participation in racetrack slot machines is included in *Casino Slots*.

<sup>23</sup> Contained in *Casino Slots*.

<sup>24</sup> Generally refers to pool, bowling, darts, golf, and other similar activities.

<sup>25</sup> Contained in *Cards*.

<sup>26</sup> Does not include participation in poker. Poker participation rate was 1.5%.

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

<sup>28</sup> Contained in *Lotteries*.

<sup>29</sup> Generally refers to stocks, options and commodities.

<sup>30</sup> May or may not include daily lotteries.

<sup>31</sup> Past year participation.

## United States

### Industry Profile

The American Gaming Association lists the following gambling types as legal in the United States<sup>32</sup>:

- Card Rooms, both public and private
- Charitable Games and Bingo
- Legal Bookmaking
- Pari-mutuel Wagering
- Commercial Casinos
- Tribal Casinos
- Lotteries

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 gambling is on Native American reservations. As sovereign nations, Native American tribes have used this legal protection to open casinos.

**Table 14-19 Commercial casinos in the United States (2016)**

	Number of casinos	Casino category
Colorado	35	Land-based
Delaware	3	Racetrack casinos
Florida	8	Racetrack casinos
Illinois	10	Riverboat casinos
Indiana	13	Land-based, Riverboat & Racetrack casinos
Iowa	19	Land-based, Riverboat & Racetrack casinos
Kansas	3	Land-based
Louisiana	20	Land-based, Riverboat & Racetrack casinos
Maine	2	Land-based & Racetrack casinos
Maryland	6	Land-based & Racetrack casinos
Massachusetts	1	Racetrack casinos
Michigan	3	Land-based
Mississippi	28	Land-based & Riverboat casinos
Missouri	13	Riverboat casinos
Nevada	273	Land-based
New Jersey	7	Land-based
New Mexico	5	Racetrack casinos
New York	9	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
<b>Total</b>	<b>515</b>	

Source: American Gaming Association (2016) *State of the States 2016: The AGA Survey of Casino Entertainment*.

In 2016, the commercial casino industry in the United States consisted of 515 casinos in 24 states.

<sup>32</sup> <http://www.americangaming.org>



Table 14-20 Casinos in the United States (2016)

	Land based or riverboat casino	Racetrack casino	Tribal casino	Card room	Non-casino locations with electronic gaming devices
Alabama			3 <sup>33</sup>		
Alaska			2 <sup>33</sup>		
Arizona			25		
California			70	77	
Colorado	35 <sup>34</sup>		2		
Connecticut			2		
Delaware		3 <sup>35</sup>			
Florida		8	7	24	
Idaho			9		
Illinois	10				5,726
Indiana	11	2			
Iowa	17	2	3		
Kansas	3		4		
Louisiana	16	4	4		1,788
Maine	1	1			
Maryland	5 <sup>35</sup>	1 <sup>35</sup>			
Massachusetts		1			
Michigan	3		25		
Minnesota			40	2	
Mississippi	28		3		
Missouri	13				
Montana			15	164	1,436
Nebraska			4 <sup>33</sup>		
Nevada	273		5		1,953 <sup>36</sup>
New Jersey	7				
New Mexico		5	28		
New York	1	8 <sup>35</sup>	15		
North Carolina			3		
North Dakota			10		
Ohio	4	7 <sup>35</sup>			
Oklahoma		2	132		
Oregon			9		2,233 <sup>35</sup>
Pennsylvania	6	6			
Rhode Island	2				
South Dakota	25 <sup>34</sup>		14		1,331 <sup>35</sup>
Texas			2 <sup>33</sup>		
Washington			33	60 <sup>37</sup>	
West Virginia	1	4			1,647 <sup>35</sup>
Wisconsin			27		
Wyoming			4		
<b>Total</b>	<b>461</b>	<b>54</b>	<b>500</b>	<b>327</b>	<b>16,089</b>
Number of states	19	14	28	5	7

Source: American Gaming Association (2017) *State of the States 2017: The AGA Survey of Casino Entertainment*.

<sup>33</sup> Class II games only.

<sup>34</sup> Limited stakes gaming.

<sup>35</sup> Video lottery terminals.

<sup>36</sup> Locations have 15 or fewer machines.

<sup>37</sup> Card rooms operate blackjack & other house or player-banked games in addition to poker.

*Expenditure and Revenue***Table 14-21 Consumer Spending on Commercial Casino Gaming (2015-16)**

<b>State</b>	<b>2015 Gross Revenues (\$US millions)</b>	<b>2016 Gross Revenues (\$US millions)</b>	<b>% Change</b>
Colorado	790.08	810.79	+2.62
Delaware	410.49	403.49	-1.71
Florida	530.66	545.95	+2.88
Illinois	1,438.03	1,413.48	-1.71
Indiana	2,215.59	2,216.00	+0.02
Iowa	1,424.35	1,446.16	+1.53
Kansas	367.78	364.33	-0.94
Louisiana	2,648.54	2,537.61	-4.19
Maine	129.81	133.12	+2.55
Maryland	1,098.43	1,203.29	+9.55
Massachusetts	88.23	155.04	+75.72 <sup>38</sup>
Michigan	1,376.41	1,385.60	+0.67
Mississippi	2,097.07	2,122.25	+1.20
Missouri	1,701.89	1,714.97	+0.77
Nevada	11,114.08	11,257.15	+1.29
New Jersey	2,563.12	2,602.72	+1.55
New Mexico	256.02	232.37	-9.24
New York	1,950.96	2,017.69	+3.42
Ohio	1,643.68	1,691.44	+2.91
Oklahoma	113.14	113.31	+0.15
Pennsylvania	3,173.79	3,213.42	+1.25
Rhode Island	615.82	619.11	+0.53
South Dakota	108.36	104.66	-3.42
West Virginia	656.56	654.83	-4.62
<b>Total</b>	<b>38.543 billion</b>	<b>38.959 billion</b>	<b>+1.08</b>

Source: American Gaming Association (2017) *State of the States 2017: The AGA Survey of Casino Entertainment*.

Economic conditions in the Casino gaming market in the United States has improved with 17 of 24 states experiencing increased gross revenue over the twelve month period from 2015 to 2016.

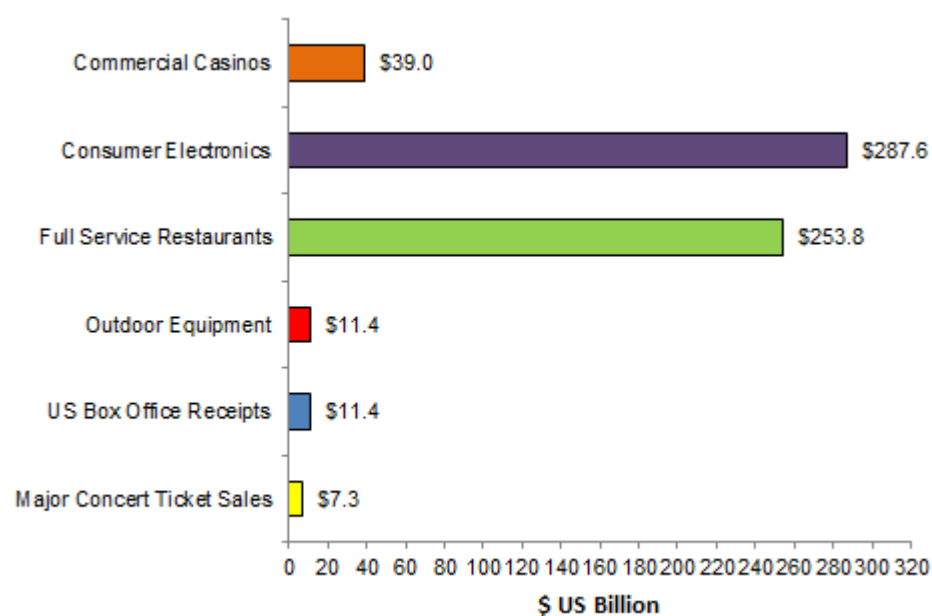
Consumer spending at commercial casinos was highest in Nevada at \$US11.26 billion (+1.29% on 2015 figures) and lowest in Massachusetts with a reported \$US155.04 million in gross revenue (up +75.72% on previous figures nonetheless).

Consumer spending in Massachusetts increased by 75.72% over a twelve month period, from \$US88.23 million in 2015 to \$US155.04 million in 2016. This significant growth reflects the first full year of operations for the state's first casino venue since its opening in June 2015.

The biggest decline (-9.24%) came in New Mexico where racinos suffered from the impact of a struggling local economy.

<sup>38</sup> 2016 gaming revenue in Massachusetts reflects first full year of gaming operations at the state's lone casino.

Figure 14-6 Commercial Casino Expenditure (US) versus Other Spending Choices (2016)



Source: American Gaming Association (2017) State of the States 2017: The AGA Survey of Casino Entertainment; "Global tech sales forecast to fall again, but US expected to buck trend" (2017); boxofficemojo.com; <https://www.statista.com/statistics/306065/concert-ticket-sales-revenue-in-north-america/>; Rewards Network (2017) 2018 Restaurant trends: Industry.

Table 14-22 Commercial Casino Tax Revenue by State in the United States (2015-16)

Jurisdiction	2015 Taxation (US\$ million)	2016 Taxation (US\$ million)	% Change
Colorado	113.80	117.48	+3.23
Delaware	160.96	156.78	-2.59
Florida	185.73	191.08	+2.88
Illinois	488.04	477.99	-2.06
Indiana	608.06	597.36	-1.76
Iowa	329.35	332.34	+0.91
Kansas	92.01	91.08	-1.01
Louisiana	632.24	604.83	-4.34
Maine	52.21	53.39	+2.25
Maryland	452.92	477.43	+5.41
Massachusetts	43.23	75.97	+75.72
Michigan	336.69	338.34	+0.49
Mississippi	252.41	253.91	+0.59
Missouri	443.89	443.56	-0.08
Nevada	889.13	900.57	+1.29
New Jersey	230.93	240.22	+4.02
New Mexico	67.15	61.00	-9.17
New York	888.37	919.73	+3.53
Ohio	545.38	564.66	+3.54
Oklahoma	20.76	20.83	+0.36
Pennsylvania	1,379.23	1,387.83	+0.62
Rhode Island	328.84	320.93	-2.41
South Dakota	15.67	15.75	+0.52
West Virginia	316.45	304.66	-3.73
<b>Total</b>	<b>8.873 billion</b>	<b>8.948 billion</b>	<b>0.84</b>

Source: American Gaming Association (2017) State of the States 2017: The AGA Survey of Casino Entertainment.

**Participation**

**Table 14-23 Participation by gambling form in the United States (2014)**

<b>Gambling Form</b>	<b>Percentage Participation (%)</b>
Playing the lottery	44
Casino gambling	34
Casual Betting	25
Playing poker	15
Wagering on racing	8
Internet gambling	4

Source: Statista Frequency of participation in selected gambling activities over the past 12 months in the United States as of May 2014, <https://www.statista.com/statistics/342852/frequency-of-participation-in-selected-gambling-activities-us/>

## 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 14-24 Gambling venues/operators in the United Kingdom (2016)**

Gambling Form	Number in the United Kingdom
Betting shop	8,788
Bingo clubs	583
Casinos	147
Adult gaming centres	1,550
Family entertainment centres	295

Source: UK Gambling Commission (2016) *Facts and Figures: Between October 2015 to September 2016*, UK Gambling Commission (2017) *Industry Statistics April 2014 to March 2017*.

The UK Gambling Commission estimate that there are approximately 182,916 gaming machines available to the public in the United Kingdom in the period April 2016 to March 2017.<sup>39</sup>

### Expenditure and Revenue

The non-remote commercial gambling industry in Great Britain is substantial, with a gross gambling yield (GGY) of almost £13.7 billion between April 2016 and March 2017 (excluding the National Lottery and Society Lotteries).<sup>40</sup>

**Table 14-25 Household expenditure on games of chance in the United Kingdom (2012-2016)**

Year	£ million
2012	9,076
2013	9,270
2014	9,801
2015	10,152
2016	10,450

Source: Office of National Statistics (2017) *Consumer trends, UK October to December 2016 (seasonally adjusted)*.

<sup>39</sup>UK Gambling Commission (2017) *Facts and Figures: Between April 2016 to March 2017*.

<sup>40</sup>UK Gambling Commission (2017) *Key facts and figures about the gambling industry*.

**Participation<sup>41</sup>****Table 14-26 Participation by gender and age in Great Britain (2015)**

<b>Gambling participation by gender and age</b>	<b>Percentage Participation (%)</b>
Male respondents	66
Female respondents	59
16-24 years old	54
25-34 years old	66
35-44 years old	67
45-54 years old	66
55-64 years old	65
65-74 years old	61
75+	53

Source: UK Gambling Commission (2017) *Gambling Behaviour in Great Britain in 2015: Evidence from England, Scotland and Wales*.

**Table 14-27 Participation by gambling type in England and Scotland (2015)**

<b>Gambling Activity</b>	<b>Percentage Participation (%)</b>
<b>Lotteries and related products</b>	
National Lottery tickets	46
Scratchcards	23
Other Lotteries	15
<b>Machines / games</b>	
Football pools	3
Bingo (not online)	6
Slot machines	7
Machines in a bookmakers	3
Casino table games (not online)	4
Poker in pubs or clubs	1
Online gambling on slots, casino or bingo	4
<b>Betting activities</b>	
Online betting with a bookmaker	7
Betting exchange	1
Horse races (not online)	11
Dog races (not online)	3
Sports events (not online)	5
Other events (not online)	2
Spread-betting	1
Private betting	5
<b>Other gambling activity</b>	
Any other gambling	2

Source: UK Gambling Commission (2017) *Gambling Behaviour in Great Britain in 2015: Evidence from England, Scotland and Wales*.

Table 14-27 shows the percentage of survey respondents that participated in the various forms of gambling available in Great Britain over a twelve month period in 2015.

<sup>41</sup> 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 14-28 Casinos operating in South Africa by province (2016)**

Jurisdiction	No. of Casinos
Eastern Cape	4
Free State	4
Gauteng	7
KwaZulu-Natal	5
Limpopo	3
Mpumalanga	3
North West	4
Northern Cape	3
Western Cape	5
<b>Total</b>	<b>38</b>

Source: Casino Association of South Africa (2016) 2016 Survey of Casino Entertainment in South Africa.

The Casino Association of South Africa has reported a total of 870 operational gaming tables and 23,735 gaming machines at their casinos.<sup>42</sup>

### Expenditure and Revenue

**Table 14-29 Casino taxation revenue in South Africa by province (2016)**

Jurisdiction	Revenue (R)
Eastern Cape	100.1 million
Free State	29.8 million
Gauteng	622.8 million
KwaZulu-Natal	407.9 million
Limpopo	33.5 million
Mpumalanga	52.9 million
North West	121.1 million
Northern Cape	14.3 million
Western Cape	425.2 million
<b>Total</b>	<b>1,807.4 million</b>

Source: Casino Association of South Africa (2016) 2016 Survey of Casino Entertainment in South Africa.

**Table 14-30 Expenditure on games of chance by gender in South Africa (2015)**

Expenditure	Male	Female	Total
	Rand per household per year		
Games of chance	123	55	95

Source: Statistics South Africa (2017) Living conditions of households in South Africa: an analysis of household expenditure and income data using the LCS 2014/2015.

<sup>42</sup> 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 14-31 Household expenditure on games of chance in South Africa by province (2014-2015)**

Jurisdiction	Rand per household per year
Eastern Cape	34
Free State	101
Gauteng	130
KwaZulu-Natal	68
Limpopo	32
Mpumalanga	173
North West	68
Northern Cape	24
Western Cape	130
Total	95

Source: Statistics South Africa (2017) *Living conditions of households in South Africa: an analysis of household expenditure and income data using the LCS 2014/2015*.

### Participation

**Table 14-32 Participation by gambling form in South Africa (2001, 2003 & 2005)**

Type of Game	2001 Participated (%)	2003 Participated (%)	2005 Participated (%)
Bingo	12.4	10.2	11.6
Cards	5.4	5.7	5.3
Dice	2.7	2.8	2.8
Fafi <sup>43</sup>	5.1	7.5	5.8
Horses	10.8	10.5	11.5
Jackpots	12.4	10.2	11.6
Lottery	69.5	76.3	86.9
Roulette	2.4	3.2	4.2
Scratch	20.8	23.7	22.7
Slots	28.9	31.1	27.7
Sports	3.9	4.7	3.9

Source: National Responsible Gambling Program (2007) *The National 2006 Prevalence Study: Gambling and Problem Gambling in South Africa*.

**Table 14-33 Participation by gambling form in South Africa (2015)**

Type of Game	2015 Participated (%)
Bingo	0.4
Casino Gambling	10.6
Horse Racing / Sports Betting	6.2
Illegal / Informal	17.5
Limited Payout Machines	0.3
Lotto	78.9
Lucky Draw	8.7
Scratch Cards	11.2

Source: National Gambling Board of South Africa (2015) *Research Bulletin Issue Five*.

Gambling participation by South Africans declined substantially from 56.8% of South Africans aged 18+ years in 2002 to 30.6% in 2017.<sup>44</sup>

<sup>43</sup> Traditional African game which originated in Soweto, South Africa (<http://www.africanvoices.co.za/newsletters/oct00.htm>).

<sup>44</sup> 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 14-34 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.

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 MOP72.76 billion (US\$9.11 billion) in revenue from direct taxes from gaming between January and November 2016 (down 7.4% the previous year)<sup>45</sup>. Direct taxes from gaming brought in nearly 78% of the Macau government's total revenue in the 11 months to November 2016.<sup>46</sup>

85% of tourists in Macau go there to gamble<sup>47</sup>. Tourists from neighboring Asian nations gamble there. Nearly 90 percent of gamblers visiting Macau are from Hong Kong or China.<sup>48</sup>

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 and by holders of sub-concessions awarded by the concession holders.<sup>49</sup>

<sup>45</sup> GGRAsia (2016) *Macau govt beats gaming tax revenue target*, 29 December 2016.

<sup>46</sup> GGRAsia (2016) *Macau govt beats gaming tax revenue target*, 29 December 2016.

<sup>47</sup> Kong et al (2015) *Tourism destination image development: a lesson from Macau*.

<sup>48</sup> "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/>

<sup>49</sup> *Ibid.*

**Table 14-35** Number of casinos in Macau (2009-16)

Concessionaries	2009	2010	2011	2012	2013	2014	2015	2016
S.J.M	20	20	20	20	20	20	20	20
Galaxy Casinos	5	5	6	6	6	6	6	6
Venetian Macau	3	3	3	4	4	4	4	4
Wynn Resorts (Macau)	1	1	1	1	1	1	1	1
Melco Crown Jogos (Macau)	3	3	3	3	3	3	4	4
MGM Grand Paradise	1	1	1	1	1	1	1	1
<b>Total</b>	<b>33</b>	<b>33</b>	<b>34</b>	<b>35</b>	<b>35</b>	<b>35</b>	<b>36</b>	<b>36</b>

Source: Gaming Inspection and Coordination Bureau, Macao SAR (2016).

**Table 14-36** Number of gaming tables and gaming machines in Macau (2011-16)

Item	2011	2012	2013	2014	2015	2016
Gaming Tables	5,302	5,485	5,750	5,711	5,957	6,287
Slot Machines	16,056	16,585	13,106	13,018	14,578	13,826

Source: Gaming Inspection and Coordination Bureau, Macao SAR (2016).

### Expenditure and Revenue

**Table 14-37** Betting amount from pari-mutuels and lotteries in Macau (2015-16)

Item	2015 (MOP million)	2016 (MOP million)
Greyhound Racing	592	335
Horse Racing	837	709
Chinese Lottery	27	29
Instant Lottery	0.0026	0.0005
Sports Lottery – Football	5,887	6,093
Sports Lottery – Basketball	2,310	2,391
<b>Total</b>	<b>9,653</b>	<b>9,557</b>

Source: Gaming Inspection and Coordination Bureau, Macao SAR (2016).

**Table 14-38** Gross revenue from various gaming activities in Macau (2015-16)

Item	2015 (MOP million)	2016 (MOP million)
Games of Fortune	230,840	223,210
Greyhound Racing	125	71
Horse Racing	166	141
Chinese Lottery	7	7
Instant Lottery	0.0021	0.00042
Sports Lottery – Football	503	541
Sports Lottery – Basketball	170	158
<b>Total</b>	<b>231,811</b>	<b>224,128</b>

Source: Gaming Inspection and Coordination Bureau, Macao SAR (2016).

**Table 14-39 Gross revenue from various games of fortune in Macau (2015-16)**

<b>Item</b>	<b>2015 (MOP million)</b>	<b>2016 (MOP million)</b>
VIP Baccarat	127,818	118,960
Baccarat	76,212	76,903
Slot Machines	11,754	11,384
Cussec	6,347	6,626
Black Jack	2,352	2,456
Stud Poker	1,134	1,075
Roulette	930	984
Mahjong	104	122
3-Card Baccarat Game	404	425
Texas Holdem Poker	272	310
Live Multigame	2,120	2,350
Craps	95	198
Other <sup>50</sup>	1,292	1406
<b>Total</b>	<b>230,840</b>	<b>223,210</b>

Source: Gaming Inspection and Coordination Bureau, Macao SAR (2016).

Baccarat in its various forms constitutes the dominant gambling form in Macau and accounts for approximately 88% of the total revenue from Games of Fortune.

<sup>50</sup> 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.<sup>51</sup>

Singapore's casinos produced a combined \$US5.6 billion in gross gaming revenue for 2015.<sup>52</sup>

In an effort to regulate local gambling involvement there is an entry levy for Singapore residents of \$S100 for 24 hours or \$S2,000 for an annual casino membership.<sup>53</sup> 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.<sup>54</sup>

There are currently 4,700 slot machines in the Singaporean casinos.<sup>55</sup>

Private clubs with 500 or more members are permitted to install jackpot and fruit machines up to a maximum of 200.<sup>56</sup> A club may operate jackpot machines if it has at least two other recreational facilities.

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.<sup>57</sup>

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.<sup>58</sup>

### Expenditure and Revenue

**Table 14-40 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*.

<sup>51</sup> Casino News Daily (2015) *Singapore: Gross Gaming Revenue Analysis*, 26/5/15.

<sup>52</sup> Success Dragon (2016) *Vietnam Gaming Market Study*.

<sup>53</sup> Forbes Asia (2015) *Politics Drive Singapore's Strict Casino Regulation*, 1/3/2015.

<sup>54</sup> Singapore National Council on Problem Gambling (2016) <http://www.ncpg.org.sg/en/Pages/home.aspx>

<sup>55</sup> Ziolkowski, S. (2017) *The World Count of Gaming Machines 2016*, Gaming Technologies Association.

<sup>56</sup> Ashton H (2010) *The Regulatory Environment for Land Based Gaming in Asian Jurisdictions*.

<sup>57</sup> <http://www.straitstimes.com/singapore/online-betting-to-be-allowed-in-next-two-months-via-singapore-pools-singapore-turf-club>

<sup>58</sup> <http://www.toteboard.gov.sg>

**Participation****Table 14-41 Gambling participation rates by type of gaming in the last 12 months in Singapore (2008, 2011, 2014 & 2017)**

<b>Types of Games</b>	<b>2008 (%)</b>	<b>2011 (%)</b>	<b>2014 (%)</b>	<b>2017 (%)</b>
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.<sup>59</sup>

The casino industry is comprised of a single casino which allows Korean citizens to gamble and a further 16 casinos open to foreigners which are supervised by the Ministry of Culture and Tourism. Only tourists with proof of foreign citizenship are permitted to enter.<sup>60</sup>

There are 2,378 slot machines in South Korea.<sup>61</sup>

### Expenditure and Revenue

**Table 14-42 Turnover by sector in Korea (2016)**

Gambling Sector	2016 Turnover (100 million won)
Casino	29,034
Horse racing	77,459
Bicycle racing	22,818
Motorboat racing	6,898
Lottery	38,855
Sports Lotto	44,414
Bullfight	299

Source: The National Gambling Control Commission – Korea (2016), <http://www.ngcc.go.kr/Eng/stats>

### Participation

In 2012, the prevalence of gambling among South Korean adults was 41.8%.<sup>62</sup>

**Table 14-43 Gambling participation rates by type of gaming in the last 12 months in South Korea (2012)**

Types of Games	2012 (%)
Lotteries and instant lotteries	36.2
Social gambling	12.0
Sports betting	2.3
Casino gambling	1.5
Internet gambling	1.5
Horse, bicycle or motor boat betting	1.1

Source: Williams, R., Lee, C., Back, K. (2013) *The prevalence and nature of gambling and problem gambling in South Korea*.

<sup>59</sup> The National Gambling Control Commission – Korea (2016), <http://www.ngcc.go.kr/Eng/>

<sup>60</sup> Calvin Ayre (2016), *South Korean casinos have bumpy Q4*, 27/1/16.

<sup>61</sup> Ziolkowski, S. (2017) *The World Count of Gaming Machines 2016*, Gaming Technologies Association.

<sup>62</sup> Williams, R., Lee, C., Back, K. (2013) *The prevalence and nature of gambling and problem gambling in South Korea*.

## 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 pachislo 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 4,575,545 pachinko/pachislo machines in Japan in 2016.<sup>63</sup> There are about 11,000 pachinko parlours, which is about 40% fewer than in 1995.<sup>64</sup>

Changes enacted in 2004 reduced coin-ins and maximum payouts on pachinko/pachislo machines and revenues have since been seen to be declining.

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, is yet to be finalised and passed by the government before Japan's first casino can open its doors.<sup>65</sup>

### Expenditure and Revenue

Although no formal expenditure statistics are available, media reports suggest around US\$204 billion was wagered in 2016 on pachinko machines.<sup>66</sup>

The Japanese Family Income and Expenditure Survey<sup>67</sup>, 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.<sup>68</sup>

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.<sup>69</sup>

<sup>63</sup> Ziolkowski, S. (2017) *The World Count of Gaming Machines 2016*, Gaming Technologies Association.

<sup>64</sup> Hincks, J. (2017) *This Japanese slot game generates more revenue than Las Vegas and Macau combined.*

<sup>65</sup> <http://www.ggrasia.com/japan-casino-law-effective-dec-26-headwinds-remain/>

<sup>66</sup> <http://www.ggrasia.com/pachinko-not-casino-but-gives-japan-pointers-analysts/>

<sup>67</sup> Japanese Ministry of Internal Affairs and Communications (2017) *Family Income and Expenditure Survey 2016*.

<sup>68</sup> 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.

<sup>69</sup> Currency conversion carried out from [www.x-rates.com](http://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 three legal lottery companies in Malaysia: Sports Toto, Magnum 4D and Pan Malaysian Pools. 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 2016.<sup>70</sup>

## 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.<sup>71</sup> Starting in 2018, PAGCOR operated casinos are to be privatized. There were 17,476 slots machines in operation in the Philippines in 2016.<sup>72</sup>

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 16.62% to approximately PHP55.06 billion in 2016, from its P47.21 billion revenues in 2015.<sup>73</sup>

Nationwide Gross Gambling Revenue (GGR) from government and private casinos for 2016 was PHP149.12 billion, up from P125.36 billion in 2015.<sup>74</sup>

## Vietnam

### *Industry Profile*

The Vietnamese gambling industry largely consists of casinos, lotteries and slot machine centres.

There are 7 licensed casinos and 22 electronic gaming clubs (slot parlours).<sup>75</sup>

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<sup>70</sup> Ziolkowski, S. (2017) *The World Count of Gaming Machines 2016*, Gaming Technologies Association.

<sup>71</sup> World Casino Directory (2018) [www.worldcasinodirectory.com](http://www.worldcasinodirectory.com)

<sup>72</sup> Ziolkowski, S. (2017) *The World Count of Gaming Machines 2016*, Gaming Technologies Association.

<sup>73</sup> Business World Online (2017) *PAGCOR chief cites winning streak for gaming industry, blasts Robredo*, 22 March 2017.

<sup>74</sup> Business World Online (2017) *PAGCOR chief cites winning streak for gaming industry, blasts Robredo*, 22 March 2017.

<sup>75</sup> 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.<sup>76</sup>

The Bai Dai Integrated Resort Project on Phu Quoc island (currently in development) 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.<sup>77</sup>

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.<sup>78</sup>

There were 1084 gaming machines in operation in Vietnam in 2016.<sup>79</sup>

Revenue from lotteries reached VND91.9 trillion (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.<sup>80</sup>

There are 64 lottery companies in Vietnam: 21 in the southern region; 29 in the northern region; and 14 in the central region.

## 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. In 2017, there were 65 licensed casinos in Cambodia.<sup>83</sup> Cambodian nationals are barred from gambling in casinos.

There were 7,660 gaming machines in operation in Cambodia in 2016.<sup>81</sup>

### Expenditure and Revenue

In 2015, the casino industry in Cambodia was worth over US\$8 billion dollars.<sup>82</sup>

Cambodian casinos contributed the amount of \$48 million in tax revenue in 2016 (up 38%), as compared to the \$34.7 million posted for 2015.<sup>83</sup>

<sup>76</sup> World Casino News (2017) *Vietnamese legislation could spell "death knell" for Cambodian border casinos.*

<sup>77</sup> CalvinAyre (2018) *Vietnam identifies first casino to take part in locals gambling trial*, 18 June 2018.

<sup>78</sup> Ggrasia (2017) *Vietnam's casino market worth up to US\$1.2bln*, 9 August 2017.

<sup>79</sup> Ziolkowski, S. (2017) *The World Count of Gaming Machines 2016*, Gaming Technologies Association.

<sup>80</sup> *Vietnamese lottery firms make bigger revenues in 2017*, [http://www.xinhuanet.com/english/2018-01/23/c\\_136917734.htm](http://www.xinhuanet.com/english/2018-01/23/c_136917734.htm)

<sup>81</sup> Ziolkowski, S. (2017) *The World Count of Gaming Machines 2016*, Gaming Technologies Association.

<sup>82</sup> CalvinAyre (2015) *Vietnam's casino industry just 3% the size of Cambodia's*, 30/9/2015.

<sup>83</sup> CalvinAyre (2017) *Cambodia casino tax takes jumps as govt squeezes NagaCorp*, 14 March 2017.